



GoToAssist Remote Support Salesforce Installation Guide

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Install GoToAssist Remote Support Integration for Salesforce

The GoToAssist Remote Support Integration for Salesforce provides technicians the ability to create support sessions, as well as collect information about these sessions upon closure. The integration uses the GoToAssist Remote Support Developer app (i.e., API) to create sessions and to collect the session information at the end of a session.

Obtain a Consumer Key

In order to install the GoToAssist Remote Support Integration for Salesforce, you must first obtain a Consumer Key from the [GoTo Developer Center](#) by downloading the GoToAssist Remote Support Developer app.

1. Go to <https://goto-developer.logmeininc.com/user/register> and create an account. There is only one account needed for a company installation.
2. Click **My Apps** in the top navigation.
3. Click **Add a new app**.
4. Fill in the *App Name* and *Description* fields.
5. For *Product API* select "GoToAssist".
6. For redirection, fill in the *Application URL* field with "https://api.getgo.com" or use a custom URL.
7. Click **Create App**.

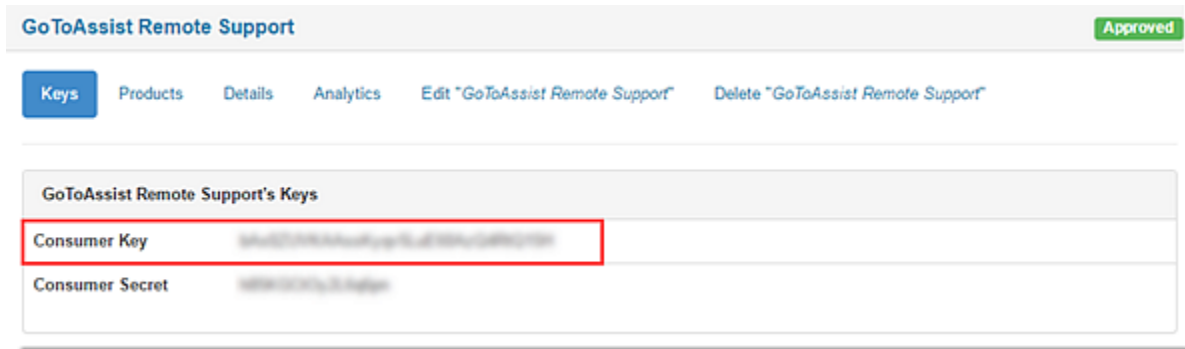
The screenshot shows a web form for creating a new app. It has four main sections, each with a yellow header:

- App Name ***: A text input field containing "GoToAssist Remote Support". Below it, the internal name "gotoassist-remote-support" is shown with an "Edit" link.
- Description ***: A text area containing "The GoToAssist Remote Support application."
- Product API ***: A list of radio buttons with the following options: GoToTraining, GoToMeeting, GoToWebinar, GoToAssist (selected), and GoToAssistCorporate.
- Application URL ***: A text input field containing "https://api.getgo.com". Below it, a note reads: "Enter your own redirect URL for the OAuth flow. If you plan to use the Direct Login flow, enter 'https://api.getgo.com' or any other URL."

At the bottom left, there is a blue "Create App" button with a hand cursor icon pointing to it.

8. Click the name of your newly created app.

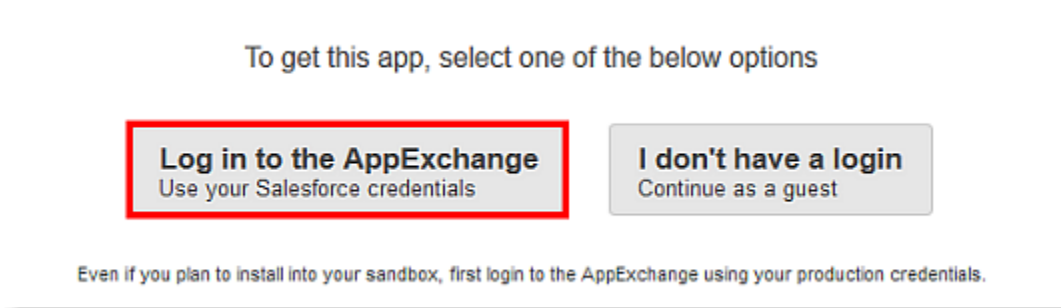
9. Click **Keys**.
10. Retain the *Consumer Key* as it will be required in Configure the Application. Then continue on to [Install the Application in Salesforce](#) for the next steps!



