# **Woocommerce Salesforce CRM Integration**

Thank you for purchasing my plugin. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thanks so much!

Created: 01/10/2017 | By: Magenest | Support Portal: http://servicedesk.izysync.com/servicedesk/customer/portal/97

### Introducing to Woocommerce Salesforce integration

The Woocommerce Salesforce integration Plugin is an indispensable tool to help you synchronize data instantly between Woocommerce and Salesforce. The plugin allows to synchronize register customers in Woocommerce to Lead in Salesforce, order in Woocommerce to Account and Contact in Salesforce.

### Features:

- Synchronize Register Customer in Woocommerce to Lead in Salesforce
- Synchronize Order in Woocommerce to Account in Salesforce
- Synchronize Order in Woocommerce to Contact in Salesforce
- Synchronize Order Products in Woocommerce to Products in Salesforce
- Synchronize Order in Woocommerce to Order in Salesforce
- Choose Equeue Sync or Auto Sync
- Report Sync data between Woocomerce and Salesforce.

The plugin page: https://store.magenest.com/woocommerce-plugins/woocommerce-salesforce-crm-integration.html

The live demo:http://mysaleforce.demo.izysync.com



### Configuration

Creat a connected app to get keys and token

Sign in Salesforce CRM and go to Set up option in dashboard.

-		Q Search Salesforce	🔬 🗄 ? 🏟	÷ 👼	
Setup	Setup Home Object Manager 🗸				
Q Quick Find		setup Home	Developer Console	ate 🔻	

In your Salesforce Dashboard, go to Platform tools > App manager.

Press New Connected App button in Connected App to creat a new connected app

-	Q Search Sal	esforce		]		🖄 🔹 🖪 📍 🗱	: A 👸	9
Setup Home Object N	Manager 🗸							
> Users	-							_
> Data	Lightning Experie	ence App Manager	r			New Lightning App	Connected Ap	p
> Email								
PLATFORM TOOLS	11 items • Sorted by App Name	Filtered by TabSet Type						
× Apps	APP NAME 🕇	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED D	APP TYPE	VISIBLE IN LIGHT.		
	3 Content	Content	Salesforce CRM Conte	5/18/2017 7:57 PM	Classic	~	*	*
App Manager	4 Marketing	Marketing	Best-in-class on-dema	5/18/2017 7:57 PM	Classic	~	•	
Connected Apps	5 Platform	Platform	The fundamental Forc	5/18/2017 7:57 PM	Classic		•	
Installed Packages	6 Sales	Sales	The world's most pop	5/18/2017 7:57 PM	Classic		•	
> Mobile Apps	7 Sales	LightningSales	Manage your sales pro	5/18/2017 7:57 PM	Lightning	~	•	
Package Manager	8 Salesforce Chatter	Chatter	The Salesforce Chatte	5/18/2017 7:57 PM	Classic	~	•	
> Feature Settings	9 Service	Service	Manage customer ser	5/18/2017 7:57 PM	Classic	~	•	
> Objects and Fields	10 Site.com	Sites	Build pixel-perfect, da	5/18/2017 7:57 PM	Classic		•	
> Process Automation	11 woocommerce_salesf	woocommerce_salesf		5/19/2017 8:06 PM	Connected		•	
> User Interface								
> Custom Code								
> Environments	4							¥ F

Then enter information in the required fields:

- Connected App Name: Enter the name for your connected app. Example: woocommerce\_salesforce\_integration
  API Name: data from this field is auto synced from Connected App Name
- Contact Email: fill your Salesforce email
  Check Enable OAuth Settings box
- Fill Callback URL: Fill like example: https://yourwebsite/RestTest/oauth/\_callback
  Selected OAuth Scopes : select Full Acess option and click Add button

Click Save button

After finish, your connected app will displayed like this:

-	(	Q Search Salesforce			🔄 🗄 ? 🌣 🐥 🍖
Setup Home	Object Manager 🗸 🗸				
Lightning Experience					
ADMINISTRATION	Manage Conn	lected Apps			
> Users					
		Version	1.0		
> Data		API Name	Woocommerce_Salesforce		
<ul> <li>Email</li> </ul>		Created Date	8/1/2017 11:48 PM		
2 FMail			By: <u>Keys NT</u>		
		Contact Email	nguyethan2704@gmail.com		
PLATFORM TOOLS		Contact Phone			
		Last Modified Date	8/1/2017 11:48 PM		
✓ Apps			By: <u>Keys NT</u>		
Ann Manager		Description			
App Manager		Info URL			
AppExchange Ma	▼ API (Enable OAuth Setti	ings)			
V. Connected An	Consumer Key 3	MVG9d8z.hDcPJ44UmZe94jhfE0Dc4hCFGk	ovAN.TPLEIiTP6yvfuxqk9I9IqLmnWAKtvt	Thkgy_pl.8C Consumer Secret	3413777390482535069
<ul> <li>Connected Ap</li> </ul>	Selected OAuth Scopes A	ccess your basic information (id, profile, email	l, address, phone)	Callback URL	https://yourwebsite/RestTest/oauth/_callback
Connected A	A P C	access and manage your data (api) Provide access to your data via the Web (web) ull access (full)			
Manage Con	Å	ccess and manage your Chatter data (chatter_	api)		

You will get your client ID and cilent serect key from here.

Now, go to Settings



Go to My Personal Information > Reset My Security Token choose Reset Security Token button.

	Q Search Salesforce	😥 🖽 ? 🌣 🐥 👼
Setup Home Object Manager 🗸		
	set My Security Token	
<ul> <li>My Personal Information</li> <li>Advanced User Details</li> </ul>	Security Token	Help for this Page 🥹
Approver Settings When you sensitive	access Salesforce from an IP address that isn't trusted for your company, and you use a alphanumeric code that's tied to your password. Whenever your password is reset, your s	desktop client or the APL you need a security token to log in. What's a security token? It's a case- ecurity token is also reset.
Authentication Settings for Exte	After you reset your token, you can't use your old token in API applications and deskt	op clients.
Change My Password		
Connections Reset Se	curity Token	
Grant Account Login Access		
Language & Time Zone		
Login History		
Personal Information		
Reset My Security Token		
Security Central		
> Display & Layout		
> Email		
> Chatter		

mail:

Your new Salesforce security token Hop thur dén x	÷ 2
support@salesforce.com <support@salesforce.com> tói tôi 🕤</support@salesforce.com>	20 thg 7 (13 ngày trước) 📩 🔸 👻
RA Tiếng Anh ▼ → Tiếng Việt ▼ Dịch thư	Tất đối với: Tiếng Anh 🗙
We've sent you a new Salesforce security token because you recently changed your pass updated security token with API or desktop clients that require it. Username: <u>nguyethan2704@gmail.com</u> Security token (case-sensitive): <u>5zLD9hLeRXkPpDx4tbnLqXYs</u>	sword or requested to reset your security token. Use this
For more information on using your security token, see Reset Your Security Token at <a href="http://</th> <th>25.//help.salestorce.com/HTViewHelpDoc/id=user_</th>	25.//help.salestorce.com/HTViewHelpDoc/id=user_

Set up the Salesforce account to integrate with Woocommerce

You can access configuration page by clicking Settings of Woocommerce, then click Salesforce integration tab



- Client ID: Enter your consumer Key of Connected App
- Client Secret: Enter your consumer Secret of Connected App
- Username: Enter your username of your salesforce account
- Password: Enter your password of your salesforce account
- Security Token: Enter your security token from your email
- Sync Salesforce: Choose Add to Queue or Auto Sync
- Click Save changes button.

### Example of usages

1. Customer register

My Account	
Login	Register
Username or email address *	Email address *
Password *	Password *
Login Remember me	Register
Lost your password?	

My Account								
Dashboard	æ	Hello hangnt2704 (not hangnt2704? Log out)						
Orders	-	From your account dashboard you can view your recent orders, manage your shipping and billing addresses and edit your password and account details.						
Downloads								
Addresses	*							
Account details	4							
Logout	•							

Sync lead data from register:

- in dashboard admin

wooCommerce	Equeue lead sync Salesforce								
Products	ID	User id	Account name	Email	Date create	Sync			
Appearance									
🖆 Plugins 💈	1	8	ghjhgjg	ghjhgjg@gmail.com	2017-07-26 16:06:14	SYNC			
🚢 Users									
差 Tools	2	9	doanh10b	doanh10b@gmail.com	2017-07-26 16:08:14	SYNC			
Et Settings	3	10	doanh10bkjk	doanh10b+kjk@gmail.com	2017-07-26 16:18:42	SYNC			
Salesforce									
Salesforce	4	11	doanh10bhv	doanh10b+hv@gmail.com	2017-07-26 16:19:52	SYNC			
Report sync data									
Collapse menu	5	12	doanh10bakjflkajflkja	doanh10b+akjflkajflkja@gmail.com	2017-07-26 16:20:56	SYNC			
	6	13	hanght2704	hangnt2704@gmail.com	2017-08-02 14:24:44	SYNC			

