

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**)

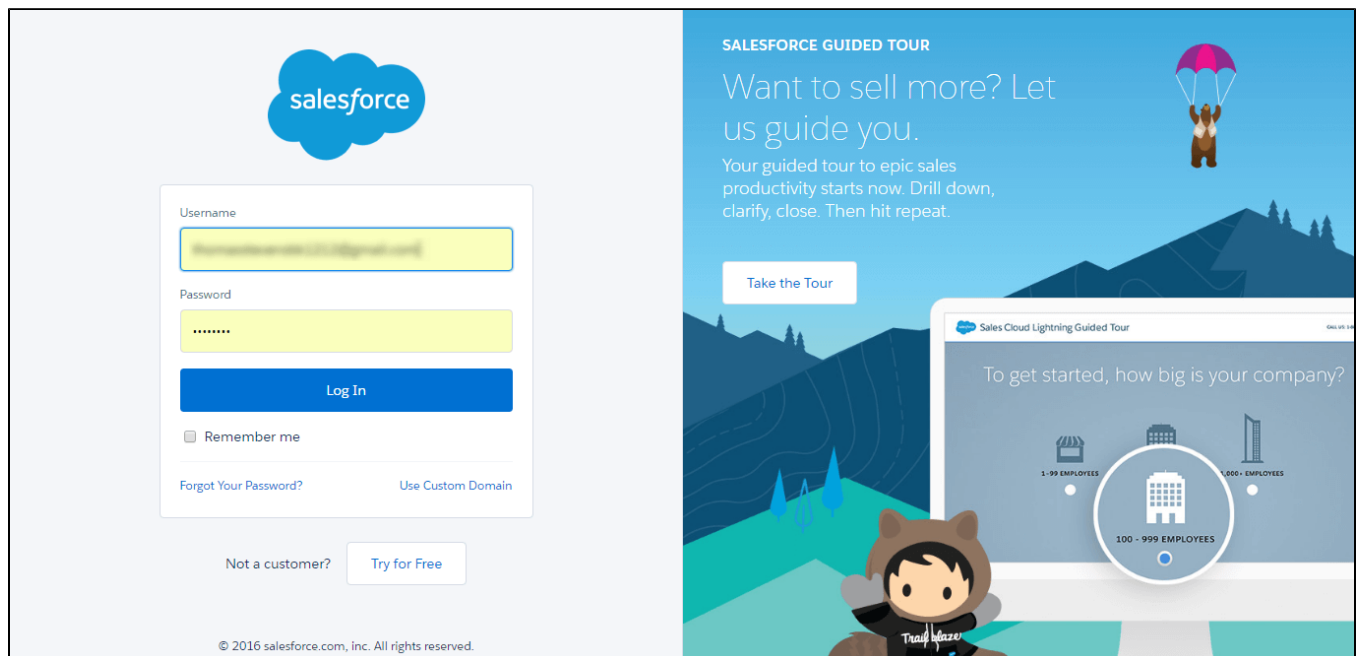
The API package is not available if you use any other edition that's not listed above.

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):

Lightning Experience App Manager

14 Items - Sorted by App Name - Filtered by TabSet Type

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED DA...	APP TYPE	VISIBL...
1 App Launcher	AppLauncher	App Launcher tabs	4/3/2018 11:58 PM	Classic	✓
2 Community	Community	Salesforce CRM Communities	4/3/2018 11:58 PM	Classic	✓
3 Content	Content	Salesforce CRM Content	4/3/2018 11:58 PM	Classic	✓
4 Magenest	Magenest		4/4/2018 12:35 AM	Connected	
5 Magenest1	Magenest1		4/4/2018 12:06 AM	Connected	
6 Marketing	Marketing	Best-in-class on-demand marketing automation	4/3/2018 11:58 PM	Classic	✓
7 Platform	Platform	The fundamental Lightning Platform	4/3/2018 11:58 PM	Classic	✓
8 Sales	Sales	The world's most popular sales force automation (SFA) solution	4/3/2018 11:58 PM	Classic	✓
9 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	4/3/2018 11:58 PM	Lightning	✓
10 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	4/3/2018 11:58 PM	Lightning	✓
11 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	4/3/2018 11:58 PM	Classic	✓
12 Service	Service	Manage customer service with accounts, contacts, cases, and more	4/3/2018 11:58 PM	Classic	✓
13 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	4/3/2018 11:58 PM	Lightning	✓
14 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	4/3/2018 11:58 PM	Classic	✓

