RO Innovation

Salesforce Integration FAQ

RO Innovation

General Questions

Which Salesforce editions can be integrated with RO Innovation?

RO Innovation integrates with Salesforce Enterprise and Unlimited editions

Are Salesforce users required to log into RO?

No, Salesforce users are automatically logged into RO when they click on one of the RO links within Salesforce.

How does single sign-on (SSO) work?

When a user clicks on the RO product tab or any of the RO links within Salesforce, information about the user and what s/he wishes to do is passed to RO. We then validate their information and redirect them to their destination within RO.

Does RO run within the Salesforce browser window?

RO runs within the Salesforce window for sales users and runs in its own browser window for Reference Managers and Admins.

What happens if a Salesforce user is no longer with the company?

If the user's account has been removed from Salesforce, the user will no longer have access to RO via SSO.

Can you limit functionality in RO based on a Salesforce user profile?

We assign RO roles to users based on their use of RO (i.e., Sales User vs. Reference Manager) which is independent of their Salesforce user profile. A user's access to Salesforce opportunities and accounts is based on his/her Salesforce profile.

Data Integration Questions

Is Salesforce the system of record?

Yes, Salesforce is the system of record for much of the customer and contact data. RO can be configured to pull additional data from Salesforce, and, for that data, Salesforce is also the system of record. RO is the system of record for data that is specifically related to the reference program.

How is RO integrated with Salesforce?

RO maintains its own data stores and pulls data from Salesforce on a periodic basis. As a small subset of status information within the RO product changes, it is written back to Salesforce.

Can you limit access of Salesforce data in RO based upon user role?

Yes, we limit the accounts, contacts and opportunities based on the user's Salesforce credentials.

Can you limit functionality in RO based on a Salesforce org profile?

Yes, each organization has its own instance of RO. Each instance is unique, having its own set of custom fields, data, and appearance.

Do we have our own RO Application/Platform?

Yes, each organization has its own instance of RO. Each instance is unique, having its own set of custom fields, data, and appearance.

What fields are integrated between RO and Salesforce?

We always integrate basic demographic information from the Account and Contact objects, as well as high level information from Opportunities. Additionally, as part of our RO package, we can integrate fields that are standard in the Account, Opportunity, and Contact objects for viewing and searching in RO.

What are our options for field integration? Can customers create these links or is this something RO Innovation needs to do?

Because system definition is a collaborative effort, RO Innovation is responsible for setting up the field integration links. We are not limited in the types of links we can set up, and can handle all Salesforce data types, including hierarchical objects and multi-pick lists.

What happens in RO if the contact is removed from Salesforce?

The contact should be marked as inactive manually within RO, but not deleted because it may be important to maintain a history of the user's reference program involvement, such as what they have done on past requests. If you need to anonymize user data in RO for deactivated users, please contact your Customer Success Manager for more information.

How often do you update fields in Salesforce and RO?

For Salesforce to RO, this is configurable. For most clients, we update nightly, but we can also update information more often. All data from RO back to Salesforce is written in real time.

What Information does RO write back to Salesforce?

In standard implementations, we write back information about requests, nominations, and spotlights, and show the status of each as they progress through associated workflows. RO can only write information back to our objects and related lists; RO does not actually change anything about the Salesforce objects.

How are credentials configured on the RO side? For example, is the username and password maintained on an "Integration Settings" page in RO and is the password encrypted or hidden from the RO admin after initial configuration?

Passwords are stored in an encrypted database. Password access is limited to one access role per strict RO "need to know" policy. Membership to this role is reviewed monthly by the security team.

Can you provide RO's relevant IP addresses for IP whitelisting?

Your RO Customer Success Manager will obtain the IP addresses from RO Engineering a day or two before the installation of the RO integration to Salesforce.

Reporting Questions

Is your reporting in Salesforce or RO?

We do have several Salesforce reports that come with the AppExchange installation, but our primary reporting resides within RO, as this is where most data is stored.

Do you use any of the Salesforce dashboards?

We have developed dashboards using Adobe Flex that operate natively within Salesforce, but these are not part of our standard installation. We can build custom Flex dashboards to reside within Salesforce upon request and can also provide Flex dashboards within RO.

What information does RO write back to Salesforce?

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Installation Questions

Explain how the install/integration process works?

Usually, we work with one of your Salesforce administrators to install RO from the AppExchange into your sandbox. You provide us with a login that will allow us to test everything to ensure that all links are working correctly. We then work with your stakeholders to define what Salesforce information needs to be available within RO and configure RO accordingly. Once everybody has determined that the configuration is correct, we install RO to the production org.

Can we choose where to place the custom links and/or buttons?

Yes.

Do you need access to our sandbox?

Ideally, yes. If you do not use the Salesforce sandbox, we can still complete the installation, but we have found that it is much easier to work in the sandbox. (See next question for more details.)

What type of access do you need to Salesforce throughout the project?

To integrate RO with any client Salesforce instance, we will require a login to each Salesforce instance. Most customers give our login System Administrator privileges in both Sandboxes and Production. If that is not possible, please refer to the below detailed requirements.

For Salesforce Sandbox instances, at a minimum our login must have:

- Read-only UI access to the Account, Implementation and Contact objects, along with all their sub-objects.
- API access to the Sandbox.
- The Sandbox must be populated with near-production data.
- We will either require rights to install our AppExchange package into the Sandbox, or work with a Salesforce administrator in a WebEx session to perform the installation.
- Read-write access to the three custom objects that our package installs.

For Salesforce Production instances, at a minimum our login must have:

- API access to the instance, with read-only access to the Account, Implementation and Contact objects, along with all their sub-objects.
- We will either require rights to install our AppExchange package into the instance, or work with a Salesforce administrator in a WebEx session to perform the installation.
- Read-write access to the three custom objects that our package installs.

How does the RO API access Salesforce?

The RO API does not log into Salesforce. We require a login for your Salesforce production org and Salesforce sandbox org while we configure RO to work for your company. This login does require a Salesforce license type, but if licenses are at a premium, we can use a shared unattended account that has API-only access. We use the login to write back to the Objects that we create in your org as part of our managed package.

Does the RO integration require a security token?

RO\ does not need a security token if your Salesforce instance does not require it. If your instance does require a security token, we will need a login, password, and security token. If we are given a login associated with one of our email addresses, and we are given access to the Salesforce website, then we can request our own security token.

Salesforce Admin Support

The following requirements provide guidance for RO customers when RO is integrated with Salesforce. Total time requirement is typically 4-5 hours.

During system setup, Salesforce Admins will be involved in the following ways:

- Provisioning RO with a Sandbox login with API access.
- Working with RO to install and configure the Reference View managed package in the Sandbox of their choice.
- Modifying Opportunity and Contact page layouts to include Reference View related lists.
- Setting up appropriate user profile access.
- Generating the necessary permission set for production installation.
- Provisioning RO with Production org login with API access.
- Working with RO to install and configure the Reference View managed package in the Production org.
- Applying permission sets and any additional post-installation configuration.

Post go-live:

- Notifying RO of upcoming sandbox refreshes and ensuring that the RO login remains active post-refresh. Note that in general we only would want a sandbox refresh out of band if there were customizations that required this.
- Installing updated versions of the RO managed package. This occurs at most once per quarter on average.