Protection!™

Connect

v4.5.2

Administrator Guide

jProductivity LLC

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Applicability
This document applies to Protection! Connect v4.5.2 software.

Contents

Chapter 1

Overview

1.1 About Protection! Connect and its Components

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

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

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

Provides integration between Protection! Enterprise and SalesForce CRM. Please see SalesForce Connector page for more information.

1.5 Microsoft Dynamics CRM Connector

Provides integration between Protection! Enterprise and Microsoft Dynamics CRM. Please see Microsoft Dynamics CRM Connector page for more information.

1.6 NetSuite CRM+ Connector

Provides integration between Protection! Enterprise and NetSuite CRM+. Please see NetSuite CRM+ Connector page for more information.

1.7 Sage CRM Connector

Provides integration between Protection! Enterprise and Sage CRM. Please see Sage CRM Connector page for more information.

1.8 SugarCRM Connector

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
`connector.count`	0	Specifies the amount of registered connectors.
`connector[0..n].name`		Specifies all of the registered Connectors implementations. All of the registered implementations must be named in this section. Supported connectors and their names are: • `SalesForceConnector` – for integration with SalesForce • `OracleCRMOnDemandConnector`– for integration with Oracle On Demand CRM • `MicrosoftDynamicsCRMConnector` – for integration with Microsoft Dynamics CRM • `SugarCRMConnector` –for integration with SugarCRM

		• `SageCRMConnector` – for integration with Sage CRM • `NetSuiteConnector` – for integration with NetSuite CRM+

`connector[0].`
`time_zone`
		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 –.
		Examples:
		`GMT-2`
		`GMT+5:30`

`log.level`	`INFO`	Logging level. Possible values are: • `ALL` - log all messages. • `FINE` – log debug messages, information messages, warnings and errors. • `INFO` – log information messages, warnings and errors. • `WARNING` – log warnings and errors • `SEVERE` – log errors only. • `OFF` – log no messages.
`log.path`	`../logs/Protection` `Connect`	Path to log files. When related path is specified, absolute folder location depends on particular Application Server. For example, default path would be `<GLASS_FISH_HOME>/domains/domain` `1/logs/ProtectionConnect` for GlassFish v2.

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

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.

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, 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.