- Entering the information needed:

App Manager

Connected App Name: Magenest

API Name: Magenest

Contact Email: mail@magenest.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: ☒

Enable for Device Flow: ☐

Callback URL:

Use digital signatures: ☐

Selected OAuth Scopes:

Available OAuth Scopes:

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_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)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to custom applications (visualforce)

Require Secret for Web Server Flow: ☒

Include ID Token: ☐

Enable Single Logout: ☐

- 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

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Pardot services (pardot_api)
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_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 Lightning applications (lightning)
- Allow access to content resources (content)
- Allow access to your unique identifier (openid)

Add
Remove

Selected OAuth Scopes

Full access (full)
Perform requests on your behalf at any time (refresh_token, offline_access)

Require Secret for Web Server Flow ☒

Require Secret for Refresh Token Flow ☐

Introspect All Tokens ☐

- 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.

Setup | Home | Object Manager

Search Setup

Quick Find

Setup Home

Lightning Experience

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Apps
 - App Manager
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth ...
 - Manage Connected Apps**
 - Installed Packages
 - Mobile Apps
 - Package Manager
 - Feature Settings
 - Einstein
 - Objects and Fields
 - Process Automation
 - User Interface

Manage Connected Apps

Edit | Delete | Manage

Version: 1.0
API Name: Magedred
Created Date: 4/4/2018 12:05 AM
By: Mai Houven
Contact Email: madamas216@gmail.com
Contact Phone:
Last Modified Date: 4/4/2018 12:35 AM
By: Mai Houven
Description:
Info URL:

API (Enable OAuth Settings)

Consumer Key: 3MVG9d8
Selected OAuth Scopes: Full access (full)
Enable for Device Flow: ☐
Token Valid for: 0 Hour(s)
Include Custom Permissions: ☐
Consumer Secret: 234
Callback URL: https://salesforce.demo.izsysync.com/admin/
Require Secret for Web Server Flow: ☒
Include Custom Attributes: ☐
Enable Single Logout: Single Logout disabled

Configure ID Token

Include Standard Claims: ☒
Include Custom Attributes: ☒
Include Custom Permissions: ☒

Custom Connected App Handler

Apex Plugin Class:
Run As:

Trusted IP Range for OAuth Web server flow

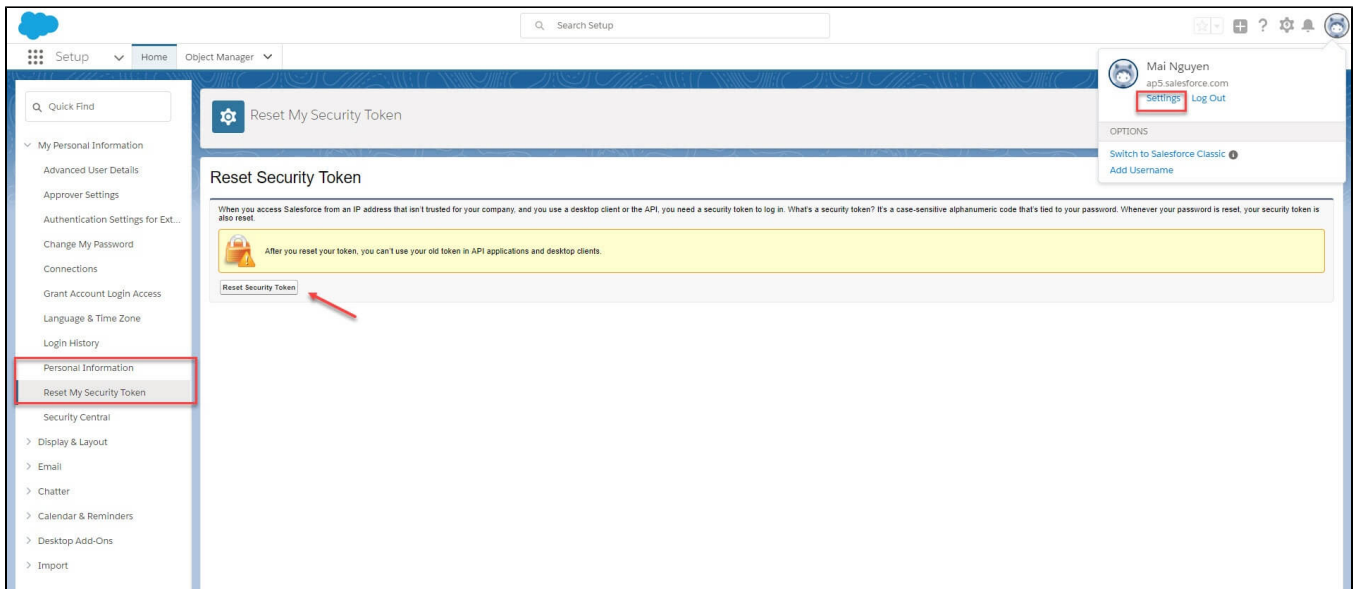
No records to display

Custom Attributes

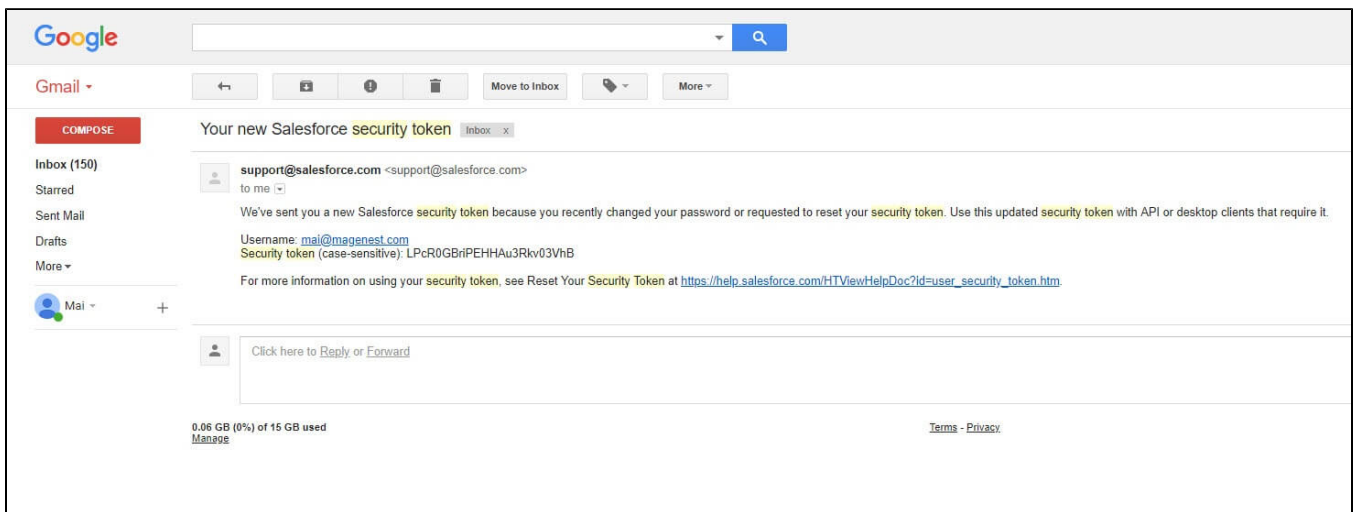
No records to display

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.

Configuration

Scope: Default Config ?

Save Config

GENERAL

CATALOG

SECURITY

MAGENEST

SalesforceCRM Config

CUSTOMERS

SALES

YOTPO

DOTDIGITAL

SERVICES

ADVANCED

Setup And Authentication SalesforceCRM Account

Connection Status **NOT CONNECTED**

Email

Password

Consumer Key

Consumer Secret

Security Token

Salesforce Environment

Get Access Token

Authorized redirect URIs:

Enable Debug

Admin will be redirected to the verification page:

- Click the **“Allow”** button

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

Configuration

Scope: Default Config ?

