

Protect your investments with Protection!

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# Protection!™

Connect

v4.5

**Administrator Guide**

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**Applicability**

This document applies to Protection! Connect v4.5 software.

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### 1.1 About Protection! Connect and its Components

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Protection! Connect™ is a turnkey integration solution between Protection! Enterprise and third-party CRM and SFA applications. Protection! Connect™ consists of the following components:

1. Protection! Connect™ Server – J2EE application (`ProtectionConnect.ear`) that listens to the Protection! Enterprise events and forwards them to all registered Protection! Connectors.
2. Protection! Connector(s) – J2EE application responsible for handling Protection! Connect™ events and for adding/updating data in CRM application (i.e., adding contacts or creating opportunities).

### 1.2 Brief Protection! Connect™ Workflow

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The following is a brief description of Protection! Connect™ workflow:

1. On create or update event for an Evaluation license:
  - a. Create a new Opportunity.
  - b. Create or update corresponding Account and/or Contact.
  - c. Associate Opportunity with corresponding Campaign (optional).
2. On create or update event for an Extended Evaluation license:
  - a. Create or update Opportunity with increased probability percentage.
  - b. Create or update corresponding Account and/or Contact.
  - c. Associate Opportunity with corresponding Campaign (optional).
3. On create or update event for a Commercial license:
  - a. If Opportunity exists then update its Sales Stage with status Closed-Won.
  - b. Create or update corresponding Account and/or Contact.
  - c. Create an Asset for the license and associate it with the corresponding Account and Contact.
  - d. Optionally create an order that corresponds to the issued Commercial license.
4. On create or update event for a Customer:
  - a. Create or update corresponding Account and/or Contact.

The following Connectors implementations are available currently or scheduled to be released in the near future:

### 1.3 Oracle CRM On Demand Connector

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Provides integration between Protection! Enterprise and [Oracle CRM On Demand](#). Please see [Oracle CRM On Demand Connector](#) page for more information.

### 1.4 Salesforce Connector

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Provides integration between Protection! Enterprise and [SalesForce CRM](#). Please see [SalesForce Connector](#) page for more information.

## **1.5 Microsoft Dynamics CRM Connector**

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Provides integration between Protection! Enterprise and [Microsoft Dynamics CRM](#). Please see [Microsoft Dynamics CRM Connector](#) page for more information.

## **1.6 NetSuite CRM+ Connector**

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Provides integration between Protection! Enterprise and [NetSuite CRM+](#). Please see [NetSuite CRM+ Connector](#) page for more information.

## **1.7 Sage CRM Connector**

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Provides integration between Protection! Enterprise and [Sage CRM](#). Please see [Sage CRM Connector](#) page for more information.

## **1.8 SugarCRM Connector**

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Provides integration between Protection! Enterprise and [SugarCRM](#). Please see [SugarCRM Connector](#) page for more information.

## Protection! Connect™ Deployment

### 2.1 Deployment on Sun GlassFish Application Server

To deploy Protection! Connect™:

1. The `ProtectionConnect.properties` file located in:  
`<PROTECTION_ENT_HOME>/server/connect/ProtectionConnect.properties` needs to be modified (see Section 2.2 below), and then copied to the GlassFish domain's configuration folder: `<GLASSFISH_HOME>/domains/domain1/config`
2. The `<PROTECTION_ENT_HOME>/server/connect/ProtectionConnect.ear` enterprise application needs to be copied to the GlassFish domain's auto deploy folder: `<GLASSFISH_HOME>/domains/domain1/autodeploy` or to be deployed via GlassFish's Admin Console.

Note

If there are several domains setup on the GlassFish then the correct domain name must be used instead of the above-mentioned `domain1`.

