

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

Updated: 10/06/2022 | By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/20>

- [Introduction](#)
 - [Features](#)
 - [Requirements](#)
 - [Video Tutorial Playlist](#)
- [How to create a new app](#)
 - [Get consumer key and consumer secret by the connected app](#)
 - [Verify Refresh Token policy](#)
 - [Reset security token](#)
- [Setup and Authentication Salesforce CRM account](#)
- [How to synchronize data from Magento 2 store to Salesforce CRM account](#)
 - [Setting Up Field Mapping](#)
 - [Synchronization Settings](#)
- [Main functions](#)
 - [Salesforce Default Synchronization Fields](#)
 - [Contact](#)
 - [Account](#)
 - [Lead](#)
 - [Product](#)
 - [Campaign](#)
 - [Order](#)
 - [Order Item](#)
 - [Opportunity](#)
 - [Opportunity Item](#)
- [Updates](#)
- [Support](#)

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 **2.3.x, and 2.4.x**



API



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

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

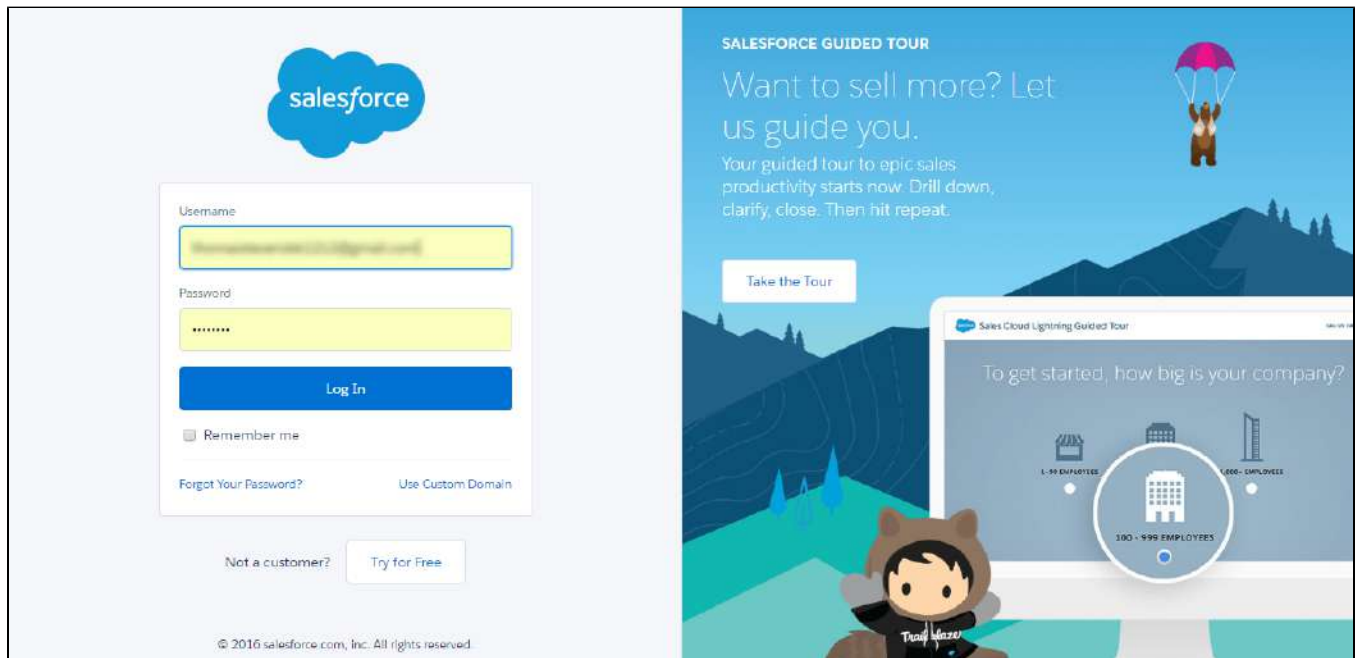
The API package is not available if you use any other edition that's not listed above.

Video Tutorial Playlist

How to create a new app

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

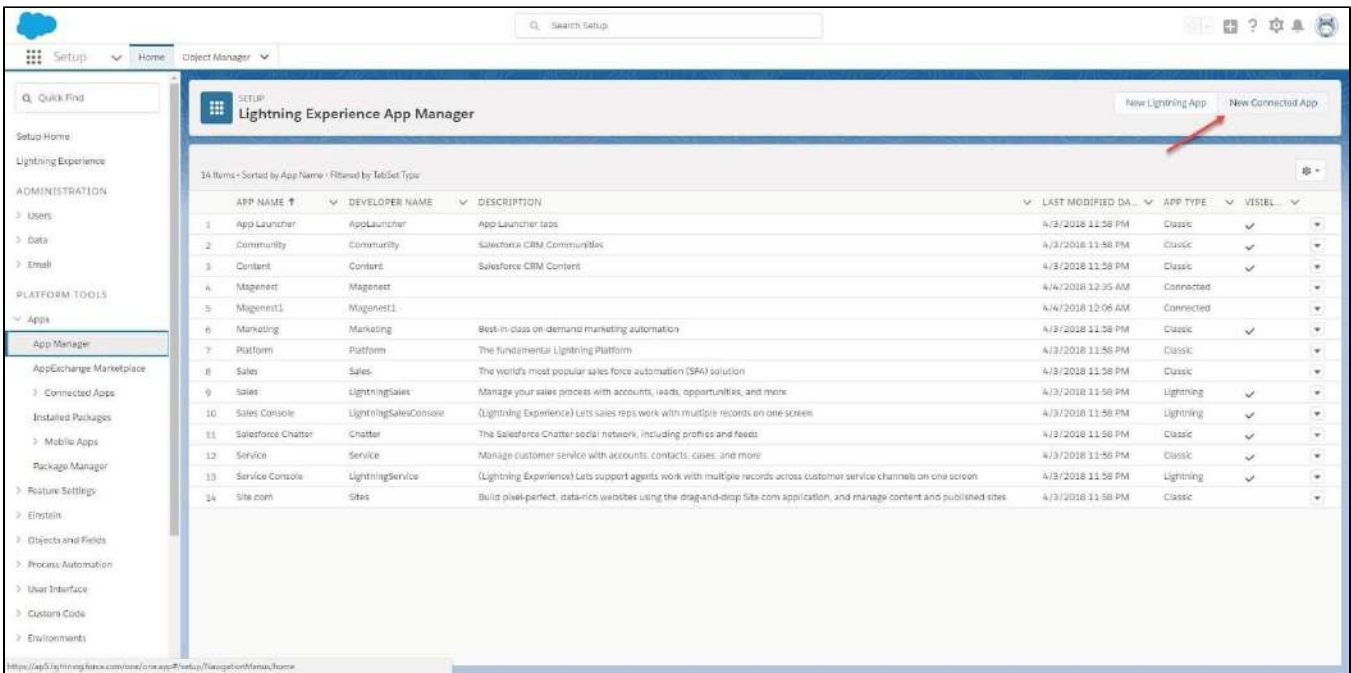
- **Login** if you already have an account.



