2. Salesforce CRM Integration User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email at support@magenest.com

By: Magenest | Support Portal: http://servicedesk.izysync.com/servicedesk/customer/portal/20

Introduction

Magento 2 Salesforce Integration allows the store owner to sync all data from Magento 2 store to the Salesforce CRM system.

Features

- Synchronizing and updating a specific or all Products from Magento 2 store into Salesforce CRM Products both manually and automatically.
- Synchronizing and updating a specific or all Customers from Magento 2 store into Salesforce CRM Leads, Contacts, Accounts both manually and automatically.
- Synchronizing a specific or all Orders from Magento 2 store into Salesforce CRM Orders and Opportunity both manually and automatically.
- Synchronizing a specific or all Campaigns and Subscribers from Magento 2 store into Salesforce CRM both manually and automatically.
- Mapping smartly manually between Magento 2 attributes and Salesforce fields
- Viewing the log to see what is synchronized between two apps
- Managing the sync queue to see what will be synchronized next.
- Following the request report on Backend of Magento 2
- Linking Contact with Account on Salesforce,
- Supporting Personal Account

Requirements

Your store should be running on Magento Edition version **2.0.x, 2.1.x., 2.2.x, 2.3.x, and 2.4.x**

Magenest Salesforce CRM Version 3.4.1

Compatibility: Magento 2.3.x, 2.4.x (Open source, Commerce)

Compatible with Magento 2.4.6

API

The module works base on using API, so make sure your Salesforce edition had API by checking the using version:

1. Enterprise Edition (API default)
2. Unlimited Edition (API default)
3. Developer Edition (API default)
4. Performance Edition (API default)
5. Professional Edition (**API purchase separately**)

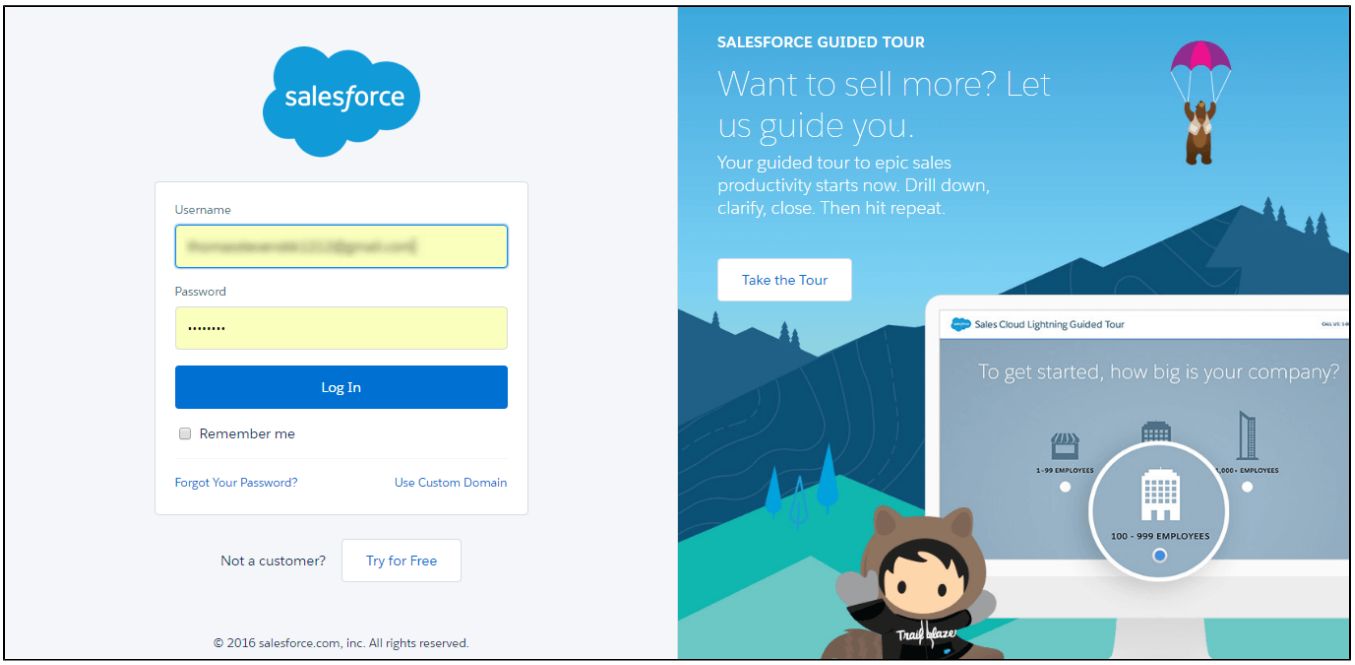
The API package is not available if you use any other edition that's not listed above.

Video Tutorial Playlist

How to create a new app

It is necessary to create a new app for the connection between Magento 2 and Salesforce CRM. First of all, you need to have a developer account in Salesforce, go to https://developer.salesforce.com/.

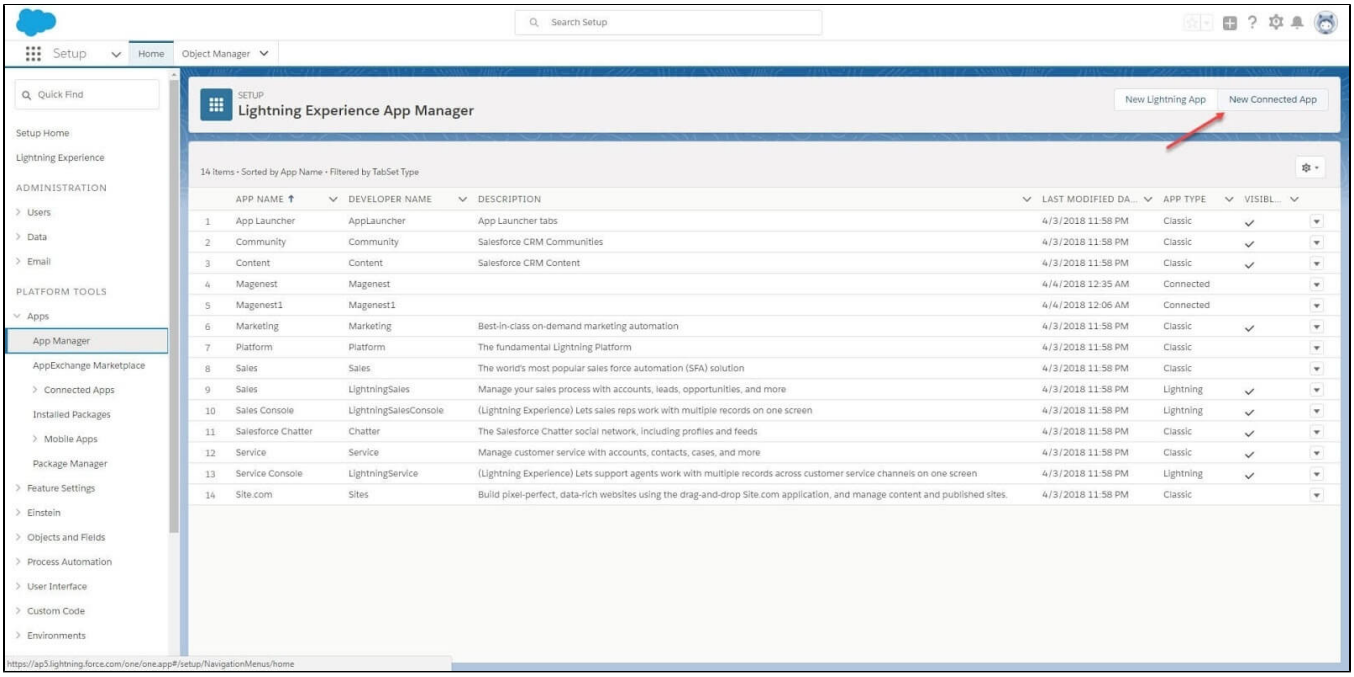
- **Login** if you already have an account.



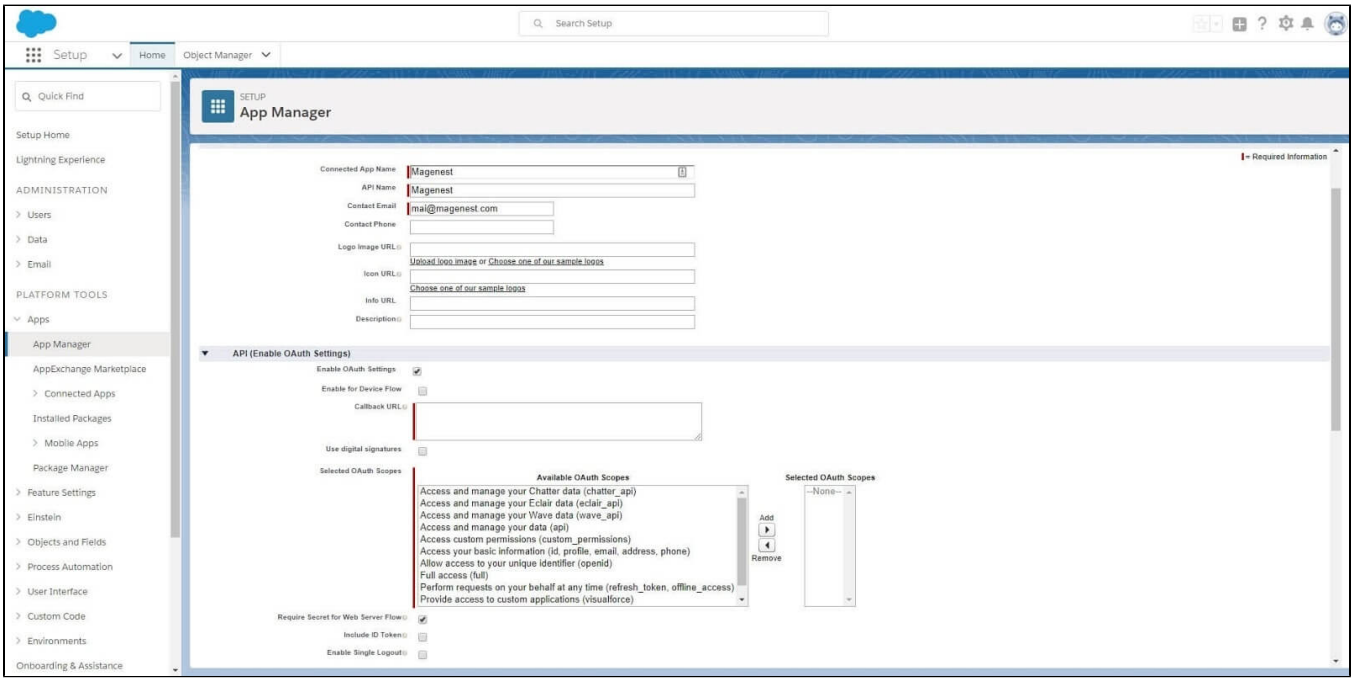
- Or **Sign up** to create a new one

Get consumer key and consumer secret by the connected app

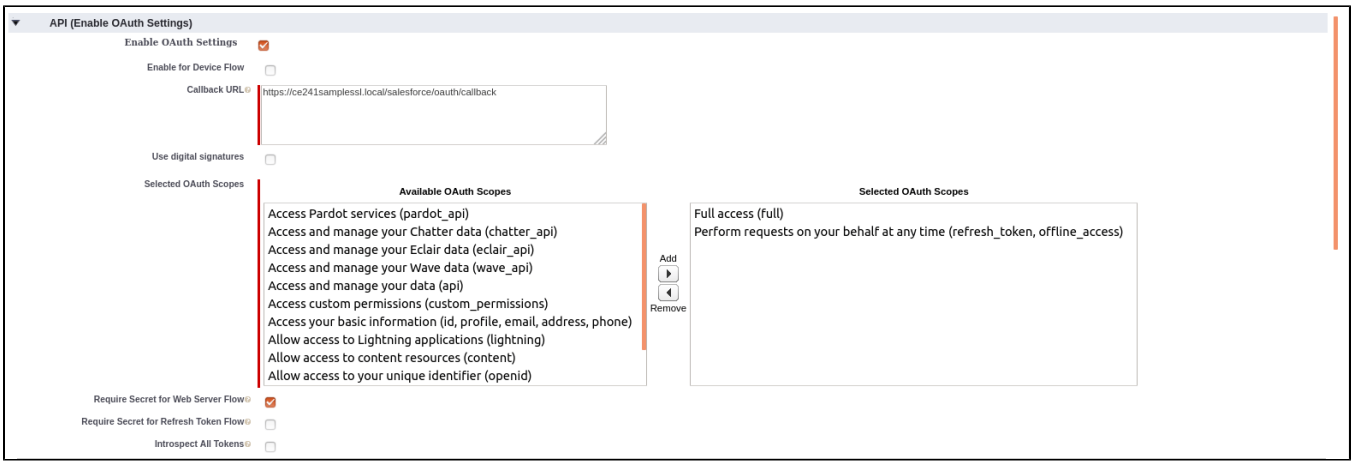
- Admin must log in the account of **Salesforce system > Setup > Apps > App Manager > Create new connected app** (click on **New Connected App** on the top right to create a new app):



- Entering the information needed:

