# Salesforce CRM Integration User Guide

## User Guide

The Salesforce Integration extension for Magento 2 allows store owners to seamlessly synchronize all data from their Magento 2 store with the Salesforce CRM system, ensuring smooth data transfer and unified customer management.

## Features

- Product Sync: Manually or automatically sync selected or all products from Magento 2 to Salesforce CRM.
- Customer Sync: Transfer specific or all customers to Salesforce Leads, Contacts, and Accounts, either manually or automatically.
- Order Sync: Sync individual or all orders to Salesforce Orders and Opportunities, manually or automatically.

- Campaign Sync: Update campaigns and subscribers from Magento 2 to Salesforce CRM, with both manual and automatic options.
- Smart Mapping: Map Magento 2 attributes to Salesforce fields manually.
- Log Viewing: Check synchronization logs for data transfer details.
- Queue Management: Monitor and manage sync tasks in the queue.
- Request Reports: Track sync requests from Magento 2's backend.
- Account Linking: Connect Salesforce Contacts with Accounts.
- Personal Account Support: Compatible with personal accounts.

# Installation

- Download the zip file
- Extract it and put it into /app/code/
- Open Cli in the Magento directory and follow the below commands

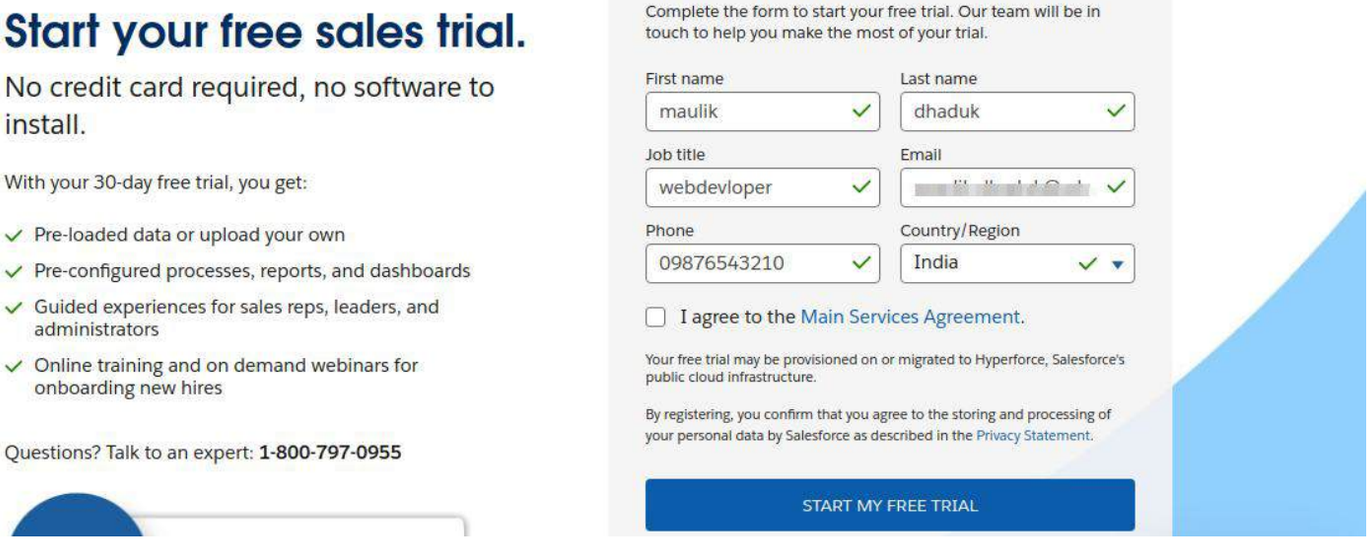
# CLI Commands

- **php bin/magento setup:upgrade**
- **php bin/magento setup:di:compile**
- **php bin/magento setup:static-content:deploy**
- **php bin/magento cache:clean**
- **php bin/magento cache:flush**

# How to Use

STEP 1

Sign up now to start your free trial.



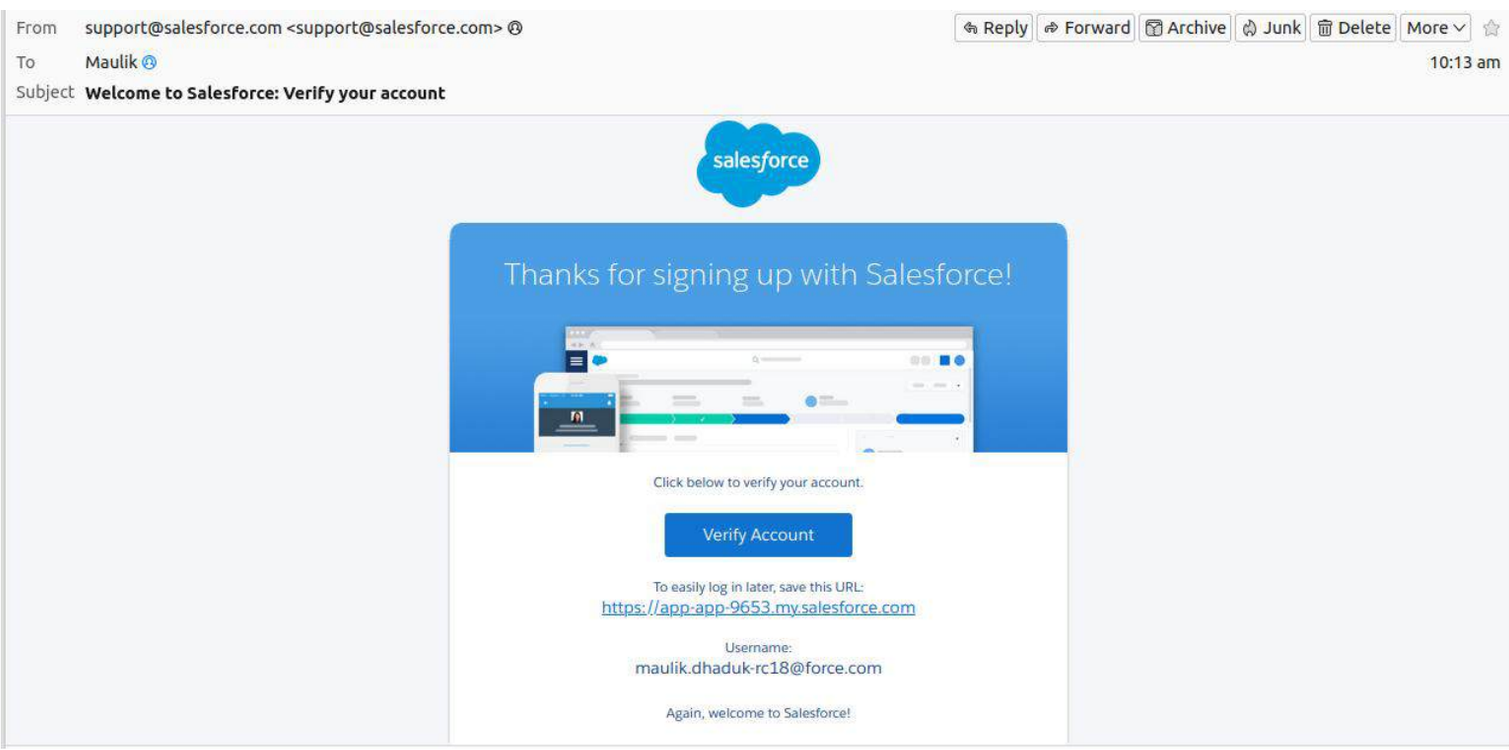

➔ **Click on the link to create an account first.**

[https://www.salesforce.com/form/signup/freetrial-sales-ee/](https://www.salesforce.com/form/signup/freetrial-sales-ee/)

➔ **If you already have an account click on this link to log in.**

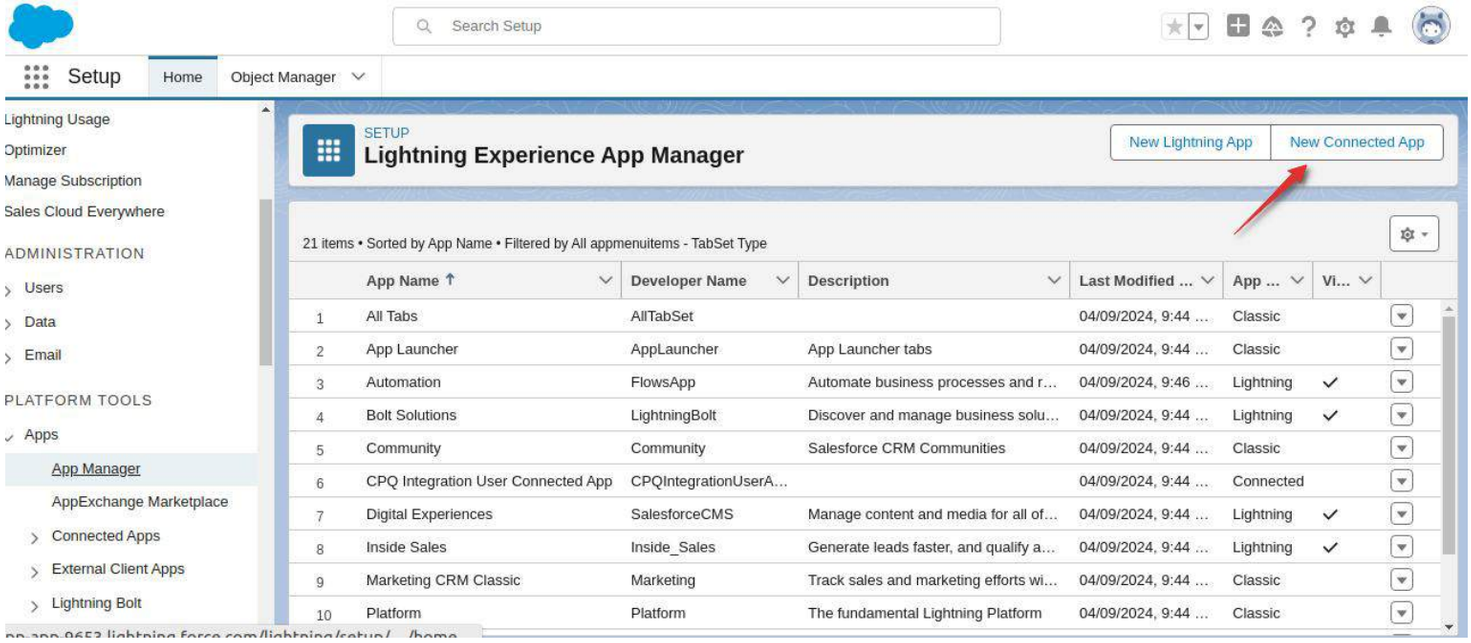
[https://developer.salesforce.com/.](https://developer.salesforce.com/)

## STEP 2



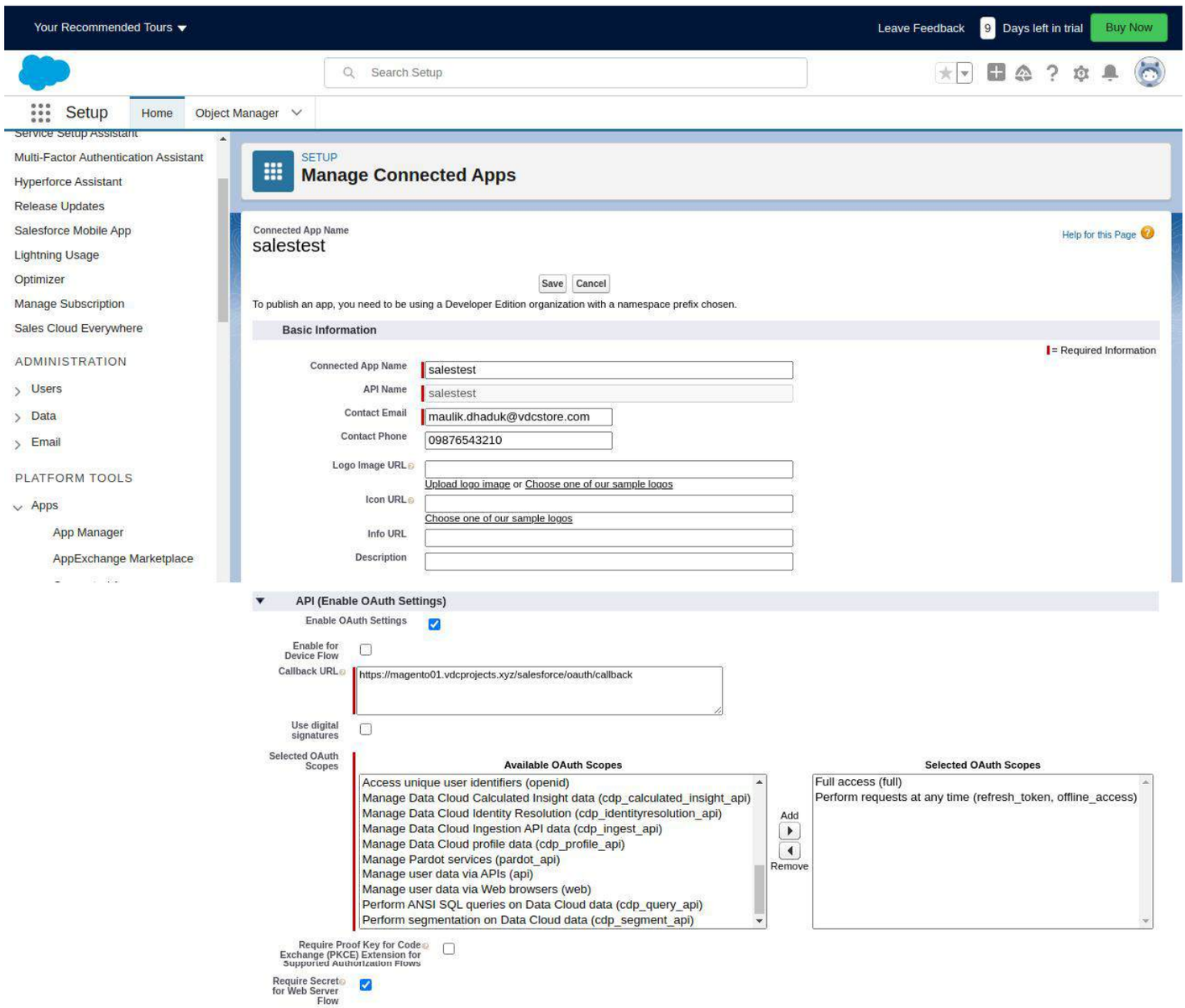

➔ **Check your email and verify your account by clicking on 'Verify Account' to set a new password or you can click on the below URL to log in.**