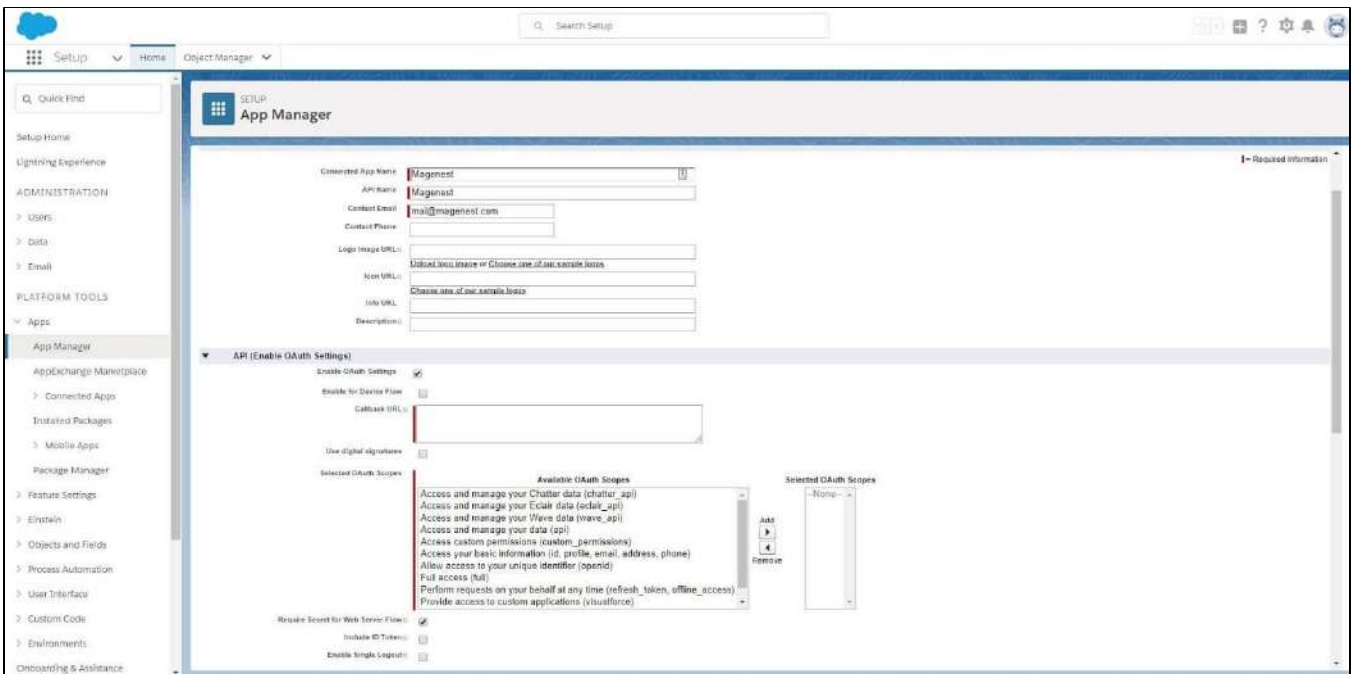
- Or **Sign up** to create a new one

Get consumer key and consumer secret by the connected app

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



- Entering the information needed:



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

The screenshot shows the 'API (Enable OAuth Settings)' configuration page. The 'Enable OAuth Settings' checkbox is checked. The 'Enable for Device Flow' checkbox is unchecked. The 'Callback URL' is set to 'https://ice241samplessl.kcc/salesforce/oauth/callback'. The 'Use digital signatures' checkbox is unchecked. Under 'Selected OAuth Scopes', 'Full access (full)' is selected, which includes 'Perform requests on your behalf at any time (refresh_token, offline_access)'. The 'Available OAuth Scopes' list includes various permissions like 'Access Pardot services', 'Access and manage your Chatter data', etc. At the bottom, 'Require Secret for Web Server Flow' is checked, while 'Require Secret for Refresh Token Flow' and 'Inspect All Tokens' are unchecked.