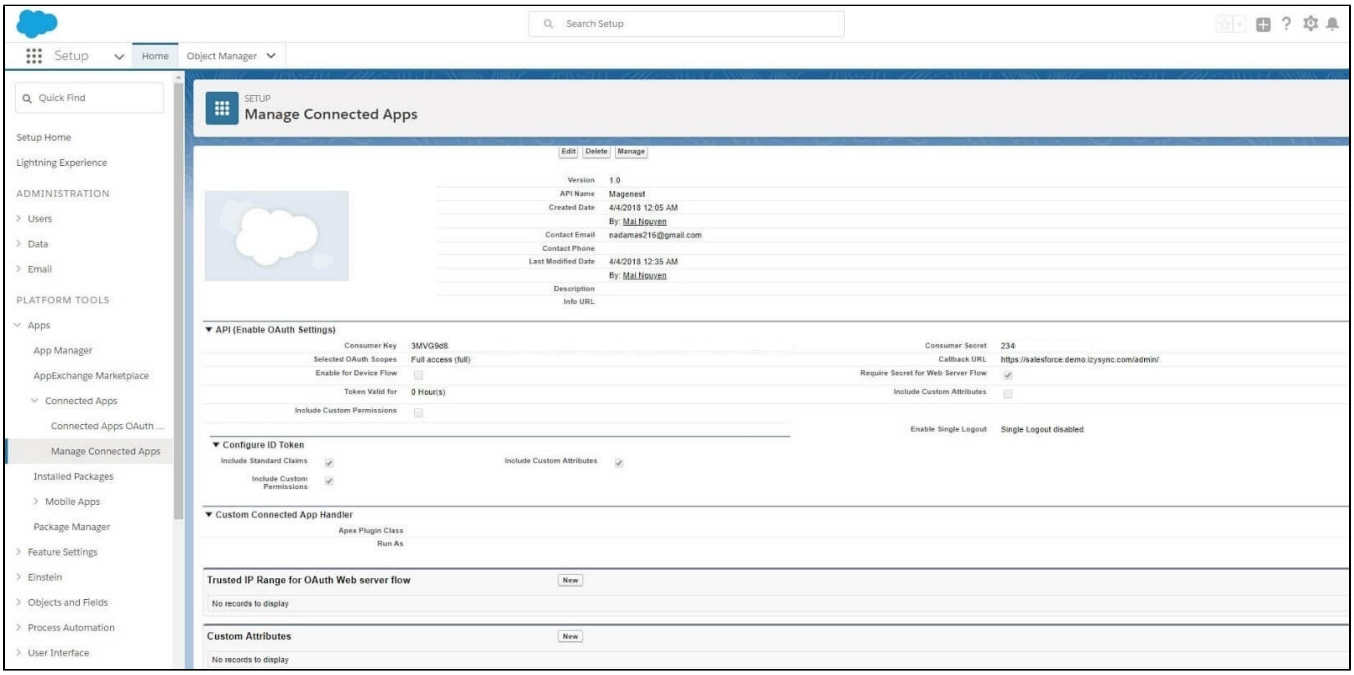


- **Connected App Name:** name for your connected app
- **API Name:** data from this field will be auto-synced from the Connected App Name
- **Contact Email:** your Salesforce email
- **Enable OAuth Settings box**
- **Callback URL:** Callback URL fill https://your_domain_site/salesforce/oauth/callback
- **Selected OAuth Scopes:** select the Full Access option and Perform requests on your behalf at any time (refresh_token, offline_access)" permission



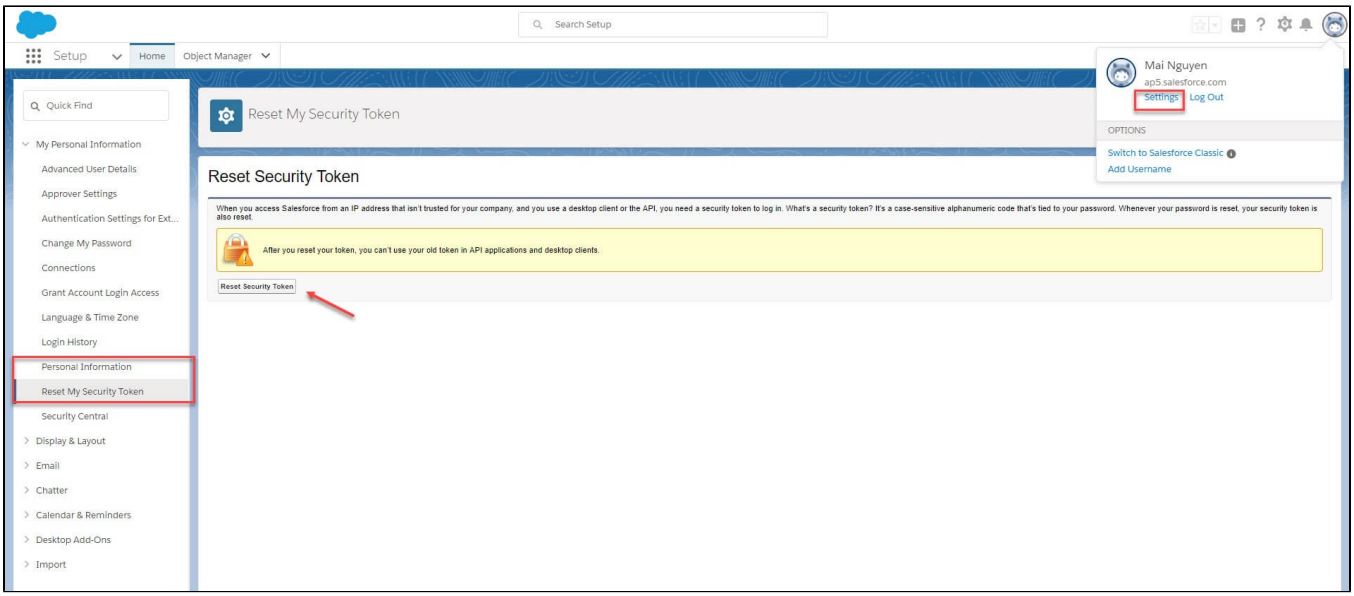
- Choose **Require Secret for Web Server Flow**
- Choose **Include ID Token: Include Standard Claims, Include Custom Attributes, Include Custom Permissions.**
- Click the **Save** button, then **Continue** to see the newly created app.

The output will look like the below, you will use the **Consumer Key** and **Consumer Secret** for the configuration.

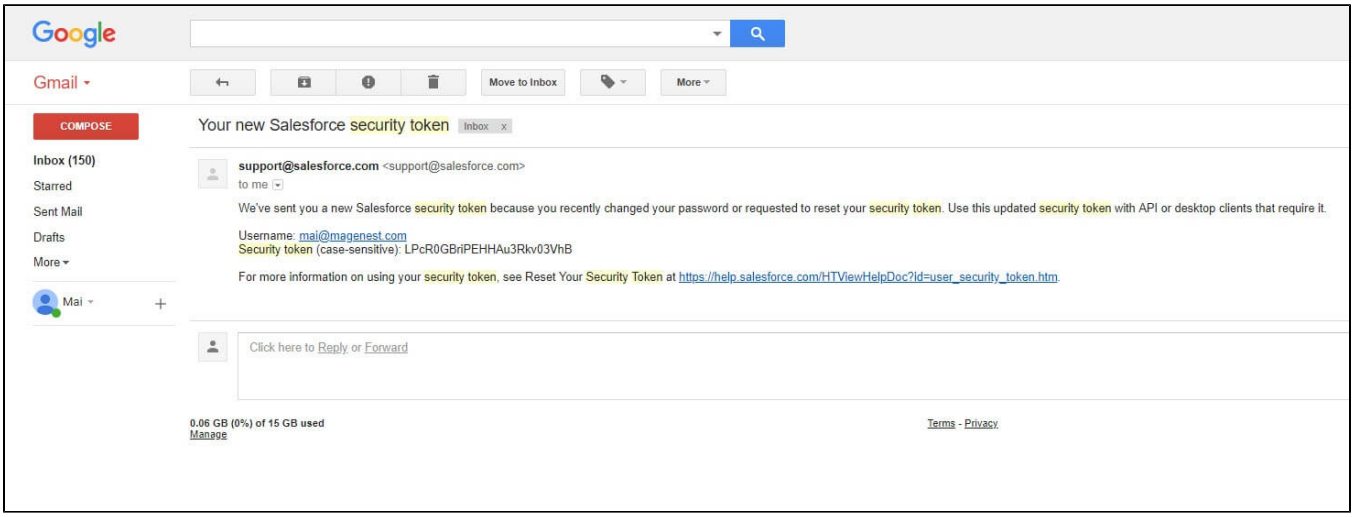


Reset security token

- Click on the user icon on the top right, choose **Settings**. Then on the left menu bar, choose **Personal Information > Reset My Security Token.**
- Click on **Reset Security Token** button to get a new one.



- A new security token will be sent to your registered email.
- Note that you will need this security token for configuration.



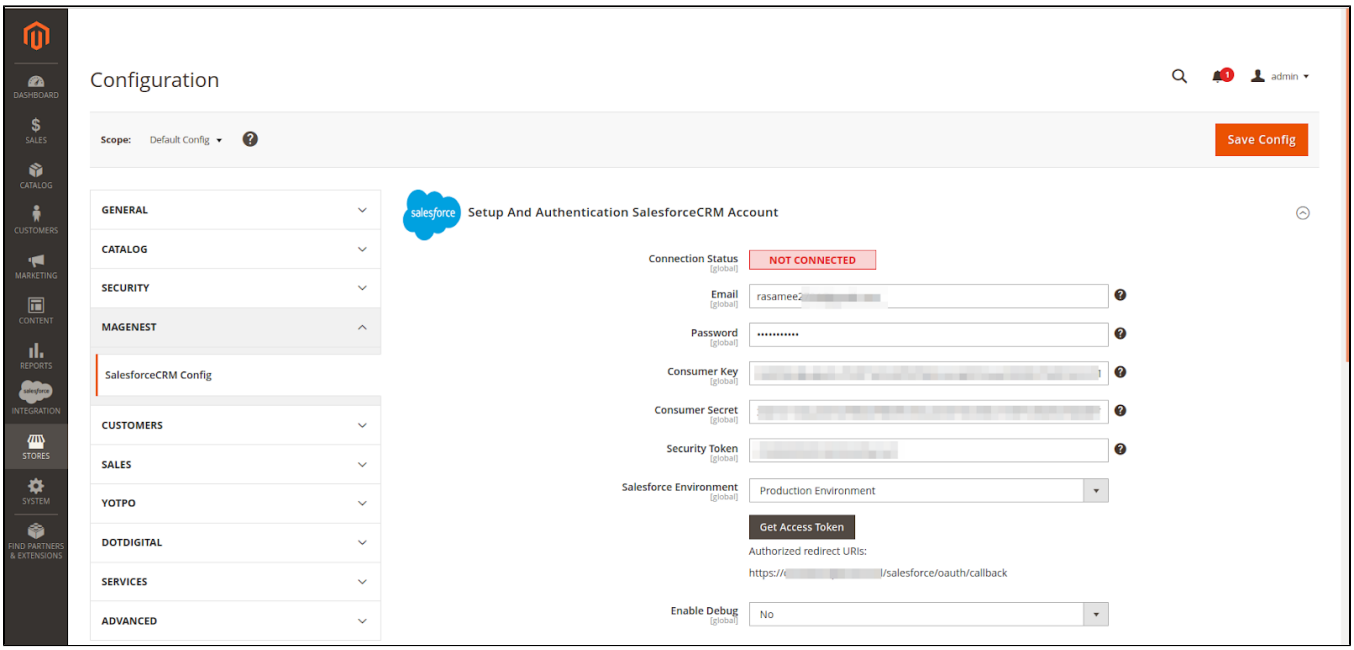
Setup and Authentication Salesforce CRM account

Setup and Authentication Salesforce CRM account will allow integrating Magento 2 store with your Salesforce CRM account.

On the Admin sidebar, go to **Salesforce Integration > Configuration**

- **Email**: Your Salesforce login email
- **Password**: Your Salesforce password
- **Consumer Key**: search in **Home > Platform Tools > Apps > App Manager > "Your app name"** (in this demo it is "Magenest") in Salesforce. Check out the above guide "Get consumer key and consumer secret by connected app"
- **Consumer Secret**: search in **Home > Platform Tools > Apps > App Manager > "Your app name"** (in this demo it is "Magenest") in Salesforce. Check out the above guide "Get consumer key and consumer secret by connected app"
- **Security Token**: Check out the above guide "Reset Security Token"
- **Salesforce environment:** You can choose the *sandbox environment* or *production environment*
- **Enable Debug**: the module will log data response to the salesforce.log file into your system
- Click **Save Config** after you've done (refresh the cache if needed) **> Get Access**.

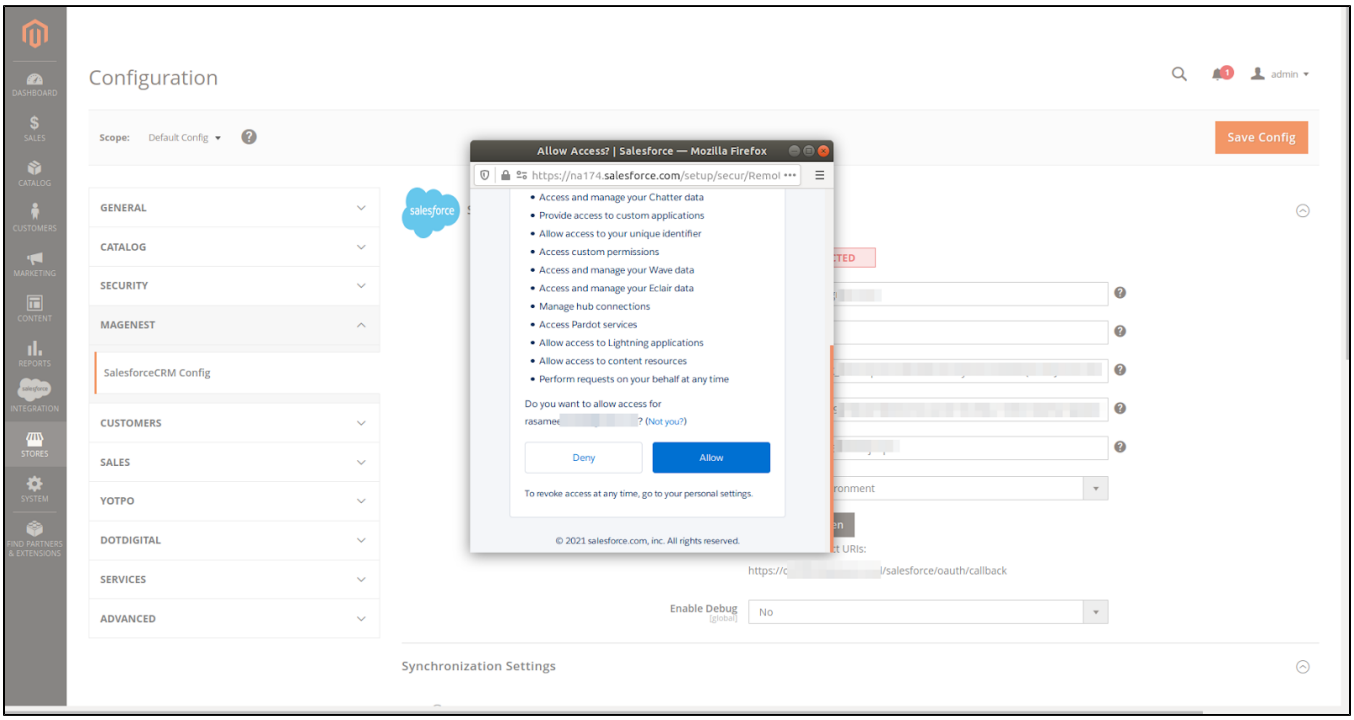
⚠️ Please **Save the config** before clicking on the **Get Access** button to avoid getting a consumer key error.