Save Config

GENERAL

CATALOG

SECURITY

MAGENEST

SalesforceCRM Config

CUSTOMERS

SALES

YOTPO

DOTDIGITAL

SERVICES

ADVANCED

Setup And Authentication SalesforceCRM Account

Connection Status **NOT CONNECTED**

Email

Password

Consumer Key

Consumer Secret

Security Token

Salesforce Environment

Get Access Token

Authorized redirect URIs:

Enable Debug

Allow Access? | Salesforce — Mozilla Firefox

https://na174.salesforce.com/setup/secur/Remot...

- Access and manage your Chatter data
- Provide access to custom applications
- Allow access to your unique identifier
- Access custom permissions
- Access and manage your Wave data
- Access and manage your Eclair data
- Manage hub connections
- Access Pardot services
- Allow access to Lightning applications
- Allow access to content resources
- Perform requests on your behalf at any time

Do you want to allow access for rasamee2? (Not you?)

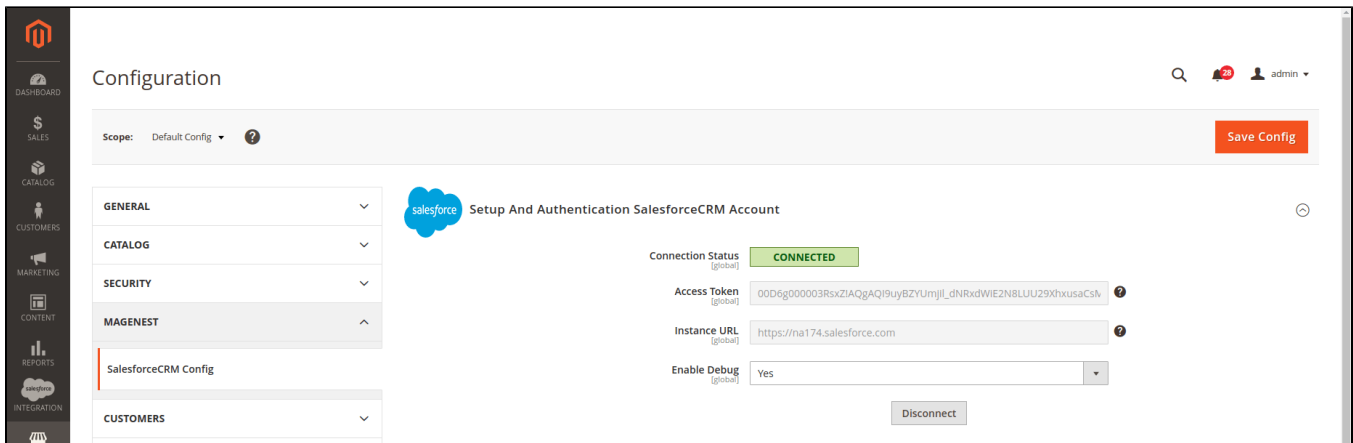
Deny Allow

To revoke access at any time, go to your personal settings.

© 2021 salesforce.com, inc. All rights reserved.

Synchronization Settings

- 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.