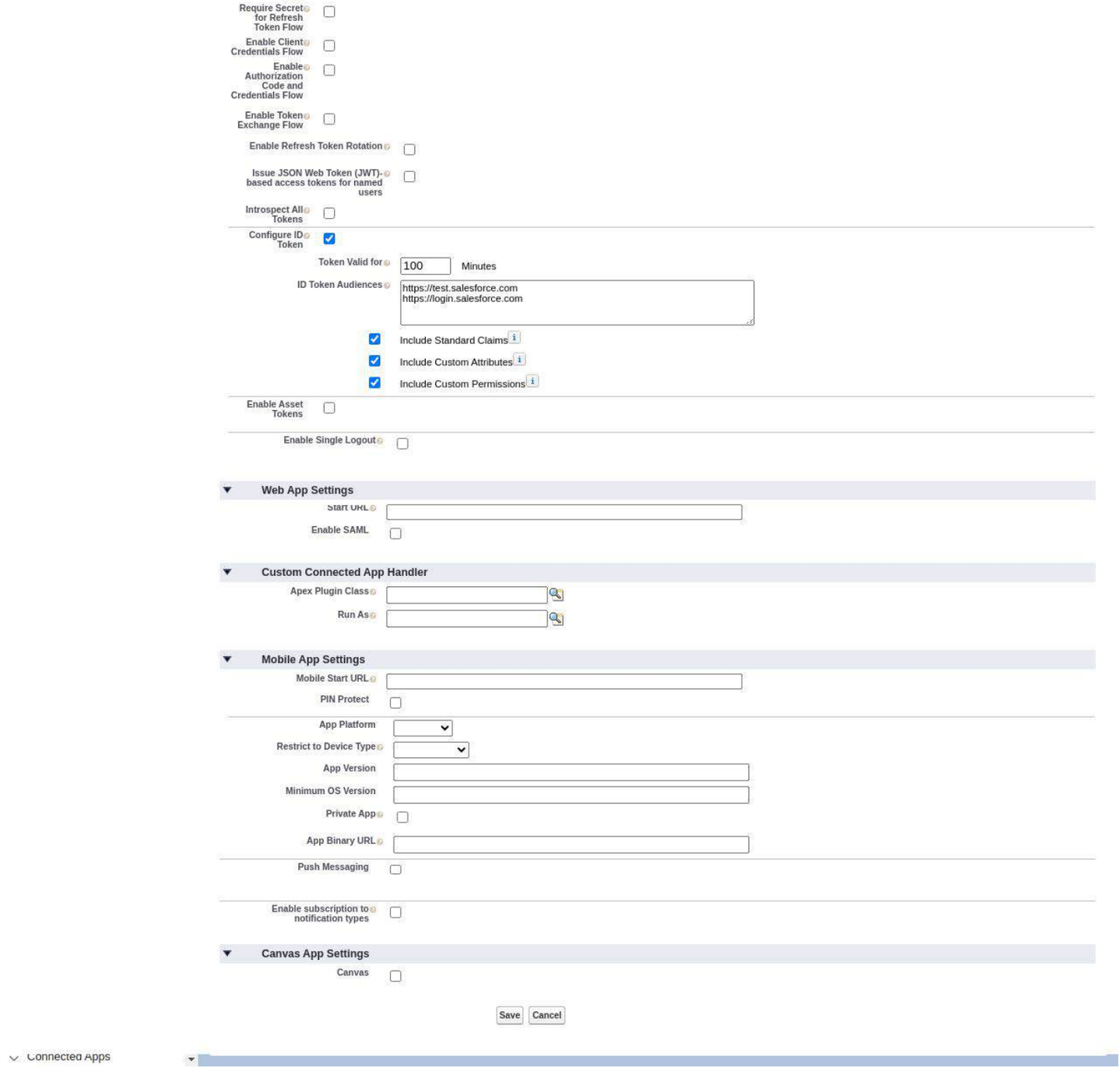
## STEP 3




➔ **Navigate to Setup > Apps > App Manager > New Connected App, then click "New Connected App" in the top right corner to create a new app.**

## STEP 4






Providing the required information:

→ Connected App Name: Enter name for your connected app

→ API Name: This will auto-populate based on the Connected App Name

→ Contact Email: Your Salesforce email address

→ Contact Phone: Enter your phone number

→ Enable OAuth Settings: Enable API OAuth Settings by ticking on the box

→ API (Enable OAuth Settings): Enable all the settings below to proceed

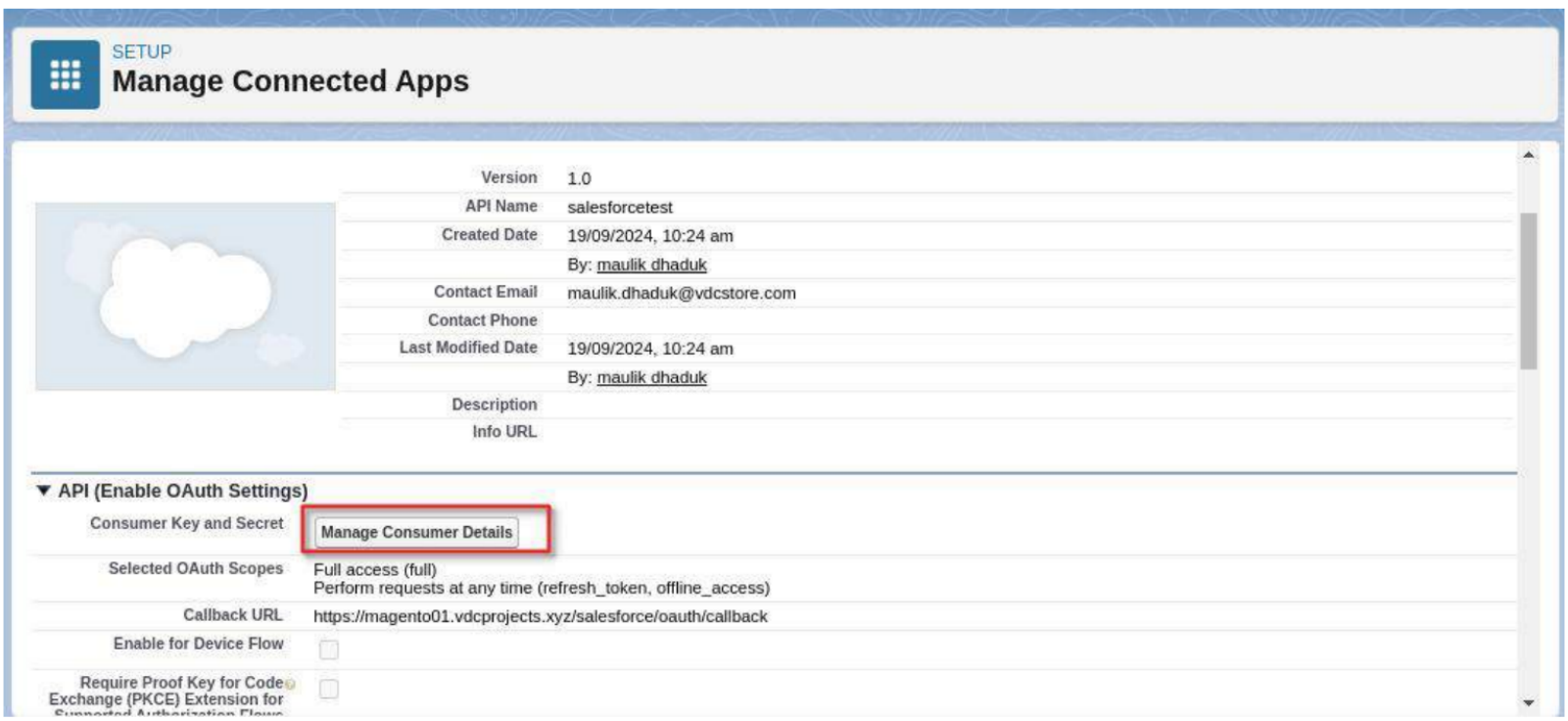
Enable OAuth Settings:

→ Callback URL: For the Callback URL, use the format provided in the reference link. https://your_domain_site/salesforce/oauth/callback

→ Selected OAuth Scopes: Choose the 'full access' option and 'Perform requests on your behalf at any time (refresh_token, offline_access)' to submit requests on your behalf whenever needed.

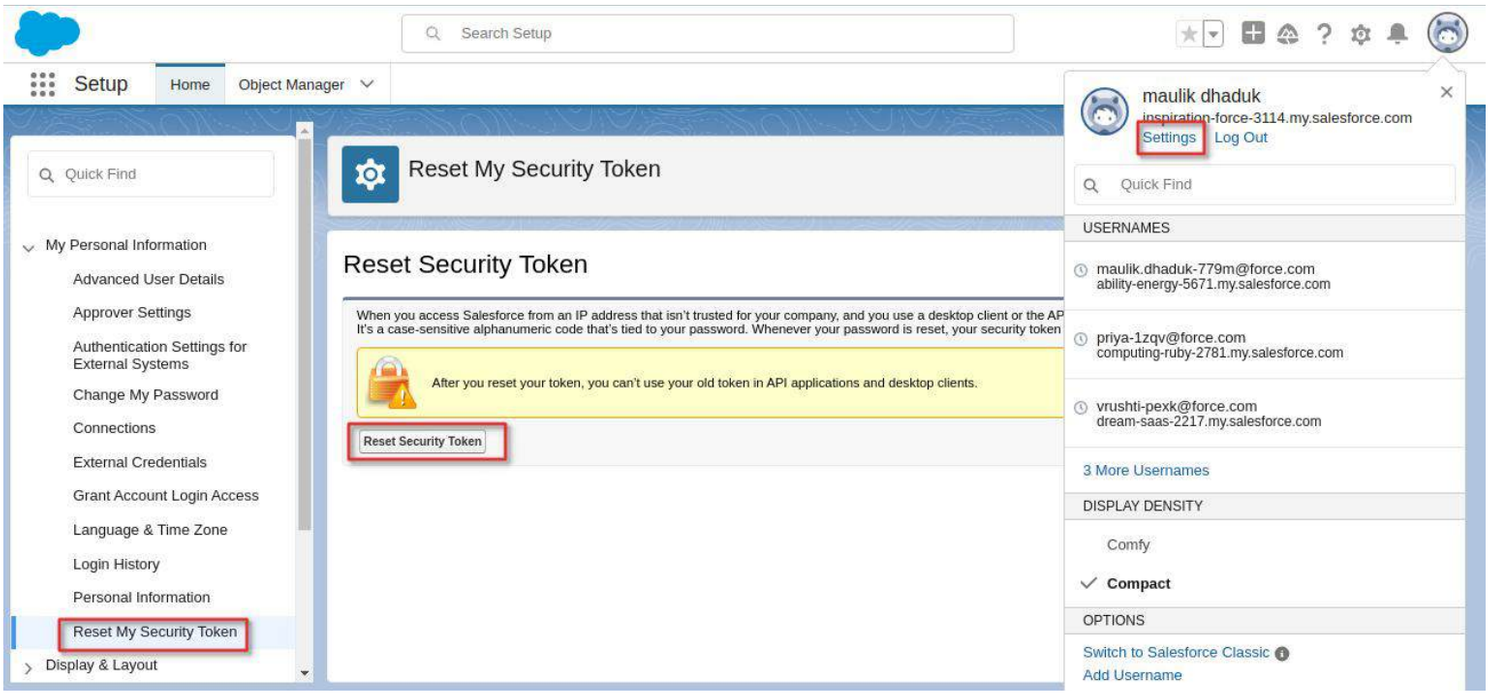
- → Require Secret for Web Server Flow: Select Require Secret for Web Server Flow.
- → Configure ID Token: Click on the check box. Now set 'Token Valid for' in minutes (For example you set for 100 minutes then type 100 into the box)
- → ID Token Audiences => https://test.salesforce.com, https://login.salesforce.com, and click on checkboxes such as 'Include Standard Claims', 'Include Custom Attributes, and 'Include Custom Permissions.

## STEP 5



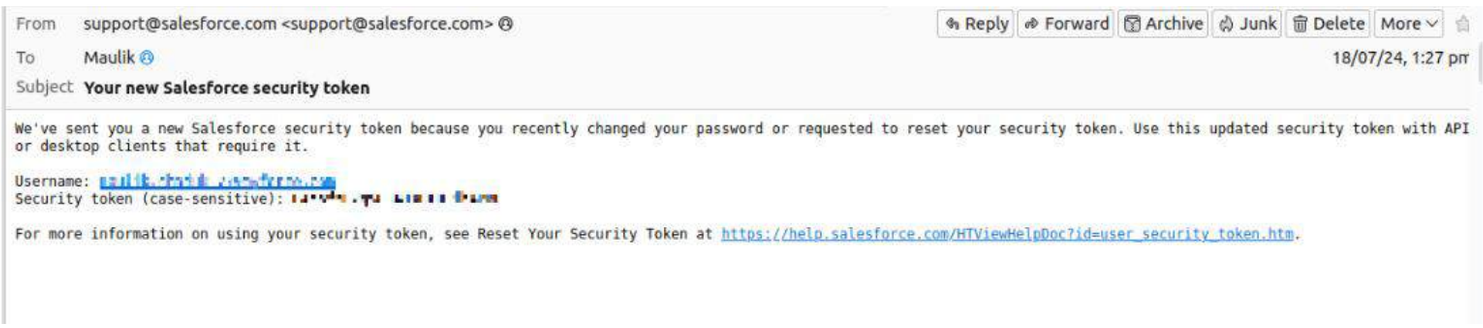

- → After filling out all the details, the output will appear as above.
- → Also, you can manage your Consumer Key and Secret by clicking on "Manage Consumer Details".

## STEP 6




→ Go to open user profile > Go to settings > My Personal info > reset my security token. Click on "Reset Security Token": Check your email after clicking this option.

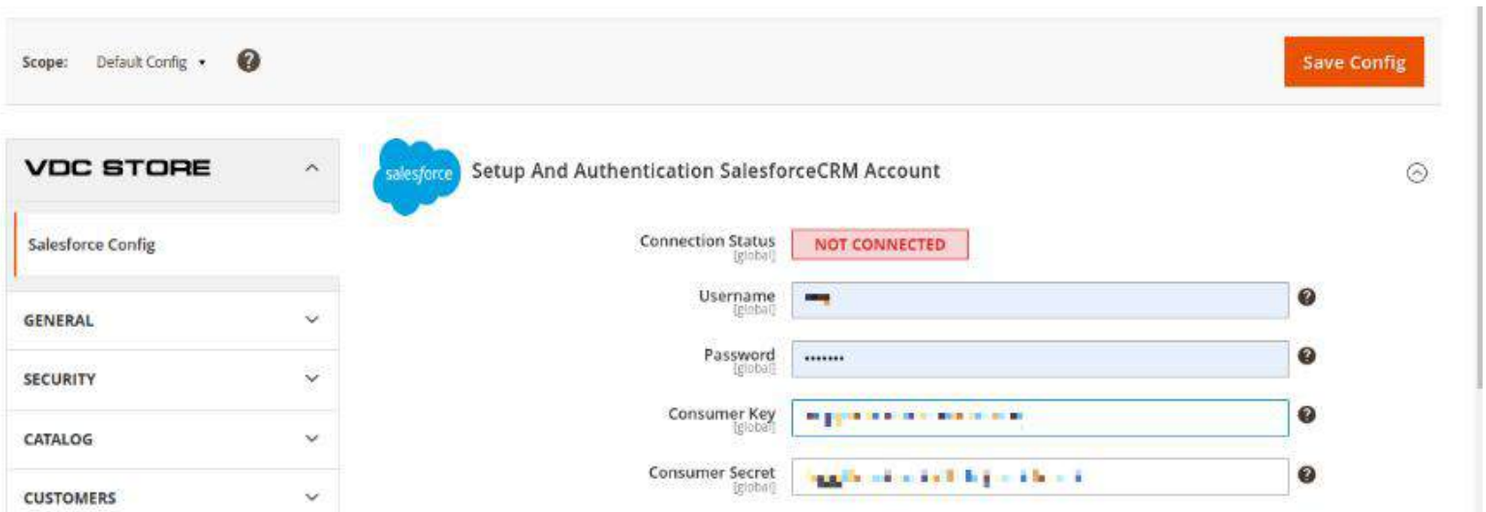
## STEP 7




→ A new security token will be sent to your registered email.

→ Use the Security Token: You'll need this token for configuration purposes.

