

2. Magento Salesforce CRM Integration User Guides

- [Introduction to Magento Salesforce CRM Integration Extension](#)
 - [Features](#)
 - [System Requirement](#)
 - [The Video Tutorial Playlist](#)
- [Configuration](#)
- [Data Integration Settings](#)
- [Basic Functions](#)
- [Advanced Functions with Custom Objects](#)
 - [Custom Objects](#)
 - [Custom Tables Syncing](#)
 - [Salesforce Default Synchronization Fields](#)
 - [Contact](#)
 - [Account](#)
 - [Lead](#)
 - [Product2](#)
 - [Campaign](#)
 - [Order](#)
 - [Order Item](#)
 - [Opportunity](#)
 - [Opportunity Item](#)
- [Updates](#)
- [Support](#)

Introduction to Magento Salesforce CRM Integration Extension

Magento Salesforce CRM Integration, taking advantage of Salesforce's API v34.0, is a powerful tool that help store-owners to synchronize data automatically from Magento site to Salesforce CRM.

Features

- Allows synchronizing and updating Customers from Magento store into Salesforce CRM Leads, Contacts, Accounts
- Allows synchronizing Orders from Magento store into Salesforce CRM Orders
- Allows synchronizing Promotions from Magento store into Salesforce CRM Campaigns
- Allows synchronizing and updating Products from Magento store into Salesforce CRM Products
- Allows synchronizing Product Categories from Magento store into Salesforce CRM Price Book
- Allows creating Custom Fields in and synchronizing Custom Invoices from Magento store into Salesforce CRM Custom Invoices
- Allows synchronizing Custom Invoice Items
- Allows creating Custom Fields in, synchronizing and updating Custom Customers from Magento store into Salesforce CRM Custom Customers
- Allows creating Custom Fields in, synchronizing and updating automatically Custom Products from Magento store into Salesforce CRM Custom Products
- Allows deleting customer and product's records in Magento once they are auto deleted in Salesforce CRM Leads, Contacts, Accounts, Custom Customer and Custom Product
- Allows admins to select conditions to transfer old data from Magento store into Salesforce CRM
- Reports about synchronizing old data
- Supports mapping smartly and manually between Magento attributes and Salesforce fields or custom fields
- Allows admins define the mapping fields in backend with ease
- Admin can view the log to see what is synchronized between two apps

System Requirement

Your store should be running on Magento Community Edition version 1.8.x or 1.9.x and Enterprise Edition version 1.13.x or 1.14.x.

Note: The module works base on using API, so make sure your salesforce edition had API by check 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. See more here: https://help.salesforce.com/HTViewSolution?id=000005140&language=en_US

The Video Tutorial Playlist

(Go to the playlist link to view more: <https://www.youtube.com/playlist?list=PL0gckfH7zIzqLHy0328zpK3LFrZts687>)

Configuration

Creating a new connected app

- Sign in Salesforce CRM and go to **Set up** option indashboard.



In your Salesforce Dashboard, go to **Built / Create / Apps**. Press **New** button in **Connected App** to create a new connected app.

A screenshot of the Salesforce 'Apps' configuration page. The left sidebar shows the 'Administer' menu with 'Build' highlighted in red. Under 'Build', 'Customize' is highlighted in red, and 'Create' is highlighted in red. Below 'Create', 'Apps' is highlighted in red. The main content area has three sections: 'Apps', 'Subtab Apps', and 'Connected Apps'. The 'Apps' section has a table with columns 'Action', 'App Label', 'Console', 'Custom', and 'Description'. The 'Subtab Apps' section has a table with columns 'Action', 'App Label', and 'Description'. The 'Connected Apps' section has a table with columns 'Action', 'Connected App Name', 'Description', and 'Version'. A red arrow points to the 'New' button in the 'Connected Apps' section. The 'Connected App Name' in the table is 'magento_salesforce_connection'.

