Salesforce Connector

webkul.com/blog/salesforce-connector-magento2/

Published On - December 16, 2016

This module is best known for synchronizing an eCommerce platform to a CRM platform. Salesforce Connector provides real-time synchronization of Magento store to Salesforce. With the help of this module, admin can easily sync their categories, products, customers, orders and contact us leads to their Salesforce org which will help them to increase their sales and improve customer services.

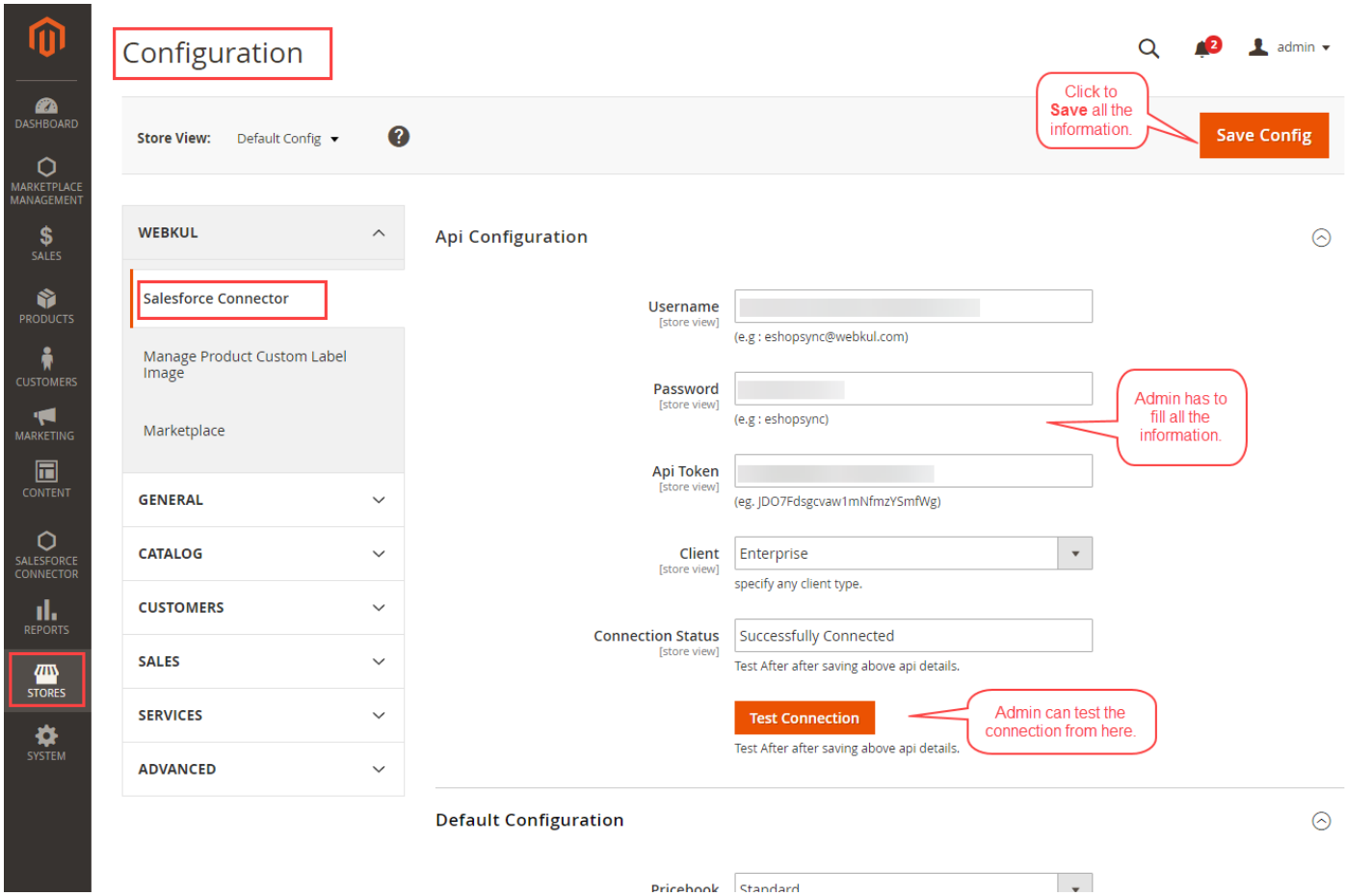
Please Note – Before installing this module on your Magento store, you have to open an account on Salesforce and add a Salesforce global app i.e. "eShopSync for Magento" in Salesforce account.