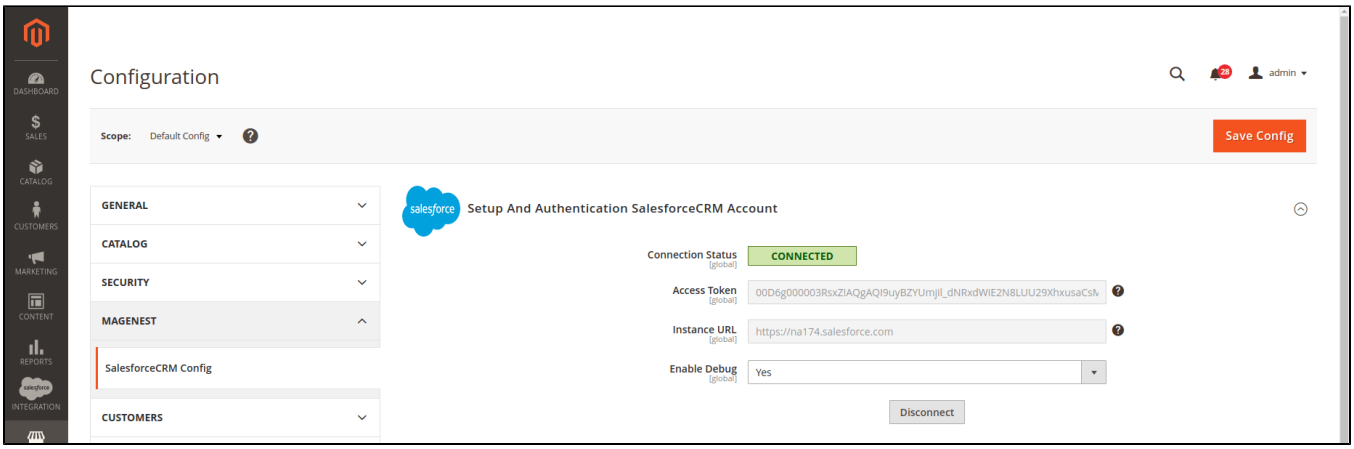
Admin will be redirected to the verification page:

- Click the **"Allow"** button

Waitting some minutes to complete the process and recheck all features of our module.



- Connection Status will be updated from ***Not Connected*** to ***Connected*** with all the information as in the image below. Once the integration is successful, the admin can mapping field from Salesforce to Magento and synchronize data from Magento to Salesforce.



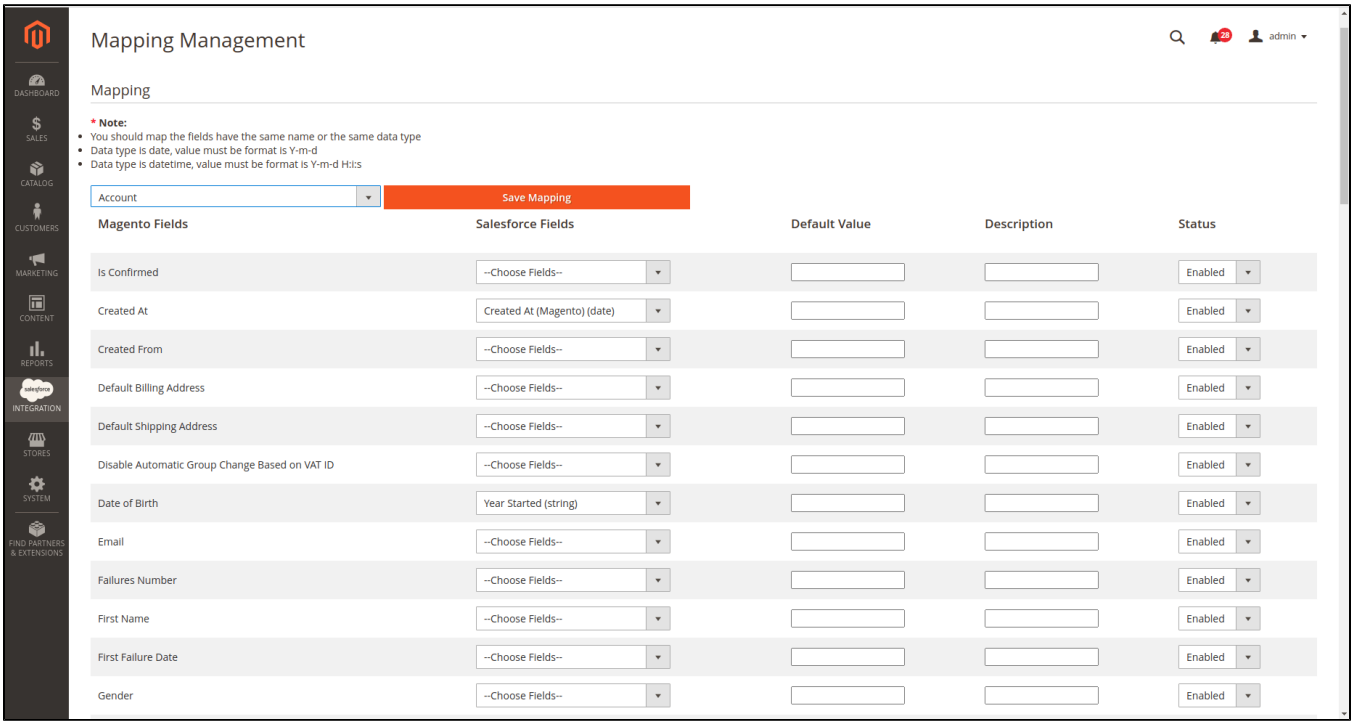
How to synchronize data from Magento 2 store to Salesforce CRM account

Setting Up Field Mapping

In order to synchronize data fields from the Magento 2 store to your Salesforce CRM account accurately, you need to create the mapping for these fields first.

- Go to **Salesforce Integration > Setup Field Mapping**
- In **Mapping Management,** choose the type of data you want to create a field map among *Account, Contact, Campaign, Lead, Product, Order, Opportunity.*

Note: For **Subscriber** data, you don't need to create field mapping.



- For each field in **Magento Fields**, choose the matching field in **Salesforce Fields** to sync data.

⚠️ Salesforce has field-level security that allows admin to restrict field access to certain users. You can click here for more info. Therefore, when you create field mapping, there would be some fields in Salesforce that don't show up in the backend. In this case, you have to go to Salesforce to invoke permission for these fields.

- **Description**: Describe the mapping fields
- **Default Value**: If one object does not have data to sync, it will get the default value as defined here. If the admin does not set the default value, it will be empty.
- **Status**: You could enable or disable the field map.

Synchronization Settings

You are able to synchronize data in the Synchronization Settings tab: **Account, Campaign, Opportunity, Contact, Lead, Product, Order, Subscriber.**

In each tab, when you **Enable** (Yes), the **Sync Mode** will show up**,** you can choose the way to synchronize data either **Auto-Sync** (Real-time) or **Add to Queue** (Cron Job).

- **Auto Sync:** The data will be automatically synchronized to Salesforce if there is any change.
- **Add to Queue**: The data will be added to the queue before synchronizing to Salesforce. If you choose this option, **Queue Auto Sync Time** shows up with 4 options: *Sync manually, 15 minutes, 1 hour, 2 hours*. These options are the waiting time in the queue of the data before it is automatically synchronized to Salesforce.

Click **Sync All <Data> Now** to add all records of the selected data type to the queue.

- **Select Date Range**: You can use the Data Filter to limit the number of records based on their Created Date (Except for Campaign, which is based on Start Date and End Date of the campaign).
- If the process is completed successfully, a widget will inform and allow you to check out the Sync Queue.

Unique Field:

- **Enable Personal Account:** If your Salesforce account enabled Person Account, please select enable this option.
- **Linked Contact with Account**: If enabled, when syncing a record to Salesforce Contact, the module will attempt to sync that record to Salesforce Account beforehand.

Save Config

Setup And Authentication SalesforceCRM Account

Connection Status [global]: CONNECTED

Access Token [global]: 00D2w00000DoZ4J!ARkAQFORlpButTMkCNKNu5ns8vqK.mhNo1mRtd5KT_

Instance URL [global]: https://ap16.salesforce.com

Enable Debug [global]: No

Disconnect

Synchronization Settings

Account

Enable [global]: Yes

Enable Personal Account [global]: Yes

If your Salesforce account enable Personal Account, please enable this field.

Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: Sync manually

Select Date Range: From:

To:

Sync All Accounts Now

Campaign

Enable [global]: Yes

Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: 15 minutes

Select Date Range: From:

To:

Sync All Campaigns Now

Opportunity

Enable [global]: Yes

Sync Mode [global]: Auto Sync

Select Date Range: From:

To:

Sync All Orders to Opportunities Now

Contact

Enable [global]: Yes

Linked Contact with Account [global]: Yes

Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: 1 hour

Select Date Range
From: 2021/01/04
To: 2021/01/22

Sync All Contacts Now

Lead

Enable [global]: Yes

Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: 30 minutes

Select Date Range
From: 2021/01/11
To:

Sync All Leads Now

Order

Enable [global]: Yes

Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: 2 hours

Select Date Range
From:
To: 2021/01/17

Sync All Orders Now

Product

Enable [global]: Yes

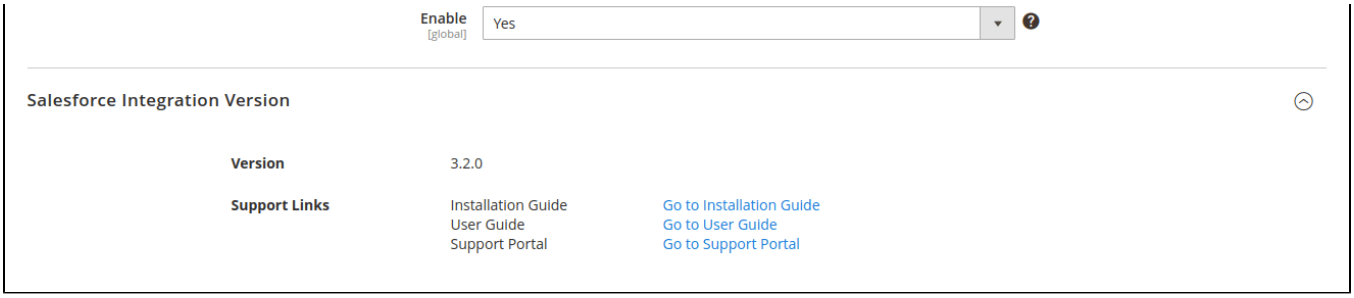
Sync Mode [global]: Add to Queue

Queue Auto Sync Time [global]: 1 hour

Select Date Range
From:
To: 2021/01/14

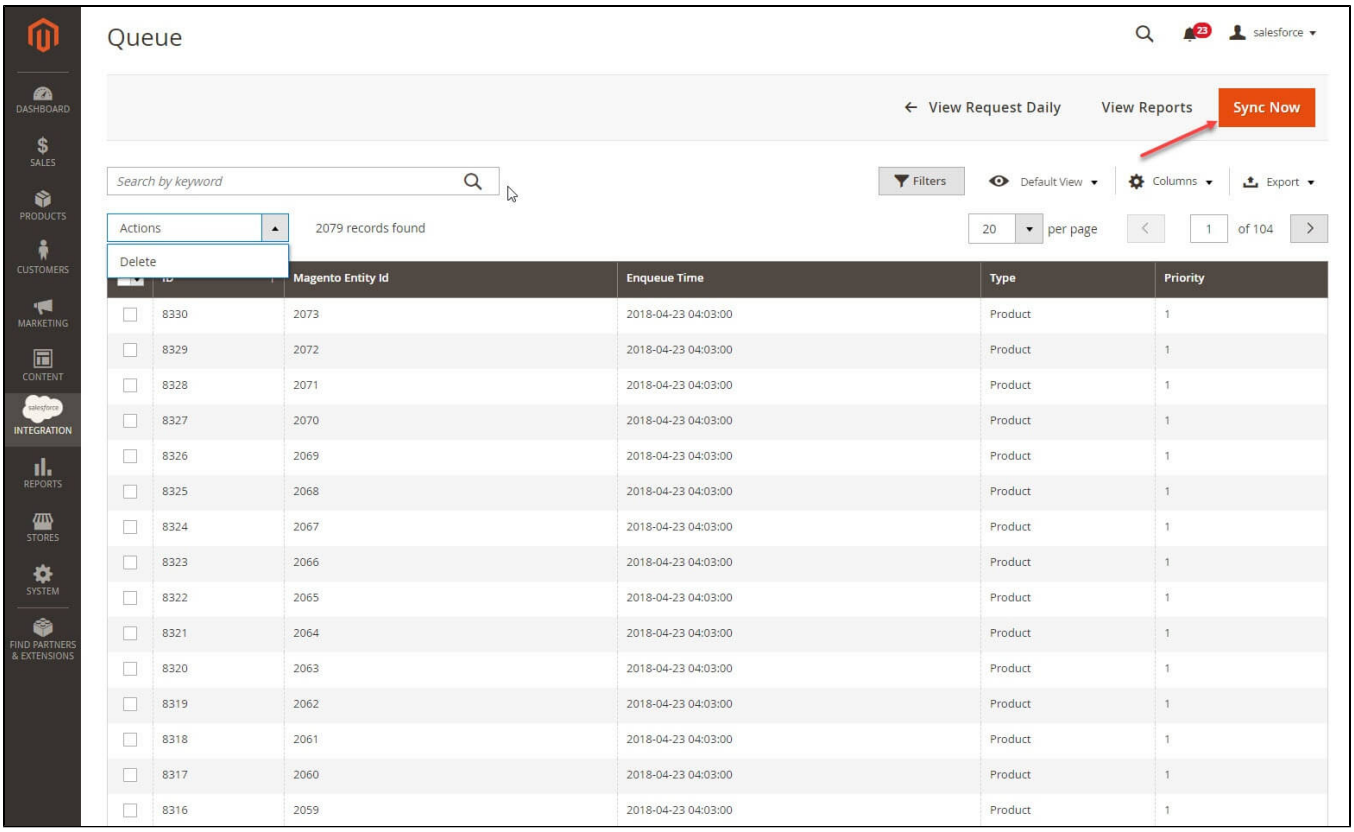
Sync All Products Now

Subscriber

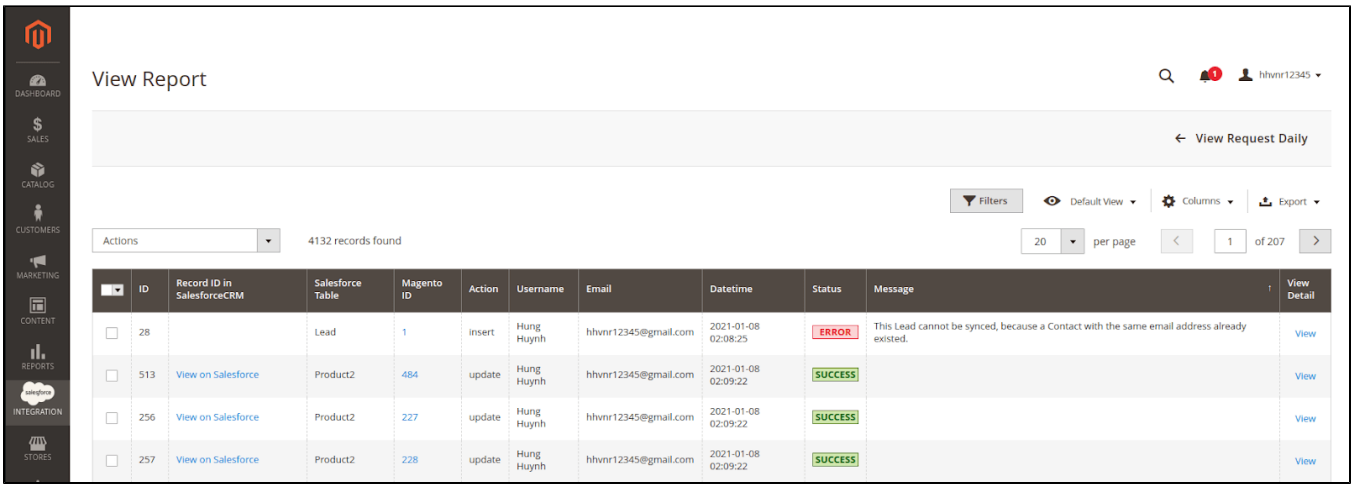


In Queue Page, you can choose the **Actions > Delete** to delete the data you don't want to sync. Then click on the **Sync Now** button to sync the data immediately to Salesforce.

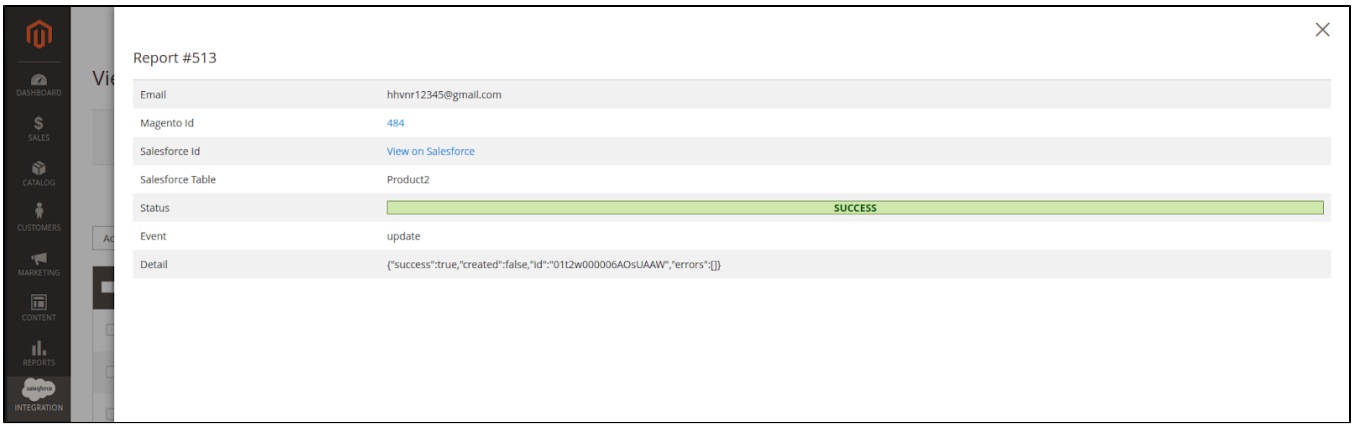
⚠ Note that synchronizing will take time, which depends on the size of the data.



When the synchronization process finished, you can go to **Salesforce Integration > View Report** to see the synchronized list.

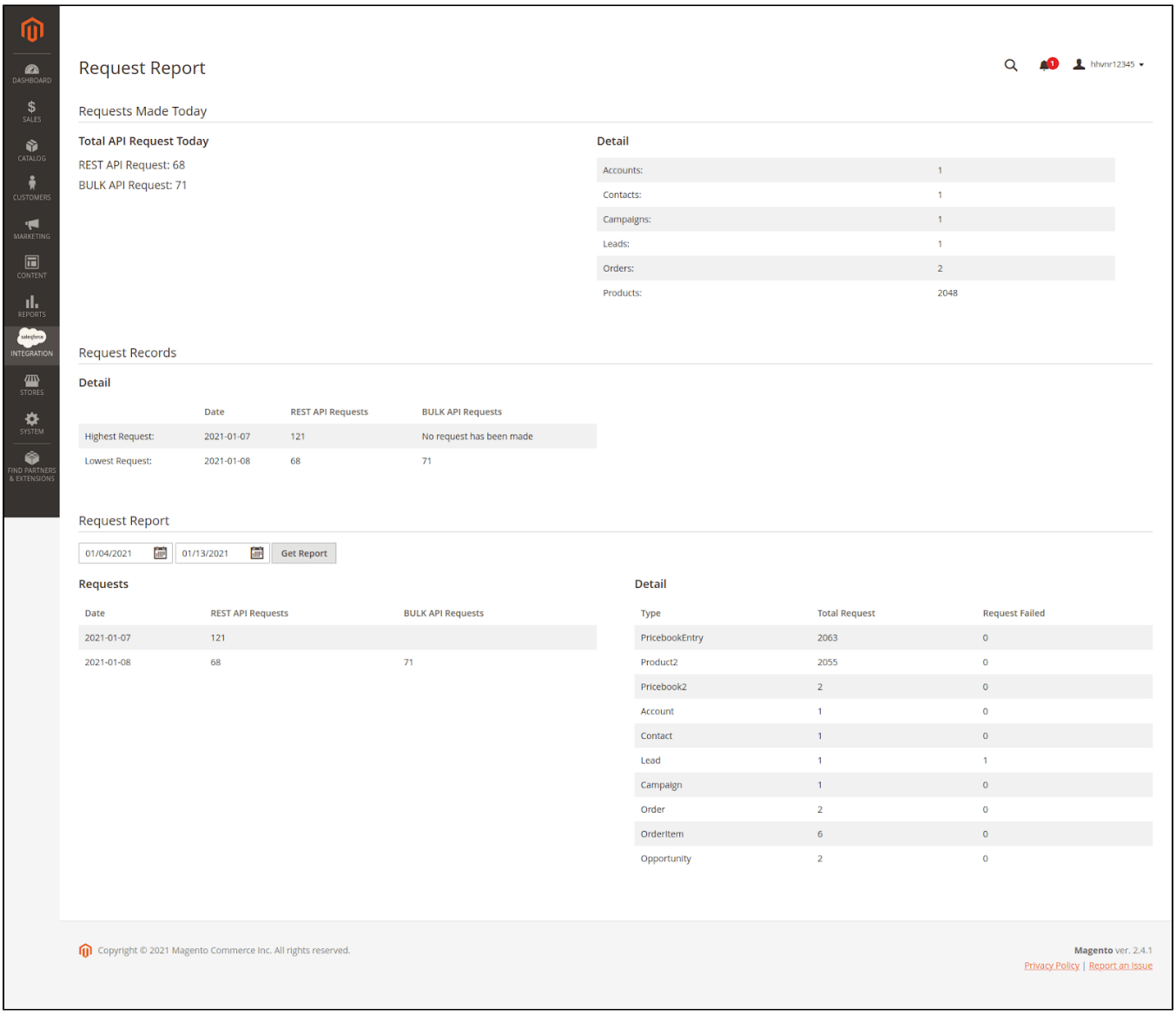


- If the data is synced right, the Status will be Success.
- If there's a problem during the syncing process, the Status will be Error. The Message column will display the error message.
- You can view the detailed response of the report by clicking on the "**View**" button.



In addition, you can easily check the synchronization with the **View Request Daily** button and **View On Salesforce** button.

Navigate to **Salesforce Integration > Request Daily Report**, you can easily follow the synchronization status.

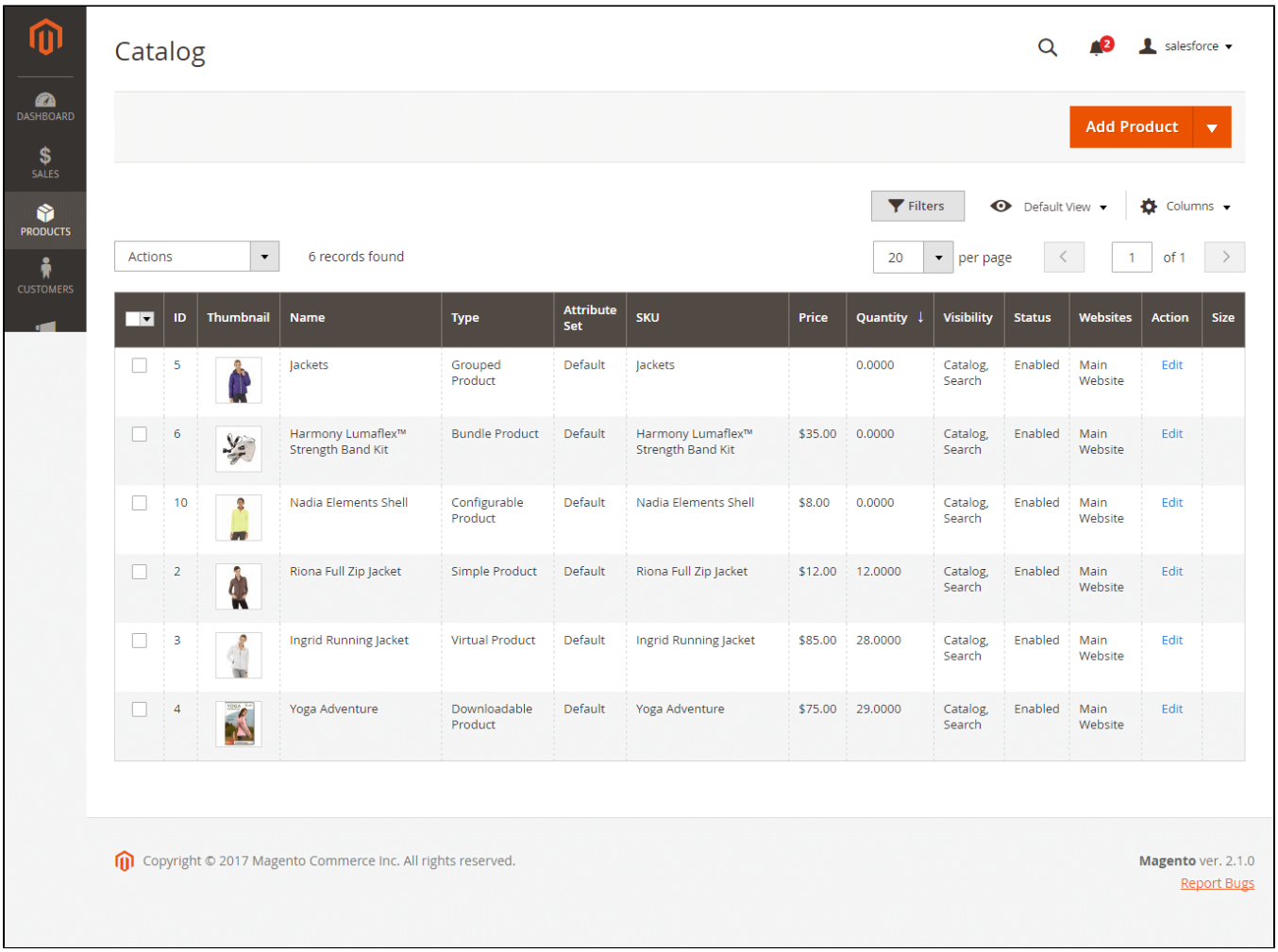


Main functions

- **Allow synchronizing and updating a specific or all Products from Magento 2 store into Salesforce CRM Products**

When a new product is added or an existing one is edited, a record with its price will be added into Salesforce's Products.