- Enter information in the required fields:

New Connected App

Save Cancel

Basic Information

Connected App Name	magento_salesforce_connection	✓
API Name	magento_salesforce_connection	✓
Contact Email	roberthemsworth2945@gmail.com	✓
Contact Phone		
Logo Image URL		
	Upload logo image or Choose one of our sample logos	
Icon URL		
	Choose one of our sample logos	
Info URL		
Description		

API (Enable OAuth Settings)

Enable OAuth Settings	☒	
Callback URL	https://login.salesforce.com/services/oauth2/callback	✓
Use digital signatures	☐	
Selected OAuth Scopes	Available OAuth Scopes Access and manage your Chatter data (chatter_api) Access and manage your Wave data (wave_api) Access and manage your data (api) Access custom permissions (custom_permissions) Access your basic information (id, profile, email, address, phone) Allow access to your unique identifier (openid) Perform requests on your behalf at any time (refresh_token, offline_access) Provide access to custom applications (visualforce) Provide access to your data via the Web (web) Add Remove Selected OAuth Scopes Full access (full) ✓	

Web App Settings

Start URL	http://demo2.magenest.com/index.php/admin/system_config/edit/sec	✓
Enable SAML	☐	

Mobile App Settings

Mobile Start URL	
PIN Protect	☐
App Platform	
Restrict to Device Type	
App Version	
Minimum OS Version	
Private App	☐
App Binary URL	
Push Messaging Enabled	☐

Canvas App Settings

Force.com Canvas	☐
------------------	--------------------------

Save Cancel

1. **Connected App Name**: name for your connected app
2. **API Name**: data from this field will be auto synced from Connected App Name
3. **Contact Email**: your Salesforce email
4. Check **Enable OAuth Settings** box
5. Fill Callback URL: see example: https://yourwebsite/RestTest/oauth/_callback
6. Selected OAuth Scopes : select **Full Access** option and click **Add** button
7. Hit **Save** button when you are done

- After finish, the connected app will displayed like this

Connected App Name
magento_salesforce_connection
[Help for this Page](#)

[Back to List: Custom Apps](#)

Edit
Delete
Manage



Version	1.0
API Name	magento_salesforce_connection
Created Date	9/9/2015 2:16 AM
By:	Robert Hamsworth
Contact Email	roberthemsworth2945@gmail.com
Contact Phone	
Last Modified Date	9/9/2015 2:16 AM
By:	Robert Hamsworth
Description	
Info URL	

API (Enable OAuth Settings)

Consumer Key	3MVG9ZL0ppGP5UrBIXFvVnq5MN_VTeTn.6MOiRIPVHBbuM7JheVCGamPKXyF5xHZ4klm_7OV0NxxYuUoCVS1Gw	Consumer Secret	Click to reveal
Selected OAuth Scopes	Full access (full)	Callback URL	https://login.salesforce.com/services/oauth2/callback

Web App Settings

Start URL	http://demo2.magenest.com/index.php/admin/system_config/edit/section/salesforce/key/09bc4dbe843c1c3bcf08497452317920/
-----------	---

Get Consumer Key (Client ID) and Consumer Secret (Client Secret) by connected app

- In order to get Security Token, go to **My Setting / Personal / Reset My Security Token**

Quick Find

My Settings

Personal

Personal Information

Change My Password

Language & Time Zone

Grant Account Login Access

My Groups

Reset My Security Token

Connections

Reset My Security Token

Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.