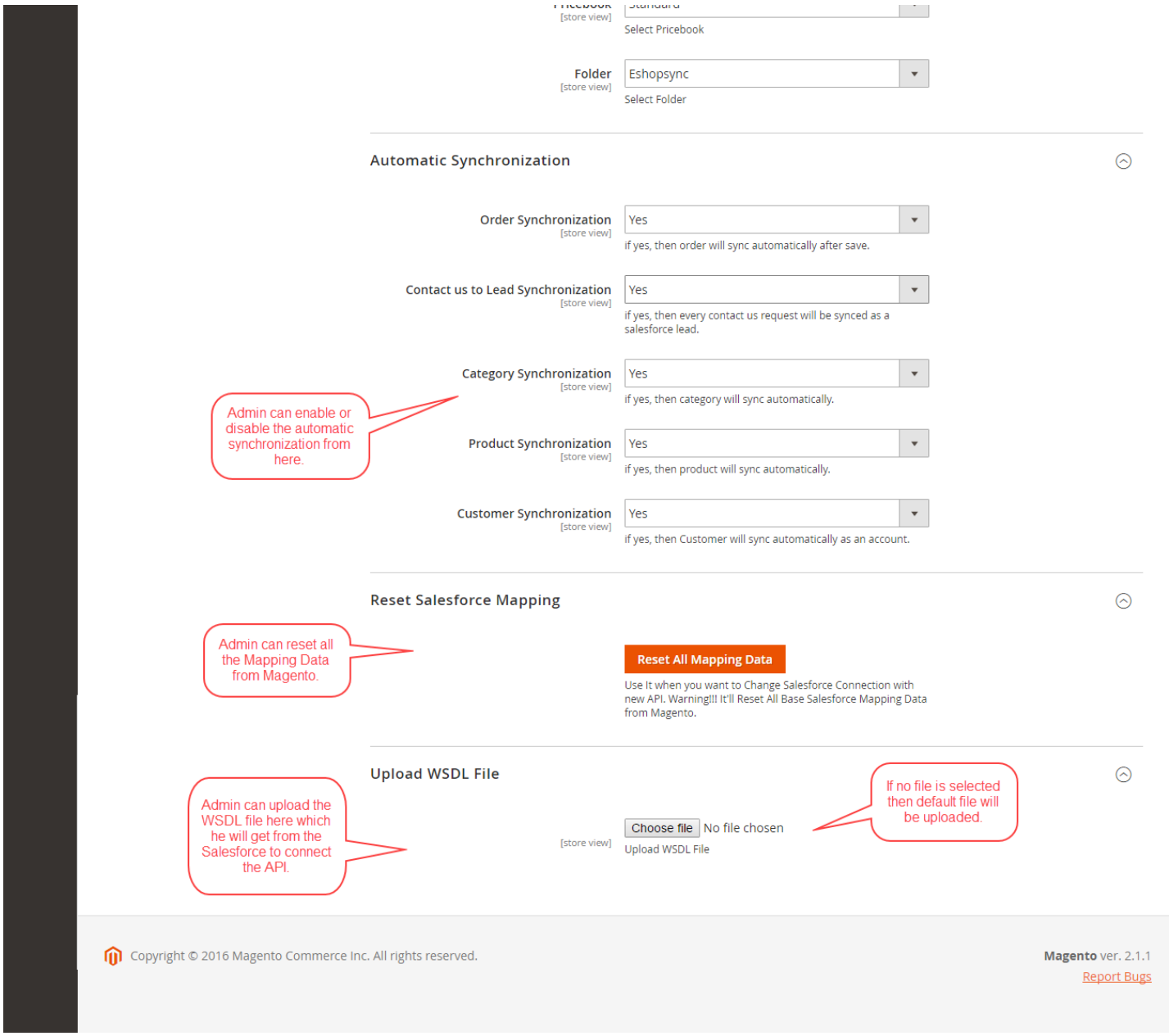
Features

- Synchronization of categories to Salesforce.
- Synchronization of products to Salesforce.
- Synchronization of customers to Salesforce.
- Synchronization of orders to Salesforce.
- Synchronization of contact us to Salesforce leads.
- The option of synchronizing leads, customers, categories and orders in real time is available at admin end.
- Shows contact us details in the form view.

Workflow – Salesforce Connector

For configuring the settings of Salesforce Connector, the admin has to go to **Stores > Configuration > Webkul > Salesforce Connector**.