## STEP 8

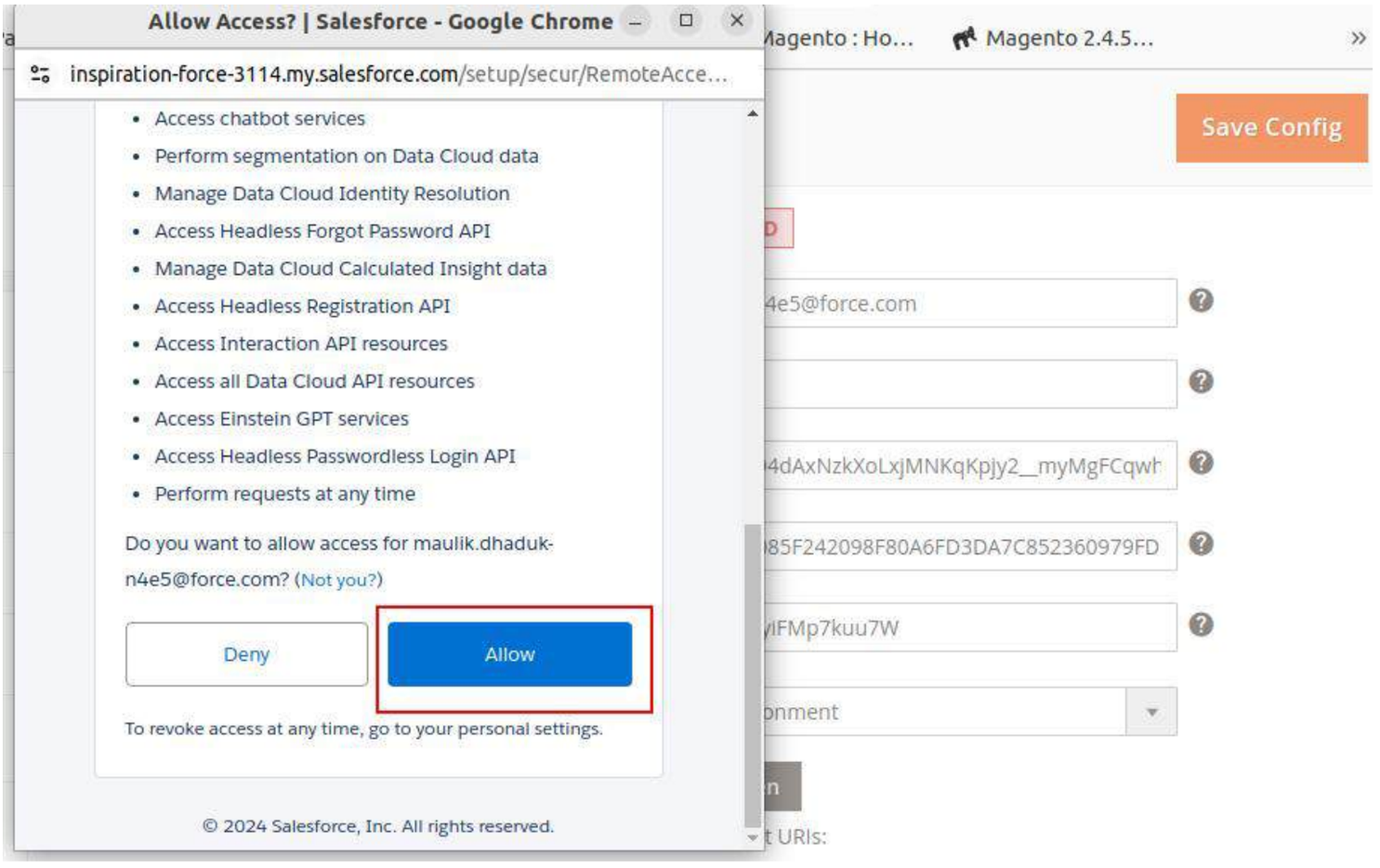


- Setup and Authentication of SalesforceCRM account
  Go to Admin > VDC STORE > Salesforce Integration > Configuration.
- Username: Enter your Salesforce login username.
- Password: Enter your Salesforce password.
- Consumer Key: Locate this in Salesforce by navigating to Home > Platform Tools > Apps > App Manager, and select your app. Refer to the guide "Get consumer key and consumer secret  by connected app" for details.
- Consumer Secret: Similarly, find this under Home > Platform Tools > Apps > App Manager for your app. Consult the guide mentioned above.
- Obtain Security Token: Refer to the guide "Reset Security Token" to receive a new security token, which will be sent to your registered email.
- Select Salesforce Environment: Choose either the sandbox environment or the production environment.
- Enable Debugging: If needed, enable debugging to log data responses to the `salesforce.log` file on your system.
- Save Configuration: Click Save Config. If necessary, Refresh the cache, click Get Access, and complete the setup.

NOTE:

- Save the configuration before clicking the Get Access button to prevent a consumer key error.

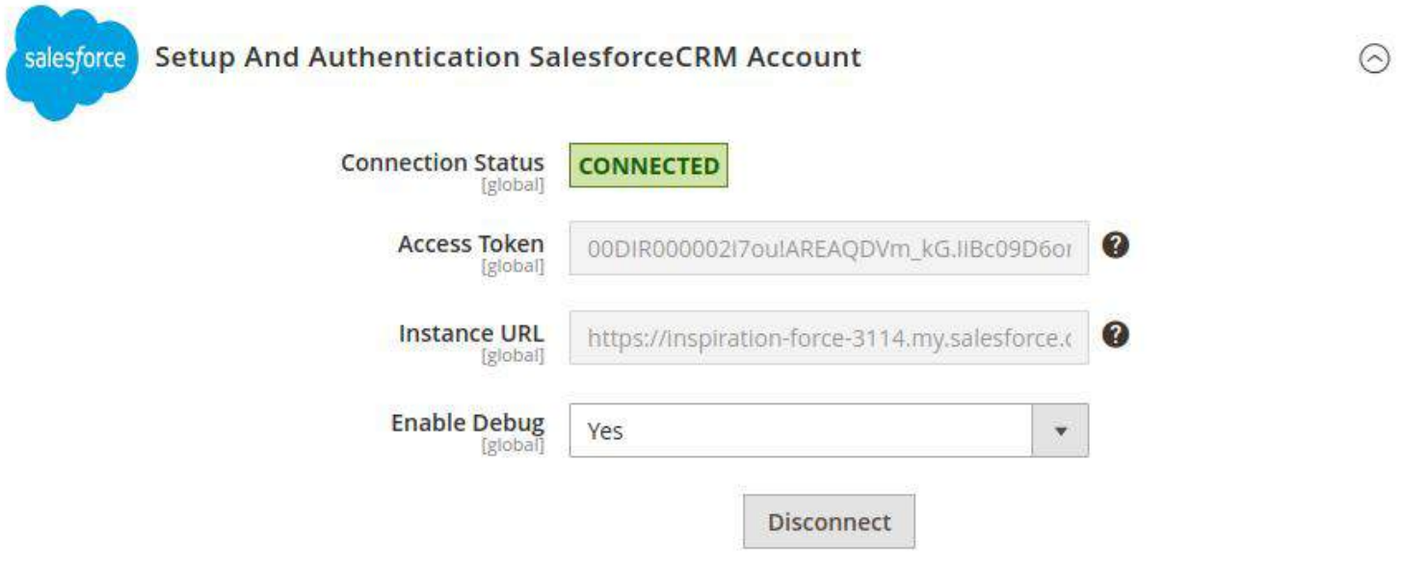
STEP 9




→ The admin will be redirected to the verification page.

→ Click the “Allow” button to proceed. Wait a few minutes for the process to complete, and then review all features of the module to ensure everything is functioning correctly.

## STEP 10

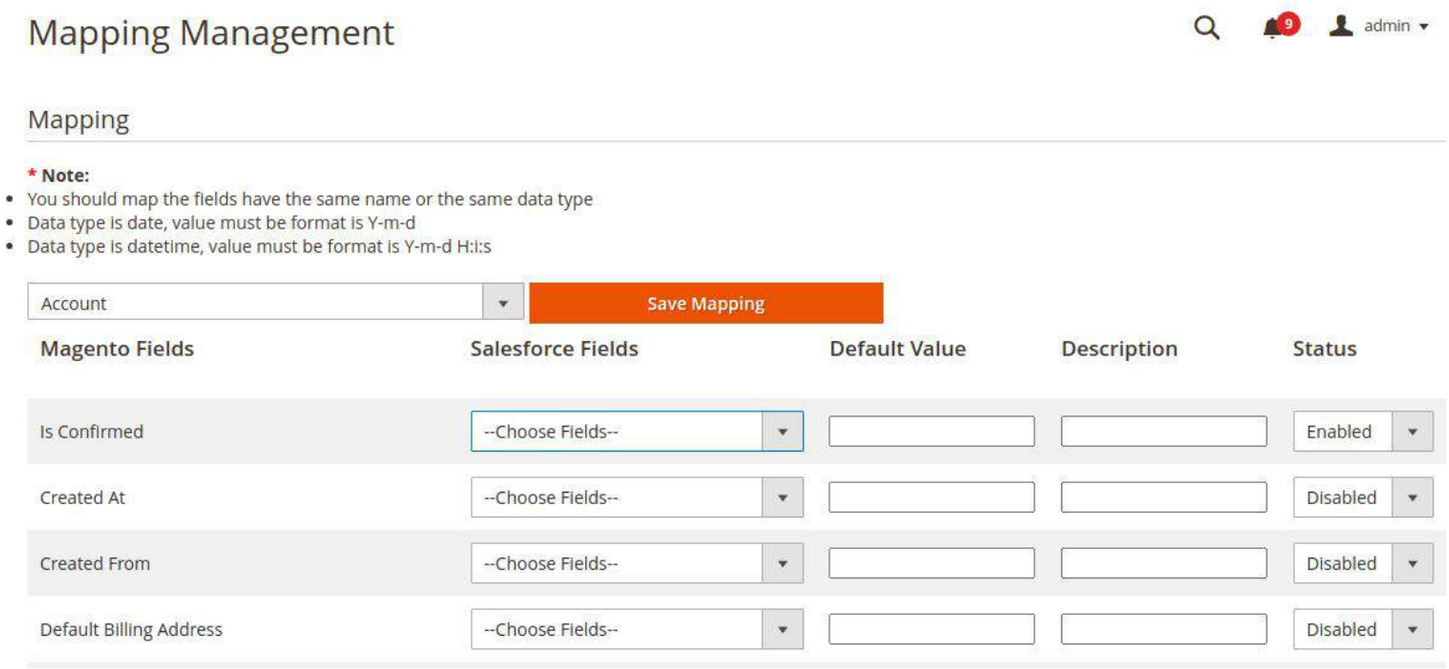



→ The Connection Status will change from "Not Connected" to "Connected," displaying all relevant information as shown in the image above

→ Once the integration is successful, the admin can map fields from Salesforce to

Magento and synchronize data between Magento and Salesforce.

## STEP 11

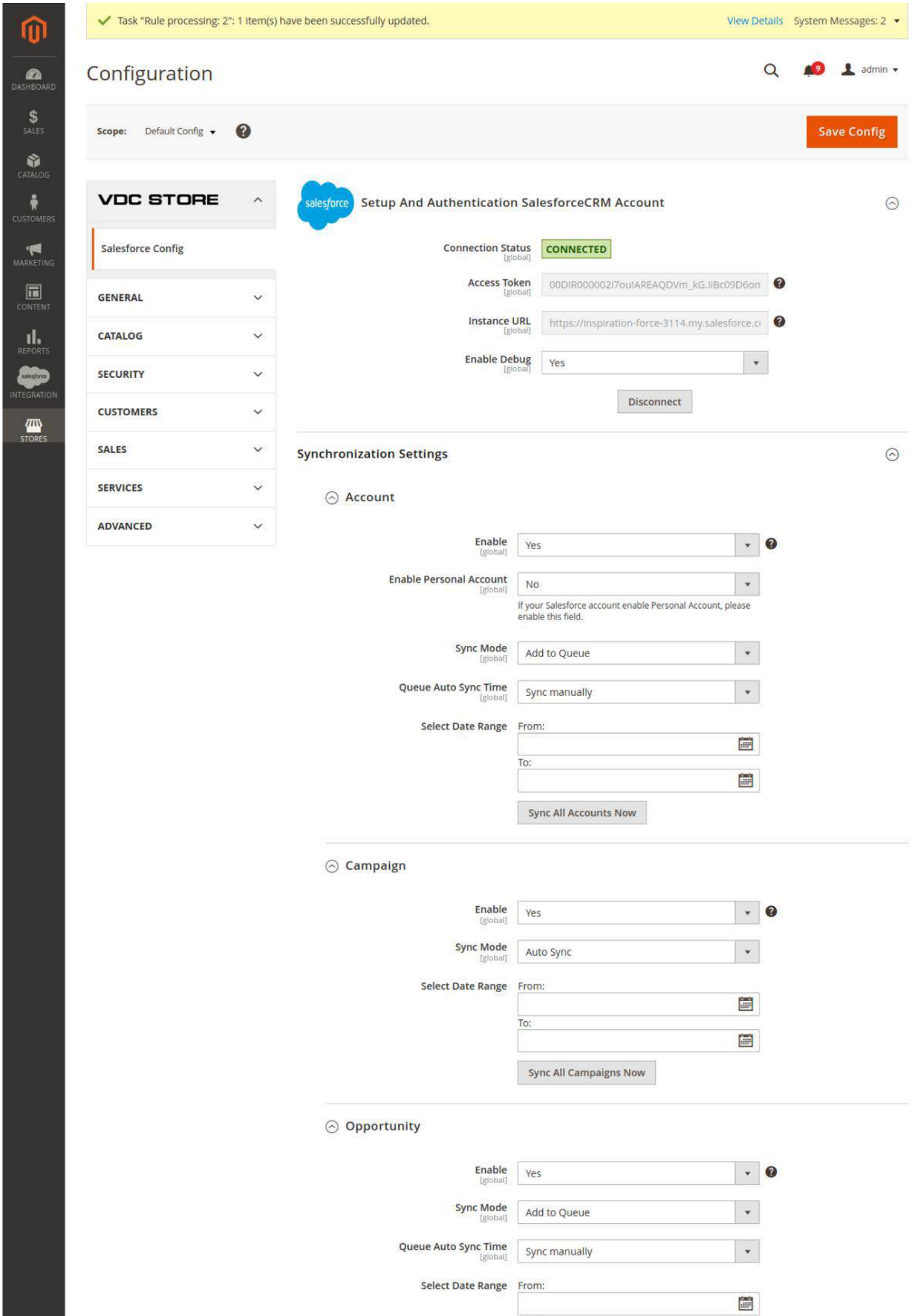



How to synchronize data from the Magento 2 store to the Salesforce CRM account

Setting Up Field Mapping

- → First, you must create the necessary field mappings to accurately synchronize data fields from your Magento 2 store to Salesforce CRM.
- → Navigate to Field Mapping: Go to Admin >Salesforce Integration > Setup Field Mapping.
- → Choose Data Type: In the Mapping Management section, the data type you want to map, such as Accounts, Contacts, Campaigns, Leads, Products, Orders, or Opportunities select 'Account'.
- → Note: Field mapping is not required for Subscriber data.
- → For each field in Magento, select the corresponding field in Salesforce to synchronize data.
- → Field Description: Describe the purpose of each mapped field.
- → Default Value: Define a default value for objects without data to sync. If no default value is set, the field will be empty.
- → Status: Enable or disable the field mapping as needed.
- → Note: Salesforce has field-level security that can restrict access to certain fields. If some fields do not appear in the backend, you may need to adjust Salesforce permissions to make them visible.