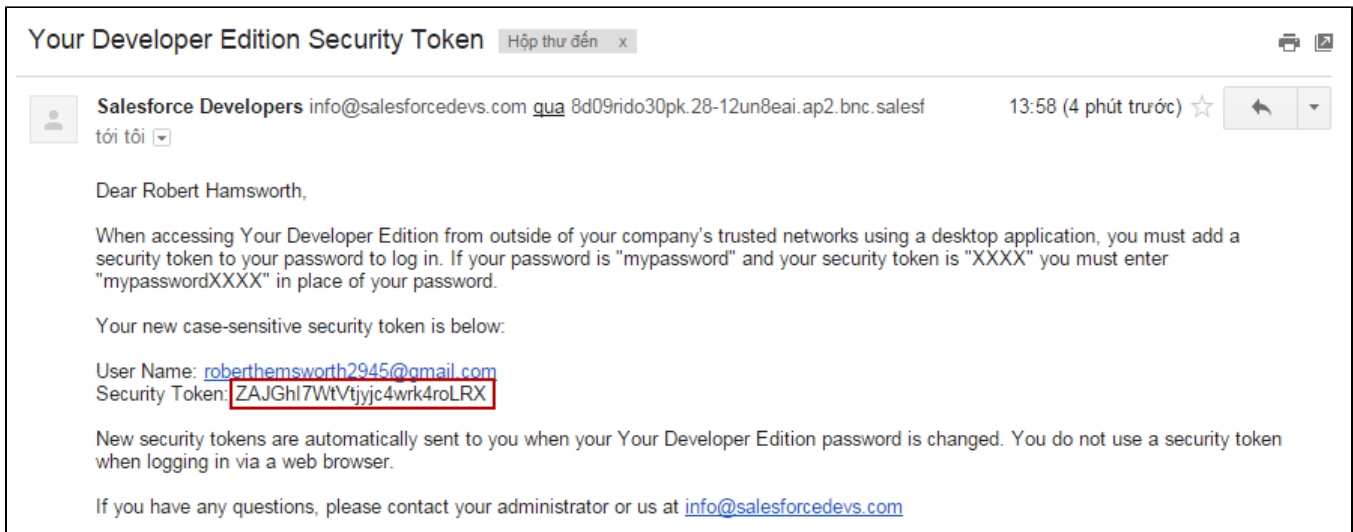
When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.

Reset Security Token

Press **Reset Security Token** button, the security token will send to your email



Set up the Salesforce account to integrate with Magento

- First, log in backend Magento

Current Configuration Scope:

Default Config ▾

[Manage Stores](#)

Configuration

- GENERAL
 - General
 - Web
 - Design
 - Currency Setup
 - Store Email Addresses
 - Contacts
 - Reports
 - Content Management
- HUNGNAM
 - Event Ticket
 - Bookable product
- Salesforce integration setting**
- Zoho integration setting
- CATALOG
 - Catalog
 - Configurable Swatches
 - Inventory

Salesforce integration setting Save Config

Salesforce integration authenticate

Username	roberthemsworth2945@gmail.com	[WEBSITE]
	▲ Email of developer account	
Password	abcd1234	[WEBSITE]
	▲ Password of developer account	
Client ID	3MVG9ZL0ppGP5UrBIXFvVnq5MN_VTeTn.6MOiF	[WEBSITE]
	▲ Consumer key of connect app	
Client Secret	5284175542110643136	[WEBSITE]
	▲ Consumer secret of connect app	
Security token	WEvlxdR8bUsJnQHKic7yOMYU5	[WEBSITE]
	▲ Receive security token via email	

Operation

Sync Account	No	[WEBSITE]
Sync Campaign	No	[WEBSITE]
Sync Lead	No	[WEBSITE]
Sync Contact	No	[WEBSITE]
Sync Order	No	[WEBSITE]
Sync Product	No	[WEBSITE]
Sync Subscriber	No	[WEBSITE]

- Go to **System Configuration Salesforce intergration setting**
- **Username:** Your Salesforce login email
- **Password:** Your Salesforce password
- **Client ID:** 'Consumer Key' search in **Setup Create App Connected Apps** in Salesforce.
- **Client Secret:** 'Consumer Secret' search in **Setup Create App Connected Apps** in Salesforce.
- **Security token :** Receive via email register. Get from My Settings Personal Reset My Security Token

Hit **Save config**, your data configuration is ready to use

Data Integration Settings

- You can choose which data you want to sync from Magento to Salesforce
- Click on **Salesforce Integration** tab → **Field Mapping**

Fields mapping management

Page 1 of 1 pages | View 20 per page | Total 9 records found

Export to: CSV Export Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Actions Submit