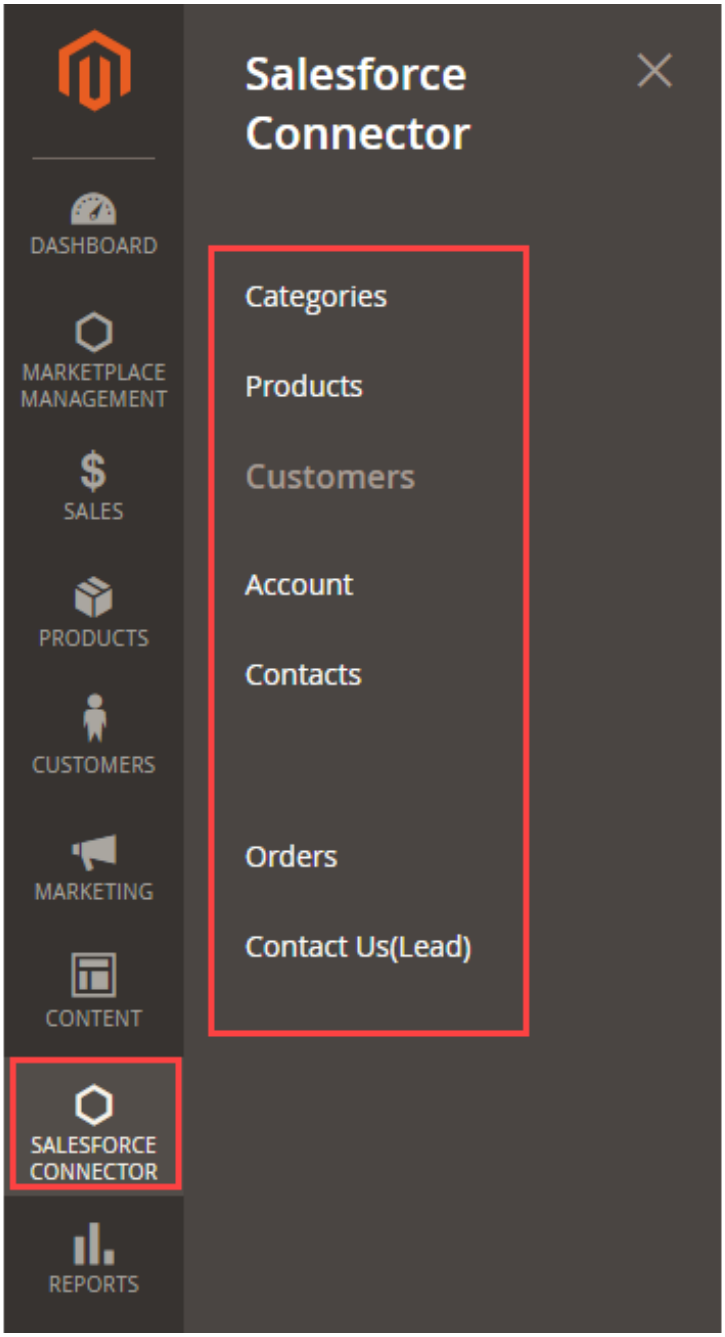


Under configurations, the admin has to fill all the credentials.

