

Hubcase for Salesforce IT Project Plan Template

Install and Configure Hubcase App

Resource Required: Salesforce Administrator

Installation Time: 1 Hour or less

Installing the Hubcase App involves downloading the App from Appexchange and completing basic setup tasks in Salesforce and the Hubcase Portal.

In order to help expedite installation, TSA.net and Hubcase have provided support for a “Fast Path” install that dedicates a Hubcase resource to work with the Admin to jointly do the install using Webex.

NOTE: It is best practice to install initially in a Sandbox or Dev instance for initial testing, proof of concept and development of workflows as needed.

- **Option 1 – Fast Path:** Work with Hubcase (support@hubcase.com) over WebEx. About 60 minutes total.
- **Option 2 - Unassisted:** SF Admin works independently following the Hubcase Official Setup Guide found at the URL below

http://www.hubcase.com/uploads/download/Hubcase_for_salesforce_installation_instruction.pdf

Milestone	Task	IT Time (*)
	1. Sign up Hubcase portal account for your organization	5 minutes
	2. Setup B2B escalation partners	5 minutes
	3. Setup B2B escalation custom fields	5 minutes
	4. B2B escalation user and profile consideration	5 minutes
	5. Install “Hubcase for Salesforce”	5 minutes
	6. Configure “Hubcase Preference”	5 minutes
	7. Add Hubcase.com as a permitted remote site	5 minutes
	8. Configure case layout to expose B2B Escalation button	10 minutes
	9. Set encryption keys (optional)	5 minutes
	10.1. Create a notification URL in Salesforce	5 minutes
	10.2. Enter notification URL in Hubcase portal	5 minutes
	11. Round trip test	10 minutes

*This is the time estimated using the Fast Path install – Option 1.

Configure workflow for inbound B2B case

Once the installation of the Hubcase has been completed and verified, you can start adding any needed workflows that will be driven off of Hubcase events. Best Practice is to develop these workflows in a Sandbox or Dev environment and then promote to Test/QA/Production per your normal promotion model

Milestone	Task	IT Time (*)
	1. Identify needed workflow modifications or new workflows (e.g. Entitlements or Case Assignments etc.)	Varies
	2. Define New Workflows	Varies
	3. Test flow using round trip tests	Varies
	4. Promote to next stage per promotion and Change Control Model	Varies

Note: Estimated time for configuring and testing new workflow is 1-2 hours

Update Escalation Process and Train Staff

Your Case Escalation processes including Assignment Rules, process for Updating B2B Escalations both inbound and outbound may be changed as a result of implementing Hubcase. Many processes that were previously manual will likely change and some new ones will be added as a result of the Hubcase “direct connect” model.

Milestone	Task	IT Time (*)
	1. Evaluate the impact of Hubcase on existing processes for handling cases.	Varies
	2. Document new case flows and process changes	Varies
	3. Test new/updated process changes	Varies
	4. Create Training Collateral on new processes	Varies
	5. Rollout training for new process prior to Hubcase Production Rollout	Varies