#### when admin press SYNC button:

					Q Searc	h Leads and more				** 🖬 ? 🌣 🏚	6
	Sales	Home Chatter	Opportunities $\checkmark$	Leads 🗸	Tasks 🗸	Files Accounts 🗸	Contacts 🗸 Campaigns 🔪	🗸 Dashboards 🥆 Reports 🗸	Chatter Groups 🗸	Calendar People 🗸 N	Nore 🔻
×	LEADS Recent	lv Viewed 🔻							New	Import Add to Campaig	gn 💌
12 ite	ms • Updated	a few seconds ago								\$• II• C' 🖌	C Y
	NAM	E	TITLE	CO	MPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS	
1	hang	nt2704		NA				nangnt2704@gmail.c	Open - Not Contacted	KNT	¥
2	dsfdf	gfhf		NA				dsfdfgfhf@gmail.com	Open - Not Contacted	KNT	•
з	dsfdf	gfhf		NA				dsfdfgfhf@gmail.com	Open - Not Contacted	KNT	•
4	dfgry	rut		NA				dfgryrut@gmail.com	Open - Not Contacted	KNT	•
5	yrfing	fgfhjgh		NA				yrfhgfgfhjgh@gmail.c	Open - Not Contacted	KNT	•
6	tyuiyu	uoulo		NA				tyuiyuoulo@gmail.com	Open - Not Contacted	KNT	Ψ.
7	dedw	vfeyhrth		NA				dedwfeyhrth@gmail.c	Open - Not Contacted	KNT	•
8	aswe	r		NA				aswer@gmail.com	Open - Not Contacted	KNT	•
9	ahng	234		NA				ahng234@gmail.com	Open - Not Contacted	KNT	•
10	nguy	ethan2704		NA				nguyethan2704@gma	Open - Not Contacted	KNT	•
11	hang	nt		NA				hangnt@magenest.com	Open - Not Contacted	KNT	•
12	coph	ongsuong2704		NA				cophongsuong2704@	Open - Not Contacted	KNT	•

2. When customer buy product

Order received	
Thank you. Your order has been received.	
ORDER NUMBER: 300	
DATE: 02/08/2017	
TOTAL: <mark>\$12,00</mark>	
PAYMENT METHOD: Direct bank transfer	
Order details	
PRODUCT	TOTAL
Premium Quality × 1	\$12,00
Subtotal:	\$12,00
Shipping:	Flat rate
Payment method:	Direct bank transfer
Total:	\$12,00

Dashboard admin:

1	🖁 Magenest 🛛 📀	6 📮 1 🔸	+ New						Howdy, admin admin 📃
🚯 Da	ashboard				Equeue syr	nc Salesforce			
📌 Po	osts		Equeue ord	er sync Salesforce					
<b>9</b> 3 Me	edia		Order id	Account name	Email	Product	Order amount	Order date	Sync
Pag	iges								
			284		doanh10b@gmail.com	Woo Single #2	2	2017-07-26 16:10:57	SYNC
👜 Wa	ooCommerce oducts		285		doanh10b+a@gmail.com	Woo Album #4	9	2017-07-26 16:15:47	SYNC
🔊 Ap	opearance ugins <b>2</b>		286		doanh10b+aa@gmail.com	Woo Single #1	3	2017-07-26 16:16:35	SYNC
👗 Usi	ers Iols		287		doanh10b+afdf@gmail.com	Woo Single #1	3	2017-07-26 16:18:04	SYNC
E Set	ttings		288	doanh10bkjk	doanh10b+kjk@gmail.com	Woo Album #3	9	2017-07-26 16:18:42	SYNC
Salesfo	lesforce		289	doanh10bhv	doanh10b+hv@gmail.com	Woo Single #1	3	2017-07-26 16:19:53	SYNC
Report	sync data Illapse menu		290	doanh10bakjflkajflkja	doanh10b+akjflkajflkja@gmail.com	Woo Album #3	9	2017-07-26 16:20:57	SYNC
			300		keys27@gmail.com	Premium Quality	12	2017-08-02 15:29:29	SYNC