STEP 12


Task "Rule processing: 2": 1 item(s) have been successfully updated.
View Details
System Messages: 2
DASHBOARD
SALES
CATALOG
CUSTOMERS
MARKETING
CONTENT
REPORTS
INTEGRATION
STORES
Configuration
admin
Scope: Default Config
Save Config
VDC STORE
Salesforce Config
GENERAL
CATALOG
SECURITY
CUSTOMERS
SALES
SERVICES
ADVANCED
Setup And Authentication SalesforceCRM Account
Connection Status [global]
CONNECTED
Access Token [global]
00DIR000002I7ou!AREAQDVm_kG.IiBc09D6on
Instance URL [global]
https://inspiration-force-3114.my.salesforce.c
Enable Debug [global]
Yes
Disconnect
Synchronization Settings
Account
Enable [global]
Yes
Enable Personal Account [global]
No
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]
Auto Sync
Select Date Range
From:
To:
Sync All Campaigns Now
Opportunity
Enable [global]
Yes
Sync Mode [global]
Add to Queue
Queue Auto Sync Time [global]
Sync manually
Select Date Range
From:

To:

Sync All Orders to Opportunities Now

## Contact

Enable [global] — Yes

Linked Contact with Account [global] — No

Sync Mode [global] — Add to Queue

Queue Auto Sync Time [global] — Sync manually

Select Date Range — From: / To:

Sync All Contacts Now

## Lead

Enable [global] — Yes

Sync Mode [global] — Add to Queue

Queue Auto Sync Time [global] — Sync manually

Select Date Range — From: / To:

Sync All Leads Now

## Order

Enable [global] — Yes

Sync Mode [global] — Add to Queue

Queue Auto Sync Time [global] — Sync manually

Select Date Range — From: / To:

Sync All Orders Now

## Product

Enable [global] — Yes

Sync Mode [global] — Add to Queue

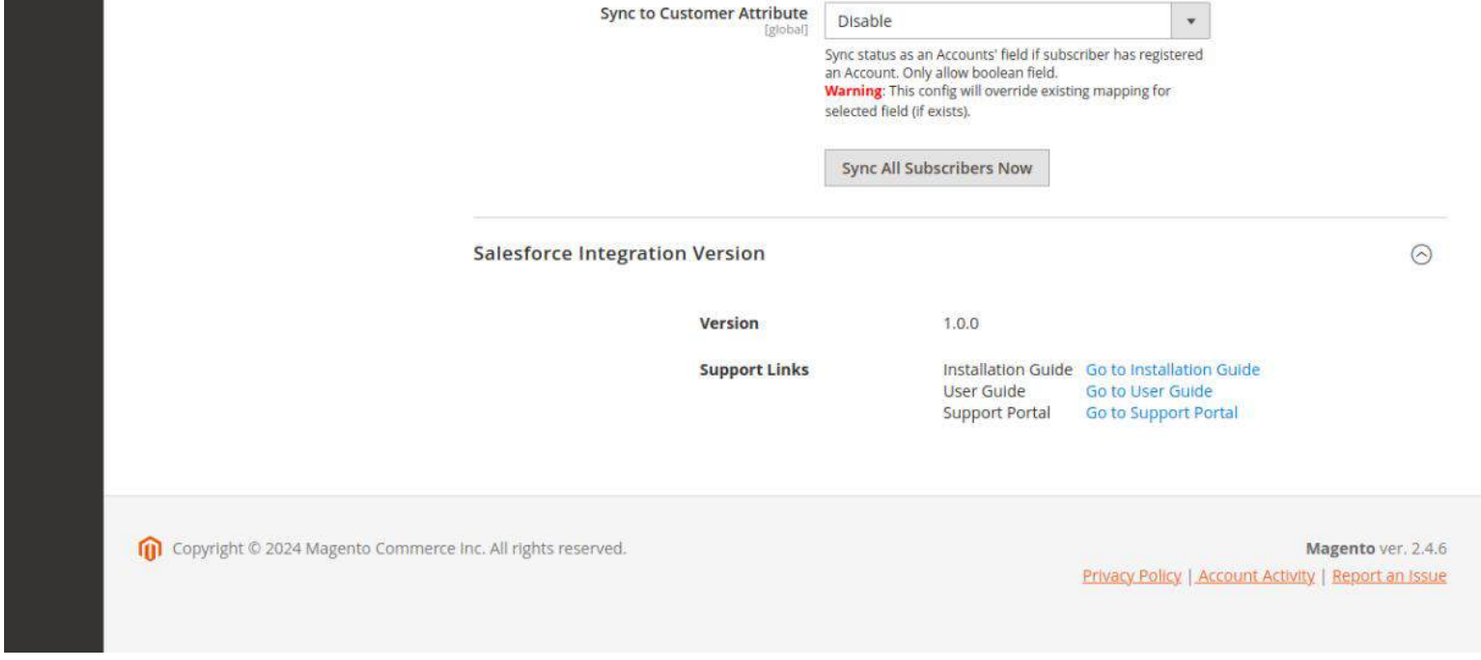
Queue Auto Sync Time [global] — Sync manually

Select Date Range — From: / To:

Sync All Products Now

## Subscriber

Enable [global] — Yes




Synchronization Setting

→ In the Synchronization Settings tab, you can configure synchronization for various data types: Account, Campaign, Opportunity, Contact, Lead, Product, Order, and Subscriber.

→ Enable Sync: Set to Yes to activate synchronization for the selected data type. Once enabled, choose the sync mode:

→ Auto Sync: Automatically synchronizes data to Salesforce when changes occur.

→ Add to Queue: Adds data to the queue before synchronization. Choose the Queue Auto Sync Time from:

- Sync Manually
- 15 minutes
- 1 hour
- 2 hours

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

→ Select Date Range: Use the data filter to limit records based on their Created Date (except for Campaigns, filtered by Start Date and End Date).

→ If the process completes successfully, a widget will notify you and allow you to view the Sync Queue.

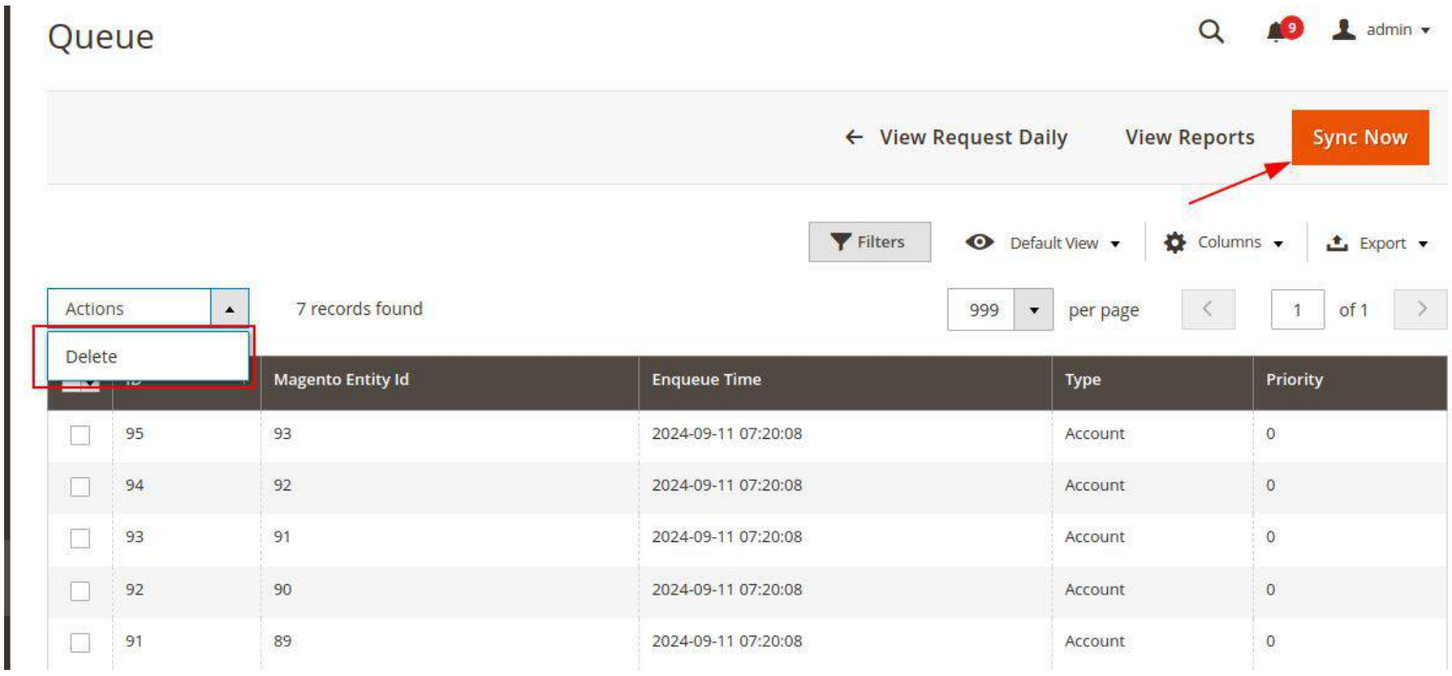
Unique Field

→ Enable Personal Account: Select this option if your Salesforce account uses Person Accounts.

→ Link Contact with Account: When enabled, the module will attempt to sync records to a

Salesforce Account before syncing them to Salesforce Contact.

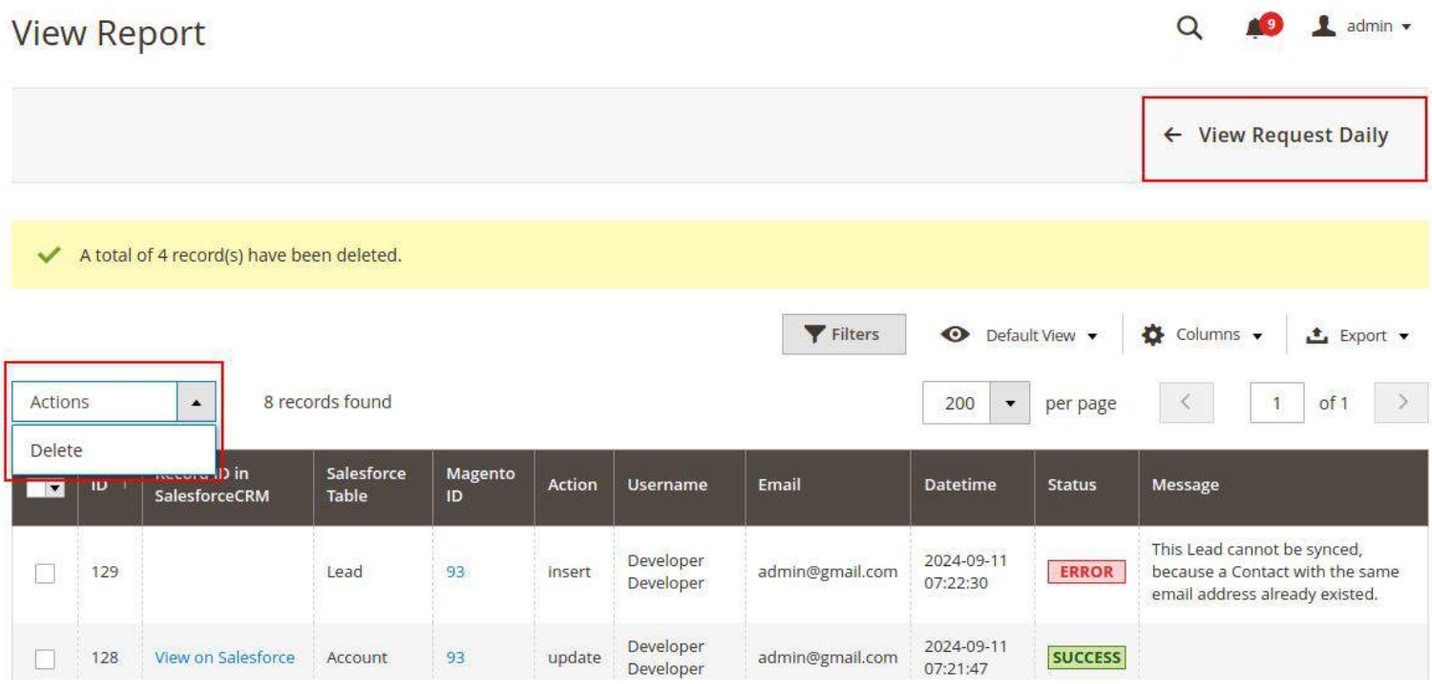
## STEP 13




→ Go to Admin > Salesforce Integration > Queue Page, and select Actions > Delete to remove any data you do not wish to sync. Then, click the Sync Now button to immediately synchronize the remaining data to Salesforce.

→ Note: Synchronization time may vary depending on the amount of data being processed.

## STEP 14



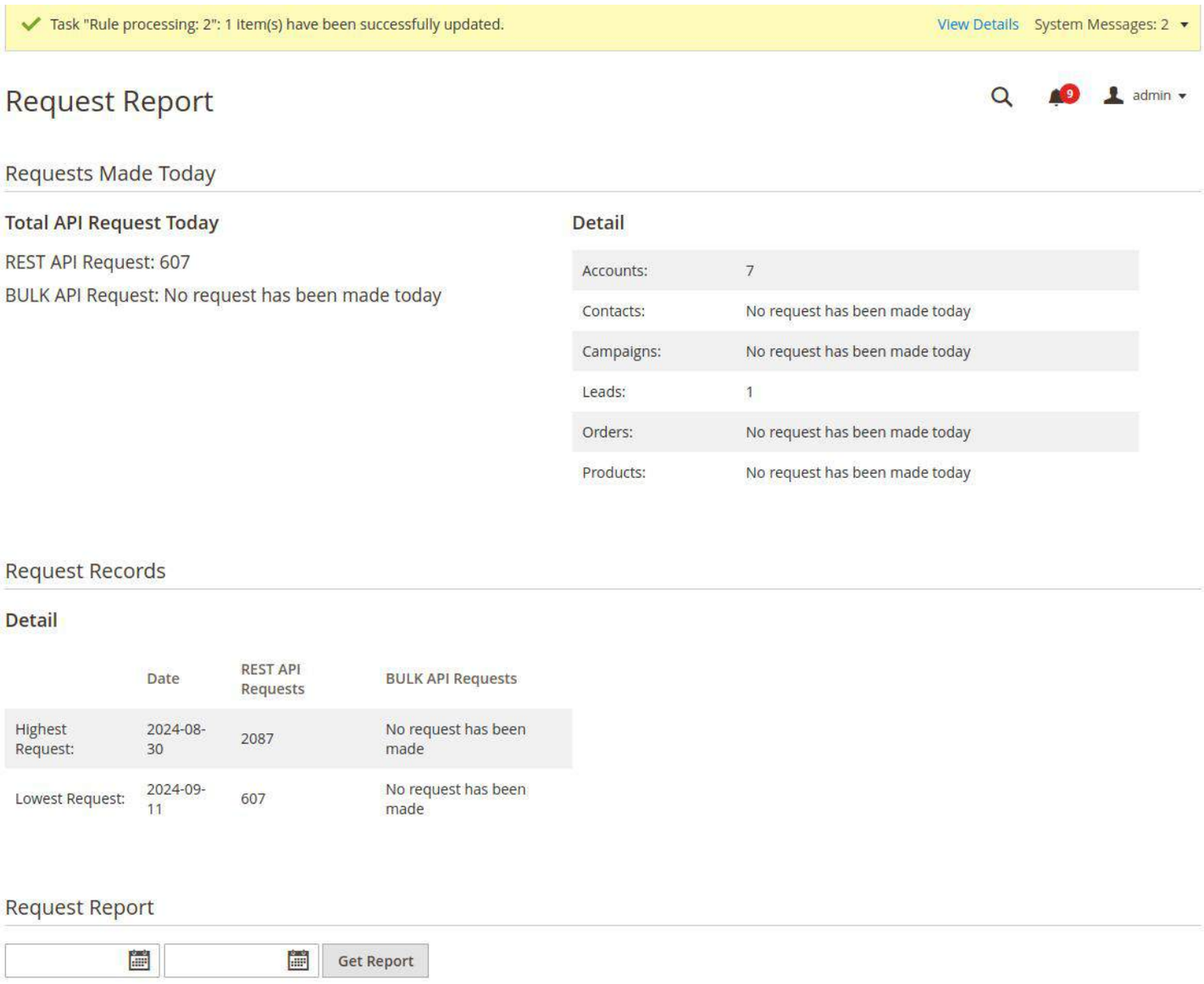

→ Go to Admin > Salesforce Integration > View Report

- Once the synchronization process is complete, navigate to Salesforce Integration > View Report to view the list of synchronized records.

- If the data is successfully synced, the Status will show as 'Success'. If there is an issue during synchronization, the Status will be 'Error', and the Message column will provide details of the error

- Additionally, you can review the synchronization status using the 'View Request Daily" buttons.