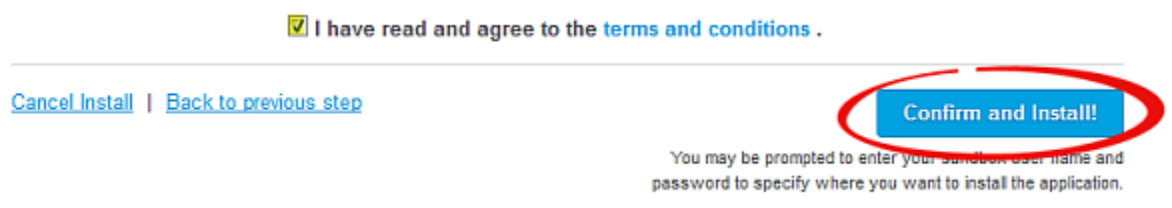
Install the Application in Salesforce

Once you've [obtained a Consumer Key](#) from the Developer Center, you can install the GoToAssist Remote Support Integration for Salesforce.

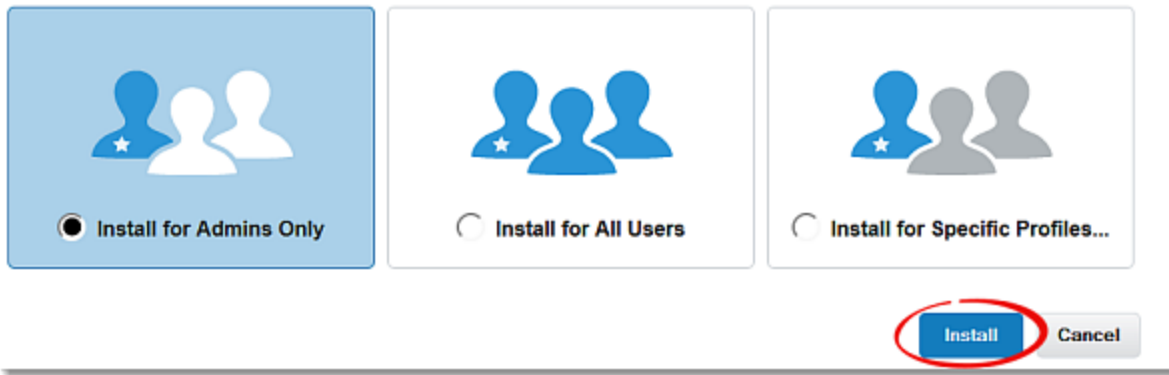
1. Go to the [GoToAssist Remote Support Integration for Salesforce](#) within AppExchange.
2. Click **Get it Now**.
3. Click **Log in to the AppExchange**. If you are already logged into Salesforce, you are not asked to re-enter your credentials.



4. After logging in, click **Install in production**, which makes the application available to other users. Otherwise, click **Install in sandbox** to test in a copy of your production org.
5. Review the **terms and conditions**, and check the box to agree to them.
6. Click **Confirm and Install**.



7. You can install the application for **Admins Only** (for testing), for **All Users**, or for **Specific Profiles** (i.e., security levels - shown below). If you select **Specific Profiles**, a list of Salesforce user profiles is displayed. You can select the default access level for all profiles and click **Set**. You can then modify the access setting for each profile.



- When you are ready, click **Install**. You are then asked to approve access to your Salesforce instance for the specific third-party (LogMeIn) sites. Check the box for **Yes, grant access** and click **Continue**.
- Review the *Approve Package API Access* permissions, then click **Next**.



- Review the security levels and choose the appropriate security setting for your deployment (the "Select security settings" option is recommended). Click **Next**.
- Click **Install** to complete the installation. Then continue on to [Configure the Application](#) for the next steps!

