Agenda

Quantum Whisper Integration Kickoff Meeting

Goal: The goal of the kick-off meeting is to complete account set-up and initial system configuration. A successful meeting will conclude with a working bidirectional integration.

Support App = Microsoft Dynamics CRM (or O365), Salesforce.com or ServiceNow
Dev App = Microsoft TFS, Azure DevOps (VSTS), JIRA, VersionOne or CA Agile Central (RallyDev)

Pre-requisites

1. Free Trial Account. Go to https://cloud.quantumwhisper.com/SignUp
   a. Simply create a trial account. Once you have successfully logged into the system, there is no need to advance. We'll do that together.
2. Support App service account with Admin privileges*
3. Dev App service account with Admin privileges*
4. Dev App "Required" fields (these fields must be mapped in the integration). We'll need to consider how we want to populate these (e.g., default values vs. support app fields)
5. IT permission to connect (we don't want anyone to get in trouble!)
6. Basic field mapping goals (proof-of-concept to start)

Participants/Roles

- Support App Admin
- Dev App Admin
- Process Champion
- IT resource (if on-prem connection)
- Quantum Whisper Consultant

Agenda

- Platform & Use Case Review (demo if necessary)
- Install Support App Add-on (i.e., managed solution, package, plug-in))
- Connect to Support App
- Connect to Dev App
- Create first integration path (use Quick Map!)
- Test integration
- Review advanced settings
- Configure as desired

* For service accounts, we recommend that you create non-user accounts explicitly to support system integration and API/service calls. These accounts generate their own data rather than a user's data.