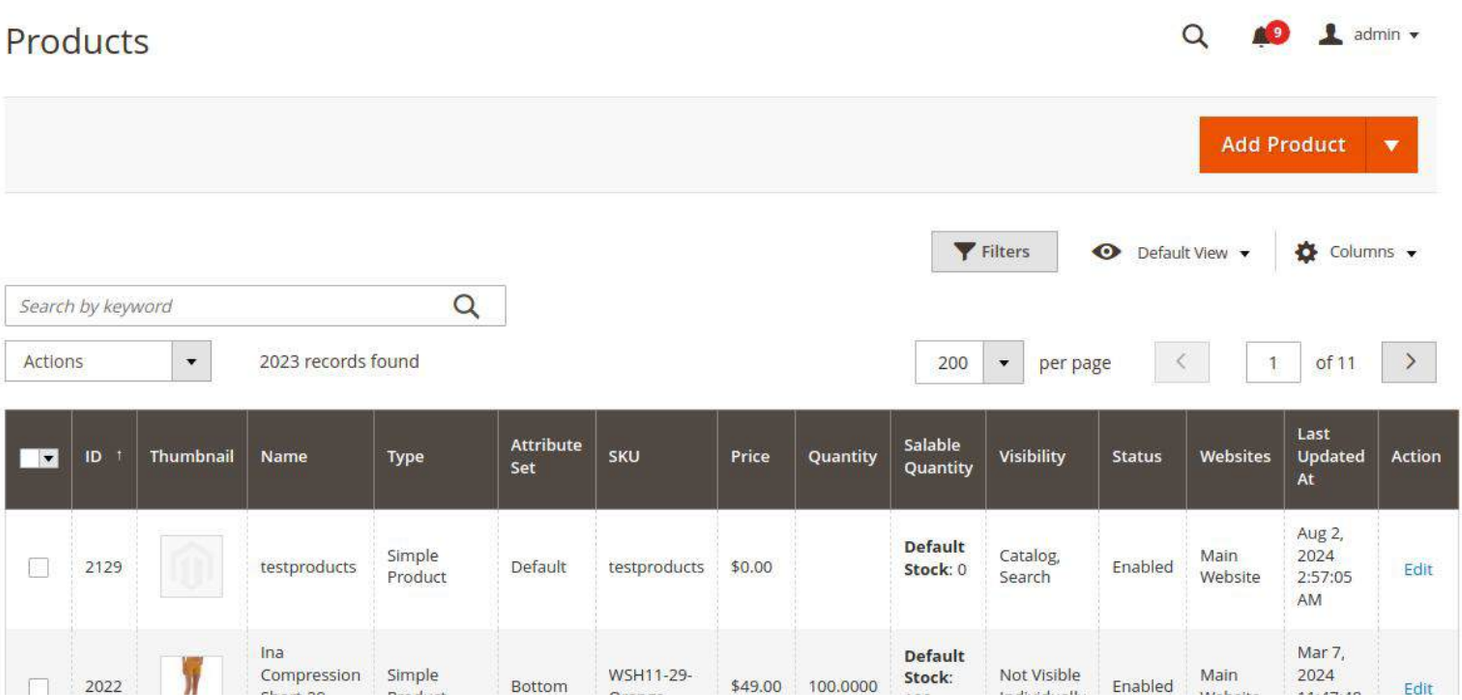
## STEP 15




- Go to Admin > Salesforce Integration > Request Daily Report.

- To monitor synchronization, go to Salesforce Integration > Request Daily Report to track the status of your synchronization efforts.

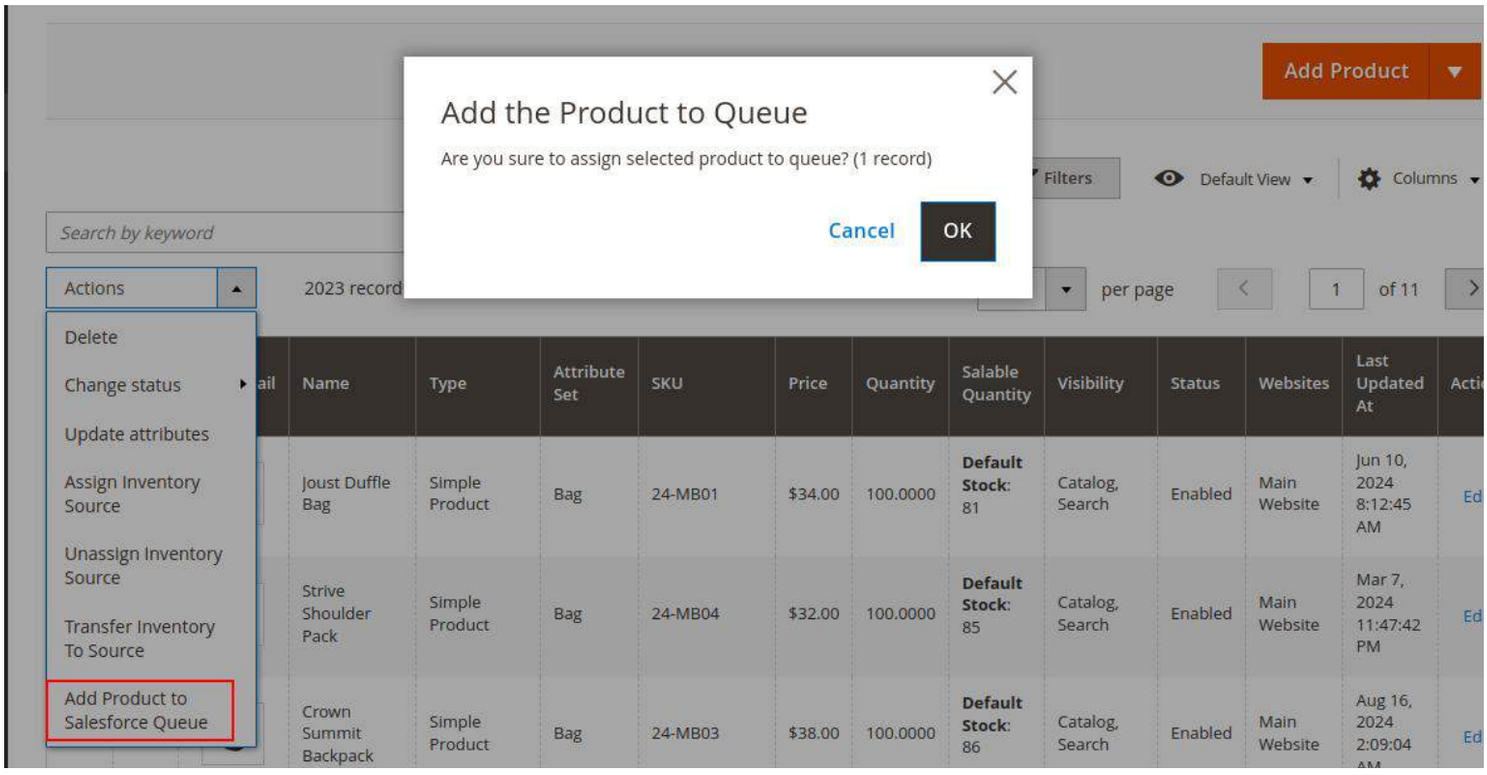
## STEP 16




➔ **Magento Product: Go to Admin > Catalog > Products.**

➔ **Synchronization and updating of specific or all products from your Magento 2 store to Salesforce CRM Products. When a new product is added or an existing product is edited, a corresponding record with its price will be created in Salesforce Products.**

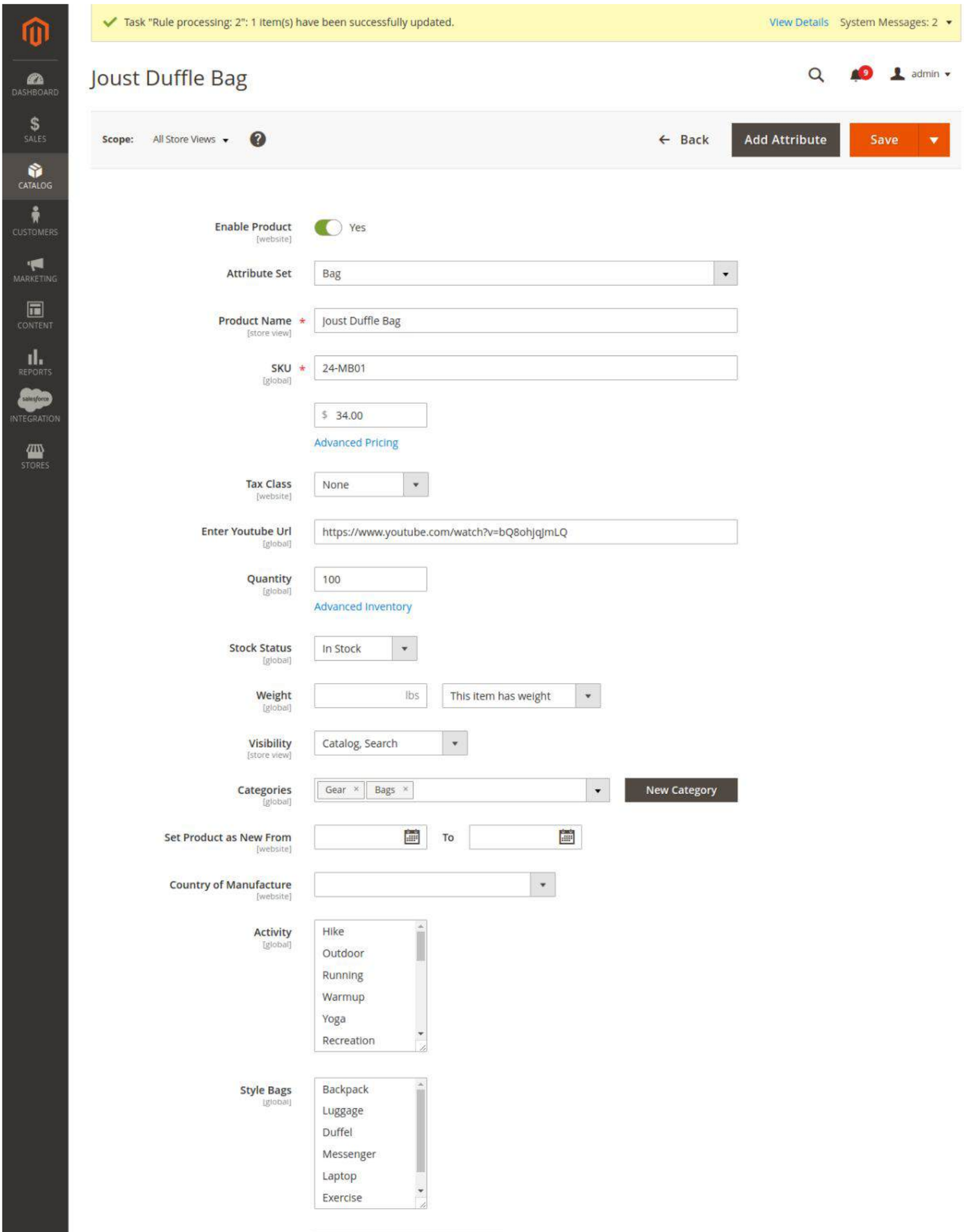
## STEP 17




➔ **To sync the data add all products or select a specific product action option to 'Add**

Products to Salesforce Queue' on the Product Listing page.

STEP 18



**Material** [global]

- Burlap
- Cocona® performance fabric
- Canvas
- Wool
- Cotton
- Fleece

**Color** [global]

Black

**Strap/Handle** [global]

- Adjustable
- Cross Body
- Detachable
- Double
- Padded
- Shoulder

**Features** [global]

- Audio Pocket
- Wheeled
- Hydration Pocket
- Audio Pocket
- Flapover
- Waterproof

**Eco Collection** [global] No

**Performance Fabric** [global] No

**Erin Recommends** [global] No

**New** [global] No

**Sale** [global] No

## Content

## Configurations

Configurable products allow customers to choose options (Ex: shirt color). You need to create a simple product for each configuration (Ex: a product for each color).

Create Configurations

## Product Reviews

## Images And Videos

## Search Engine Optimization

## Related Products, Up-Sells, and Cross-Sells

## Customizable Options

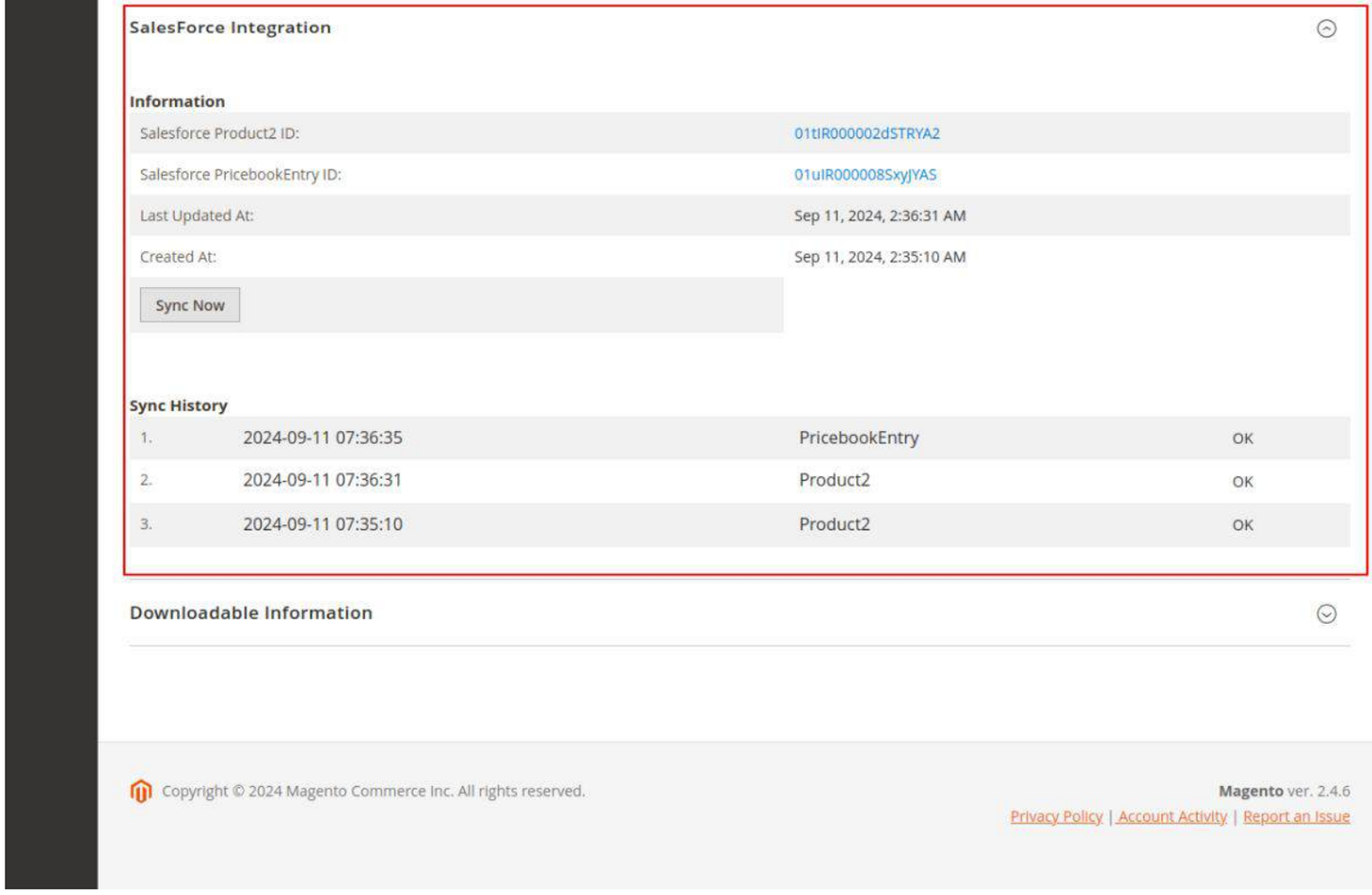
## Product in Websites

## Product Salable Quantity

## Design

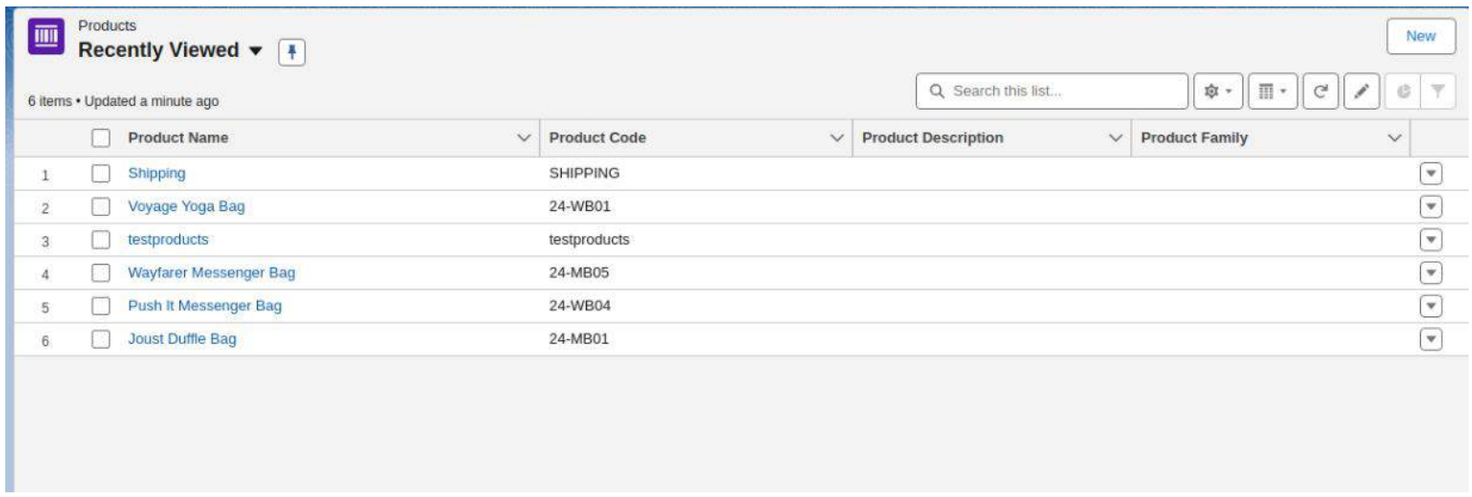
## Schedule Design Update

## Gift Options




- → Navigate: Go to Admin > Catalog > Products.
- → Edit Product: Select and sync a particular single product.
- → Locate Section: Scroll down to find the Salesforce Integration section.
- → View IDs: Check the Salesforce ID for the product and price.
- → Sync Product: Click the Sync Now button to sync theproduct with Salesforce.
- → Check History: Review the product's sync history after synchronization.

