

OpsHub Integration Manager for Salesforce and Rally



System Type: Customer Relationship Management

System Description: Salesforce is an on-demand customer relationship management (CRM) system service helping companies with global customer communication. Salesforce helps companies maintain list of cases, problems logged by their customers, manage customer accounts, solutions for customer issues, opportunities details and hence giving companies a complete package of customer relationship solution.

Integration Description: OpsHub Integration Manager (OIM) allows the cross-functional teams using disparate tools like Salesforce and Rally in application development organizations to effectively communicate and collaborate with each other, thus increasing overall team agility, productivity and efficiency.

OIM supports the synchronization of cases, opportunities and all other objects available from Salesforce to all the possible entities existing in Rally viz., Defects, User Story, Test cases, Test sets, Test Case Result (Only write support), Task.

- Supports Unidirectional and Bidirectional synchronization between Salesforce and Rally for all supported entities.
- The synchronization includes the field data, attachments, comments and issue-relationship traceability.
- Provides deployment options to fit the needs of business whether On-Premise or on Customer Cloud.
- Fully manageable and functional via the web based administration tool including defining entities for synchronization between Salesforce and Rally.
- Maintains history of both systems. If any of Salesforce or Rally becomes unavailable, it will reflect all transactions that occurred during that time once the system is operational again.
- Provides with templates and ability to define custom mapping between ALM systems to support mapping of fields and linkages.
- Supports number of replication models to support development organization such as master/slave, partitioned ownership, dynamic ownership, peer-to-peer and custom.
- Proactive conflict management with support for automated conflict resolution.

Integration Screenshot:




User creates a case in Salesforce

[← Back to List: Cases](#)

[Attachments \(0\)](#) | [Case Comments \(0\)](#) | [Related Stories \(0\)](#) | [Activity History \(0\)](#) | [Case History \(1\)](#)

Case Detail

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

Subject	Forgot Password link is not working		
Description	On clicking on forgot password nothing happens		
Case Owner	Demouser [Change]	Status	New
Case Number	00004015 [View Hierarchy]	Priority	High
Contact Name		Contact Phone	
Type		Contact Email	
Case Reason		Case Origin	Email
Fix Detail 		Parent Case	
OH_Last_Update 			
Resolved_On 			
Link To Remote Entity			
start date			
Case_Type	Problem,		
Date/Time Opened	7/16/2015 5:00 AM		
Created By	Demouser , 7/16/2015 5:00 AM	Last Modified By	Demouser , 7/16/2015 5:00 AM


[Edit](#) [Delete](#) [Close Case](#) [Clone](#)


Attachments

[Attach File](#) [Attachments Help ?](#)