Magento Catalog:


Catalog
salesforce
DASHBOARD
SALES
PRODUCTS
CUSTOMERS
Add Product
Filters
Default View
Columns
Actions
6 records found
20
per page
1
of 1
ID
Thumbnail
Name
Type
Attribute Set
SKU
Price
Quantity
Visibility
Status
Websites
Action
Size
5
Jackets
Grouped Product
Default
Jackets
0.0000
Catalog, Search
Enabled
Main Website
Edit
6
Harmony Lumaflex™ Strength Band Kit
Bundle Product
Default
Harmony Lumaflex™ Strength Band Kit
$35.00
0.0000
Catalog, Search
Enabled
Main Website
Edit
10
Nadia Elements Shell
Configurable Product
Default
Nadia Elements Shell
$8.00
0.0000
Catalog, Search
Enabled
Main Website
Edit
2
Riona Full Zip Jacket
Simple Product
Default
Riona Full Zip Jacket
$12.00
12.0000
Catalog, Search
Enabled
Main Website
Edit
3
Ingrid Running Jacket
Virtual Product
Default
Ingrid Running Jacket
$85.00
28.0000
Catalog, Search
Enabled
Main Website
Edit
4
Yoga Adventure
Downloadable Product
Default
Yoga Adventure
$75.00
29.0000
Catalog, Search
Enabled
Main Website
Edit
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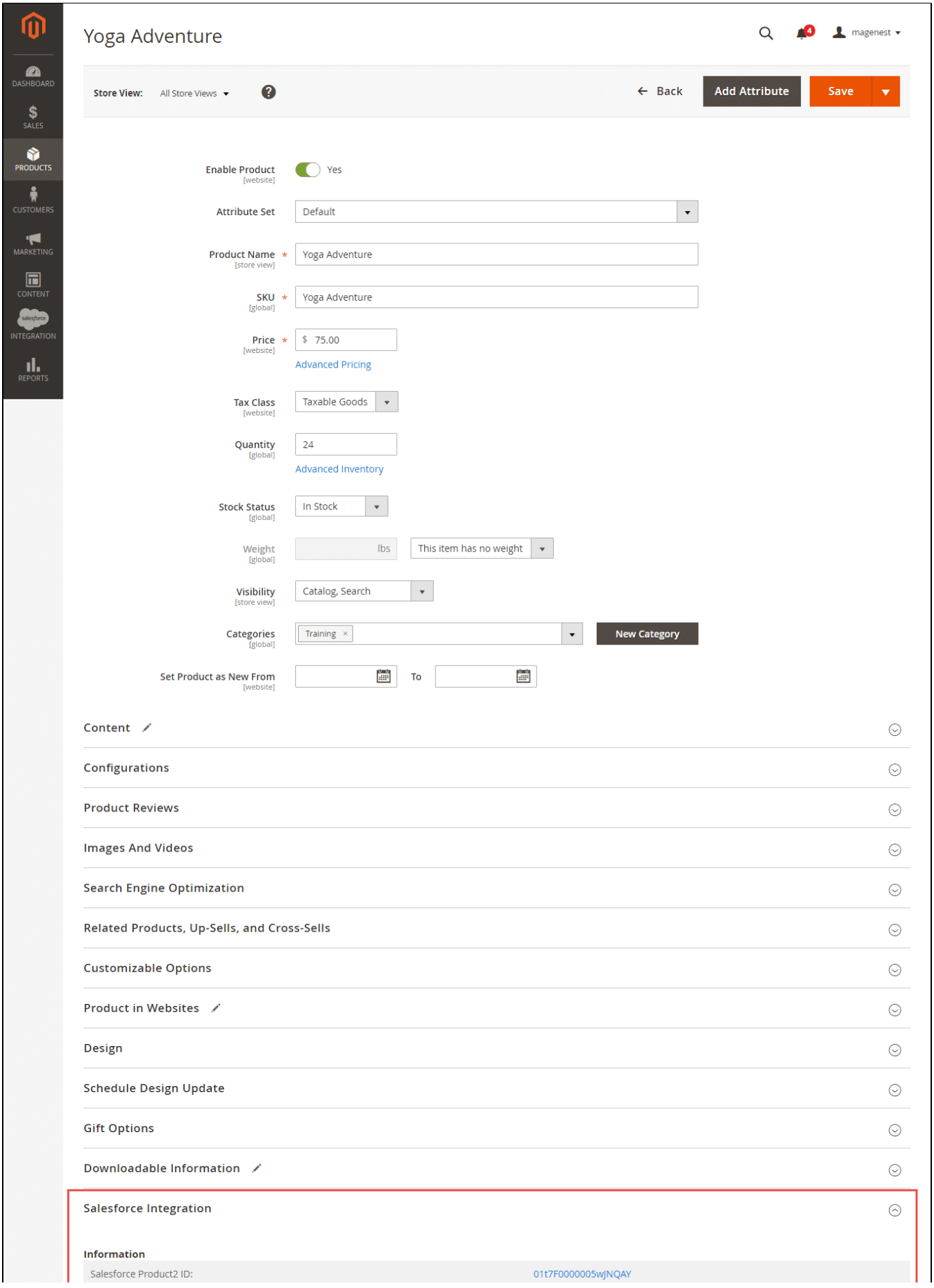
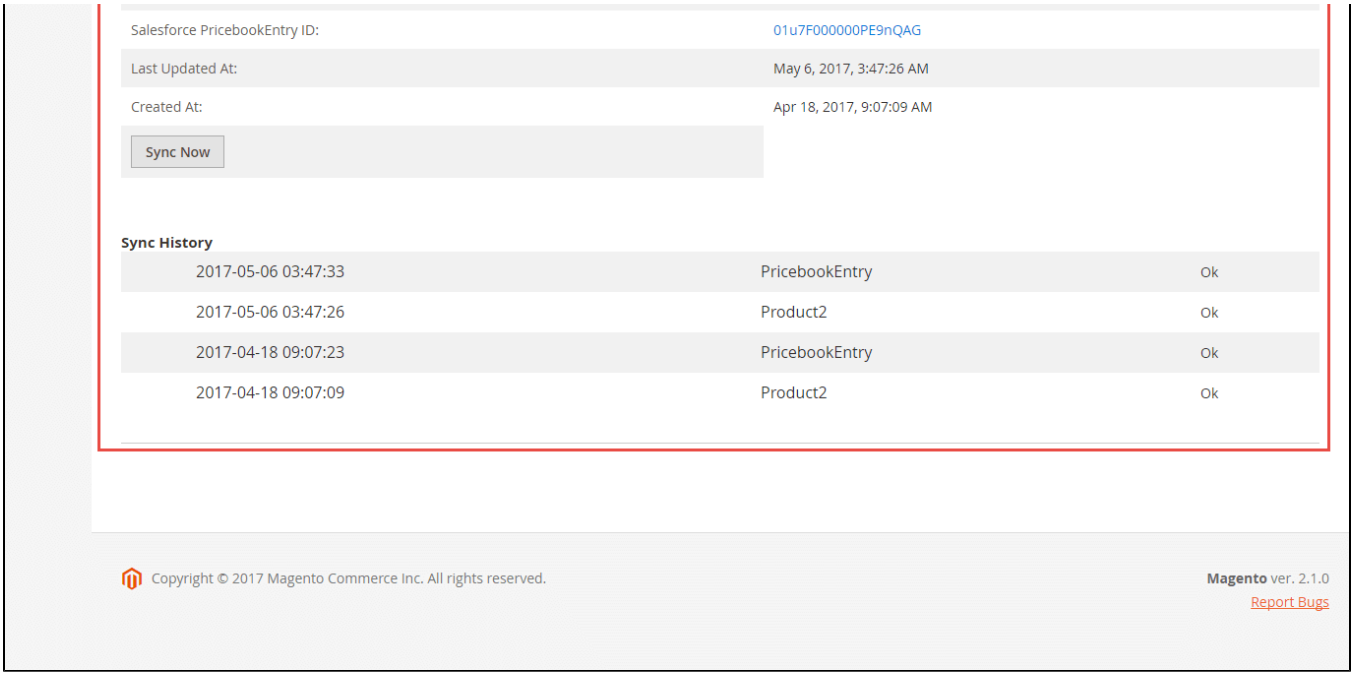
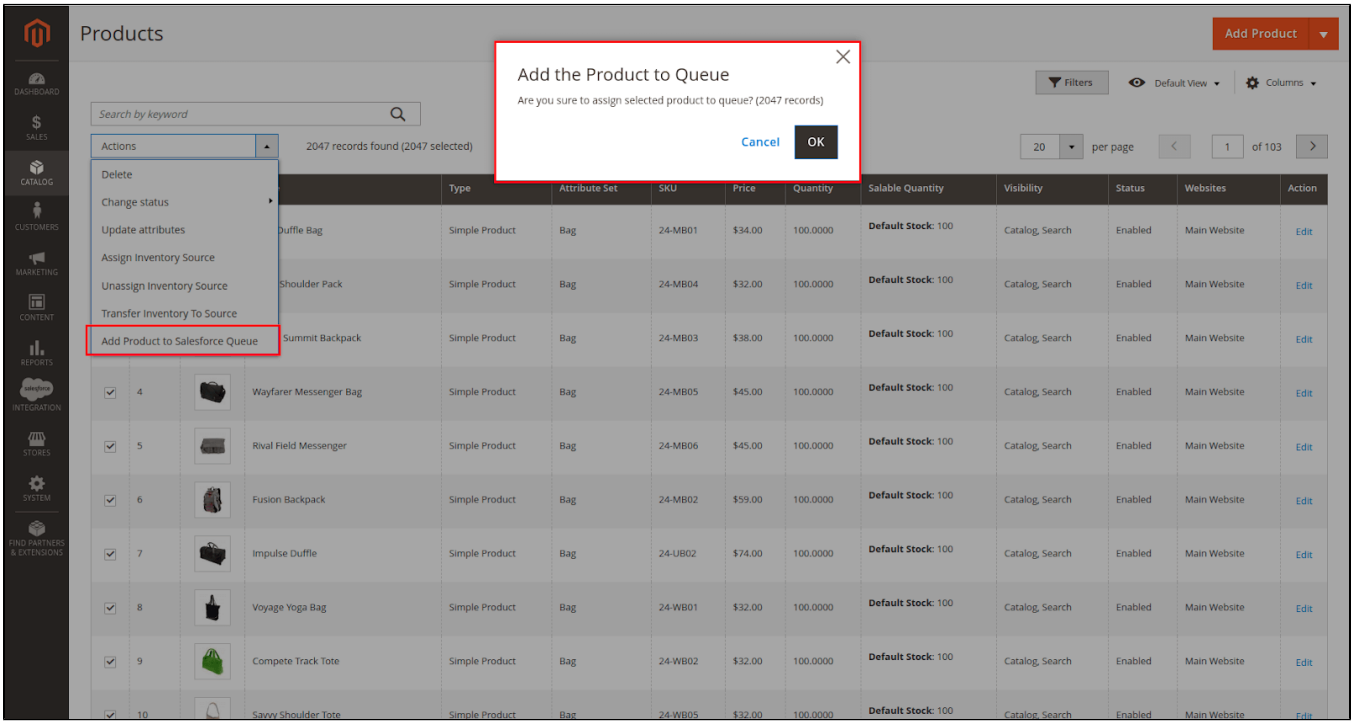
Magento ver. 2.1.0
Report Bugs

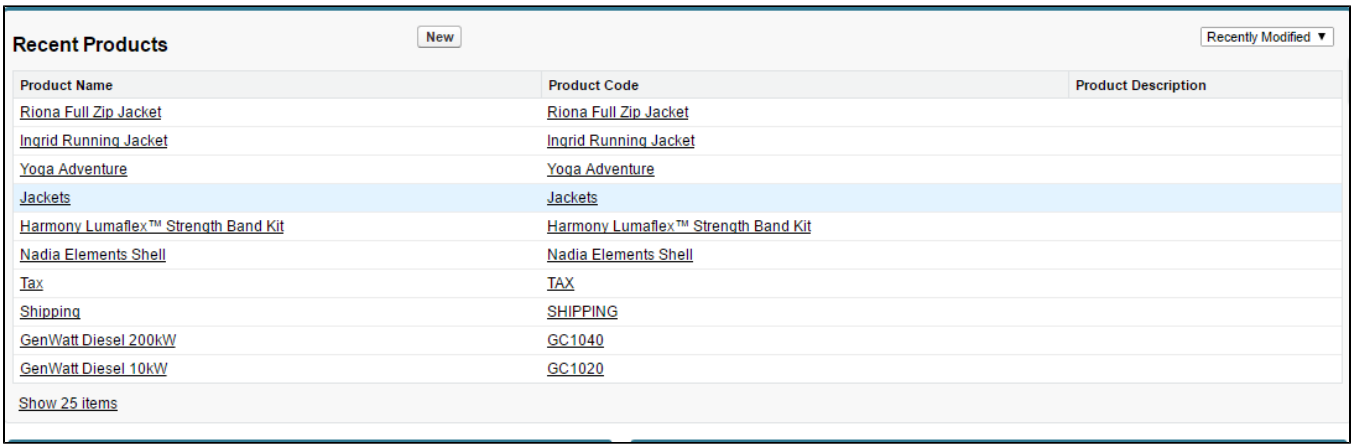

Yoga Adventure
magenest
DASHBOARD
SALES
PRODUCTS
CUSTOMERS
MARKETING
CONTENT
INTEGRATION
REPORTS
Store View: All Store Views
Back
Add Attribute
Save
Enable Product [website] Yes
Attribute Set Default
Product Name * [store view] Yoga Adventure
SKU * [global] Yoga Adventure
Price * [website] $ 75.00
Advanced Pricing
Tax Class [website] Taxable Goods
Quantity [global] 24
Advanced Inventory
Stock Status [global] In Stock
Weight [global] lbs
This item has no weight
Visibility [store view] Catalog, Search
Categories [global] Training
New Category
Set Product as New From [website]
To
Content
Configurations
Product Reviews
Images And Videos
Search Engine Optimization
Related Products, Up-Sells, and Cross-Sells
Customizable Options
Product in Websites
Design
Schedule Design Update
Gift Options
Downloadable Information
Salesforce Integration
Information
Salesforce Product2 ID:
01t7F0000005wJNQAY



Add mass action **Add products to Salesforce Queue** on Product Listing page:



Salesforce Products:

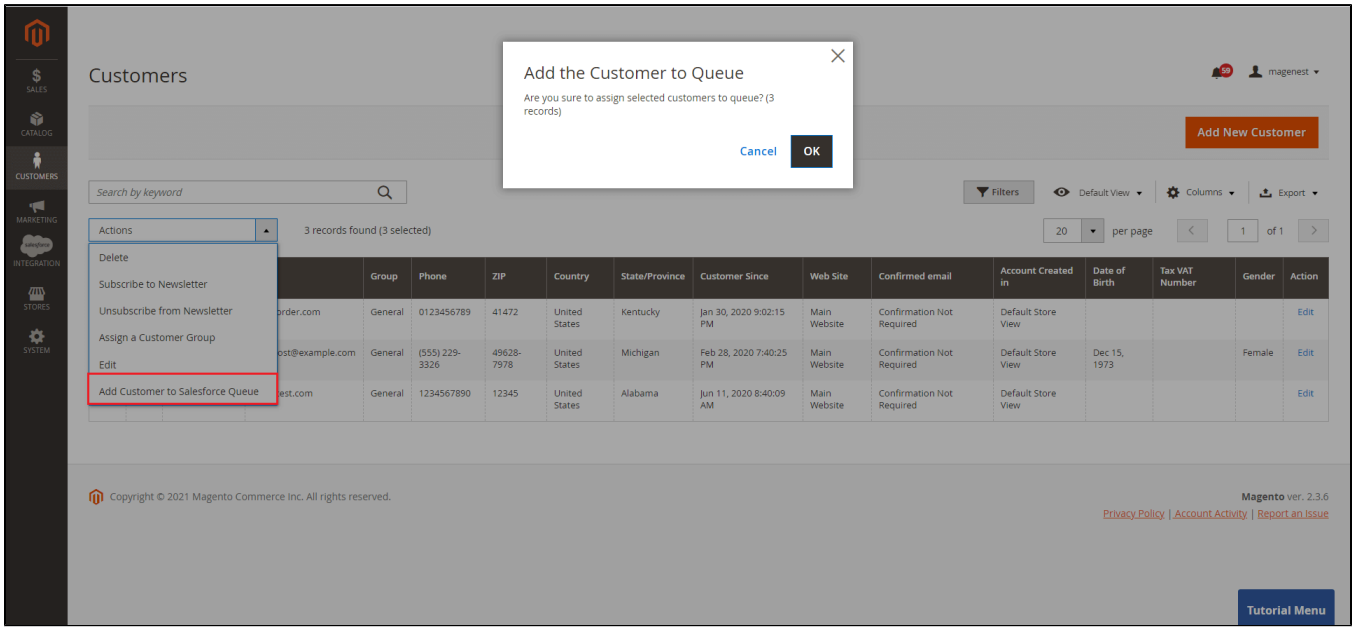


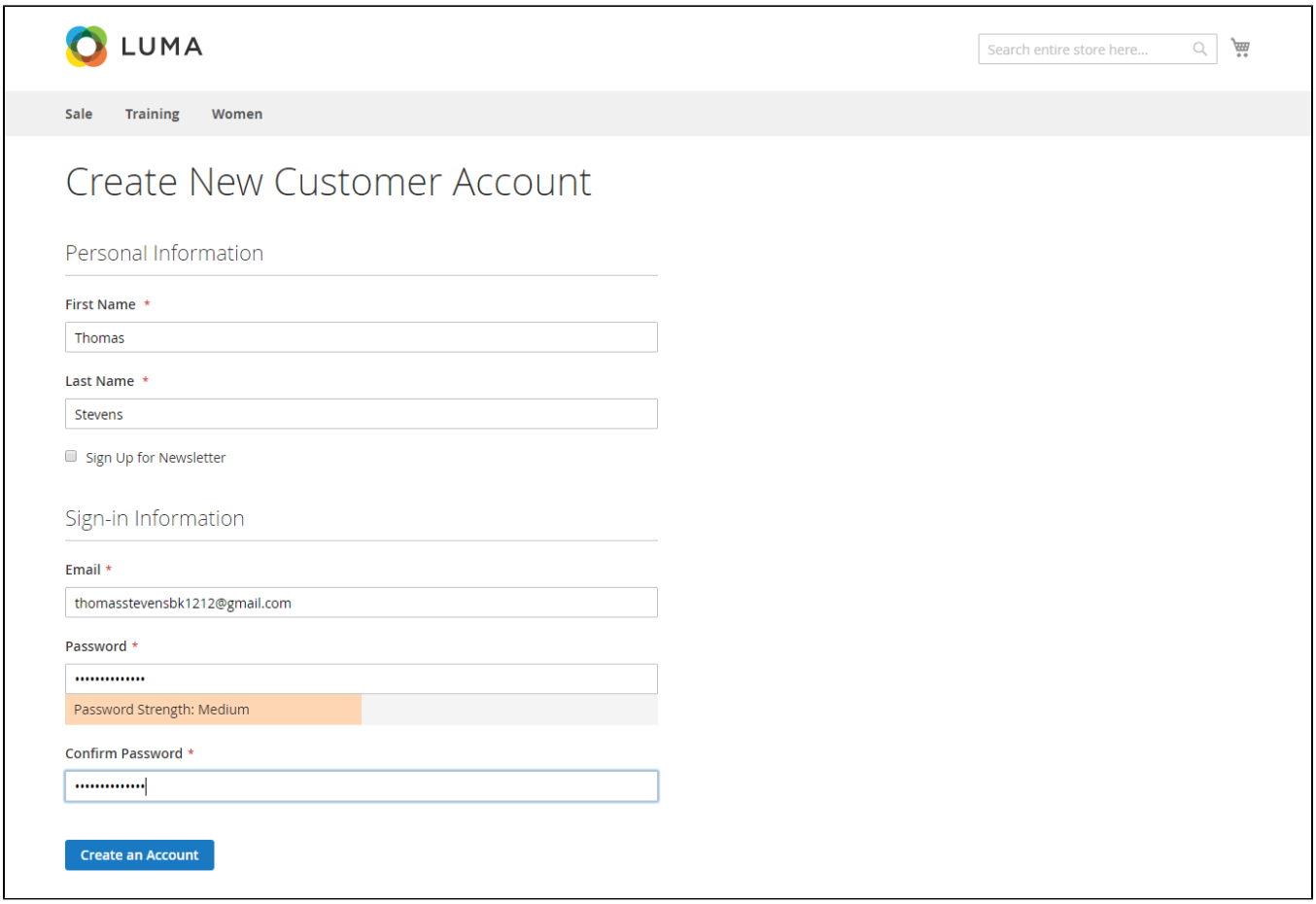
- **Allow synchronizing and updating a specific or all Customers from Magento 2 store into Salesforce CRM Leads, Contacts, Accounts**

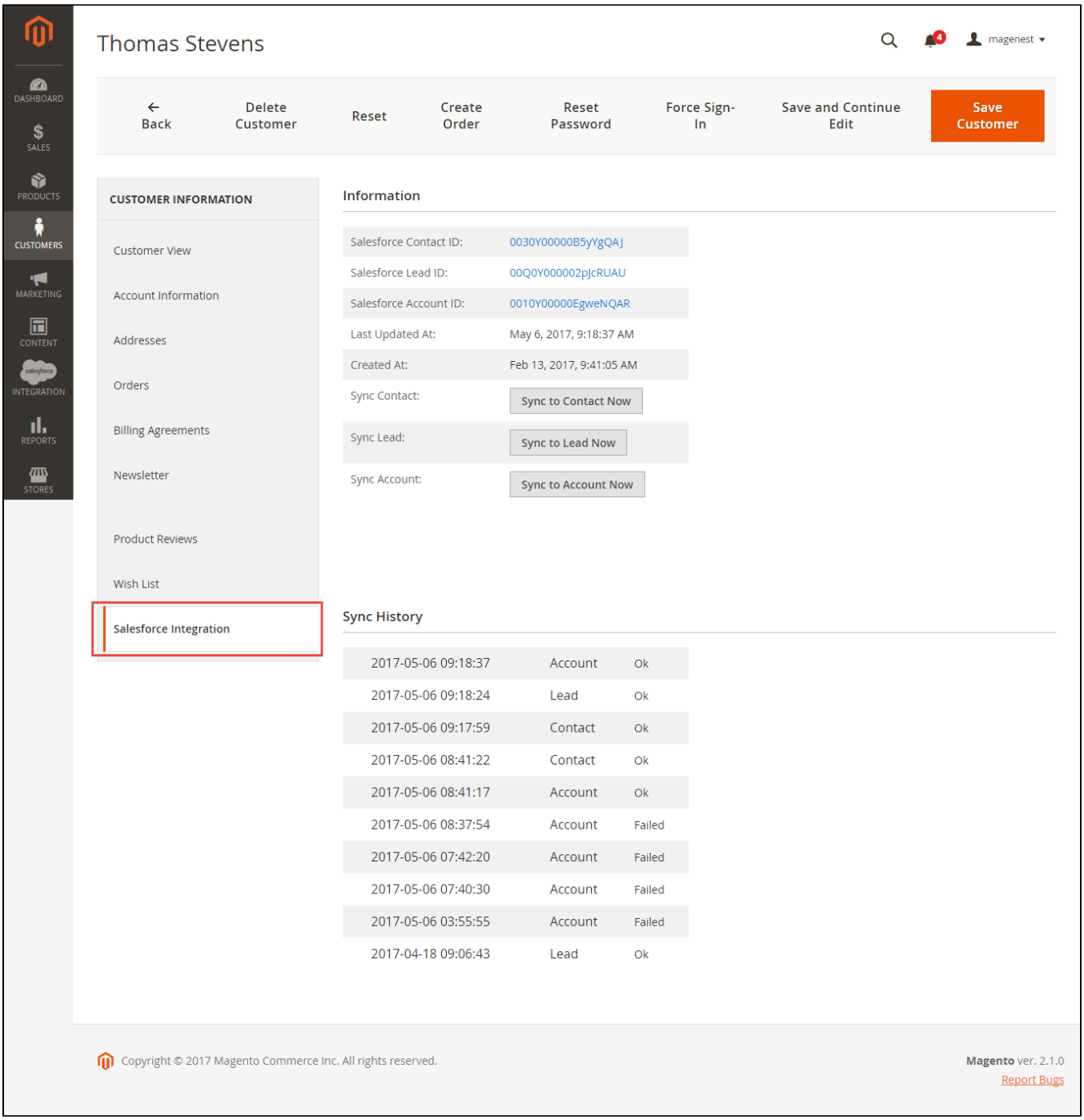
Whenever a customer account is created or updated in Magento 2 store, his/her information will be synchronized to Salesforce CRM in Leads, Accounts, and Contacts. Especially, this extension creates a Salesforce Integration tab for each customer information that allows you to easily synchronize a specific customer.

Magento 2 Dashboard:

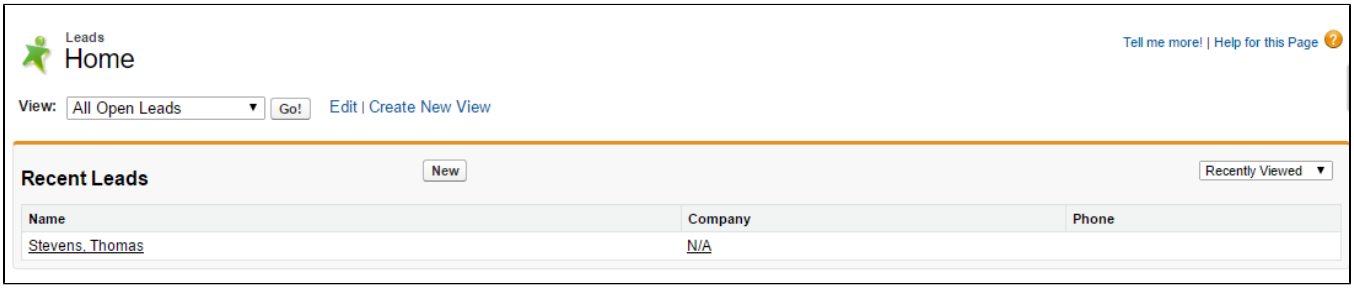
Mass action **Add customer Salesforce Queue** on the Customers Listing page



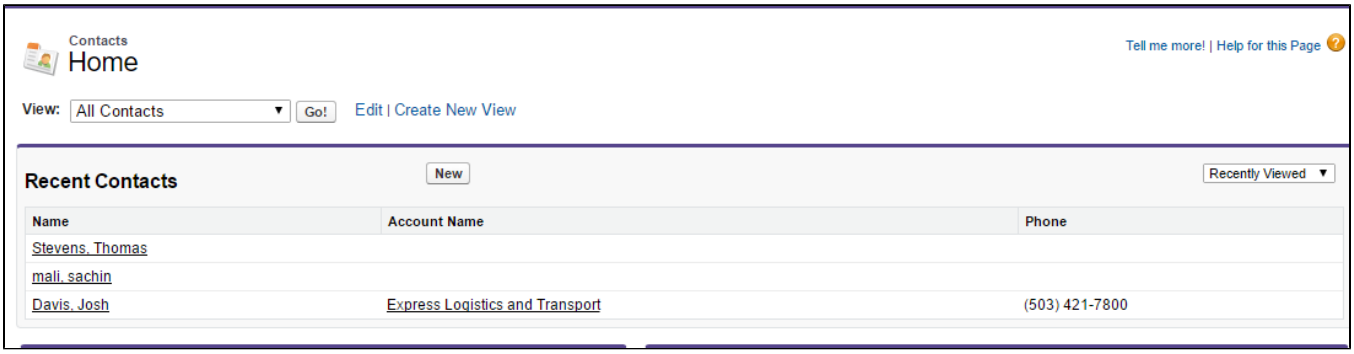

LUMA
Search entire store here...
Sale
Training
Women
Create New Customer Account
Personal Information
First Name *
Thomas
Last Name *
Stevens
Sign Up for Newsletter
Sign-in Information
Email *
thomasstevensbk1212@gmail.com
Password *
Password Strength: Medium
Confirm Password *
Create an Account



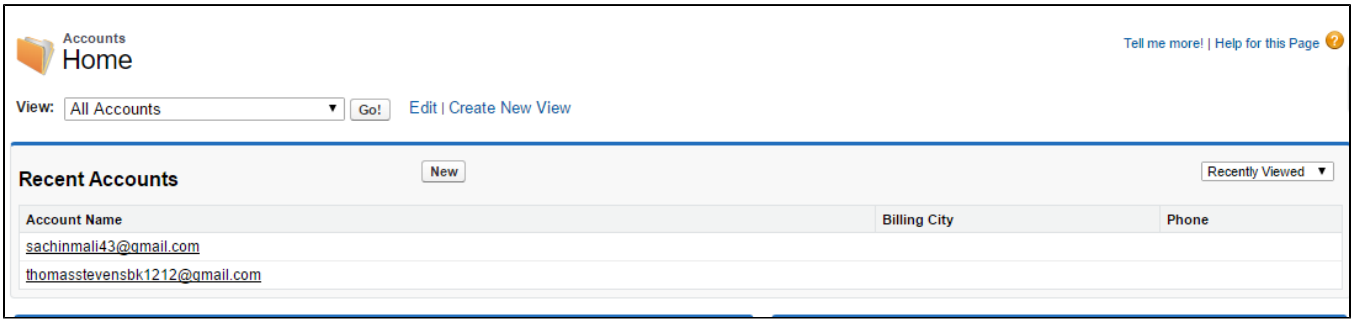
Salesforce Leads:



Salesforce Contacts:



Salesforce Accounts:

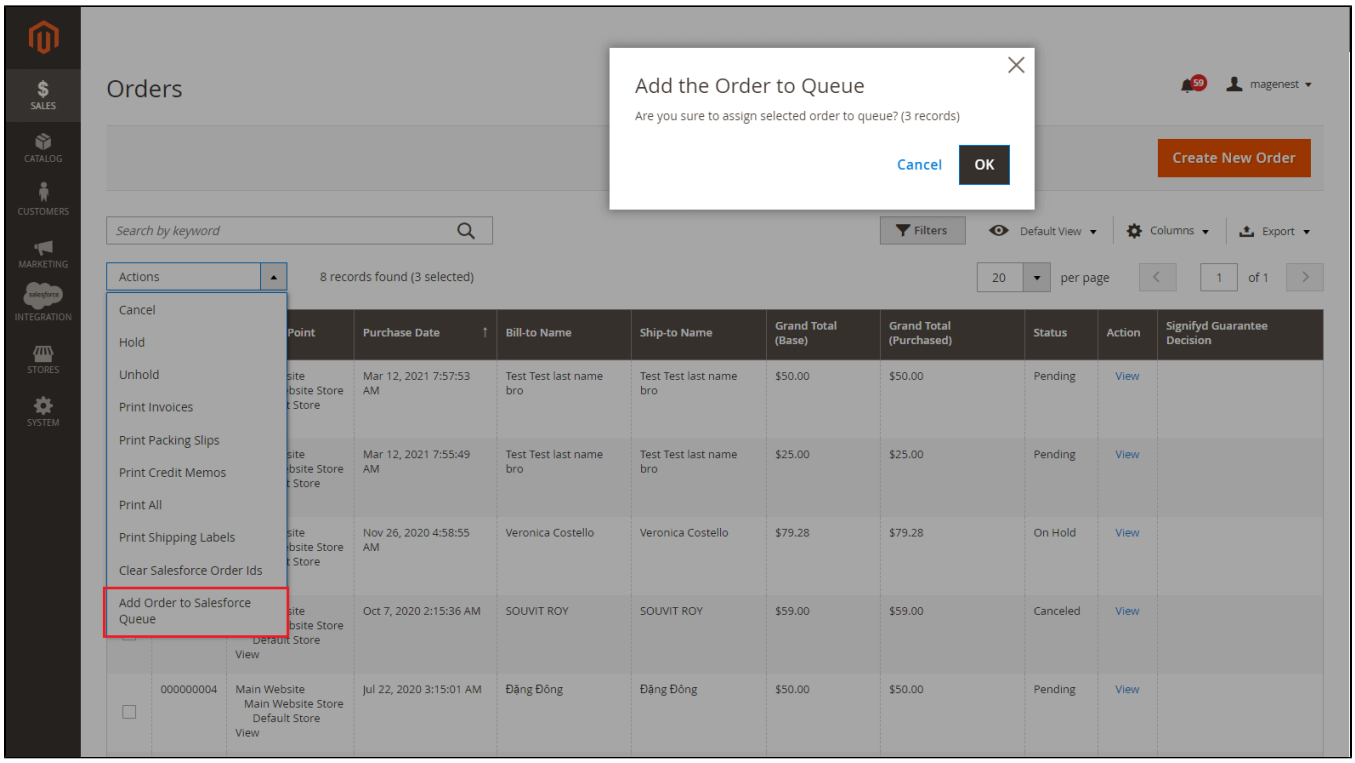


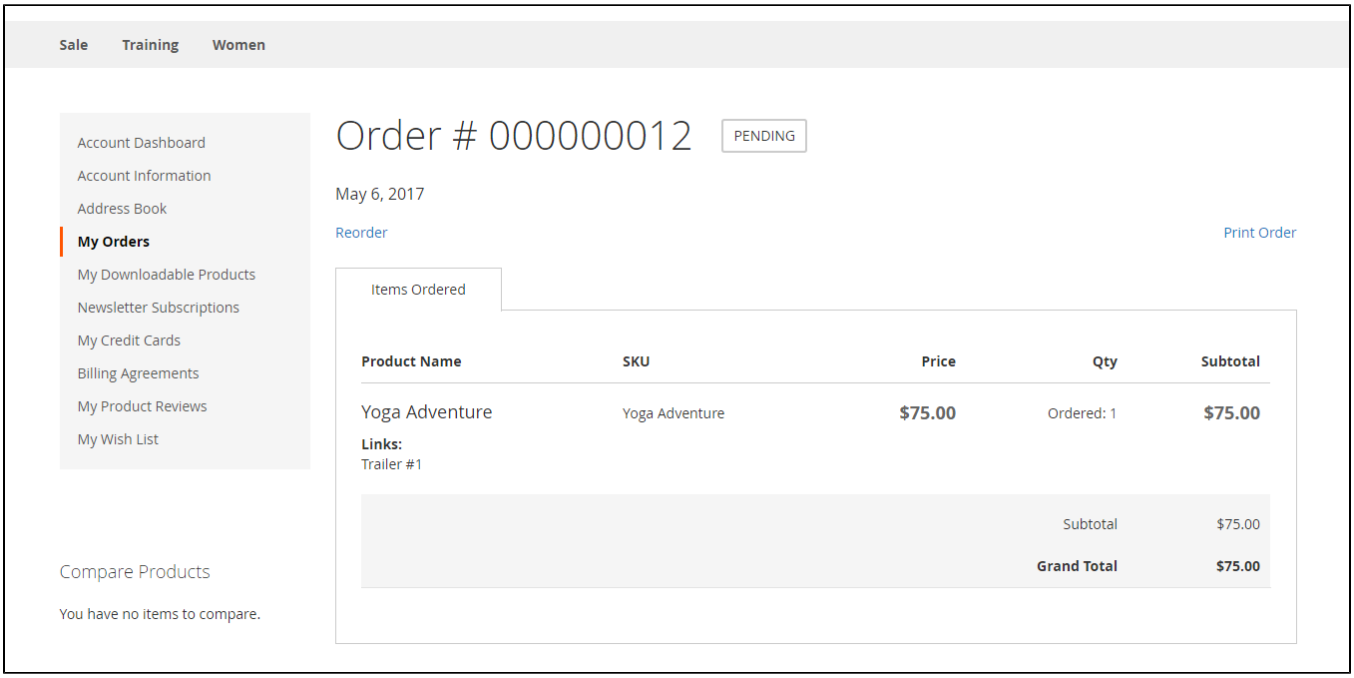
- **Allow synchronizing a specific or all Orders from Magento 2 store into Salesforce CRM Orders and Salesforce Opportunity both manually and automatically**

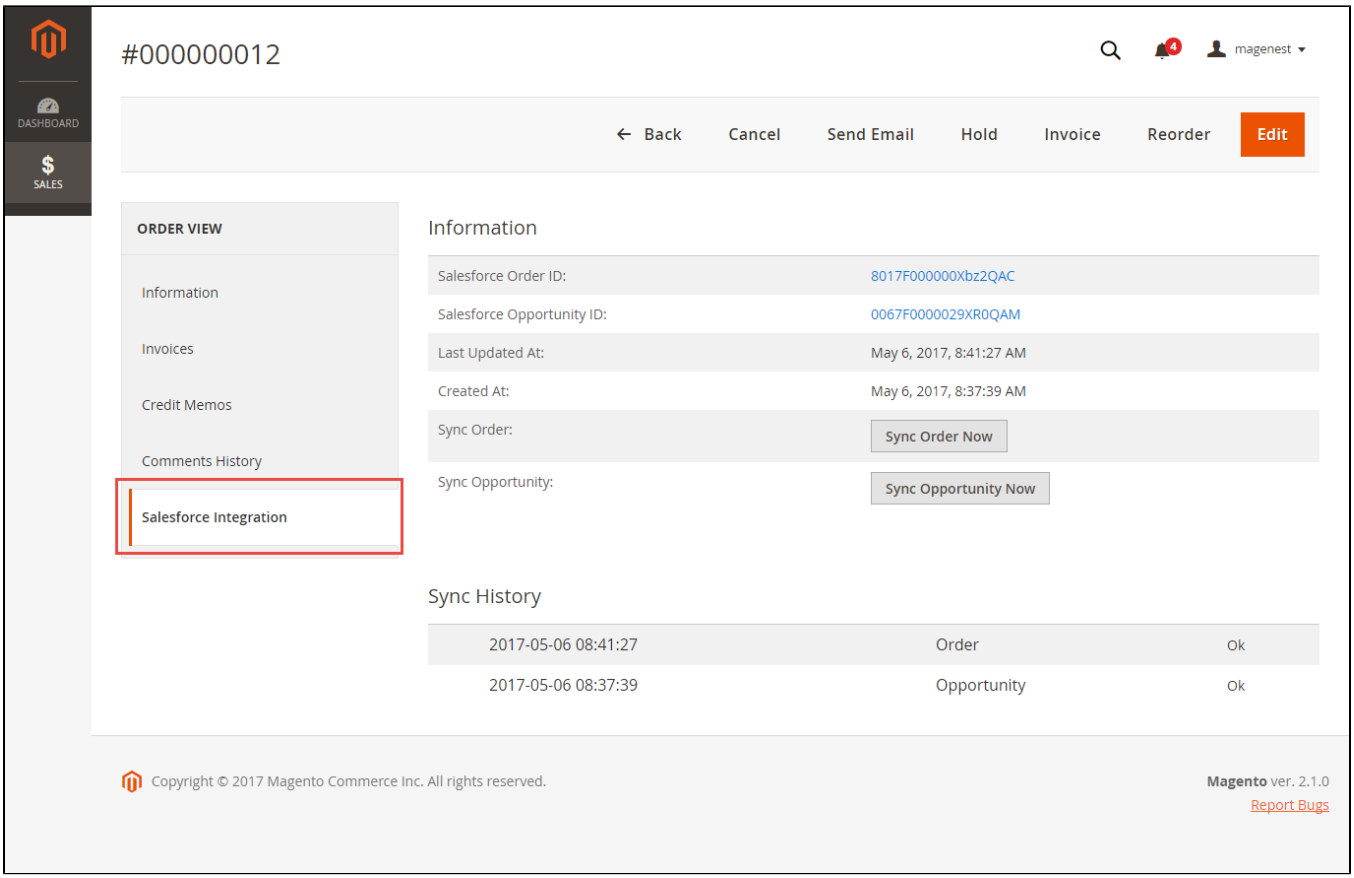
Whenever a customer places an order, the information will be synced in Salesforce's Orders and Opportunities.

Magento 2 Orders Data:

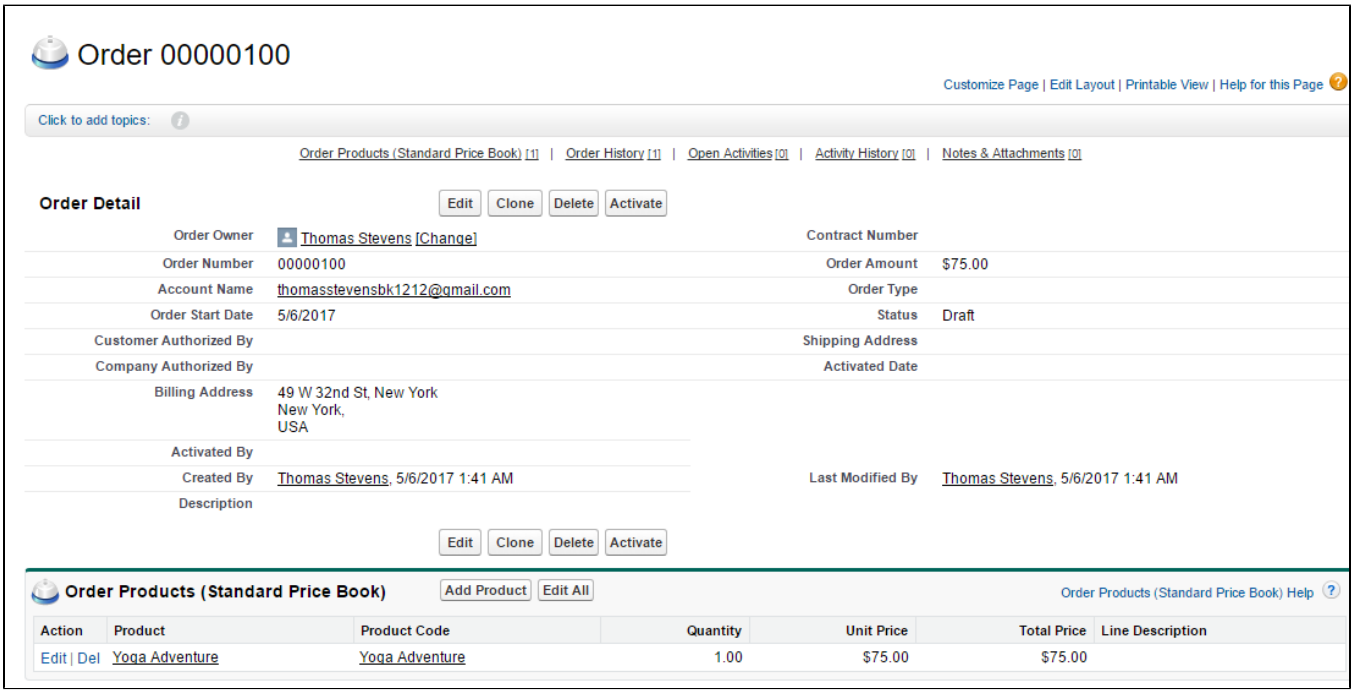
Mass action **Add Order to Salesforce Queue** on the Order Listing page:


Orders
Add the Order to Queue
Are you sure to assign selected order to queue? (3 records)
Cancel
OK
Create New Order
Search by keyword
Filters
Default View
Columns
Export
Actions
8 records found (3 selected)
20
per page
1
of 1
Cancel
Hold
Unhold
Print Invoices
Print Packing Slips
Print Credit Memos
Print All
Print Shipping Labels
Clear Salesforce Order Ids
Add Order to Salesforce Queue
Purchase Date
Bill-to Name
Ship-to Name
Grand Total (Base)
Grand Total (Purchased)
Status
Action
Signifyd Guarantee Decision
Mar 12, 2021 7:57:53 AM
Test Test last name bro
$50.00
$50.00
Pending
View
Mar 12, 2021 7:55:49 AM
$25.00
$25.00
Nov 26, 2020 4:58:55 AM
Veronica Costello
$79.28
$79.28
On Hold
Oct 7, 2020 2:15:36 AM
SOUVIT ROY
$59.00
Canceled
000000004
Main Website Main Website Store Default Store View
Jul 22, 2020 3:15:01 AM
Đặng Đông
$50.00
Pending