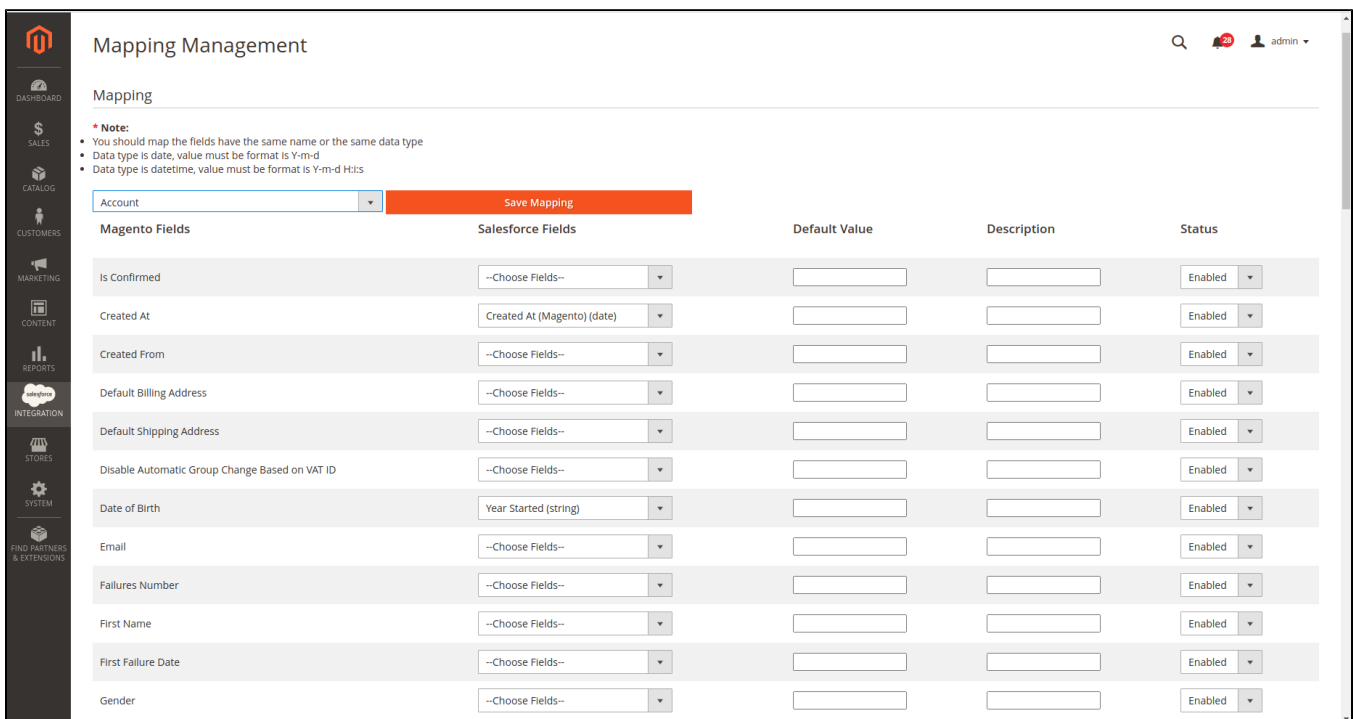
How to synchronize data from Magento 2 store to Salesforce CRM account

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]

00D2w00000DoZ4JIARkAQFORlpButTMkCNKNu5ns8vqK.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

View Report

🔍
 1
 hlvnr12345 ▾

[← View Request Daily](#)

Actions ▾

4132 records found

Filters ▾

Default View ▾

Columns ▾

Export ▾

20 ▾ per page

< 1 of 207 >

ID	Record ID in SalesforceCRM	Salesforce Table	Magento ID	Action	Username	Email	Datetime	Status	Message	View Detail	
☐	28		Lead	1	insert	Hung Huynh	hlvnr12345@gmail.com	2021-01-08 02:08:25	ERROR	This Lead cannot be synced, because a Contact with the same email address already existed.	View
☐	513	View on Salesforce	Product2	484	update	Hung Huynh	hlvnr12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View
☐	256	View on Salesforce	Product2	227	update	Hung Huynh	hlvnr12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View
☐	257	View on Salesforce	Product2	228	update	Hung Huynh	hlvnr12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View

Report #513

Email	hhvnr12345@gmail.com
Magento Id	484
Salesforce Id	View on Salesforce
Salesforce Table	Product2
Status	SUCCESS
Event	update
Detail	{ "success": true, "created": false, "id": "012w000006A0sUAAW", "errors": [] }

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

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

INTEGRATION

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Request Report

Requests Made Today

Total API Request Today

REST API Request: 68

BULK API Request: 71

Detail

Accounts:	1
Contacts:	1
Campaigns:	1
Leads:	1
Orders:	2
Products:	2048

Request Records

Detail

	Date	REST API Requests	BULK API Requests
Highest Request:	2021-01-07	121	No request has been made
Lowest Request:	2021-01-08	68	71

Request Report

01/04/2021

01/13/2021

Get Report

Requests

Date	REST API Requests	BULK API Requests
2021-01-07	121	
2021-01-08	68	71

Detail

Type	Total Request	Request Failed
PricebookEntry	2063	0
Product2	2055	0
Pricebook2	2	0
Account	1	0
Contact	1	0
Lead	1	1
Campaign	1	0
Order	2	0
OrderItem	6	0
Opportunity	2	0

Copyright © 2021 Magento Commerce Inc. All rights reserved.