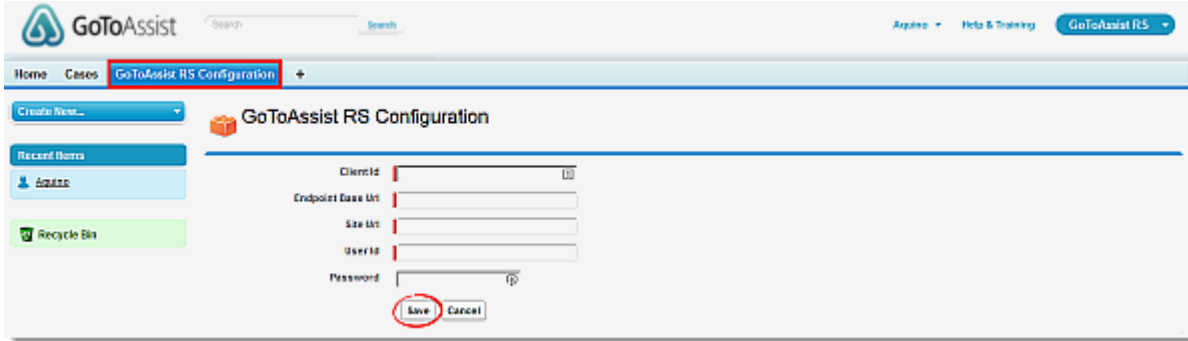
Configure the Application

Now that you have [installed](#) the GoToAssist Remote Support Integration for Salesforce, you will need to link it to the Consumer Key from your [GoTo Developer Center](#) account.

Note: The steps outlined in [Obtain a Consumer Key](#) must be completed before completing the steps in this section.

- From the Salesforce home page, click the *Force.com App Menu* in the top right navigation.
- Select **GoToAssist RS** from the list of app menu items.
- Click on the **GoToAssist RS Configuration** tab.
- Click **Edit**.
- Fill out the following required fields:
 - Client Id*: Enter the *Consumer Key* that was obtained during Step 10 of [Obtain a Consumer Key](#)
 - Endpoint Base Url*: Enter "https://api.getgo.com" (i.e., *Application URL*)
 - Site Url*: Enter the secure and direct URL of your Force.com site. Make sure that the Site URL listed includes "https://" (i.e., not "http://"), otherwise the session data will not be generated.

- *User Id & Password:* Enter the email address and password of any GoToAssist Remote Support agent account, which will only be used to validate use of the API within Salesforce. To generate support sessions, GoToAssist Remote Support users will still be asked to log in using their own agent account credentials.
6. Click **Save**.
 7. Then continue on to [Set Up Layout Pages!](#)

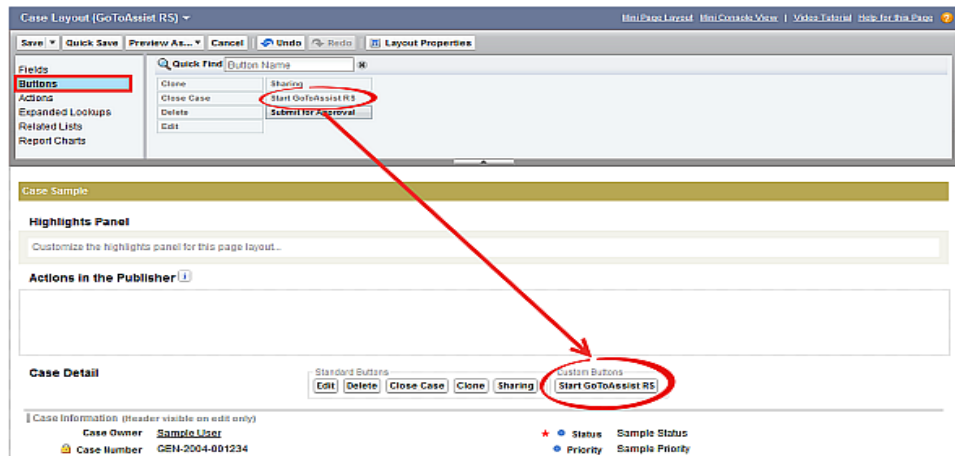


Set Up Layout Pages

Once you have [installed the GoToAssist Remote Support for Salesforce Integration](#), you need to customize the layout pages. To make these tasks easily accessible for users, the administrator can add the appropriate buttons and tabs.