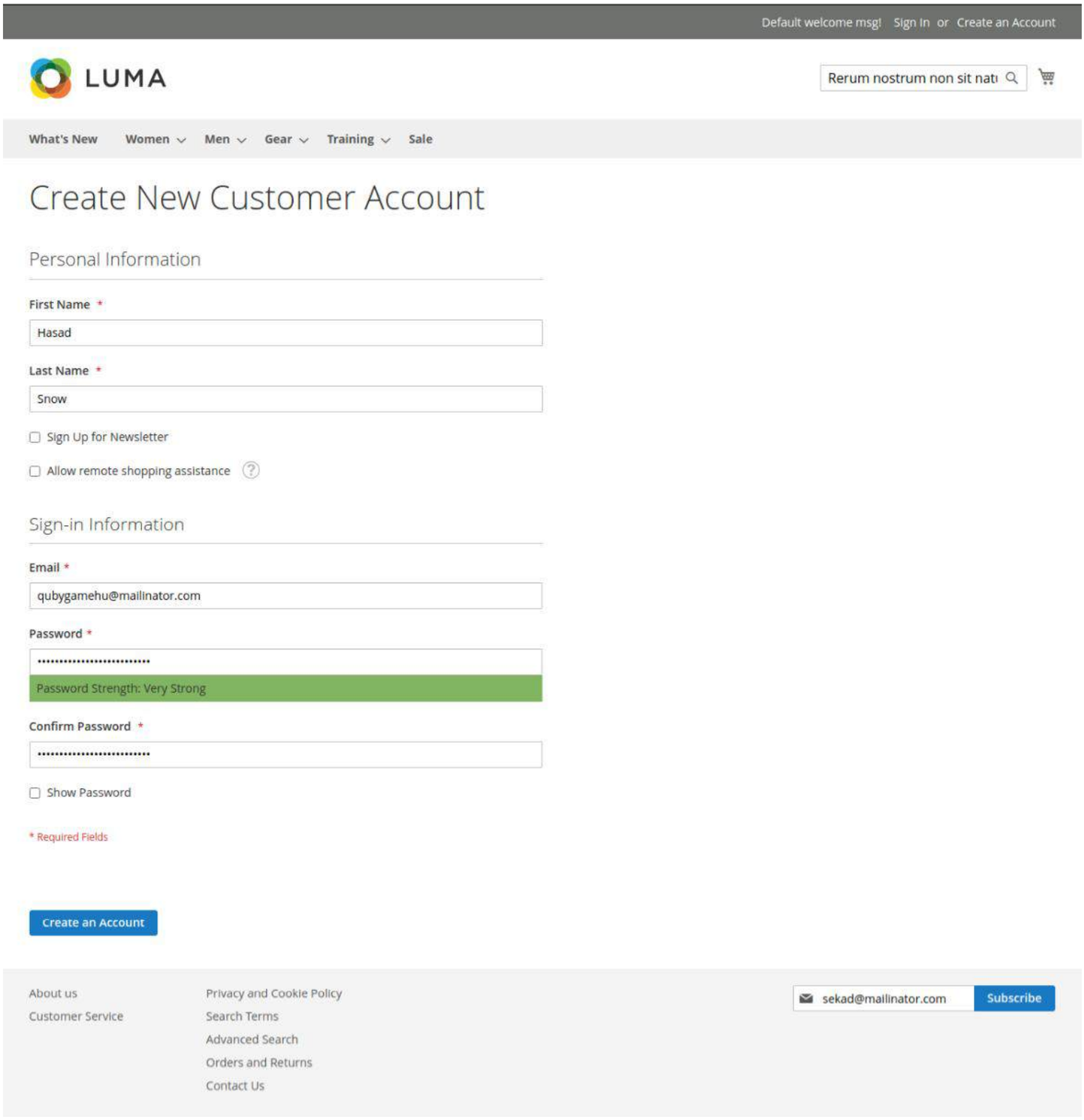
## STEP 19




Salesforce Products

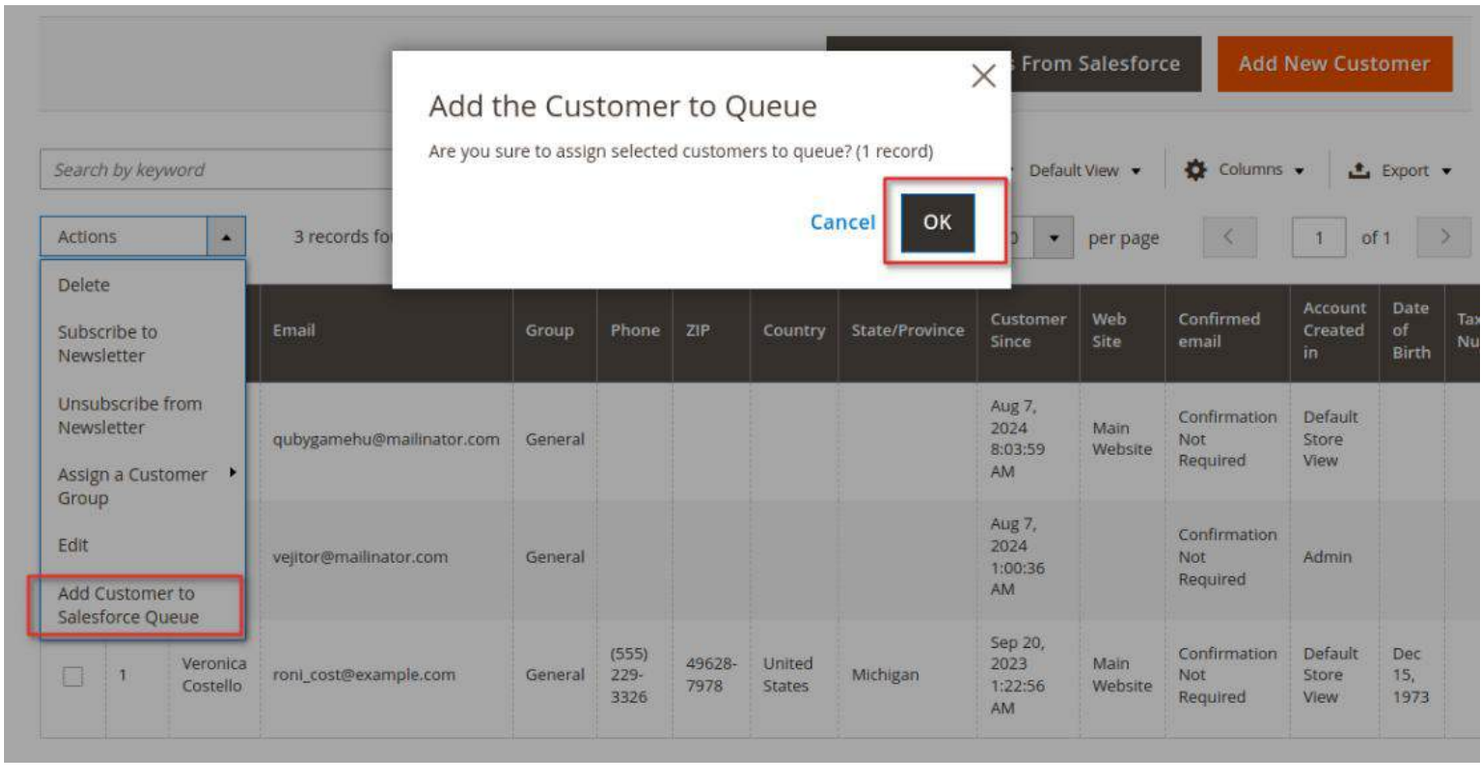
- Synchronize particular or all customers from Magento 2 to Salesforce CRM and update Leads, Contacts, and Accounts. New/updated customer accounts in Magento automatically sync in Salesforce. A 'Salesforce Integration' tab on each customer's profile offers individual syncing abilities.

## STEP 20: Add customer Salesforce Queue




- Create a new customer account and fill in all the necessary details and then click on 'Create an Account'.

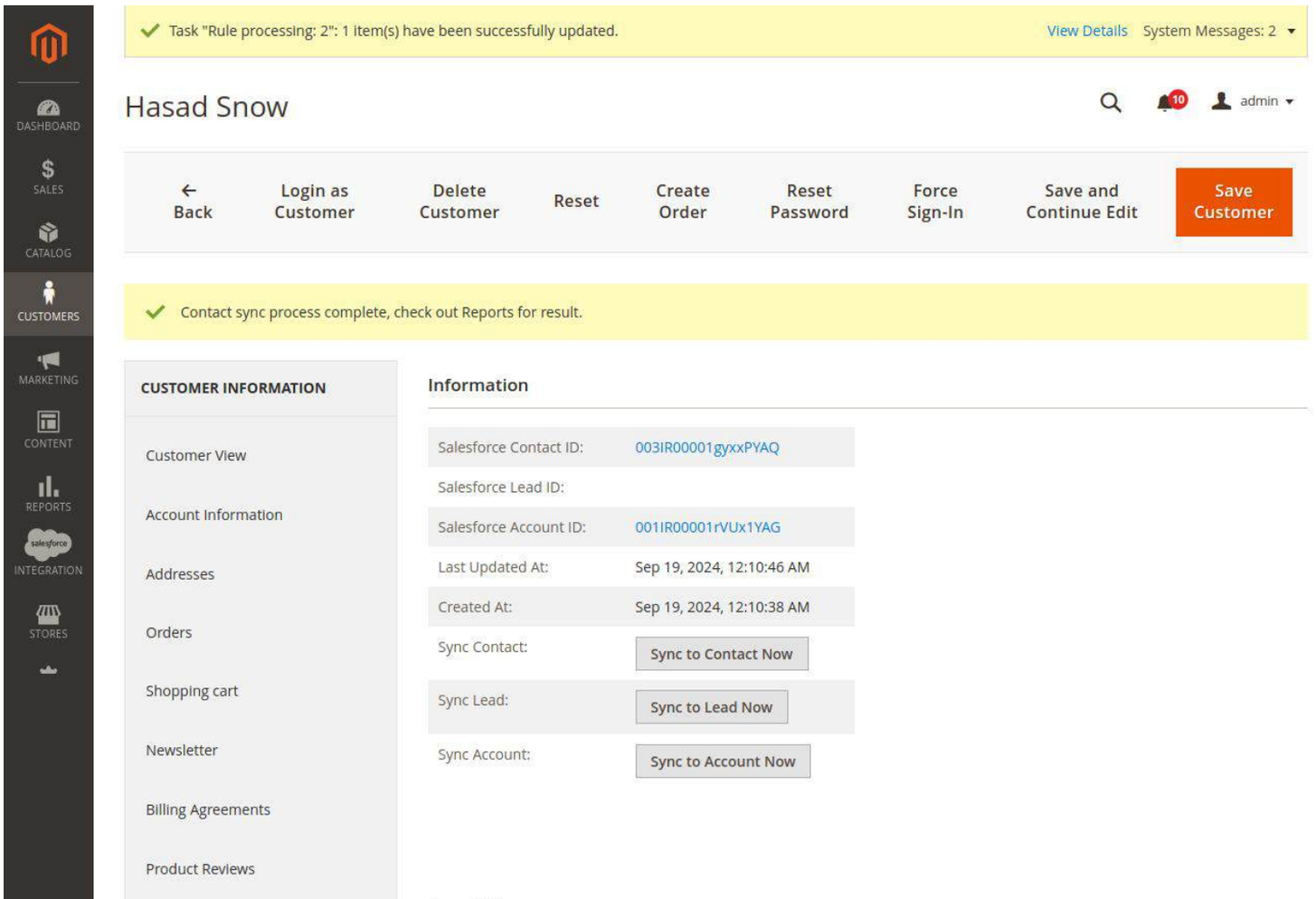
## STEP 21

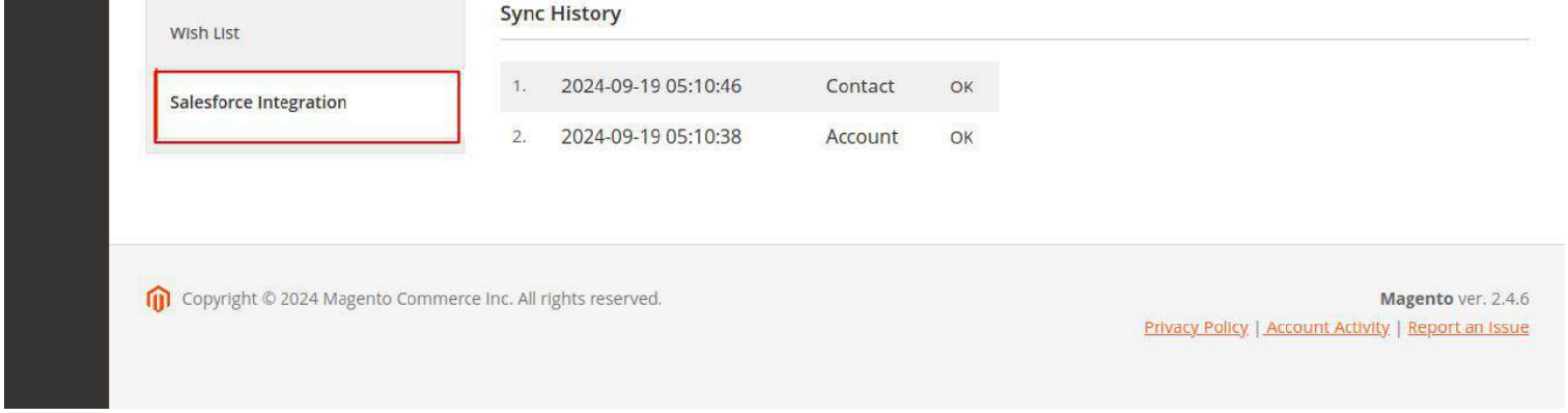



→ **Magento Customer : Go to Admin > Customers > All Customers.**

→ **Add a mass action option called 'Add Customers to Salesforce Queue' on the Customer Listing page.**