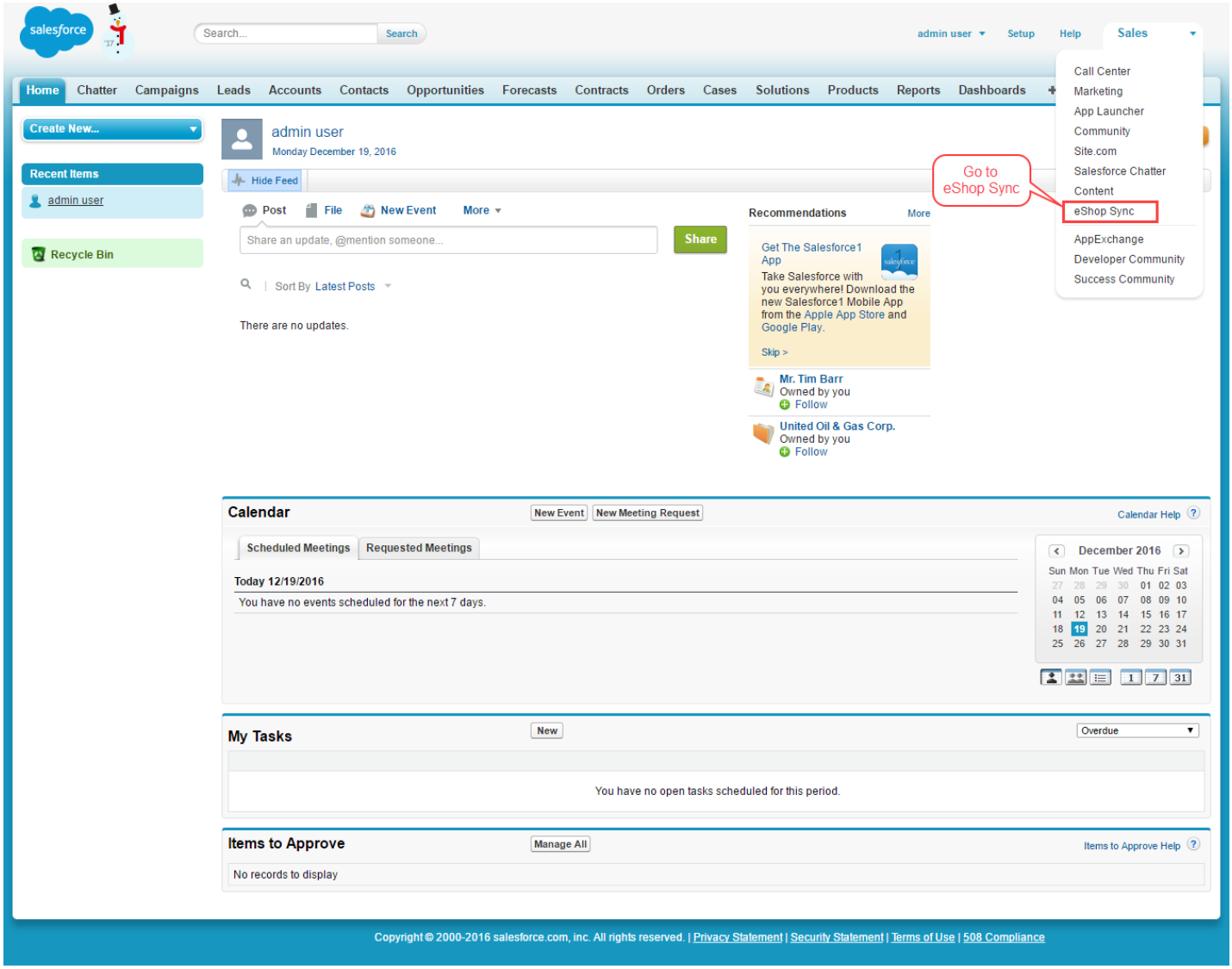
Admin can enable or disable auto synchronization for Orders, Contact Us Leads, Categories, Products, and Customers. Admin can also Reset all the Salesforce Mapped Data from Magento. In Upload WSDL File, the admin has to upload the WSDL file which he got from Salesforce account. This file is used for connecting the APIs. If the admin does not upload any WSDL file then a default file will be upload. After all the settings are done admin has to save them by clicking on **Save Config**.

Note: " Check the user guide manual to learn How to Generate Enterprise WSDL file from Salesforce "

Admin can manage all the Salesforce connector option by going to **Salesforce Connector**. Here admin will see Categories, Products, Account, Contacts, Orders and Contact Us (Lead). We will discuss each one them one by one.