### 2.2 Protection! Connect™ Configuration

To configure Protection! Connect™ the `ProtectionConnect.properties` file needs to be modified. The following properties are available:

Name	Default Value	Description
<code>connector.count</code>	0	Specifies the amount of registered connectors.
<code>connector[0..n].name</code>		Specifies all of the registered Connectors implementations. All of the registered implementations must be named in this section. Supported connectors and their names are: <ul style="list-style-type: none"><li>• <code>SalesForceConnector</code> – for integration with Salesforce</li><li>• <code>OracleCRMOnDemandConnector</code> – for integration with Oracle On Demand CRM</li><li>• <code>MicrosoftDynamicsCRMConnector</code> – for integration with Microsoft Dynamics CRM</li><li>• <code>SugarCRMConnector</code> – for integration with SugarCRM</li></ul>

		<ul style="list-style-type: none"> <li>• SageCRMConnector – for integration with Sage CRM</li> <li>• NetSuiteConnector – for integration with NetSuite CRM+</li> </ul>
connector[0].time_zone		<p>Specifies target CRM's time zone for date/time conversion. If this property is not specified then current time zone (local time zone where Protection! Connect is installed) will be used. Use the following format:  GMT[sign][hours:minutes]  Where sign is either + or -.  <b>Examples:</b>  GMT-2  GMT+5:30</p>
log.level	INFO	<p>Logging level. Possible values are:</p> <ul style="list-style-type: none"> <li>• ALL - log all messages.</li> <li>• FINE - log debug messages, information messages, warnings and errors.</li> <li>• INFO - log information messages, warnings and errors.</li> <li>• WARNING - log warnings and errors</li> <li>• SEVERE - log errors only.</li> <li>• OFF - log no messages.</li> </ul>
log.path	../logs/ProtectionConnect	<p>Path to log files. When relative path is specified then folder location will be relative to an Application Server location. Example default path:  &lt;GLASSFISH_HOME&gt;/domains/domain1/logs/ProtectionConnect</p>

The following is a sample of the `ProtectionConnect.properties` file that configures Protection! Connect to work with Salesforce and with Oracle On Demand CRM simultaneously:

```
connector.count=2
connector[0].name=SalesForceConnector
connector[1].name=OracleCRMOnDemandConnector
connector[1].time_zone=GMT-2
log_level=SEVERE
log.path=../logs/ProtectionConnect
```

Tip

Protection! Connect™ tracks changes of `ProtectionConnect.properties` file and is able to apply them at runtime. So neither GlassFish Application Server nor Protection! Connect™ application need to be restarted to apply changes in configuration.

## 2.3 Protection! Connect™ Security Configuration

Protection! Connect™ security policy requires valid user credentials to be provided during connection. Such user must be created in GlassFish and it must belong to the *protection* group. To create a new user:

1. Run GlassFish Admin Console (e.g. <http://<host>:4848>) and login.
2. Go to *Configuration | Security | Realms | file* and press the "Manage Users" button.
3. Add a user by pressing the "New" button.
4. Specify *protection* in the "Group List" field and enter other user attributes.
5. Press the "Save" button to commit changes.

## 2.4 Protection! Enterprise Configuration

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Protection! Enterprise must be properly configured to allow posting change notifications to Protection! Connect™. Note: this ability is turned OFF by default. It can be configured by choosing the "Edit | Protection! Connect™ Account" menu in the Protection! Enterprise Manager. There are two independent options to configure:

1. Server – specifies connection attributes for Protection! Enterprise Server to allow it post change notifications to Protection! Connect™.
2. Client - specifies connection attributes for Protection! Enterprise Manager to allow it post change notifications or export products and data to Protection! Connect™.

Note

The user provided for authorization must belong to *protection* group in GlassFish Application Server.

# Feedback

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As part of the continuing effort to improve our product, we welcome your comments, suggestions and general feedback regarding the product.

If you have questions about Protection! Connect™ and/or Protection! Enterprise please feel free to contact us for further information at [protection@jproductivity.com](mailto:protection@jproductivity.com), or visit our web site at: <http://www.jproductivity.com>.

If you discover any issues or defects in Protection! please send a detailed description to [protection@jproductivity.com](mailto:protection@jproductivity.com).