### when admin press SYNC button, Salesforce:

order:

\$	orders Recently Viewed 🔻					New
50+ i	tems • Updated a few seconds ago					\$ • III • C' 🖉 C T
	ORDER NUMBER	ACCOUNT NAME	ORDER AMOUNT	ORDER START DATE	STATUS	CONTRACT NUMBER
1	00000211	keys27	<mark>\$12.00</mark>	8/2/2017	Draft	V
2	00000210	angnuyen11	\$9.00	8/2/2017	Draft	v
3	00000209	luonghuyenmy95	\$3.00	7/27/2017	Draft	V
4	00000208	admin	\$53.00	7/27/2017	Draft	•
5	00000207	doanh10b	\$9.00	7/26/2017	Draft	•
6	00000206	ghjhgjg	\$9.00	7/26/2017	Draft	V
7	00000205	gbnhkhjk	\$12.00	7/26/2017	Draft	V
8	00000204	dsfdfgfhf	\$53.00	7/26/2017	Draft	•
9	00000203	nguyenhang	\$35.00	7/22/2017	Draft	•
10	00000202	nguyenhang	\$38.00	7/25/2017	Draft	V
11	00000201	nguyenhang	\$18.00	7/25/2017	Draft	•
12	00000200	nguyethan2704	\$18.00	7/24/2017	Draft	V
13	00000199	nguyenhang	\$35.00	7/22/2017	Draft	V
14	00000198	nguyenhang	\$30.00	7/25/2017	Draft	V

order product:

Sorder Product Premium Quality										
Unit Price \$12.00	Quantity 1.00	Total Price \$12.00								
RELATED	DETAILS	_								
Order				Total Price						
00000211				\$12.00						
Product										
Premium Qua	lity									
List Price										
\$12.00										
Unit Price										
\$12.00										
Quantity										
1.00										
Created By				Last Modified By						
Keys NT, 8	3/2/2017 1:34 AN	1		E Keys NT, 8/2/2017 1:34 AM						
Line Description	ı									

### 3. Report Sync data

🕅 🔏 Magenest 😳 6 🕊 1 🕂 New Howdy, admin admin 🔟											
2 Dashboard	Wo	WordPress 4.8 is available! Please update now.									
🖈 Posts											
91 Media	W	WooCommerce data update complete. Thank you for updating to the latest version!									
Pages		Report sync Salesforce									
Comments 1		ID	Woo ID	Salesforce ID	Туре	Create date					
wooCommerce											
Products		1	<u>281</u>	01u7F000001QziKQAS	Product from order	2017-07-26 16:05:15					
🔊 Appearance		2	<u>281</u>	01u7F000001QziPQAS	Product from order	2017-07-26 16:05:15					
😰 Plugins 🔕		3	<u>281</u>	0017F000008Z42eQAC	Account from order	2017-07-26 16:05:15					
💄 Users 🎤 Tools		4	<u>281</u>	0037F000005MJfnQAG	Contact from order	2017-07-26 16:05:15					
5 Settings		5	282	01u7F000001R1AaQAK	Product from order	2017-07-26 16:58:17					
🔅 Salesforce		б	282	0017F000008ZCttQAG	Account from order	2017-07-26 16:58:17					
Salesforce Report sync data		7	282	0037F000005MKqMQAW	Contact from order	2017-07-26 16:58:17					
<ul> <li>Collapse menu</li> </ul>		8	283	01u7F000001R1E3QAK	Product from order	2017-07-26 16:59:33					
		9	283	0017F000008ZCvSQAW	Account from order	2017-07-26 16:59:33					
		10	283	0037F000005MKslQAG	Contact from order	2017-07-26 16:59:33					
		11	<u>292</u>	01u7F000001RBOiQAO	Product from order	2017-07-27 14:08:31					

## Summary

Once again, thank you so much for purchasing this plugin. As I said at the beginning, I'd be glad to help you if you have any questions relating to this plugin. No guarantees, but I'll do my best to assist. If you have a more general question relating to the plugin on Codecanyon, you might consider visiting the forums and asking your question in the "Item Discussion" section.

If you have want the further features that is not supported in current version, do not hesitate to contact us.