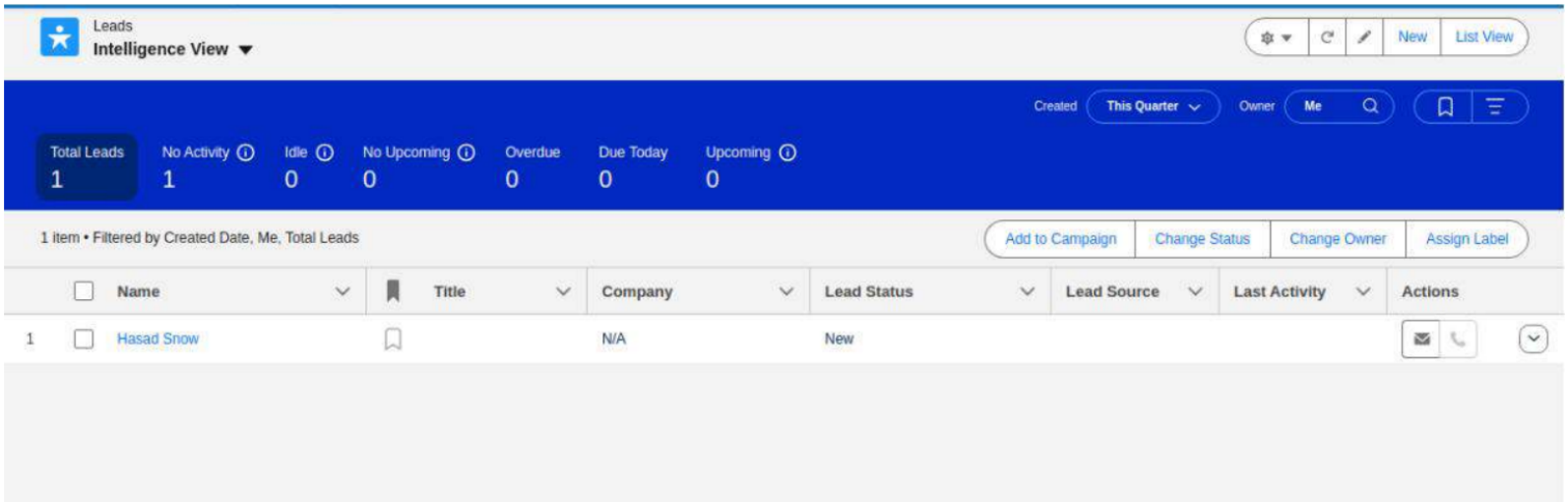
## STEP 22





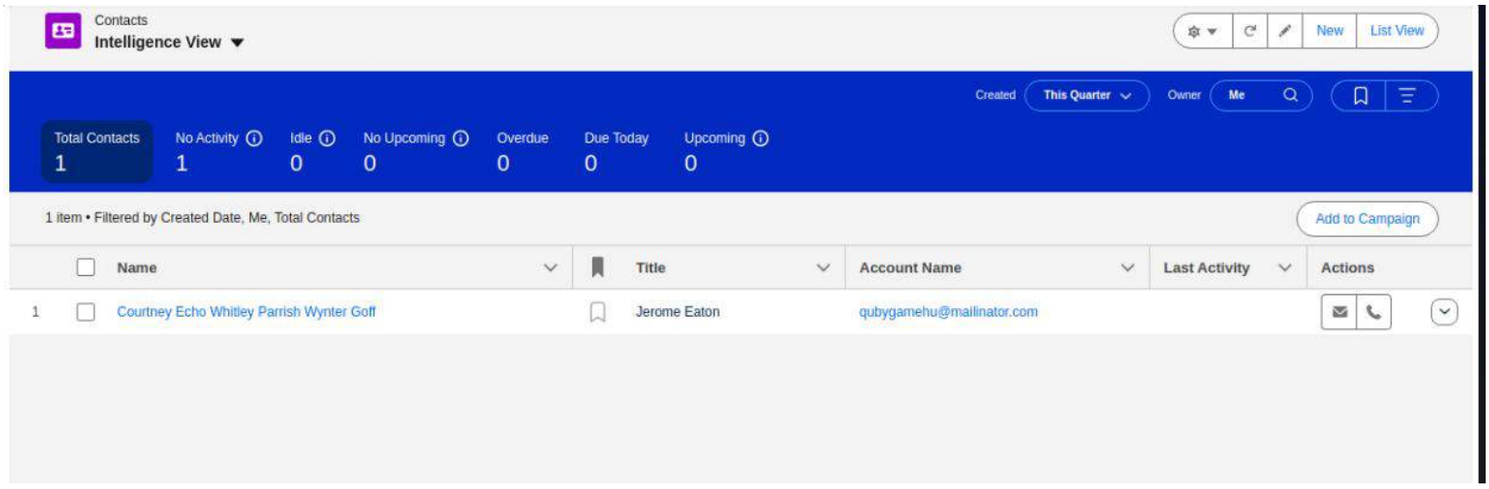

- → Navigate: Go to Admin > Customers > All Customers.
- → Edit Customer: Select and sync a particular single Customer.
- → Locate Section: Scroll down to find the Salesforce Integration section.
- → View IDs: Check the Salesforce ID for the Lead, Contact, and Account.
- → Sync Customer: Click the Sync Now button to sync the customer with Salesforce.
- → Check History: Review the customer sync history after synchronization.

## STEP 23



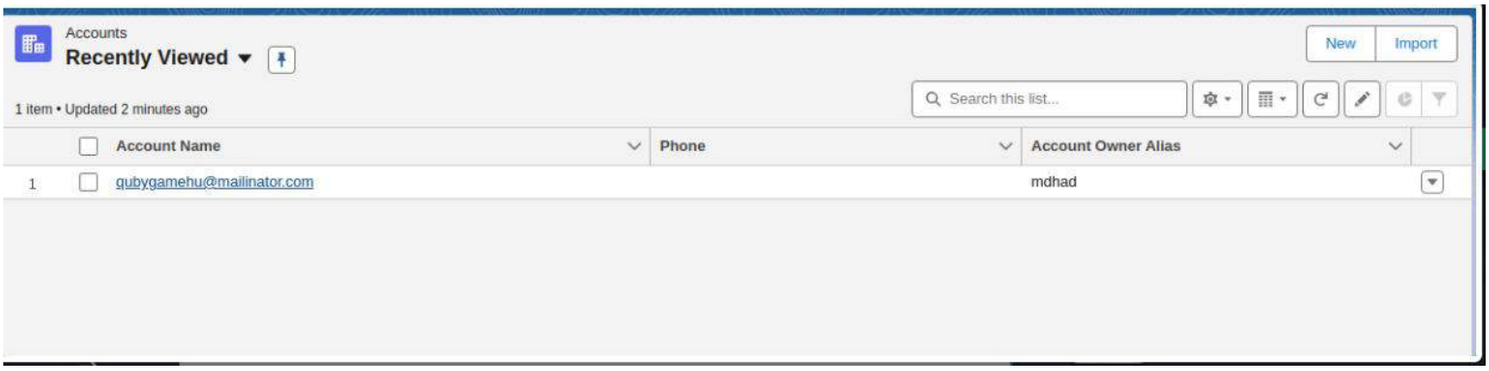

- → Salesforce Leads: You can track Salesforce Leads.

## STEP 24




➔ **Salesforce Contacts: You can check Total Salesforce Contacts**

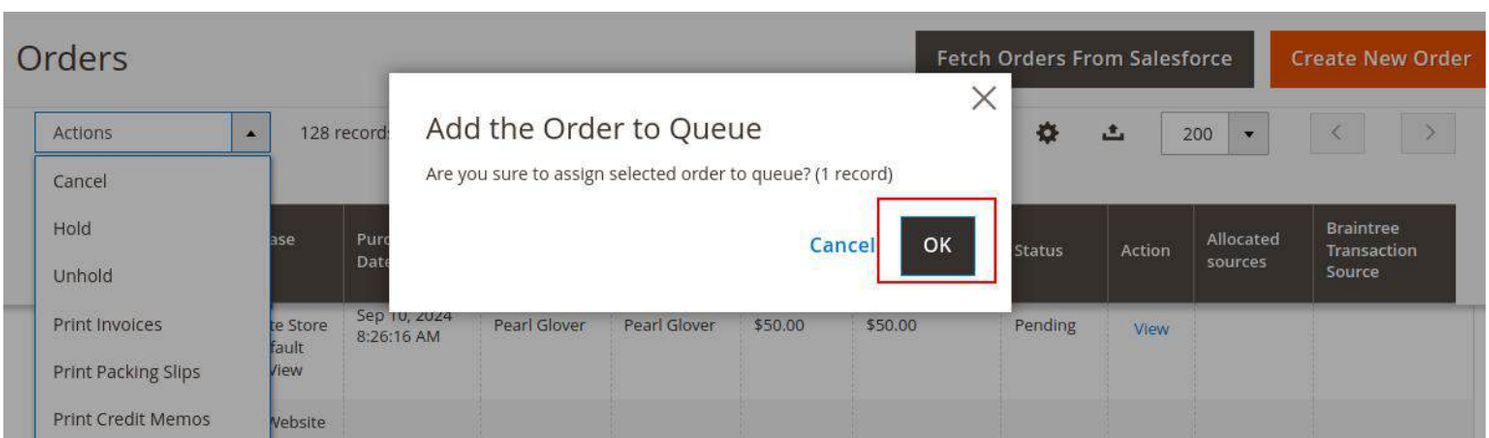
## STEP 25

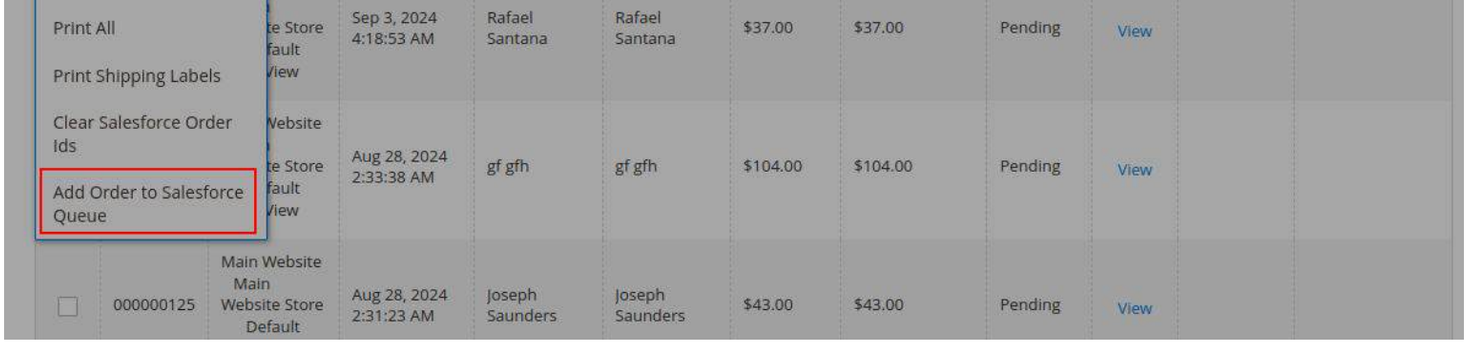



➔ **Salesforce Accounts: You can view Salesforce accounts or those who viewed recently. Enable the synchronization of specific or all orders from your Magento 2 store to Salesforce CRM, including Orders and Opportunities, both manually and automatically. When a customer places an order, the details will be synced to Salesforce's Orders and Opportunities.**

## STEP 26

**Magento 2 Orders Data**

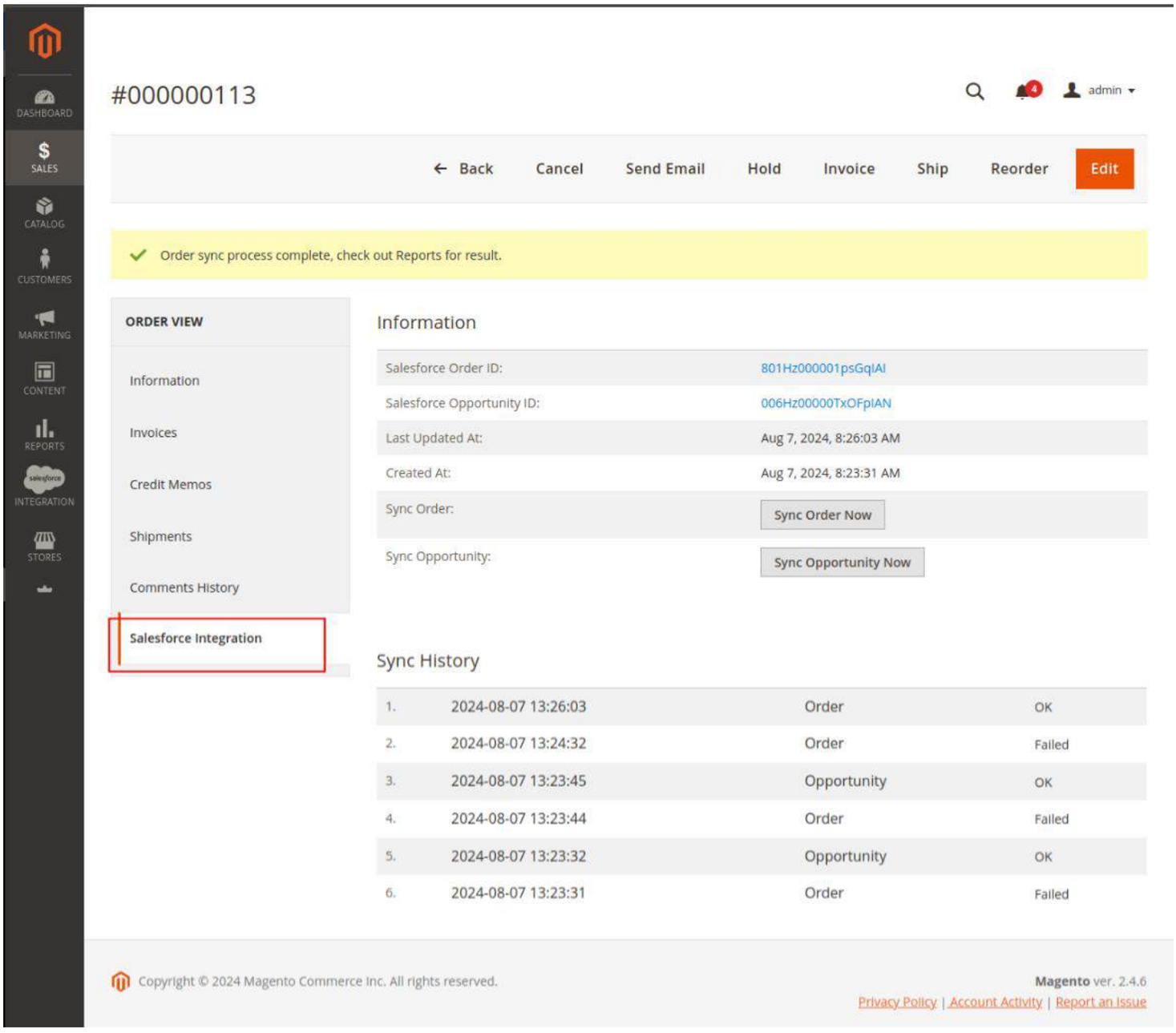





→ Go to Admin > Sales > Orders.

→ Add a mass action option labeled 'Add Order to Salesforce Queue' on the Order Listing page.

## STEP 27




→ Navigate: Go to Admin > Sales > Orders.

→ Edit Order: Select and sync a particular single Order.