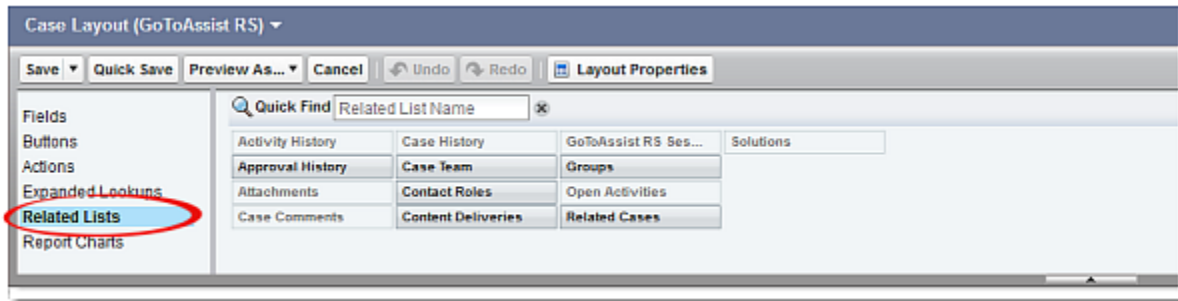
Add the "Start GoToAssist RS" button


1. From the Salesforce home page, click your account name in the top-right navigation. Select **Setup**.
2. Click **App Setup > Customize > Cases > Page Layouts**.
3. Select the Case Page Layout you want to modify. If you do not have any existing custom layout pages, click **Customize fields on the cases page**.
4. Click **Edit**.
5. Locate the *Case Layout* section at the top of the Edit Layout page, and select **Buttons** on the left column.
6. Click and drag the **Start GoToAssist RS** button to the *Custom Buttons* box in the *Case Detail* section.
7. Click **Save**.
8. Then continue on to [Add the GoToAssist RS Sessions Related List!](#)

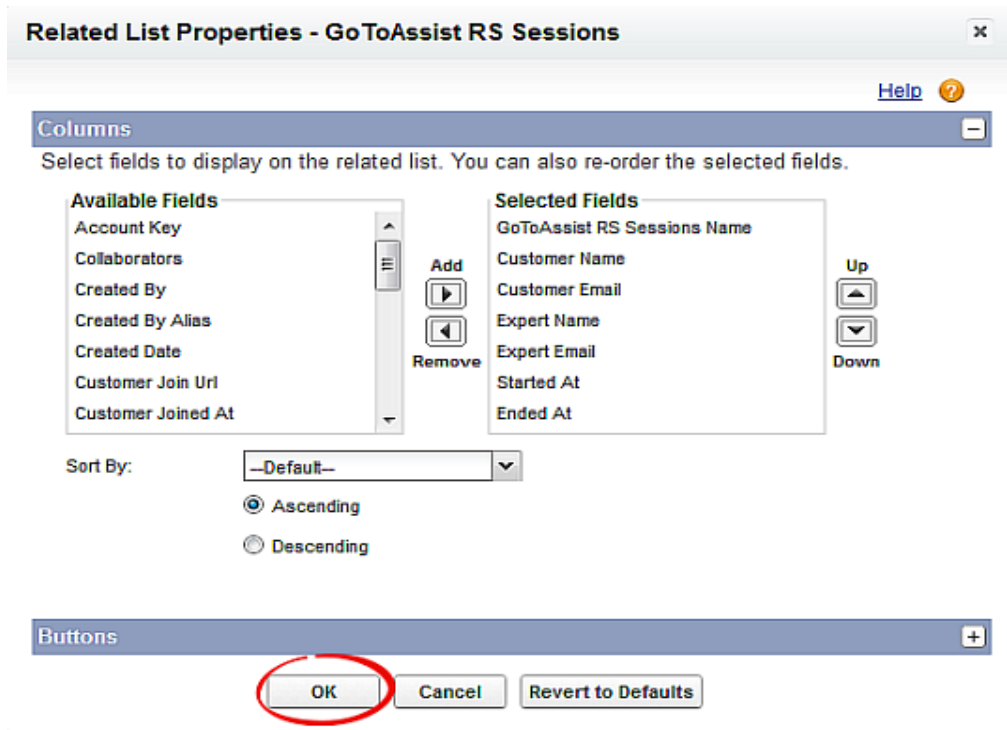


Add the GoToAssist RS Sessions Related List

1. From the Salesforce home page, click your account name in the top-right navigation. Select **Setup**.
2. Click **App Setup > Customize > Cases > Page Layouts**.
3. Select the Case Page Layout you want to modify. If you do not have any existing custom layout pages, click **Customize fields on the cases page**.
4. Click **Edit**.
5. Locate the *Case Layout* section at the top of the Edit Layout page, and select **Related Lists** on the left column.



6. To add additional columns to display quick reference Session information, click the Related List Properties icon .
7. Select the fields you would like to display in the Related List, and add them to the *Selected Fields* column. You can customize the order in which you'd like them to appear.
8. Click **OK**.