Magento ver. 2.4.1

[Privacy Policy](#) | [Report an Issue](#)

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:



DASHBOARD

SALES

PRODUCTS

CUSTOMERS

Catalog



salesforce ▾

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	



Copyright © 2017 Magento Commerce Inc. All rights reserved.

Magento ver. 2.1.0

[Report Bugs](#)



Store View: All Store Views



← Back

Add Attribute

Save



Enable Product ☒ Yes
[website]

Attribute Set

Product Name *
[store view]

SKU *
[global]

Price *
[website]

[Advanced Pricing](#)

Tax Class
[website]

Quantity
[global]

[Advanced Inventory](#)

Stock Status
[global]

Weight
[global]

Visibility
[store view]

Categories
[global]

Set Product as New From To
[website]

- 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

Salesforce PricebookEntry ID:01u7F000000PE9nQAG

Last Updated At:May 6, 2017, 3:47:26 AM

Created At:Apr 18, 2017, 9:07:09 AM

Sync Now

Sync History

2017-05-06 03:47:33	PricebookEntry	Ok
2017-05-06 03:47:26	Product2	Ok
2017-04-18 09:07:23	PricebookEntry	Ok
2017-04-18 09:07:09	Product2	Ok

Copyright © 2017 Magento Commerce Inc. All rights reserved.

Magento ver. 2.1.0
[Report Bugs](#)

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

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

INTEGRATION

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Products

Search by keyword

Filters

Default View

Columns

20 per page

1 of 103

Add Product

2047 records found (2047 selected)

Actions

Delete

Change status

Update attributes

Assign Inventory Source

Unassign Inventory Source

Transfer Inventory To Source

Add Product to Salesforce Queue

	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Action	
☐	Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☐	Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☐	Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Wayfarer Messenger Bag	Simple Product	Bag	24-MB05	\$45.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Rival Field Messenger	Simple Product	Bag	24-MB06	\$45.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Fusion Backpack	Simple Product	Bag	24-MB02	\$59.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Impulse Duffle	Simple Product	Bag	24-UB02	\$74.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Voyage Yoga Bag	Simple Product	Bag	24-WB01	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Compete Track Tote	Simple Product	Bag	24-WB02	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit
☒	Savvy Shoulder Tote	Simple Product	Bag	24-WB05	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	Edit

Add the Product to Queue

Are you sure to assign selected product to queue? (2047 records)

Cancel

OK

Salesforce Products:

Recent Products New Recently Modified		
Product Name	Product Code	Product Description
Riona Full Zip Jacket	Riona Full Zip Jacket	
Ingrid Running Jacket	Ingrid Running Jacket	
Yoga Adventure	Yoga Adventure	
Jackets	Jackets	
Harmony Lumaflex™ Strength Band Kit	Harmony Lumaflex™ Strength Band Kit	
Nadia Elements Shell	Nadia Elements Shell	
Tax	TAX	
Shipping	SHIPPING	
GenWatt Diesel 200kW	GC1040	
GenWatt Diesel 10kW	GC1020	
Show 25 items		

- 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

The screenshot displays the Magento 2 Customers Listing page. A modal dialog titled "Add the Customer to Queue" is open, asking "Are you sure to assign selected customers to queue? (3 records)" with "Cancel" and "OK" buttons. The background shows the Customers listing table with columns: Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, Date of Birth, Tax/VAT Number, Gender, and Action. The "Actions" dropdown menu is open, highlighting the "Add Customer to Salesforce Queue" option. The page footer includes the Magento logo, copyright notice, version (2.3.6), and links for Privacy Policy, Account Activity, and Report an Issue.

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](#)

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

INTEGRATION

REPORTS

STORES

Thomas Stevens

magenest

← Back

Delete Customer

Reset

Create Order

Reset Password

Force Sign-In

Save and Continue Edit

Save Customer

CUSTOMER INFORMATION

Customer View

Account Information

Addresses

Orders

Billing Agreements

Newsletter

Product Reviews

Wish List

Salesforce Integration

Information

Salesforce Contact ID: 0030Y00000B5yYgQAJ

Salesforce Lead ID: 00Q0Y000002pjCRAU

Salesforce Account ID: 0010Y00000EgweNQAR

Last Updated At: May 6, 2017, 9:18:37 AM

Created At: Feb 13, 2017, 9:41:05 AM

Sync Contact: Sync to Contact Now

Sync Lead: Sync to Lead Now

Sync Account: Sync to Account Now

Sync History

2017-05-06 09:18:37	Account	Ok
2017-05-06 09:18:24	Lead	Ok
2017-05-06 09:17:59	Contact	Ok
2017-05-06 08:41:22	Contact	Ok
2017-05-06 08:41:17	Account	Ok
2017-05-06 08:37:54	Account	Failed
2017-05-06 07:42:20	Account	Failed
2017-05-06 07:40:30	Account	Failed
2017-05-06 03:55:55	Account	Failed
2017-04-18 09:06:43	Lead	Ok