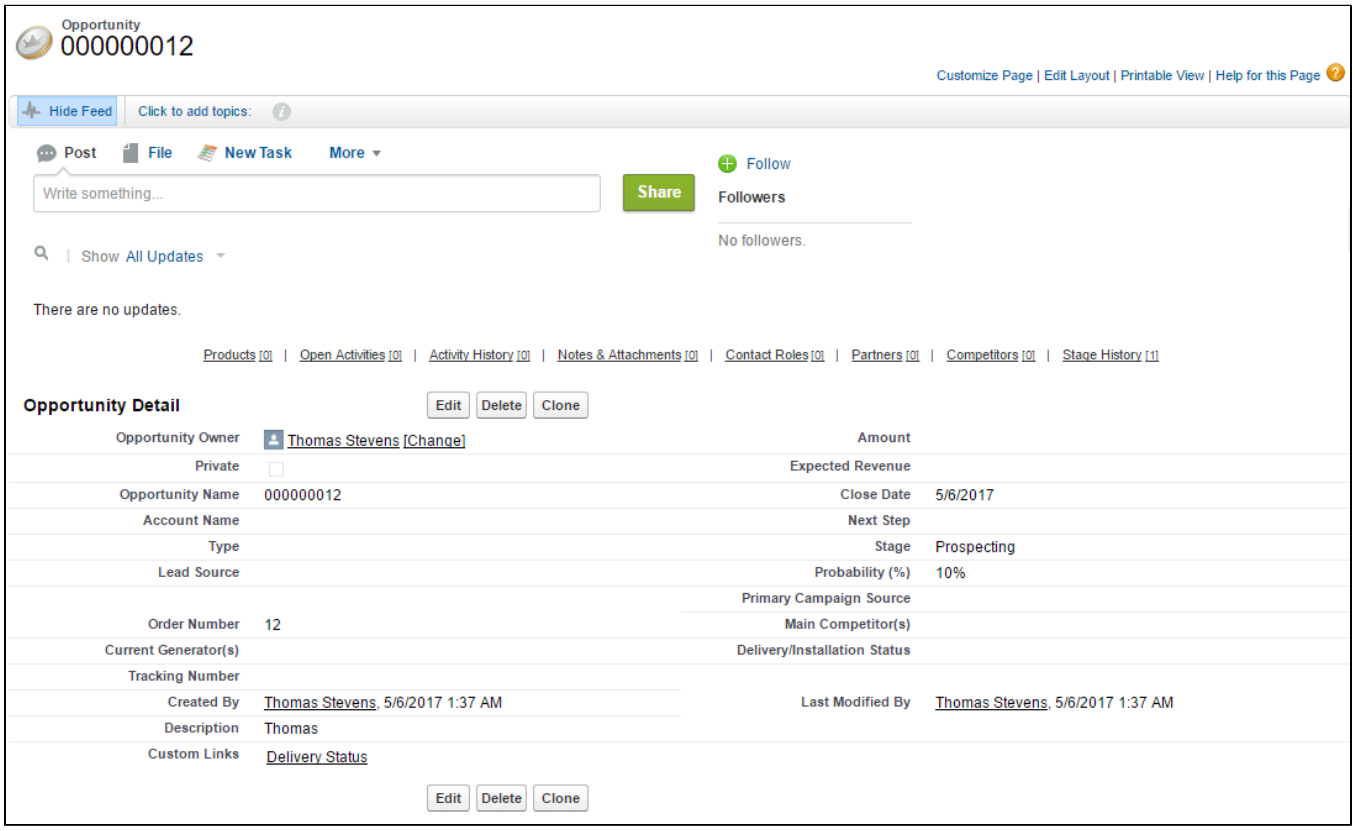

Sale
Training
Women
Account Dashboard
Account Information
Address Book
My Orders
My Downloadable Products
Newsletter Subscriptions
My Credit Cards
Billing Agreements
My Product Reviews
My Wish List
Compare Products
You have no items to compare.
Order # 000000012
PENDING
May 6, 2017
Reorder
Print Order
Items Ordered
Product Name
SKU
Price
Qty
Subtotal
Yoga Adventure
Yoga Adventure
$75.00
Ordered: 1
$75.00
Links:
Trailer #1
Subtotal
$75.00
Grand Total
$75.00



Salesforce Order Information:



Opportunity:

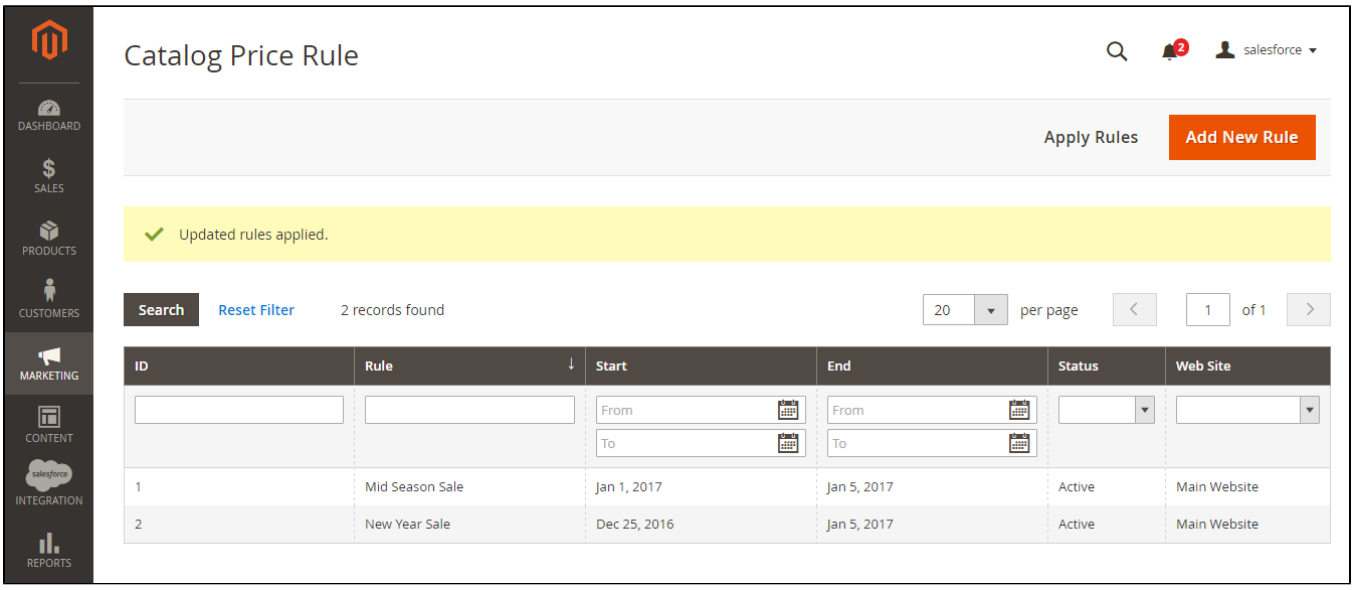


- **Allow synchronizing and updating Promotions from Magento 2 store into Salesforce CRM Campaigns both manually and automatically**

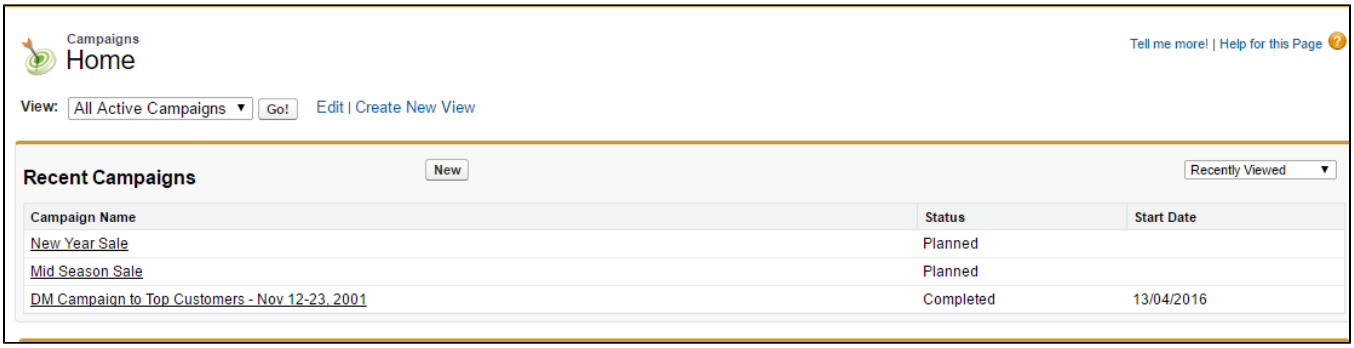
When store owners launch a new promotion or update an existing one, the corresponding campaign will be added into Salesforce.

⚠️ Note that if you change the rule name when updating the campaign, it will create another one in Salesforce.

Magento 2 Catalog Price Rule:



Salesforce Campaigns:



Salesforce Default Synchronization Fields

⚠️ The fields in Red are hard-code.

The other fields can be defined in field mapping.

Contact

Magento Customer	SalesForce Contact
ID	
Email	Email
Created At	
Updated At	
is Active	
Created in	
Prefix	
First name	First name
Last name	Last name
Middle name	
Tax/VAT number	
Gender	
Date of Birth	
Billing First Name	
Billing Middle Name	
Billing Last Name	
Billing Company	
Billing City	
Billing State/Province	
Billing Country	
Billing Zip/Postal Code	

Billing Telephone	
Billing Fax	
Shipping First Name	
Shipping Middle Name	
Shipping Last Name	
Shipping Company	
Shipping Street	
Shipping City	
Shipping State/Province	
Shipping Country	
Shipping Zip/Postal Code	
Shipping Telephone	
Shipping Fax	
VAT number	

Account

Magento Customer	SalesForce Account
ID	
Email	Name
Created At	
Updated At	
is Active	
Created in	
Prefix	
First name	
Last name	
Middle name	
Tax/VAT number	
Gender	
Date of Birth	
Billing First Name	
Billing Middle Name	
Billing Last Name	
Billing Company	
Billing City	
Billing State/Province	
Billing Country	
Billing Zip/Postal Code	
Billing Telephone	

Billing Fax	
Shipping First Name	
Shipping Middle Name	
Shipping Last Name	
Shipping Company	
Shipping Street	
Shipping City	
Shipping State/Province	
Shipping Country	
Shipping Zip/Postal Code	
Shipping Telephone	
Shipping Fax	
VAT number	

Lead

Magento Customer	SalesForce Lead
ID	
Email	Email
Created At	
Updated At	
is Active	
Created in	
Prefix	
First name	First name
Last name	Last name
Middle name	
Tax/VAT number	
Gender	
Date of Birth	
Billing First Name	
Billing Middle Name	
Billing Last Name	
Billing Company	"N/A"
Billing City	
Billing State/Province	
Billing Country	
Billing Zip/Postal Code	

Billing Telephone	
Billing Fax	
Shipping First Name	
Shipping Middle Name	
Shipping Last Name	
Shipping Company	"N/A"
Shipping Street	
Shipping City	
Shipping State/Province	
Shipping Country	
Shipping Zip/Postal Code	
Shipping Telephone	
Shipping Fax	
VAT number	

Product

Magento Product	SalesForce Product2
Name	Name
Description	
is Active	isActive
Short Description	
SKU	ProductCode
Weight	
Set Product as New from Date	
Set Product as New to Date	
Status	
Country of Manufacture	
URL Key	
Price	
Special Price	
Special From Date	
Special To Date	
Stock Id	
Qty	
Min Qty	
Meta Title	
Meta Keywords	
Meta Description	
Tax Class	

Base Image	
Small Image	
Thumbnail	
Min Qty	
Meta Keywords	
Meta Description	

Campaign

Magento Campaign	SalesForce Campaign
Rule ID	
Name	Name
Description	
From Date	
To Date	
Active	
Simple Action(Apply)	
Discount Amount	
Enable Discount to Subproducts	
Subproducts Simple Action(Apply)	
Subproducts Discount Amount	

Order

Magento	SalesForce Order
ID	
State	
Status	Status
Coupon Code	
Coupon Rule Name	
Increment ID	
Created At	EffectiveDate
Company	
Customer First Name	
Customer Middle Name	
Customer Last Name	
Billing First Name	
Billing Middle Name	
Billing Last Name	

Billing Company	
Billing Street	
Billing City	
Billing State/Province	
Billing Zip/Postal Code	
Billing Telephone	
Billing Country	
Shipping First Name	
Shipping Middle Name	
Shipping Last Name	
Shipping Company	
Shipping Street	
Shipping City	
Shipping State/Province	
Shipping Zip/Postal Code	
Shipping Country	
Shipping Amount	
Shipping Description	
Currency Code	
Total Item Count	
Store Currency Code	
Shipping Discount Amount	
Discount Description	
Shipping Method	
Store Name	
Discount Amount	
Tax Amount	
Sub Total	
Grand Total	
Remote IP	

Order Item

Magento Order Item	**SalesForce Order Item**
Parent ID	OrderID
Qty	Quantity
Price	UnitPrice

Opportunity

Magento	SalesForce Opportunity
ID	
State	
Status	Prospecting
Coupon Code	
Coupon Rule Name	
Increment ID	Name
Created At	CloseDate
Company	
Customer First Name	
Customer Middle Name	
Customer Last Name	
Billing First Name	
Billing Middle Name	
Billing Last Name	
Billing Company	
Billing Street	
Billing City	
Billing State/Province	
Billing Zip/Postal Code	
Billing Telephone	
Billing Country	
Shipping First Name	
Shipping Middle Name	
Shipping Last Name	
Shipping Company	
Shipping Street	
Shipping City	
Shipping State/Province	
Shipping Zip/Postal Code	
Shipping Country	
Shipping Amount	
Shipping Description	
Currency Code	
Total Item Count	
Store Currency Code	
Shipping Discount Amount	
Discount Description	
Shipping Method	
Store Name	

Discount Amount	
Tax Amount	
Sub Total	
Grand Total	
Remote IP	

Opportunity Item

Magento Opportunity Item	SalesForce Opportunity Item
Parent ID	OrderID
Qty	Quantity
Price	UnitPrice

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    - 1.1.1 Requirements
    - 1.1.2 Video Tutorial Playlist
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  - 2.1 Get consumer key and consumer secret by the connected app
  - 2.2 Reset security token
- 3 Setup and Authentication Salesforce CRM account
- 4 How to synchronize data from Magento 2 store to Salesforce CRM account
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Updates

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed module should be working as expected

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Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6-month free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other services such as customizing our products, installation, and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.

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  - 1.1.1 Requirements
  - 1.1.2 Video Tutorial Playlist

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6 Updates

7 Support