	ID	Description	Saleforces Field	Magento Field	Status	Type	Action
Any							
☐	1	email	Email	email	In active	Lead	Edit
☐	2	website	Website	website_id	In active	Lead	Edit
☐	3	shipping address	Department	default_shipping	In active	Contact	Edit
☐	4	billing street	BillingStreet	billing_street	In active	Order	Edit
☐	5	billing address	BillingAddress	default_shipping	In active	Account	Edit
☐	6	shipping adress	ShippingAddress	default_shipping	In active	Account	Edit
☐	7	produc description	Description	short_description	In active	Product	Edit
☐	8	duration time	Description	from_date	In active	Campaign	Edit
☐	9	duration time	IsActive	to_date	In active	Campaign	Edit

- You can edit, export to CSV, change status or delete mappings.

Fields mapping management

Page 1 of 1 pages | View 20 per page | Total 9 records found

Export to: CSV Export

Reset Filter

Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Submit

	ID	Description	Saleforces Field	Magento Field	Status	Type	Actions
Any							Delete Change status
☐	1	email	Email	email	In active	Lead	Edit
☐	2	website	Website	website_id	In active	Lead	Edit
☐	3	shipping address	Department	default_shipping	In active	Contact	Edit
☐	4	billing street	BillingStreet	billing_street	In active	Order	Edit
☐	5	billing address	BillingAddress	default_shipping	In active	Account	Edit
☐	6	shipping address	ShippingAddress	default_shipping	In active	Account	Edit
☐	7	produc description	Description	short_description	In active	Product	Edit
☐	8	duration time	Description	from_date	In active	Campaign	Edit
☐	9	duration time	IsActive	to_date	In active	Campaign	Edit

- To add new mapping, Click on **Add**, **Add New Mapping** window will be immediately loaded

Add New Mapping		Back	Reset	Save
Rule				
Select Table *	Lead			
	Update Fields			
Magento field *	Billing Telephone			
Salesforce field *	Phone (phone)			
Status *	In active			
Description *	Customer Lead Billing Phone			

- **Select Table**: select table for new mapping
- **Salesforce field**: choose Salesforce field
- **Magento field**: Magento field's name

- **Status:** default status is Active
- **Description:** Description for this new mapping

When done, hit **Save**, your mapping will be included in the next sync.

Basic Functions

1. When a new account is registered in Magento store, a new Lead record will be synced in Salesforce

- A new customer has successfully registered a new account

MY DASHBOARD

Thank you for registering with Main Website Store.

Hello, John Hopkins!
 From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

ACCOUNT INFORMATION

CONTACT INFORMATION

[EDIT](#)

John Hopkins
 john117@gmail.com
[Change Password](#)

NEWSLETTERS

[EDIT](#)

You are currently not subscribed to any newsletter.

- A new record in **Leads** was created

Leads
 Tell me more! | Help for this Page ?

Home

View: View - Custom 1 Go! [Edit](#) | [Create New View](#)

Recent Leads

New
Recently Viewed Go!

Name	Company	Phone
Hopkins, John	N/A	
Smiths, Johns	N/A	
Berg, Lucidvan	N/A	4354354

2. When a customer edits his account, his information will be synced in Salesforce's Contacts

- A customer has successfully edited his address info

ADDRESS BOOK

[ADD NEW ADDRESS](#)

The address has been saved.

DEFAULT ADDRESSES

DEFAULT BILLING ADDRESS

John Hopkins
Magenest
Fift Ave
Brooklyn, New York, 10923
United States
T: 0123912402

[Change Billing Address](#)

ADDITIONAL ADDRESS ENTRIES

You have no additional address entries in your address book.

- A record has been added to **Contacts**

Contacts

Home

Tell me more! | Help for this Page ?

View:

All Contacts

Go!

[Edit](#) | [Create New View](#)

Recent Contacts

New

Recently Viewed

Go!

Name	Account Name	Phone
Hopkins, John		
Smiths, Johns		
johshon, mary		

3. When a customer places an order, his information will be synced in Salesforce's Accounts and Orders

- An order has been placed

MY DASHBOARD

Hello, John Hopkins!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

RECENT ORDERS [VIEW ALL](#)

ORDER #	DATE	SHIP TO	ORDER TOTAL	STATUS	
100000029	10/8/2015	John Hopkins	\$117.00	Pending	VIEW ORDER REORDER

- A record has been added to **Accounts**

Accounts

Home

Tell me more! | Help for this Page ?