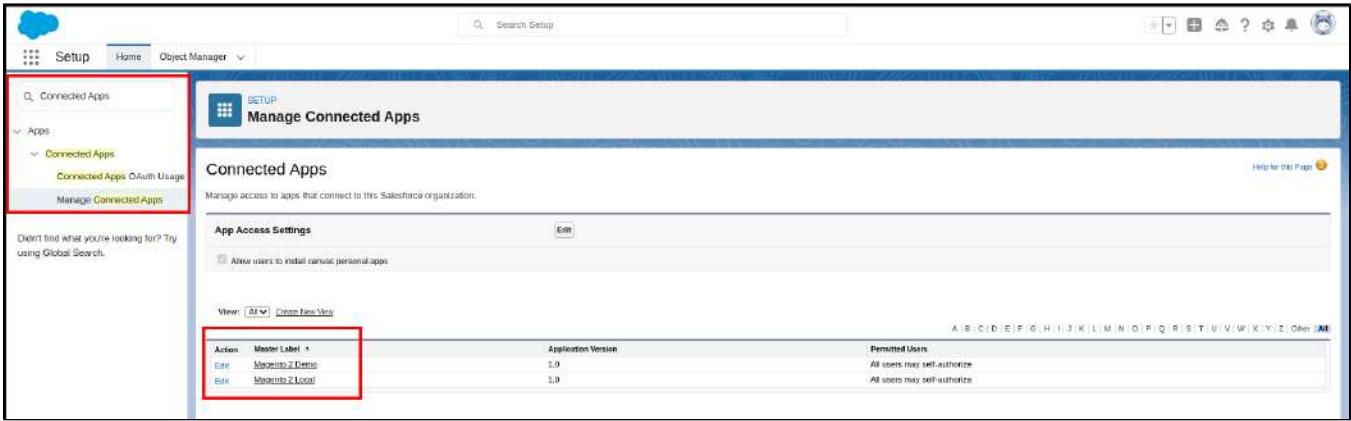
- Choose **Require Secret for Web Server Flow**
- Choose **Include ID Token: Include Standard Claims, Include Custom Attributes, Include Custom Permissions.**
- Click the **Save** button, then **Continue** to see the newly created app.

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

The screenshot shows the 'Manage Connected Apps' page in Salesforce Setup. The app details include: Version 1.0, API Name Magportal, Created Date 4/4/2018 12:05 AM, Contact Email sadanaa21@gmail.com, and Description Info URL. The 'API (Enable OAuth Settings)' section shows: Consumer Key 3MFV090t, Consumer Secret 238, Callback URL https://ice241samplessl.kcc/salesforce/oauth/callback, and 'Require Secret for Web Server Flow' checked. The 'Configure ID Token' section has 'Include Standard Claims', 'Include Custom Attributes', and 'Include Custom Permissions' all checked. The 'Custom Connected App Handler' section shows 'App Plug-in Class' set to 'None'. At the bottom, there are sections for 'Trusted IP Range for OAuth Web server flow' and 'Custom Attributes', both with 'No records to display'.

Verify Refresh Token policy

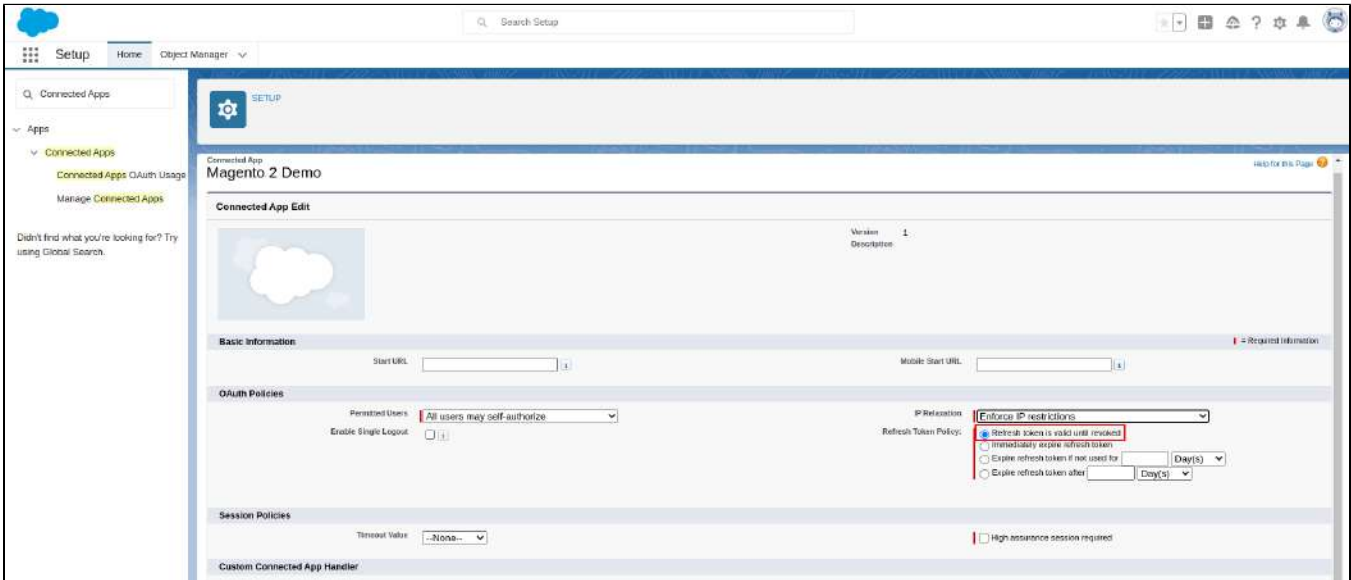
On Salesforce Setup page, enter **Connected Apps** in Quick Find box to quickly access **Manage Connected Apps** page. Click on the Connected Apps you've created in the previous step:



Click on **Edit Policies** button:

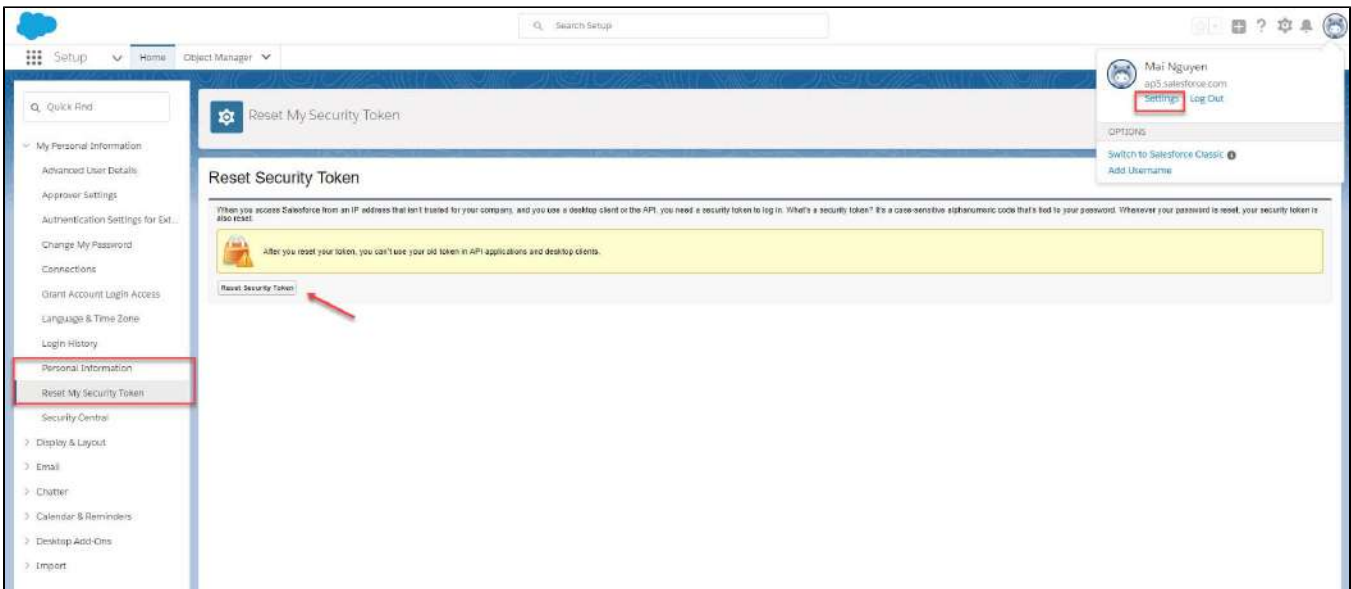


Make sure the selected **Refresh Token Policy** is **Refresh token is valid until revoked**. Save the policy to continue.

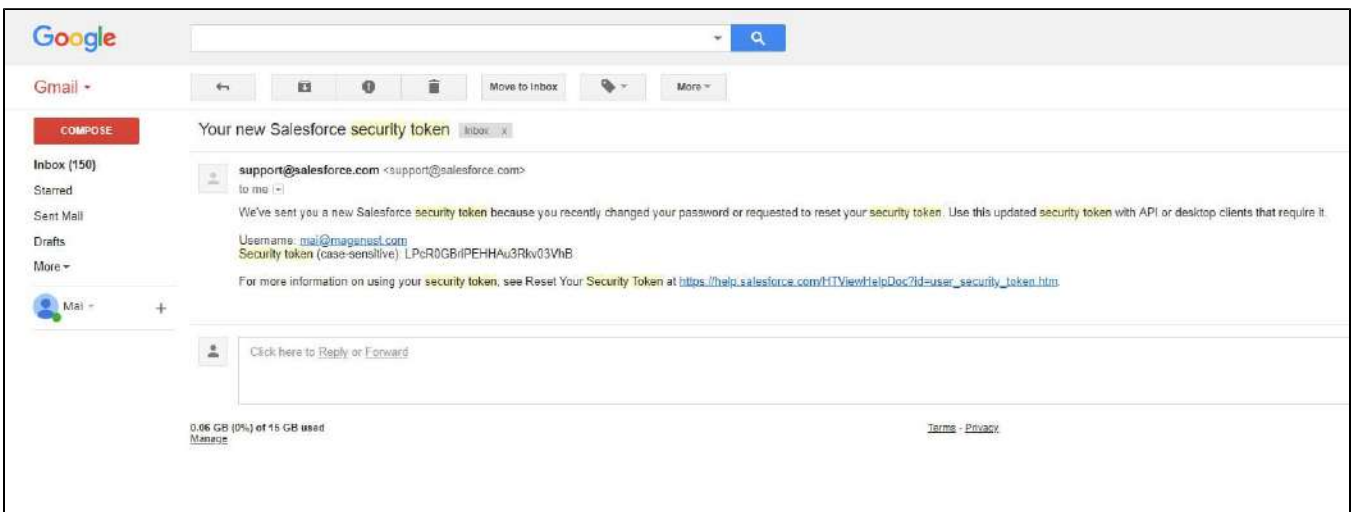


Reset security token

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



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



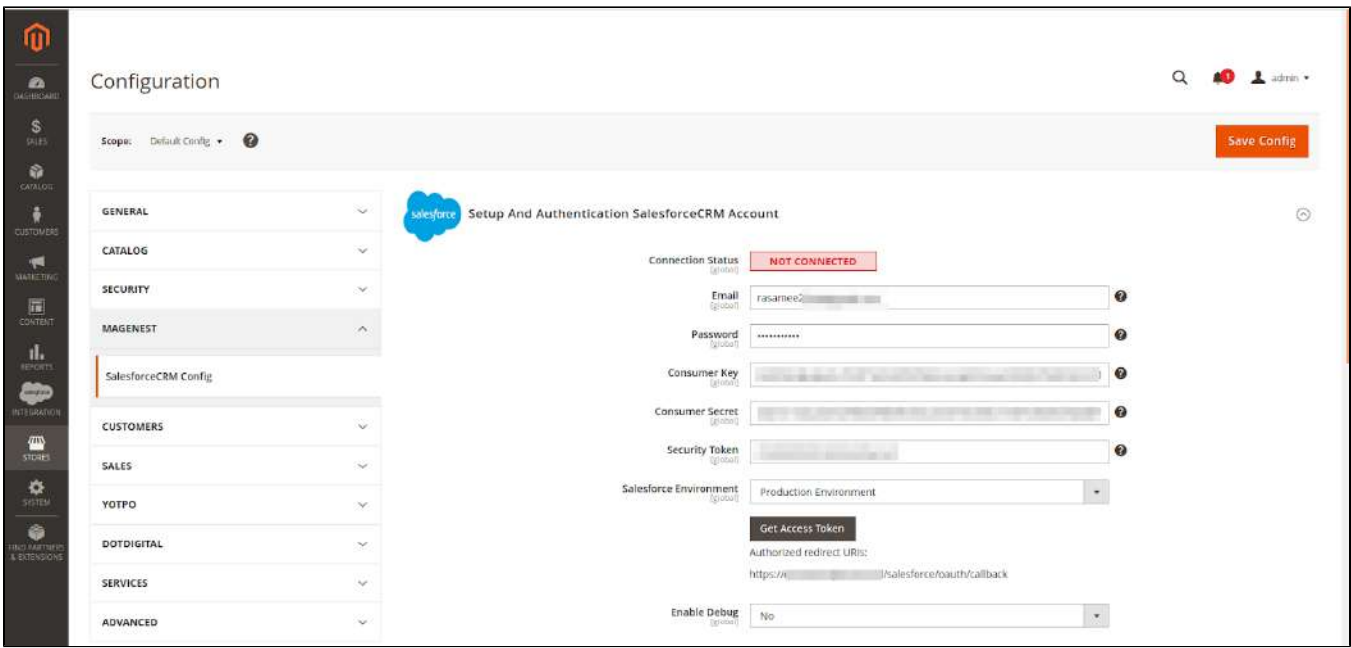
Setup and Authentication Salesforce CRM account