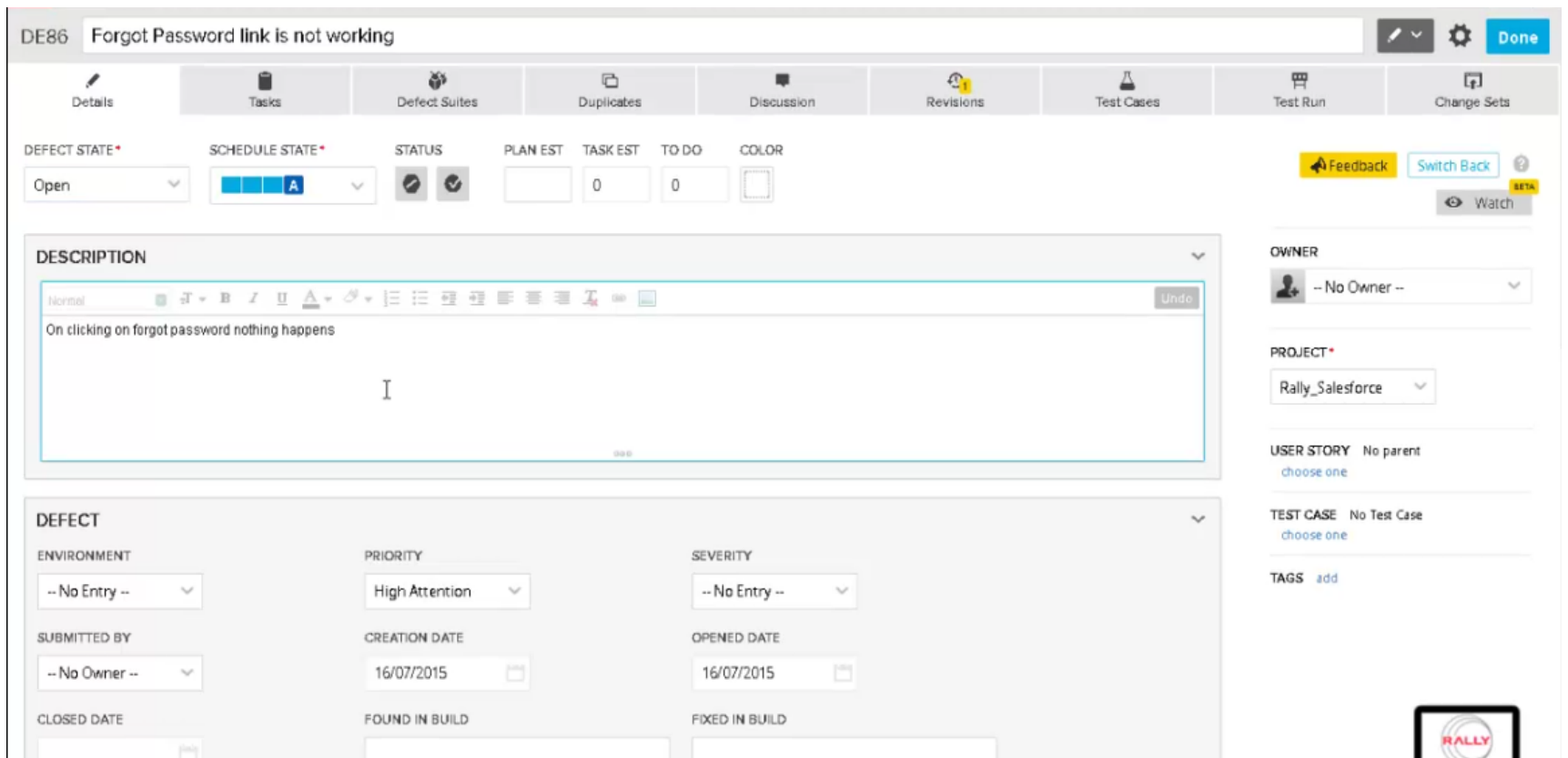
No records to display

Case Comments

[New](#) [Case Comment](#) 



Case is synced to Rally as Defect through OIM



The screenshot displays the OpsHub interface for a defect record. The title bar shows 'DE86 Forgot Password link is not working'. The main content area is divided into several sections:

- DEFECT STATE:** Open
- SCHEDULE STATE:** A
- STATUS:** Open (with a checkmark icon)
- PLAN EST:** 0
- TASK EST:** 0
- TO DO:** 0
- COLOR:** (empty)

The **DESCRIPTION** section contains a rich text editor with the text: "On clicking on forgot password nothing happens".

The **DEFECT** section includes the following fields:

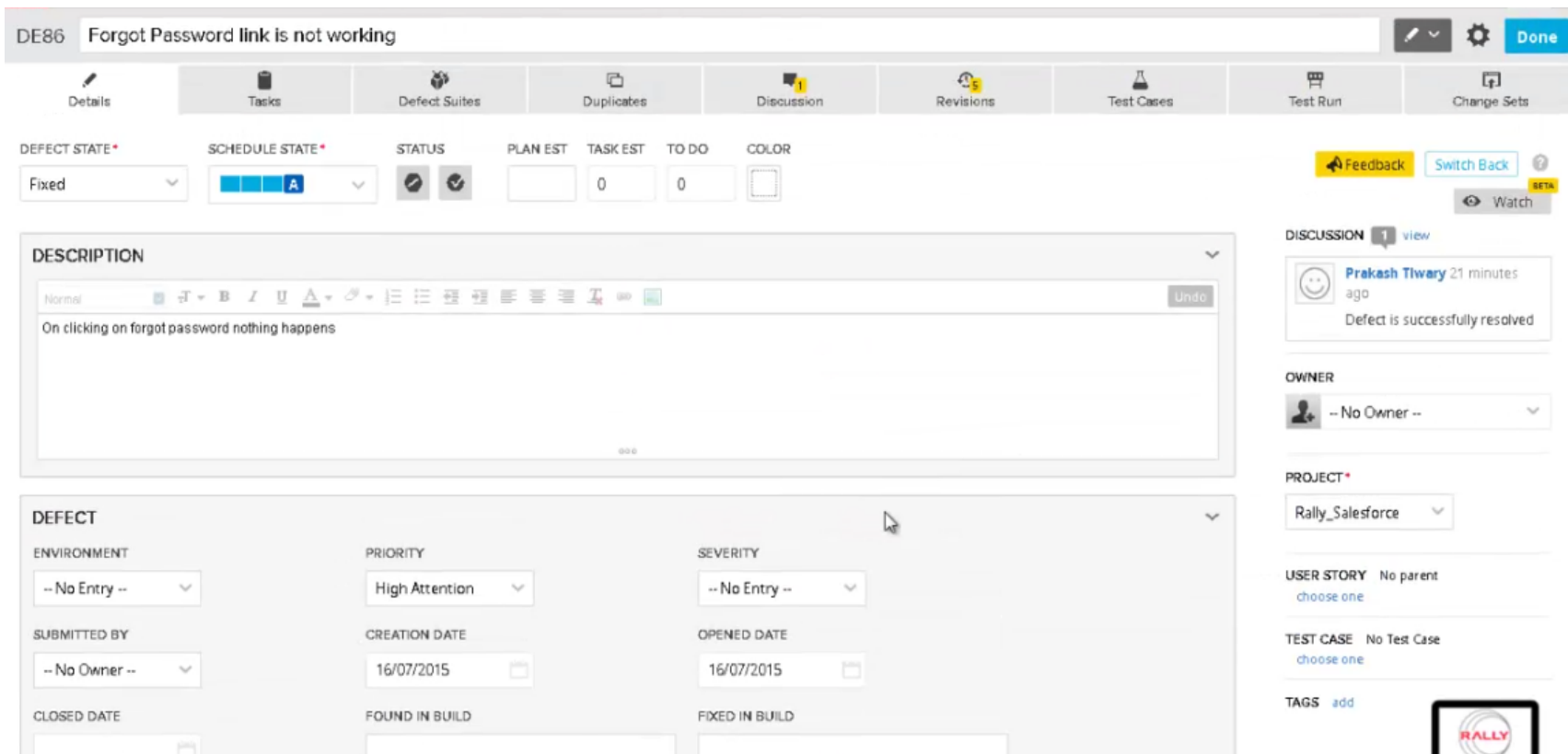
- ENVIRONMENT:** -- No Entry --
- PRIORITY:** High Attention
- SEVERITY:** -- No Entry --
- SUBMITTED BY:** -- No Owner --
- CREATION DATE:** 16/07/2015
- OPENED DATE:** 16/07/2015
- CLOSED DATE:** (empty)
- FOUND IN BUILD:** (empty)
- FIXED IN BUILD:** (empty)