View: My Accounts Go! [Edit](#) | [Create New View](#)

Recent Accounts

New

Recently Viewed

Go!

Account Name	Billing City	Phone
john117@gmail.com	Brooklyn	
mary.hu.89@gmail.com		

4. When store admin launch a new promotion, a corresponding new campaign will be added in to Salesforce

- A new promotion has been applied successfully by store admin

The rule has been saved.

The rules have been applied.

Catalog Price Rules

Apply Rules

Add New Rule

Page 1 of 1 pages | View 20 per page | Total 2 records found

Reset Filter

Search

ID	Rule Name	Date Start	Date Expire	Status
		From: To: 	From: To: 	
2	30% summer sale off	Oct 7, 2015	Oct 30, 2015	Active
3	Autumn Clothes Hotsale	Oct 2, 2015	Oct 9, 2015	Active

- A record has been added to **Campaigns**

Campaigns

Home

Tell me more! | Help for this Page ?

View: All Active Campaigns Go! [Edit](#) | [Create New View](#)

Recent Campaigns

New

Recently Viewed

Go!

Campaign Name	Status	Start Date
Autumn Clothes Hotsale	Planned	
30% summer sale off	Planned	
Get up to 50% off on Candle holders	Planned	
Get up to 50% off on Candle holders	Planned	

5. When a new product is added or an existing one is edited, a record will be added in Salesforce's Products

- A new product is added by store admin

The product has been saved.

Manage Products

Add Product

Page 1 of 1 pages | View 20 per page | Total 4 records found | [Notify Low Stock RSS](#)

Reset Filter

Search

Select All

Unselect All

Select Visible

Unselect Visible

0 items selected

Actions

Submit

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Action
Any	From: To: 				From: To: In: USD	From: To: 			
☐	5 Smartphone	Simple Product	Default	phone1234	\$700.00	0	Catalog, Search	Enabled	Edit

- A record has been added to **Products**

Recent Products		
New		Recently Modified Go!
Product Name	Product Code	Product Description
Smartphone	phone1234	brand new smartphone arrived at store
shirt	12412	
Lolita Vans	lolita_vans	High fashion

Advanced Functions with Custom Objects

Custom Objects

- Custom Objects is a stand-out feature of SalesforceCRM, since it allows store admins and developers to create unique tables with fields of their favor.
- in Magento, we have developed 3 Custom Tables: **Custom Customer**, **Custom Products and Invoices**(Since Salesforce doesn't support an Invoice table by default) and a minitable called **ItemInvoice** to give the admin a closer look at the products invoiced. Now what you need to do to make use of these tables is making some Custom Objects with the following steps:

Creating a Custom Object

- In Magento admin site, go to **SalesforceCRM Integration -> Configuration** and scroll down, you will see some options in **Sync Custom Table**.

Sync Custom Table		
Sync Custom Customer	Yes	[WEBSITE]
Custom Customer Table		[WEBSITE]
	▲ API Name of Table	
Unique field of Custom Customer Table		[WEBSITE]
	▲ API Name of unique field(pass email of customer, use it check avoid duplicate customer)	
Sync Custom Product	Yes	[WEBSITE]
Custom Product Table		[WEBSITE]
	▲ API Name of Table	
Unique field of Custom Product Table		[WEBSITE]
	▲ API Name of unique field(pass SKU of Product, use it check avoid duplicate Product)	
Sync Custom Invoice	Yes	[WEBSITE]
Custom Invoice		[WEBSITE]
	▲ API Name of Table	
Custom Invoice Product		[WEBSITE]
	▲ API Name of Table	

- 1. Sync Custom Customer:** this sync option is on by default.
- 2. Custom Customer Table:** this is the API Name of the Custom Table in Salesforce.
- 3. Unique field of Custom Customer Table:** this is the API Name of an unique field in Custom Customer Table.