Copyright © 2017 Magento Commerce Inc. All rights reserved.

Magento ver. 2.1.0
[Report Bugs](#)

Salesforce Leads:

Leads

Home

Tell me more! | Help for this Page

View: All Open Leads Go! Edit | Create New View

Recent Leads

New

Recently Viewed

Name	Company	Phone
Stevens, Thomas	N/A	

Salesforce Contacts:

Contacts

Home

Tell me more! | Help for this Page ?

View:

All Contacts

Go!

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

Recent Contacts

New

Recently Viewed ▼

Name	Account Name	Phone
Stevens, Thomas		
mali, sachin		
Davis, Josh	Express Logistics and Transport	(503) 421-7800

Salesforce Accounts:

Accounts

Home

Tell me more! | Help for this Page ?

View:

All Accounts

Go!

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

Recent Accounts

New

Recently Viewed ▼

Account Name	Billing City	Phone
sachinmali43@gmail.com		
thomasstevensbk1212@gmail.com		

- 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:

SALES

CATALOG

CUSTOMERS

MARKETING

INTEGRATION

STORES

SYSTEM

Orders

Search by keyword

Filters

Default View

Columns

Export

8 records found (3 selected)

20 per page

1 of 1

Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
site bsite Store t Store	Mar 12, 2021 7:57:53 AM	Test Test last name bro	Test Test last name bro	\$50.00	\$50.00	Pending	View	
site bsite Store t Store	Mar 12, 2021 7:55:49 AM	Test Test last name bro	Test Test last name bro	\$25.00	\$25.00	Pending	View	
site bsite Store t Store	Nov 26, 2020 4:58:55 AM	Veronica Costello	Veronica Costello	\$79.28	\$79.28	On Hold	View	
site bsite Store t Store	Oct 7, 2020 2:15:36 AM	SOUVIT ROY	SOUVIT ROY	\$59.00	\$59.00	Canceled	View	
000000004 Main Website Main Website Store Default Store View	Jul 22, 2020 3:15:01 AM	Đặng Đồng	Đặng Đồng	\$50.00	\$50.00	Pending	View	

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

Add the Order to Queue

Are you sure to assign selected order to queue? (3 records)

Cancel

OK

Create New Order

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

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

Compare Products

You have no items to compare.

DASHBOARD

SALES

#000000012

Back

Cancel

Send Email

Hold

Invoice

Reorder

Edit

ORDER VIEW

Information

Invoices

Credit Memos

Comments History

Salesforce Integration

Information

Salesforce Order ID: 8017F000000Xbz2QAC

Salesforce Opportunity ID: 0067F0000029XR0QAM

Last Updated At: May 6, 2017, 8:41:27 AM

Created At: May 6, 2017, 8:37:39 AM

Sync Order: Sync Order Now

Sync Opportunity: Sync Opportunity Now

Sync History

2017-05-06 08:41:27	Order	Ok
2017-05-06 08:37:39	Opportunity	Ok

Copyright © 2017 Magento Commerce Inc. All rights reserved.