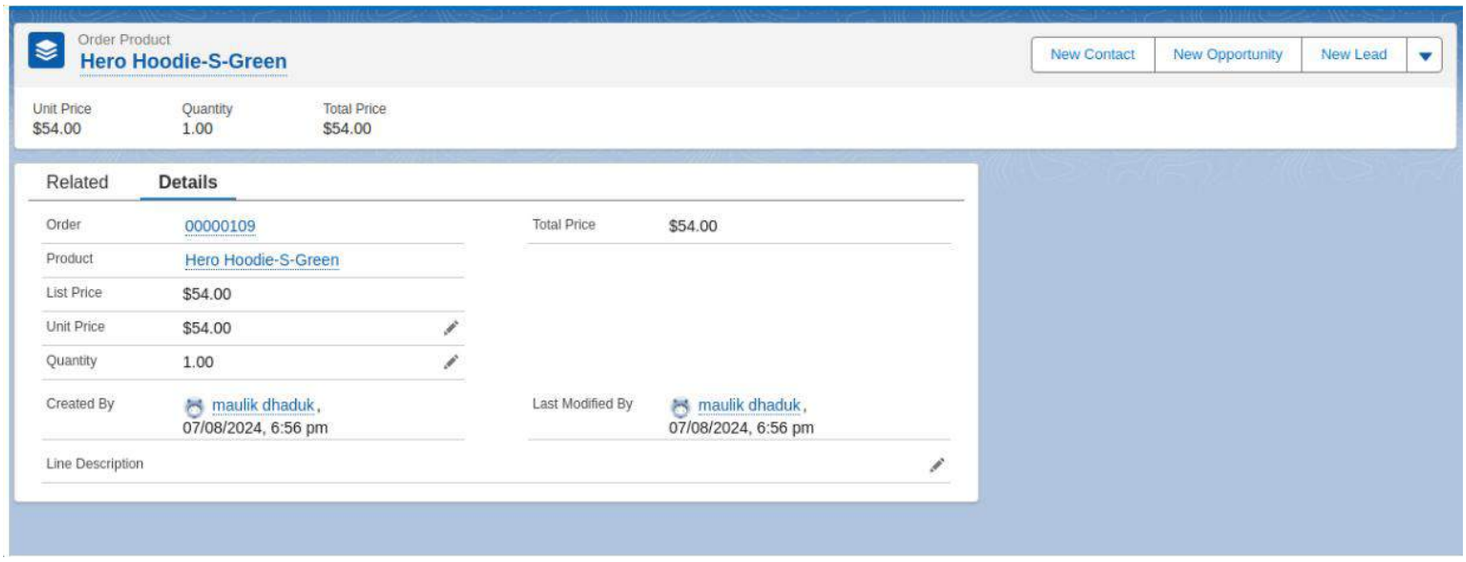
→ Locate Section: Scroll down to find the Salesforce Integration section.

→ View IDs: Check the Salesforce ID for the Order, and Opportunity.

→ Sync Order: Click the Sync Now button to sync the order with Salesforce.

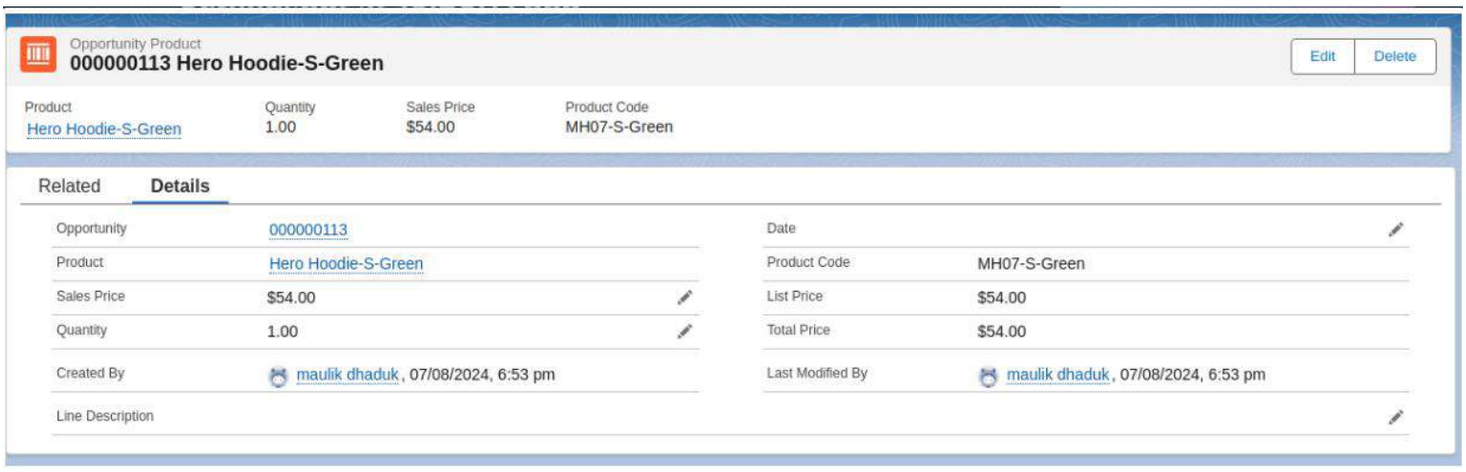
→ Check History: Review the order sync history after synchronization.

## STEP 28



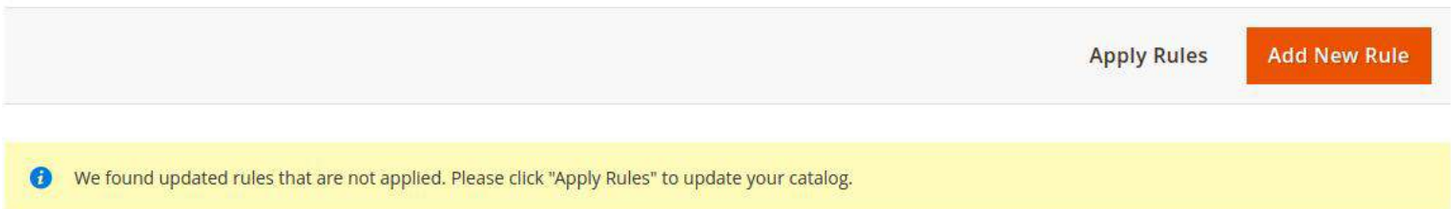

→ Get your Salesforce Order Information.

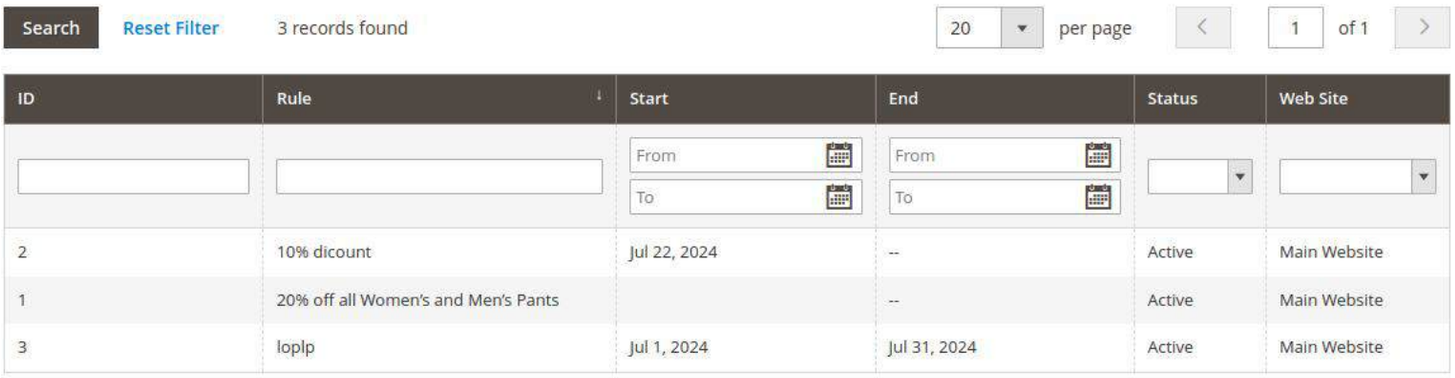
## STEP 29




→ Get your Salesforce Order Opportunities.

## STEP 30



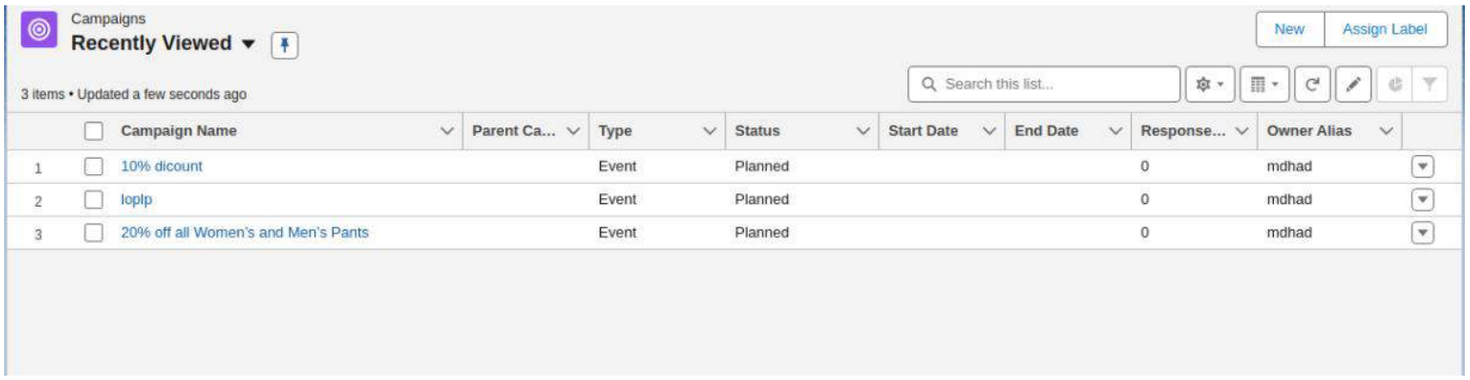


Search | Reset Filter | 3 records found | 20 per page | 1 of 1

| ID | Rule | Start | End | Status | Web Site |
|---|---|---|---|---|---|
| | | From / To | From / To | | |
| 2 | 10% dicount | Jul 22, 2024 | -- | Active | Main Website |
| 1 | 20% off all Women's and Men's Pants | | -- | Active | Main Website |
| 3 | loplp | Jul 1, 2024 | Jul 31, 2024 | Active | Main Website |

- ➔ Magento 2 Catalog Price Rule: Go to Marketing > Catalog Price Rule
- ➔ Enable synchronization and updating of promotions from your Magento 2 store to Salesforce CRM Campaigns, including manual and automatic synchronization. When a store owner launches a new promotion or updates one, Salesforce will include the corresponding campaign.
- ➔ NOTE: Changing the rule name during a campaign update will create a new campaign in Salesforce.

## STEP 31



Campaigns
Recently Viewed
3 items • Updated a few seconds ago

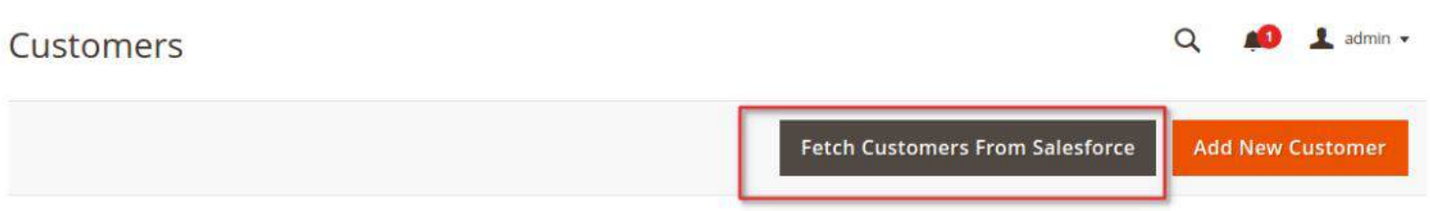
New | Assign Label | Search this list...

| | Campaign Name | Parent Ca... | Type | Status | Start Date | End Date | Response... | Owner Alias |
|---|---|---|---|---|---|---|---|---|
| 1 | 10% dicount | | Event | Planned | | | 0 | mdhad |
| 2 | loplp | | Event | Planned | | | 0 | mdhad |
| 3 | 20% off all Women's and Men's Pants | | Event | Planned | | | 0 | mdhad |

- ➔ Here you can check your Salesforce Campaigns.

## STEP 32

**Fetch Customers From Salesforc**



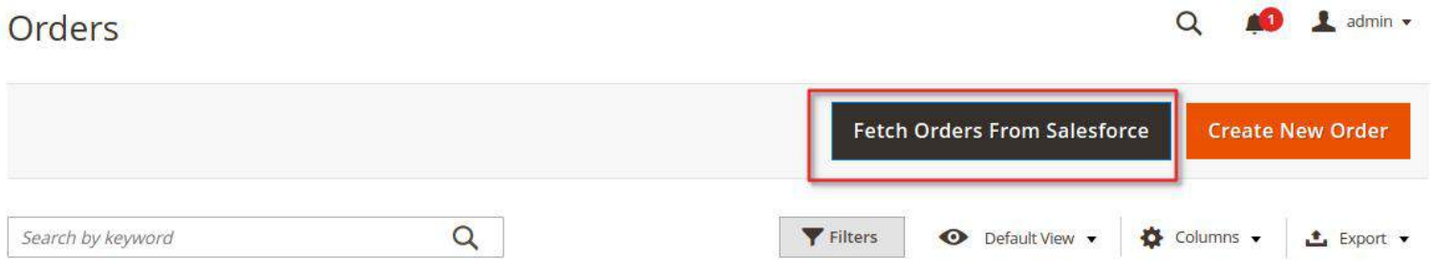
→ **Go to Customers > All Customers.**
**Click on 'Fetch Customers From Salesforce' to fetch your customers from the list.**

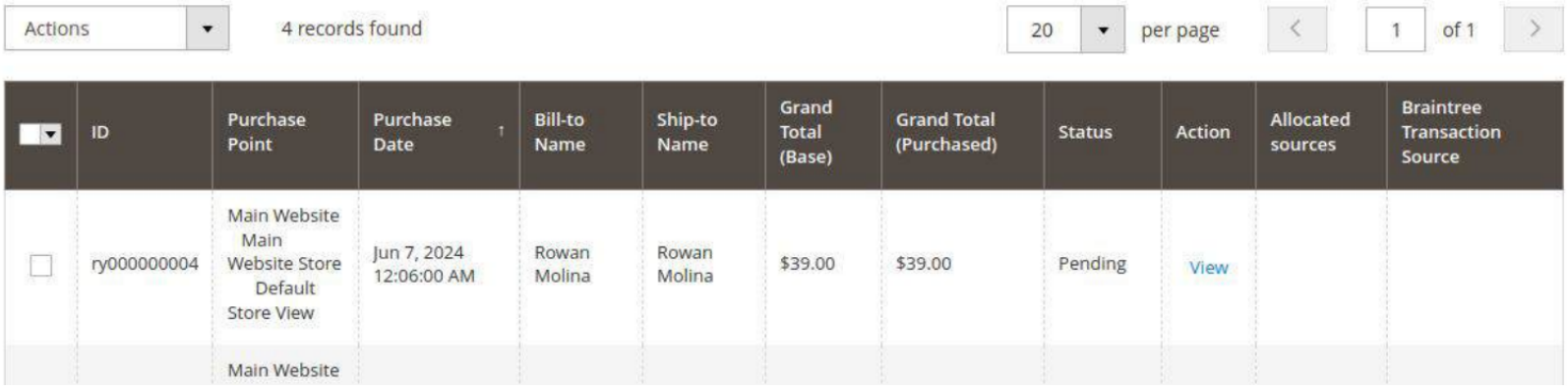
## STEP 33

→ **You can retrieve your customers by selecting a date from the 'Choose Date' option and clicking the 'Fetch' button in the top right corner.**

## STEP 34

**Fetch Order From Salesforc**






➔ **Go to Sale > Orders**

**Fetch Orders from the salesforce by clicking on the top of the right option 'Fetch Orders From Salesforce'.**

## STEP 35

➔ **You can retrieve orders by selecting a date from the 'Choose Date' option and clicking the 'Fetch' button in the top right corner.**