- The other 2 tables' options have the same function as above. To add a new Custom Object, go to **Setup**. In the **Build** console, expand **Create** and click on **Objects**, the **Custom Objects** window will popup. Click on **New Custom Object** to get started.

Custom Objects									
				Help for this Page					
Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.									
Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.									
New Custom Object Schema Builder <table> <tr> <th>Action</th><th>Label</th><th>Master Object</th><th>Deployed</th><th>Description</th></tr> </table>					Action	Label	Master Object	Deployed	Description
Action	Label	Master Object	Deployed	Description					

- Fill in the following fields

New Custom Object

[Help for this Page](#) 

 Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

[Save](#) [Save & New](#) [Cancel](#)

Custom Object Information

 = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  CustomCustomer **Example: Account**

Plural Label  CustomCustomers **Example: Accounts**

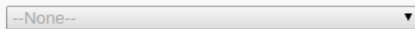
Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  CustomCustomer **Example: Account**

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name 

- **Label:** Name of your Custom Object
- **Plural Label:** Name of your Custom Object in plural form
- **Object Name:** This name will be auto-filled once Label is filled
- **Description:** Describe your Custom Object

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  CustomCustomer Name **Example: Account Name**

Data Type  Text

Optional Features

- ☐ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Object Creation Options (Available only when custom object is first created)

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

[Save](#) [Save & New](#) [Cancel](#)

- **Record Name** and **Data Type:** This will also be auto-filled.
- Hit **Save** when done, your new Custom Object is now successfully created.

Custom Objects

[Help for this Page](#) ?

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

New Custom Object Schema Builder				
Action	Label	Master Object	Deployed	Description
Edit Del	CustomCustomer		✓	

Creating a Custom Field

- To add or edit custom fields, go to **Setup**. In the **Build** console, expand **Create** and click on **Objects**, the **Custom Objects** window will popup.

Build Customize Create Apps Custom Labels Interaction Log Layouts Objects Packages Report Types Tabs Action Link Templates	Custom Fields & Relationships New Field Dependencies Set History Tracking Custom Fields & Relationships Help ?							
	Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
	Edit Del	DOB	DOB__c	Date/Time			Perry Matthew , 10/8/2015 7:47 PM	☐
	Edit Del	Email	Email__c	Email (Unique)	✓		Perry Matthew , 9/28/2015 1:10 AM	☐
	Edit Del	First Name	FirstName__c	Text(50)			Perry Matthew , 9/28/2015 1:11 AM	☐
	Edit Del	Gender	Gender__c	Text Area(255)			Perry Matthew , 10/8/2015 7:51 PM	☐
	Edit Del	LastName	LastName__c	Text(50)			Perry Matthew , 9/28/2015 1:12 AM	☐
	Edit Del	VAT Number	VAT_Number__c	Number(18, 0)			Perry Matthew , 10/8/2015 7:48 PM	☐

- Click on the table that you want to edit, in here we will take **Custom Customer** for instance, add click on **New** to start adding new field.

Standard Fields Standard Fields Help ?						
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
	Created By	CreatedBy	Lookup(User)			☐
Edit	CustomCustomer Name	Name	Text(80)		✓	☐
	Last Modified By	LastModifiedBy	Lookup(User)			☐
Edit	Owner	Owner	Lookup(User,Queue)		✓	☐

Custom Fields & Relationships New Field Dependencies Set History Tracking Custom Fields & Relationships Help ?							
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit Del	DOB	DOB__c	Date/Time			Perry Matthew , 10/8/2015 7:47 PM	☐
Edit Del	Email	Email__c	Email (Unique)	✓		Perry Matthew , 9/28/2015 1:10 AM	☐
Edit Del	First Name	FirstName__c	Text(50)			Perry Matthew , 9/28/2015 1:11 AM	☐
Edit Del	Gender	Gender__c	Text Area(255)			Perry Matthew , 10/8/2015 7:51 PM	☐
Edit Del	LastName	LastName__c	Text(50)			Perry Matthew , 9/28/2015 1:12 AM	☐
Edit Del	VAT Number	VAT_Number__c	Number(18, 0)			Perry Matthew , 10/8/2015 7:48 PM	☐

- You will see a long list of options for your new field, choose one of your need, then click on **Next**.