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

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

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

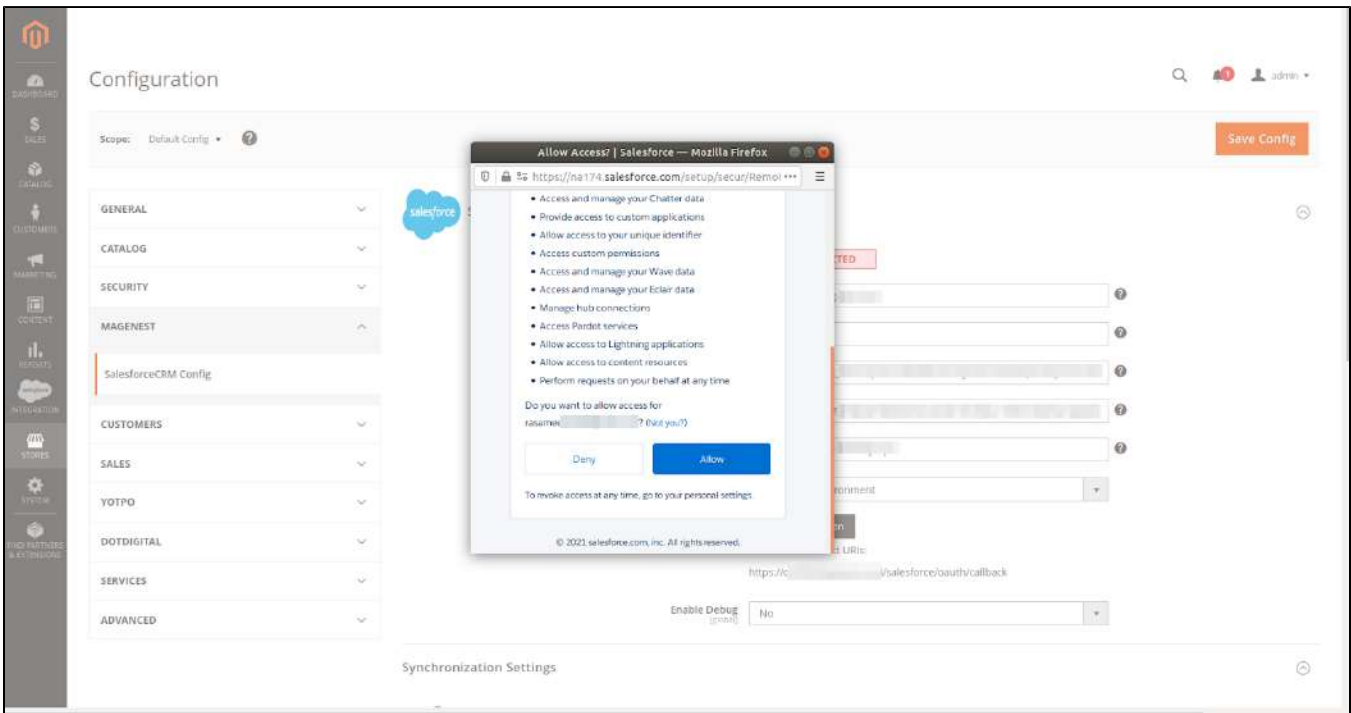
⚠ Please **Save the config** before clicking on the **Get Access** button to avoid getting a consumer key error.



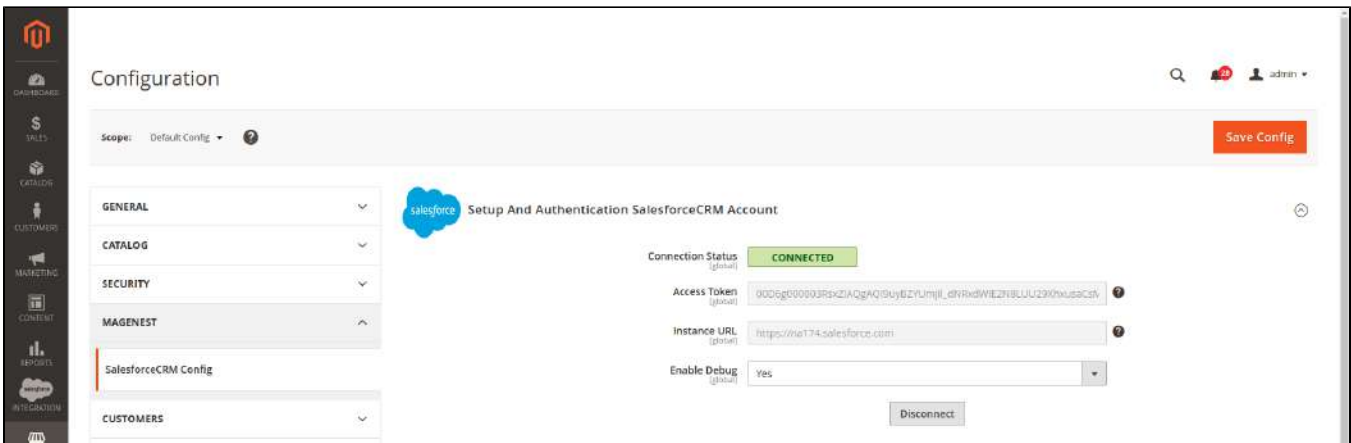
Admin will be redirected to the verification page:

- Click the “**Allow**” button

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



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



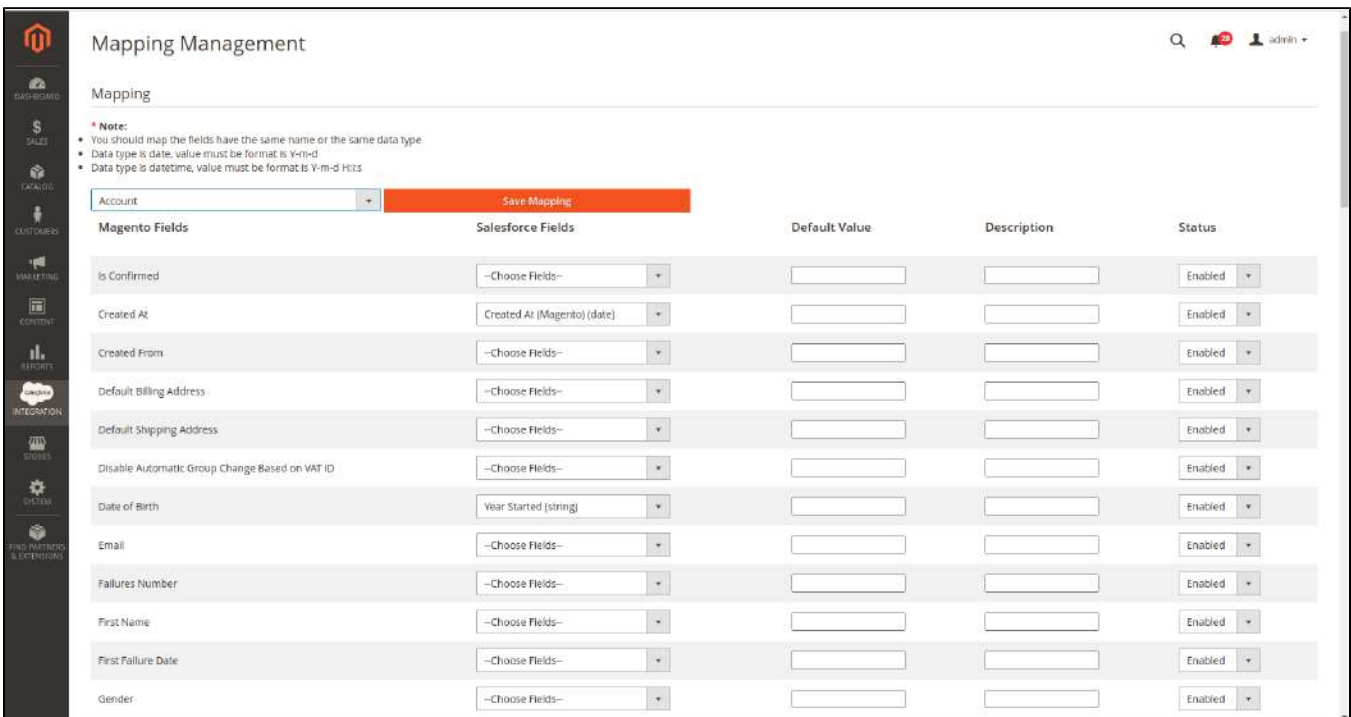
How to synchronize data from Magento 2 store to Salesforce CRM account

Setting Up Field Mapping

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

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

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



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

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

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

Synchronization Settings

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

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

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

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

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

Unique Field:

- **Enable Personal Account:** If your Salesforce account [enabled Person Account](#), please select enable this option.
- **Linked Contact with Account:** If enabled, when syncing a record to Salesforce Contact, the module will attempt to sync that record to Salesforce Account beforehand.
- **Sync To Customer Attribute:** Subscriber sync by default will only create Lead for Guest Subscriber. If customers have registered an Account, Admin can choose to sync their subscription status to a Boolean field of Salesforce Account. To avoid conflict, make sure the field selected in this configuration isn't used in Account Field Mapping.



Setup And Authentication SalesforceCRM Account



Connection Status **CONNECTED**

Access Token

Instance URL

Enable Debug

Disconnect

Synchronization Settings



Account

Enable

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

Sync Mode

Queue Auto Sync Time

Select Date Range From:
To:

Sync All Accounts Now

Campaign

Enable

Sync Mode

Queue Auto Sync Time

Select Date Range From:
To:

Sync All Campaigns Now

Opportunity

Enable

Sync Mode

Queue Auto Sync Time

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] 15 minutes

Select Date Range From:

To:

Sync All Leads Now

Order

Enable [global] Yes

Sync Mode [global] Add to Queue

Queue Auto Sync Time [global] 15 minutes

Select Date Range From:

To:

Sync All Orders Now

Product

Enable [global] Yes

Sync Mode [global] Add to Queue

Queue Auto Sync Time [global] 30 minutes

Select Date Range From:

To:

Sync All Products Now

Subscriber

Enable [global] Yes

Sync to Customer Attribute [global] Disable

Sync status as an Accounts' field if subscriber has registered an Account. Only allow boolean field.
Warning: This config will override existing mapping for selected field (if exists).