9. Scroll back to the *Case Layout* section at the top of the *Edit Layout* page, and click **Save**.
10. Then continue on to [Set Up and Configure a Force.com Site!](#)

Set Up and Configure a Force.com Site

Once you have setup your layout pages, you must configure a Salesforce Force.com site to allow the GoToAssist Remote Support Integration for Salesforce to post and retrieve session data.

Note: These instructions assume that the Site Label for your Force.com site is called "Demo", although you can name it whatever you'd like.

1. From the Salesforce home page, click your account name in the top-right navigation. Select **Setup**.
2. Navigate to **App Setup > Develop > Sites**.
3. Depending on your organization's setup, do the following:
 - If a Force.com site is not already configured in your organization, then click **New**. Fill in the required fields (use the *Creating and Editing Force.com Sites* support page [here](#) to define each field). In addition to filling out the required fields, also fill in the optional text box suffix of the *Default Web Address* field (e.g., typing "GoToAssist" in the text box will set the Site URL to be <http://<yoursitedomain>.force.com/GoToAssist>; in the example provided, the Site URL will be <http://demo.force.com/GoToAssist>) and click **Save**. Once you have created a new site, click **Activate**.

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Activate	Demo	http://demo.force.com/	Demo for RS for Salesforce plugin installation.	<input type="checkbox"/>	Force.com	Aguino, 4/30/2015 12:12 PM

- If a Force.com site is already configured, then click the **Site Label** (e.g., "Demo" in the example below), then click **Edit** to modify the existing Force.com site settings.

Action	Site Label	Site URL	Site Description
Edit Deactivate	Demo	http://demo.force.com/	Demo for RS for Salesforce plugin installation.

4. Click **Public Access Settings**.

Site Details
Demo

< Back to List: Sites


Site Detail

Site Label	Demo	Site Name	Demo
Site Description	Demo for RS for Salesforce plugin installation.	Site Contact	Aguino
Active	<input type="checkbox"/>	Login	Not Allowed
Active Site Home Page	UnderConstruction (Preview)	Site Favorite Icon	
Inactive Site Home Page	Maintenance (Preview)	Site Robots.txt	
Site Template	SiteTemplate (Preview)	Enable Feeds	<input type="checkbox"/>

5. Click **Edit**.
6. Locate the *Custom Object Permissions* section.
7. Check the following boxes in the row for GoToAssist RS Sessions: "Read," "Create," and "Edit".

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
GoToAssist RS Sessions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Click **Save**.
9. Locate the *Enable Apex Class Access* section and confirm that `g2ars.RESTCallbackController` is listed.

10. If it is not listed, click **Edit**.
11. Select **g2ars.RESTCallbackController** from the *Available Apex Classes* column, then click the Add arrow  to add it to the *Enabled Apex Classes* column.
12. Click **Save**.
13. You can now continue to [Grant Access to User Profiles](#)!

Grant Access to User Profiles

Assign the custom page layout to user profiles

User profiles that require access to the custom pages will need to have their default *Case Page Layout* assigned to the new custom page layout.


Note: These instructions assume that the title assigned to the page layout you [set up earlier](#) is called "GoToAssistRS," although you can name it whatever you'd like.

1. From the Salesforce home page, click on your account name in the top right navigation. Select **Setup**.
2. Click **App Setup > Customize > Cases > Page Layouts**.
3. Locate the *Case Page Layouts* section at the top of the page, and click **Page Layout Assignment**.