☐ Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
☐ Number	Allows users to enter any number. Leading zeros are removed.
☐ Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
☒ Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
☐ Picklist	Allows users to select a value from a list you define.
☐ Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
☐ Text	Allows users to enter any combination of letters and numbers.
☐ Text Area	Allows users to enter up to 255 characters on separate lines.
☐ Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
☐ Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
☐ Text (Encrypted) 	Allows users to enter any combination of letters and numbers and store them in encrypted form.
☐ URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

- Next, you need to fill in a few details for your new Custom Field

CustomCustomer
[Help for this Page](#) 

New Custom Field

Step 2. Enter the details
Step 2 of 4

Field Label

Field Name

Description

Help Text

Required

☐ Always require a value in this field in order to save a record

Default Value

[Show Formula Editor](#)

Use [formula syntax](#): e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

- **Field Label:** Name for your new Custom Field.
- **Field Name:** This will be auto-filled after you filled in Field Label.
- **Description:** more detail description about the field.
- **Help Text:** this text will appear when user hover mouse on the field's icon.
- Hit **Next** to continue, you will see a list of checkboxes for security purpose, leave them and move on.
- When done, hit **Save**. Your field is successfully created.

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label

Office Phone

Data Type

Phone

Field Name

Office_Phone

Description

Customer's office phone

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

CustomCustomer Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

Configuring for Custom Tables

- Things get a bit more tricky when it comes to this part, as you have to create an unique field for each table. In here we have created a Custom Customer Table with the default API name CustomCustomer_c and an unique field Email.

Custom Fields & Relationships						
New Field Dependencies Set History Tracking						
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	DOB	DOB__c	Date/Time			Perry Matthew , 10/8/2015 7:47 PM
Edit Del	Email	Email__c	Email (Unique)	☒		Perry Matthew , 9/28/2015 1:10 AM
Edit Del	First Name	FirstName__c	Text(50)			Perry Matthew , 9/28/2015 1:11 AM
Edit Del	Gender	Gender__c	Text Area(255)			Perry Matthew , 10/8/2015 7:51 PM

- When you are done with creating, go to Salesforce's Configuration Site in Magento and fill in the needed information.

Sync Custom Table

Sync Custom Customer

Yes

[WEBSITE]

Custom Customer Table

CustomCustomer__c

[WEBSITE]

▲ API Name of Table

Unique field of Custom Customer Table

Email__c

[WEBSITE]

▲ API Name of unique field(pass email of customer, use it check avoid duplicate customer)

Sync Custom Product

Yes

[WEBSITE]

Custom Product Table

CustomProduct__c

[WEBSITE]

▲ API Name of Table

Unique field of Custom Product Table

SKU__c

[WEBSITE]

▲ API Name of unique field(pass SKU of Product, use it check avoid duplicate Product)

Sync Custom Invoice

Yes

[WEBSITE]

Custom Invoice

Invoice__c

[WEBSITE]

▲ API Name of Table

Custom Invoice Product

InvoiceItem__c

[WEBSITE]

▲ API Name of Table

- One small remind, you also have to create a table called InvoiceItem with the following config

Custom Object Definition Detail

Edit

Delete

Singular Label	InvoiceItem	Description	InvoiceItem
Plural Label	InvoiceItem	Enable Reports	☐
Object Name	InvoiceItem	Track Activities	☐
API Name	InvoiceItem__c	Allow in Chatter Groups	☐
		Allow Sharing	☒
		Allow Bulk API Access	☒
		Allow Streaming API Access	☒
		Track Field History	☐
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	Perry Matthew, 9/21/2015 7:32 PM	Modified By	Perry Matthew, 9/28/2015 9:50 PM

Standard Fields

Standard Fields Help ?