On the right side, there are additional controls:

- Feedback:** (yellow button)
- Switch Back:** (blue button)
- Watch:** (eye icon)
- OWNER:** -- No Owner --
- PROJECT:** Rally_Salesforce
- USER STORY:** No parent (choose one)
- TEST CASE:** No Test Case (choose one)
- TAGS:** add

A small Rally logo is visible in the bottom right corner of the interface.

Rally Defect is fixed by backend team



The screenshot shows a Rally Defect record with the following details:

- ID:** DE86
- Title:** Forgot Password link is not working
- Defect State:** Fixed
- Schedule State:** A
- Status:** Resolved
- Plan Est:** 0
- Task Est:** 0
- To Do:** 0
- Description:** On clicking on forgot password nothing happens
- Priority:** High Attention
- Severity:** -- No Entry --
- Environment:** -- No Entry --
- Submitted By:** -- No Owner --
- Creation Date:** 16/07/2015
- Opened Date:** 16/07/2015
- Project:** Rally_Salesforce
- User Story:** No parent
- Test Case:** No Test Case
- Discussion:** 1 view. Comment by Prakash Tiwary: Defect is successfully resolved.
- Owner:** -- No Owner --
- Tags:** add

Case in Salesforce is marked resolved

[← Back to List: Cases](#)


[Attachments \(1\)](#) | [Case Comments \(1\)](#) | [Related Stories \(0\)](#) | [Activity History \(0\)](#) | [Case History \(2\)](#)

Case Detail

Subject	Forgot Password link is not working		
Description	On clicking on forgot password nothing happens		
Case Owner	Demouser <input type="button" value="Change"/>	Status	Resolved <input type="button" value="Change"/>
Case Number	00004015 View Hierarchy	Priority	High
Contact Name		Contact Phone	
Type		Contact Email	
Case Reason		Case Origin	Email
Fix Detail		Parent Case	
OH_Last_Update	17=14370752592413_0_2.9		
Resolved_On			
Link To Remote Entity	https://rally1.rallydev.com/sim/rally.sp#detail...		
start date			
Case_Type	Problem,		
Date/Time Opened	7/16/2015 5:00 AM		
Created By	Demouser , 7/16/2015 5:00 AM	Last Modified By	Sync User , 7/16/2015 5:40 AM

Attachments

Action	File Name	Size	Last Modified	Created By



Integration Demo:

The video shows the integration of two systems and how easily a user can configure integration and maintain it. The integration flow shown in video highlights the integration of Salesforce Case and Rally Defect. The video also shows how any comment or attachment added in either system is synced to the other system, how the developer working in Rally resolves the defect and same is reflected in Salesforce.

Video Link: http://www.opshub.com/ohftp/Resources/RallyPartnershipVideos/Rally_Salesforce.mp4