[Sync All Subscribers Now](#)

Salesforce Integration Version

Version 3.4.0

Support Links [Installation Guide](#) [Go to Installation Guide](#)
[User Guide](#) [Go to User Guide](#)
[Support Portal](#) [Go to Support Portal](#)

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

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

Queue

← View Request Daily View Reports **Sync Now**

Search by keyword

Filters Default View Columns Export

20 per page 1 of 104

2079 records found

Actions	Magento Entity Id	Enqueue Time	Type	Priority	
<input type="checkbox"/>	8330	2073	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8329	2072	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8328	2071	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8327	2070	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8326	2069	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8325	2068	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8324	2067	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8323	2066	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8322	2065	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8321	2064	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8320	2063	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8319	2062	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8318	2061	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8317	2060	2018-04-23 04:03:00	Product	1
<input type="checkbox"/>	8316	2059	2018-04-23 04:03:00	Product	1

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

View Report

← View Request Daily

Filters Default View Columns Export

Actions 4132 records found 20 per page 1 of 207

ID	Record ID in Salesforce CRM	Salesforce Table	Magento ID	Action	Username	Email	Datetime	Status	Message	View detail
28		Lead	1	insert	Hung Huynh	hhuyn12345@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	hhuyn12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View
256	View on Salesforce	Product2	227	update	Hung Huynh	hhuyn12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View
257	View on Salesforce	Product2	228	update	Hung Huynh	hhuyn12345@gmail.com	2021-01-08 02:09:22	SUCCESS		View












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

Report #513

Email	hhuyn12345@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.

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

Request Report

🔍
🔔
👤 hhor12345

Requests Made Today

Total API Request Today

REST API Request: 68

BULK API Request: 71

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

Detail

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

Request 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:



Catalog

Search salesforce

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

Add Product

Filters Default View Columns

Actions 6 records found 20 per page 1 of 1

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action	Size
5		Jackets	Grouped Product	Default	Jackets		0.0000	Catalog, Search	Enabled	Main Website	Edit	
6		Harmony Lumaflex™ Strength Band Kit	Bundle Product	Default	Harmony Lumaflex™ Strength Band Kit	\$35.00	0.0000	Catalog, Search	Enabled	Main Website	Edit	
10		Nadia Elements Shell	Configurable Product	Default	Nadia Elements Shell	\$8.00	0.0000	Catalog, Search	Enabled	Main Website	Edit	
2		Riona Full Zip Jacket	Simple Product	Default	Riona Full Zip Jacket	\$12.00	12.0000	Catalog, Search	Enabled	Main Website	Edit	
3		Ingrid Running Jacket	Virtual Product	Default	Ingrid Running Jacket	\$85.00	28.0000	Catalog, Search	Enabled	Main Website	Edit	
4		Yoga Adventure	Downloadable Product	Default	Yoga Adventure	\$75.00	29.0000	Catalog, Search	Enabled	Main Website	Edit	



DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

INTEGRATION

REPORTS

Store View: All Store Views

← Back

Add Attribute

Save

Enable Product Yes

Attribute Set: Default

Product Name: Yoga Adventure

SKU: Yoga Adventure

Price: \$ 75.00

[Advanced Pricing](#)

Tax Class: Taxable Goods

Quantity: 24

[Advanced Inventory](#)

Stock Status: In Stock

Weight: lbs This item has no weight

Visibility: Catalog, Search

Categories: Training [New Category](#)

Set Product as New From To

Content

Configurations

Product Reviews

Images And Videos

Search Engine Optimization

Related Products, Up-Sells, and Cross-Sells

Customizable Options

Product in Websites

Design

Schedule Design Update

Gift Options

Downloadable Information

Salesforce Integration

Information

Salesforce Product2 ID:

01t7F000005WjNQAY

Salesforce PricebookEntry ID: 01U7F000000PE9nQAG
 Last Updated At: May 6, 2017, 3:47:26 AM
 Created At: Apr 18, 2017, 9:07:09 AM

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:

The screenshot shows the Magento Admin interface for the 'Products' section. A search bar at the top indicates '2047 records found (2047 selected)'. A context menu is open over the product list, with the 'Add Product to Salesforce Queue' option highlighted in red. A modal dialog box is displayed in the center, asking 'Add the Product to Queue' and 'Are you sure to assign selected product to queue? (2047 records)'. The dialog has 'Cancel' and 'OK' buttons. The background product list table includes columns for Type, Attribute Set, SKU, Price, Quantity, Salable Quantity, Visibility, Status, Websites, and Action.

Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Action
Simple Product	Bag	24-MB01	\$34.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-MB04	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-MB03	\$38.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-MB05	\$45.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-MB06	\$45.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-MB02	\$39.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-UB02	\$74.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-WB01	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-WB02	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit
Simple Product	Bag	24-WB05	\$32.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	edit

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 shows 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)". The dialog has "Cancel" and "OK" buttons. In the background, the Customers listing table is visible with a context menu open over the first row. The menu item "Add Customer to Salesforce Queue" is highlighted with a red box. The table has 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.

Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created In	Date of Birth	Tax/VAT Number	Gender	Action
General	0123456789	41472	United States	Kentucky	Jan 30, 2020 9:02:15 PM	Main Website	Confirmation Not Required	Default Store View				Edit
General	(555) 236-3326	49628-7928	United States	Michigan	Feb 28, 2020 7:40:25 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit
General	1234567890	12345	United States	Alabama	Jun 11, 2020 8:40:08 AM	Main Website	Confirmation Not Required	Default Store View				Edit

Create New Customer Account

Personal Information

First Name *

Last Name *

 sign up for Newsletter

Sign-in Information

Email *

Password *

Password Strength: Medium

Confirm Password *

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: 00Q0Y000002pjCRUAU

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

Date	Type	Status
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:

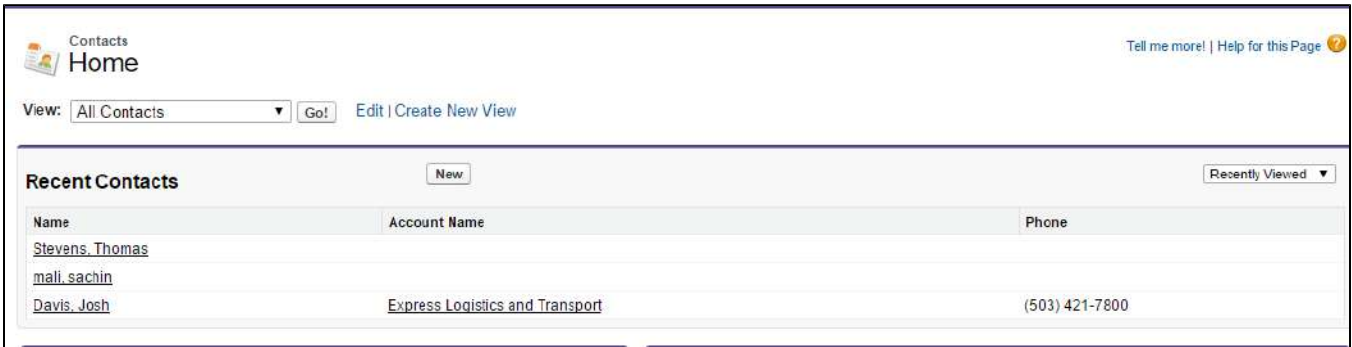
Leads Home Tell me more! | Help for this Page ?