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		☒
Edit	Product Name	Name	Text(80)		☒

Custom Fields & Relationships

New

Field Dependencies

Custom Fields & Relationships Help ?

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	InvoiceId	InvoiceId__c	Lookup(Invoice)	☒		Perry Matthew, 9/28/2015 9:44 PM
Edit Del	Product2Id	Product2Id__c	Lookup(Product)	☒		Perry Matthew, 9/28/2015 9:57 PM
Edit Del	Quantity	Quantity__c	Number(18, 0)			Perry Matthew, 9/28/2015 2:35 AM
Edit Del	UnitPrice	UnitPrice__c	Number(18, 0)			Perry Matthew, 9/28/2015 2:36 AM

- One last step, in Magento, hit **SalesforceCRM Integration -> Retrieve Field**, your new Custom Table and fields are ready to use

Add New Mapping

Back

Reset

Save

Rule

Select Table *

CustomCustomer

Update Fields

Magento field *

ID

Salesforce field *

Email (email)

Email (email)

First Name (string)

LastName (string)

VAT Number (double)

Gender (textarea)

Office Phone (phone)

Status *

Description *

Custom Tables Syncing

When a new account is registered or an existing one is edited, a new record will be added into Custom Customer

- a new customer has successfully registered an account

MY DASHBOARD

Thank you for registering with Main Website Store.

Hello, Harry Berman!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

ACCOUNT INFORMATION

CONTACT INFORMATION

[EDIT](#)

Harry Berman

hrrberman453@gmail.com

[Change Password](#)

NEWSLETTERS

[EDIT](#)

You are currently not subscribed to any newsletter.

- a new record is added in **Custom Customer**

 CustomCustomer Home [Help for this Page](#)

View: All Go! [Edit](#) | [Create New View](#)

Recent CustomCustomer New Recently Viewed Go!

CustomCustomer Name
Harry Berman
Lucidvan Berg

When a new product is added or existing one is edited, a new record will be added into Custom Products

- a new product is added successfully

 Manage Products Add Product

Page 1 of 1 pages | View 20 per page | Total 5 records found | [Notify Low Stock RSS](#) Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Action
Any	From: To:				From: To: In: USD	From: To:			
☐	6 Laptop	Simple Product	Default	lap59182	\$1,000.00	0	Catalog, Search	Enabled	Edit

- a new record is synced in **Custom Products**

 CustomProduct Home [Help for this Page](#)

View: All Go! [Edit](#) | [Create New View](#)

Recent CustomProduct New Recently Viewed Go!

CustomProduct Name
Laptop

When a new invoice is sent by store admin, a new record is added in Salesforce's Invoices and Invoice Item

- a new invoice is sent by admin

 The invoice has been created.

 Order # 100000038 | Oct 8, 2015 6:25:18 PM

Back

Edit

Send Email

Credit Memo

Hold

Ship

Order # 100000038 (the order confirmation email was sent)

Order Date

Oct 8, 2015 6:25:18 PM

Order Status

Processing

Purchased From

Main Website
Main Website Store
Default Store View

Account Information

Customer Name

John Hopkins

Email

john117@gmail.com

Customer Group

General

- In Salesforce's Invoices

Invoice

100000006

Back to List: Leads

Customize Page | Edit Layout | Printable View | Help for this Page

Invoice Detail

Edit

Delete

Clone

Invoice Number

100000006

Owner

Perry Matthew [Change]

First Name

New York

Last Name

Billing First Name

John

Billing Last Name

Hopkins

Billing State

New York

Billing Zip

- In Salesforce's Invoice Item

InvoiceItem

Home

View: Demo

Go!

Edit | Create New View

Recent InvoiceItem

New

Recently Viewed

Go!

Product Name

Dream and Dream

When a product is deleted from Magento, it will also be deleted from Salesforce's Products and Custom Products

When a customer is deleted from Magento, it will also be deleted from Salesforce's Accounts, Leads, Contacts and Custom Customers

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	

Product2

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	PoNumber
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

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.
-

Support

- We will reply to support requests after **2 business days**.
- We will offer **lifetime free update and 6 months 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 series 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.