Magento ver. 2.1.0
[Report Bugs](#)

Salesforce Order Information:

Order 00000100

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

Click to add topics:

[Order Products \(Standard Price Book\) \[1\]](#) | [Order History \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Order Detail

Edit

Clone

Delete

Activate

Order Owner	Thomas Stevens [Change]	Contract Number	
Order Number	00000100	Order Amount	\$75.00
Account Name	thomasstevensbk1212@gmail.com	Order Type	
Order Start Date	5/6/2017	Status	Draft
Customer Authorized By		Shipping Address	
Company Authorized By		Activated Date	
Billing Address	49 W 32nd St, New York New York, USA		
Activated By			
Created By	Thomas Stevens, 5/6/2017 1:41 AM	Last Modified By	Thomas Stevens, 5/6/2017 1:41 AM
Description			

Edit

Clone

Delete

Activate

Order Products (Standard Price Book)

Add Product

Edit All

Order Products (Standard Price Book) Help

Action	Product	Product Code	Quantity	Unit Price	Total Price	Line Description
Edit Del	Yoga Adventure	Yoga Adventure	1.00	\$75.00	\$75.00	

Opportunity:

Opportunity

000000012

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

Hide Feed

Click to add topics:

Post

File

New Task

More

Write something...

Share

Follow

Followers

No followers.

Show All Updates

There are no updates.

Products

 |

Open Activities

 |

Activity History

 |

Notes & Attachments

 |

Contact Roles

 |

Partners

 |

Competitors

 |

Stage History

Opportunity Detail

Edit

Delete

Clone

Opportunity Owner	Thomas Stevens [Change]	Amount	
Private		Expected Revenue	
Opportunity Name	000000012	Close Date	5/6/2017
Account Name		Next Step	
Type		Stage	Prospecting
Lead Source		Probability (%)	10%
		Primary Campaign Source	
Order Number	12	Main Competitor(s)	
Current Generator(s)		Delivery/Installation Status	
Tracking Number			
Created By	Thomas Stevens, 5/6/2017 1:37 AM	Last Modified By	Thomas Stevens, 5/6/2017 1:37 AM
Description	Thomas		
Custom Links	Delivery Status		

Edit

Delete

Clone

- 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:

Dashboard

Sales

Products

Customers

Marketing

Content

Integration

Reports

Catalog Price Rule

Search

2 records found

20 per page

1 of 1

Apply Rules

Add New Rule

Updated rules applied.

ID	Rule	Start	End	Status	Web Site
		From To	From To		
1	Mid Season Sale	Jan 1, 2017	Jan 5, 2017	Active	Main Website
2	New Year Sale	Dec 25, 2016	Jan 5, 2017	Active	Main Website

Salesforce Campaigns:

Campaigns

Home

Tell me more! | Help for this Page

View:

All Active Campaigns

Go!

Edit | Create New View

Recent Campaigns

New

Recently Viewed

Campaign Name	Status	Start Date
New Year Sale	Planned	
Mid Season Sale	Planned	
DM Campaign to Top Customers - Nov 12-23, 2001	Completed	13/04/2016

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

- 1 [Introduction](#)
 - 1.1 [Features](#)
 - 1.1.1 [Requirements](#)
 - 1.1.2 [Video Tutorial Playlist](#)
- 2 [How to create a new app](#)
 - 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](#)
 - 4.1 [Setting Up Field Mapping](#)
 - 4.2 [Synchronization Settings](#)
- 5 [Main functions](#)
 - 5.1 [Salesforce Default Synchronization Fields](#)
 - 5.2 [Contact](#)
 - 5.3 [Account](#)
 - 5.4 [Lead](#)
 - 5.5 [Product](#)
 - 5.6 [Campaign](#)
 - 5.7 [Order](#)
 - 5.8 [Order Item](#)
 - 5.9 [Opportunity](#)
 - 5.10 [Opportunity Item](#)
- 6 [Updates](#)
- 7 [Support](#)

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 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.

- 1 [Introduction](#)
 - 1.1 [Features](#)
 - 1.1.1 [Requirements](#)
 - 1.1.2 [Video Tutorial Playlist](#)
- 2 [How to create a new app](#)
 - 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](#)
 - 4.1 [Setting Up Field Mapping](#)
 - 4.2 [Synchronization Settings](#)
- 5 [Main functions](#)
 - 5.1 [Salesforce Default Synchronization Fields](#)
 - 5.2 [Contact](#)
 - 5.3 [Account](#)
 - 5.4 [Lead](#)
 - 5.5 [Product](#)
 - 5.6 [Campaign](#)
 - 5.7 [Order](#)
 - 5.8 [Order Item](#)
 - 5.9 [Opportunity](#)
 - 5.10 [Opportunity Item](#)
- 6 [Updates](#)
- 7 [Support](#)