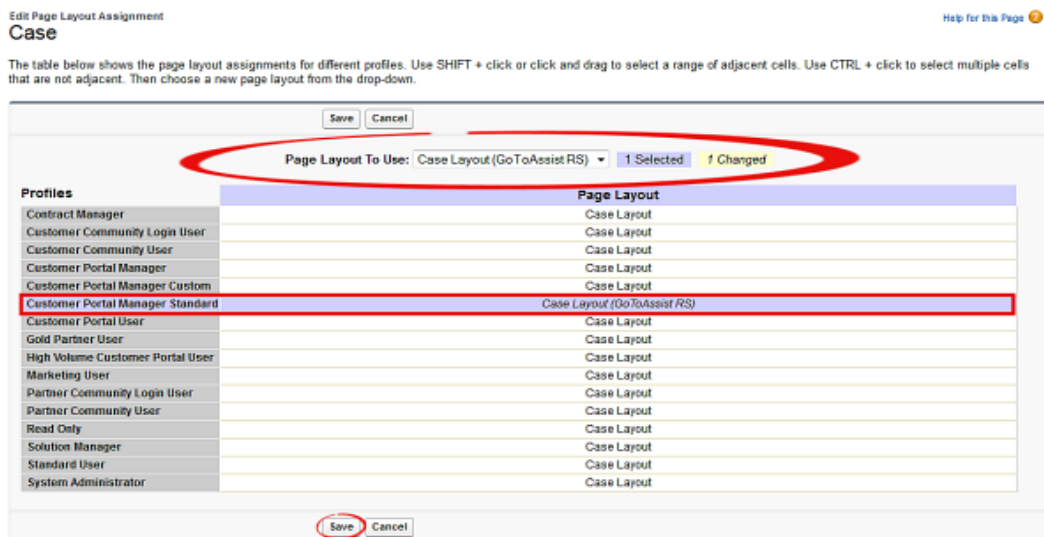
Case Page Layout

This page allows you to create different page layouts to display Case data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.



Action	Page Layout Name	Installed Package	Created By	Modified By	Feed-Based Layout
Edit Del	Case Layout		Matthew Wame, 2/25/2015 8:46 AM	Matthew Wame, 2/25/2015 8:46 AM	<input type="checkbox"/>
Edit Del	 Case Layout (GoToAssist RS)	GoToAssist Remote Support	Justin Brown, 4/24/2015 2:22 PM	Aquino, 4/28/2015 3:51 PM	<input type="checkbox"/>

4. Click **Edit Assignment**.
5. From the *Profiles* column, select the user profile(s) for which you want to modify the page layout. In the example below, "Customer Portal Manager Standard" is selected.
6. Select **GoToAssist RS Case Layout** from the *Page Layout To Use* drop-down menu.
7. Click **Save**.



Save Cancel

Page Layout To Use: Case Layout (GoToAssist RS) | 1 Selected | 1 Changed

Profiles	Page Layout
Contract Manager	Case Layout
Customer Community Login User	Case Layout
Customer Community User	Case Layout
Customer Portal Manager	Case Layout
Customer Portal Manager Custom	Case Layout
Customer Portal Manager Standard	Case Layout (GoToAssist RS)
Customer Portal User	Case Layout
Gold Partner User	Case Layout
High Volume Customer Portal User	Case Layout
Marketing User	Case Layout
Partner Community Login User	Case Layout
Partner Community User	Case Layout
Read Only	Case Layout
Solution Manager	Case Layout
Standard User	Case Layout
System Administrator	Case Layout

Save Cancel

Provide Access to User Profiles

By default, the custom objects in the GoToAssist Remote Support Integration for Salesforce are only visible to the system administrator profile in Salesforce. Administrators can provide access to any user profile(s) that intend to run the application.

Standard user profiles have hard-set permissions that cannot be edited to grant additional Create/Read/Edit/Delete access to custom objects of the integration. For this reason, it is recommended that the administrator create a new user profile by cloning an existing one as follows:



1. From the Salesforce home page, click on your account name in the top right navigation. Select **Setup**.
2. Navigate to **Administration Setup > Manage Users > Profiles**.
3. Select an existing user profile name.
4. Click **Clone**.

5. Create a new *Profile Name*.
6. Click **Save**.
7. In the *Profile Detail* section in the top navigation, click **Edit**.

8. Locate the *Custom Object Permissions* section.
9. Check all boxes in the row for GoToAssist RS Sessions (i.e., "Read," "Create," "Edit," "Delete," "View All," "Modify All").

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
GoToAssist RS Sessions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Click **Save**.
11. Locate the *Enabled Apex Class Access* section and confirm that *g2ars.RESTCallbackController* is listed.
12. If it is not listed, click **Edit**.

13. Select **g2ars.RESTCallbackController** from the *Available Apex Classes* column, then click the Add arrow  to add it to the *Enabled Apex Classes* column.
14. Click **Save**.
15. Locate the *Enabled Visualforce Page Access* section and confirm that *g2ars.RESTCallbackController* is listed.
16. If it is not listed, click **Edit**.
17. Select **g2ars.RESTCallbackController** from the *Available Visualforce Pages* column, then click the Add arrow  to add it to the *Enabled Visualforce Pages* column.
18. Click **Save**.
19. You can now use the GoToAssist Remote Support Integration for Salesforce!