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

Recent Leads New Recently Viewed ▾

Name	Company	Phone
Stevens, Thomas	N/A	

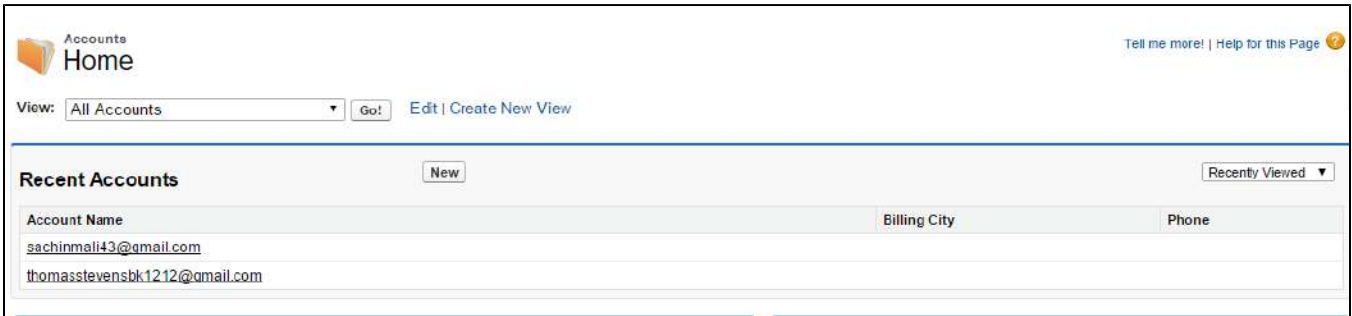
Salesforce Contacts:



The screenshot shows the Salesforce Contacts Home page. At the top left, there is a 'Contacts Home' header with a 'Tell me more! | Help for this Page' link. Below the header, there is a 'View: All Contacts' dropdown menu with a 'Go!' button and a link to 'Edit | Create New View'. The main content area is titled 'Recent Contacts' and includes a 'New' button and a 'Recently Viewed' dropdown. A table lists recent contacts with columns for Name, Account Name, and Phone.

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

Salesforce Accounts:



The screenshot shows the Salesforce Accounts Home page. At the top left, there is an 'Accounts Home' header with a 'Tell me more! | Help for this Page' link. Below the header, there is a 'View: All Accounts' dropdown menu with a 'Go!' button and a link to 'Edit | Create New View'. The main content area is titled 'Recent Accounts' and includes a 'New' button and a 'Recently Viewed' dropdown. A table lists recent accounts with columns for Account Name, Billing City, and Phone.

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:

Orders

59 | magnest

Create New Order

Search by keyword

Filters | Default View | Columns | Export

20 per page | 1 of 1

8 records found (3 selected)

Actions

- 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**

Point	Purchase Date	Bill to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
Site 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 Store	Mar 12, 2021 7:58:49 AM	Test Test last name bro.	Test Test last name bro.	\$25.00	\$25.00	Pending	View	
Site Store	Nov 26, 2020 4:58:55 AM	Veronica Costello	Veronica Costello	\$79.28	\$79.28	On Hold	View	
Site Store	Oct 7, 2020 2:15:36 AM	SOUVIT ROY	SOUVIT ROY	\$59.00	\$59.00	Cancelled	View	
00000004	Jul 22, 2020 3:15:01 AM	Dang Dong	Dang Dong	\$50.00	\$50.00	Pending	View	

Sale Training Women

Account Dashboard
Account Information
Address Book
My Orders
My Downloadable Products
Newsletter Subscriptions
My Credit Cards
Billing Agreements
My Product Reviews
My Wish List

Compare Products
You have no items to compare.

Order # 000000012

PENDING

May 6, 2017

Reorder | Print Order

Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Yoga Adventure	Yoga Adventure	\$75.00	Ordered: 1	\$75.00
Links: Trailer #1				
			Subtotal	\$75.00
			Grand Total	\$75.00

#00000012

← 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 Opportunity:

Sync History

Date	Time	Type	Status
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

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			

Order Products (Standard Price Book) 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	<input type="checkbox"/>	Expected Revenue	
Opportunity Name	000000012	Close Date	5/6/2017
Account Name		Next Step	
Type		Stage	Prospecting
Lead Source		Probability (%)	10%
Order Number	12	Primary Campaign Source	
Current Generator(s)		Main Competitor(s)	
Tracking Number		Delivery/Installation Status	
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:

Catalog Price Rule

Apply Rules | Add New Rule

Updated rules applied.

Search | Reset Filter | 2 records found | 20 per page | 1 of 1

ID	Rule	Start	End	Status	Web Site
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:



Campaign Name	Status	Start Date
New Year Sale	Planned	
Mid Season Sale	Planned	
DM Campaign to Top Customers - Nov 12-23, 2001	Completed	13/04/2010

Salesforce Default Synchronization Fields

⚠ The fields in **Red** are hard-code.

⚠ The fields in **Yellow** are default mapping that can be overridden.

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	Salesforce PersonAccount
ID		
Email	Name	PersonEmail
Created At		
Updated At		
is Active		
Created in		
Prefix		
First name		FirstName
Last name		LastName
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	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	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 (default: Draft)
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	StageName (default: "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 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.