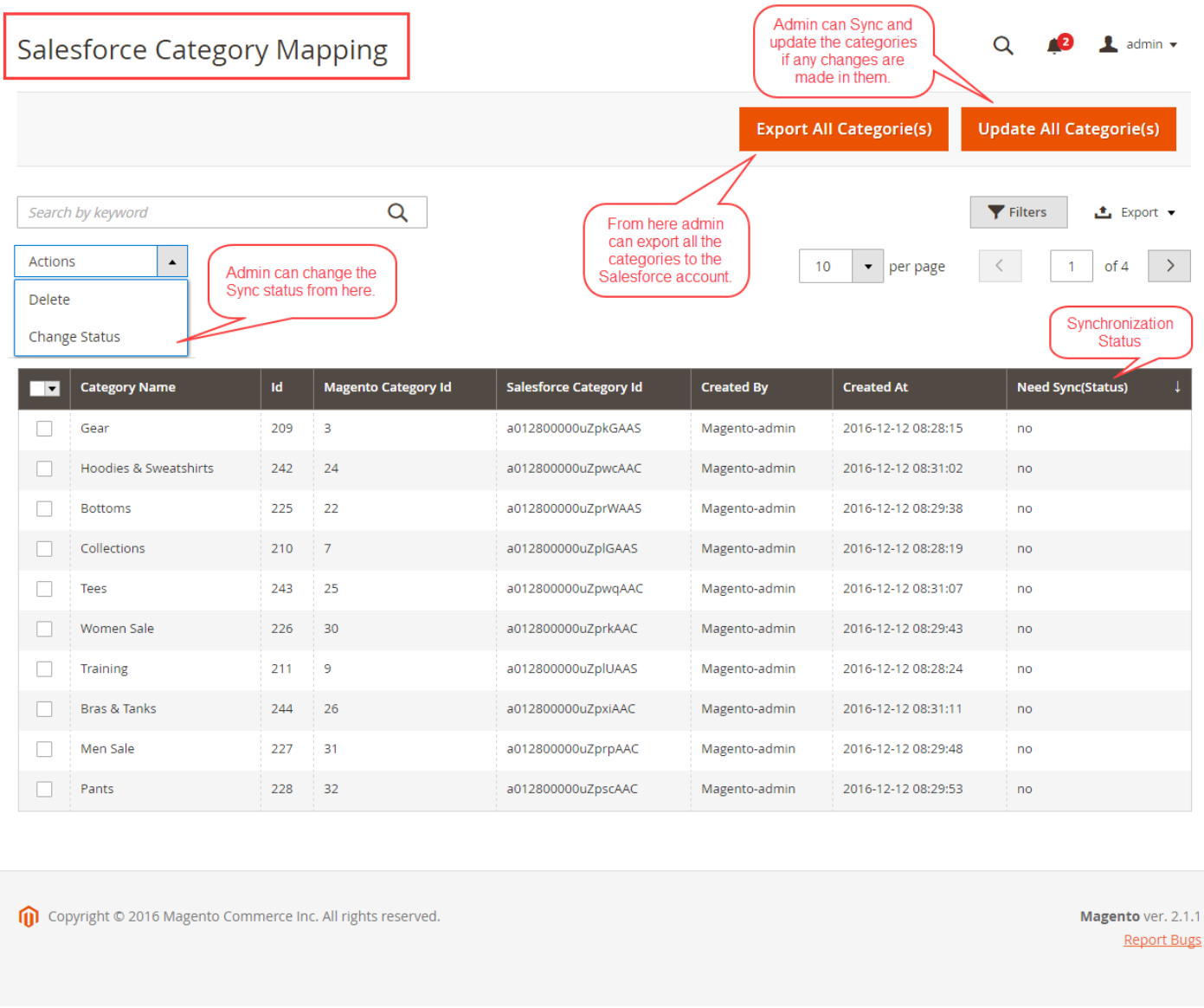
View At Salesforce End



Categories

When automatic Category Synchronisation is disabled, then admin can synchronize them manually by exporting all categories.

From here, admin can export all the Magento categories to Salesforce account by clicking on " **Export All Categories**". If any changes are made in the any of the categories then admin can select those categories and then change the sync status as "yes" and then click on "**Update All Categories**", this will only update the selected categories in the Salesforce account.


Salesforce Category Mapping
Admin can Sync and update the categories if any changes are made in them.
admin
Export All Categorie(s)
Update All Categorie(s)
Search by keyword
From here admin can export all the categories to the Salesforce account.
Filters
Export
Actions
Admin can change the Sync status from here.
10
per page
1
of 4
Delete
Change Status
Synchronization Status
Category Name
Id
Magento Category Id
Salesforce Category Id
Created By
Created At
Need Sync(Status)
Gear 209 3 a012800000uZpkGAAS Magento-admin 2016-12-12 08:28:15 no
Hoodies & Sweatshirts 242 24 a012800000uZpwcAAC Magento-admin 2016-12-12 08:31:02 no
Bottoms 225 22 a012800000uZprWAAS Magento-admin 2016-12-12 08:29:38 no
Collections 210 7 a012800000uZplGAAS Magento-admin 2016-12-12 08:28:19 no
Tees 243 25 a012800000uZpwqAAC Magento-admin 2016-12-12 08:31:07 no
Women Sale 226 30 a012800000uZprkAAC Magento-admin 2016-12-12 08:29:43 no
Training 211 9 a012800000uZplUAAS Magento-admin 2016-12-12 08:28:24 no
Bras & Tanks 244 26 a012800000uZpxiAAC Magento-admin 2016-12-12 08:31:11 no
Men Sale 227 31 a012800000uZprpAAC Magento-admin 2016-12-12 08:29:48 no
Pants 228 32 a012800000uZpscAAC Magento-admin 2016-12-12 08:29:53 no
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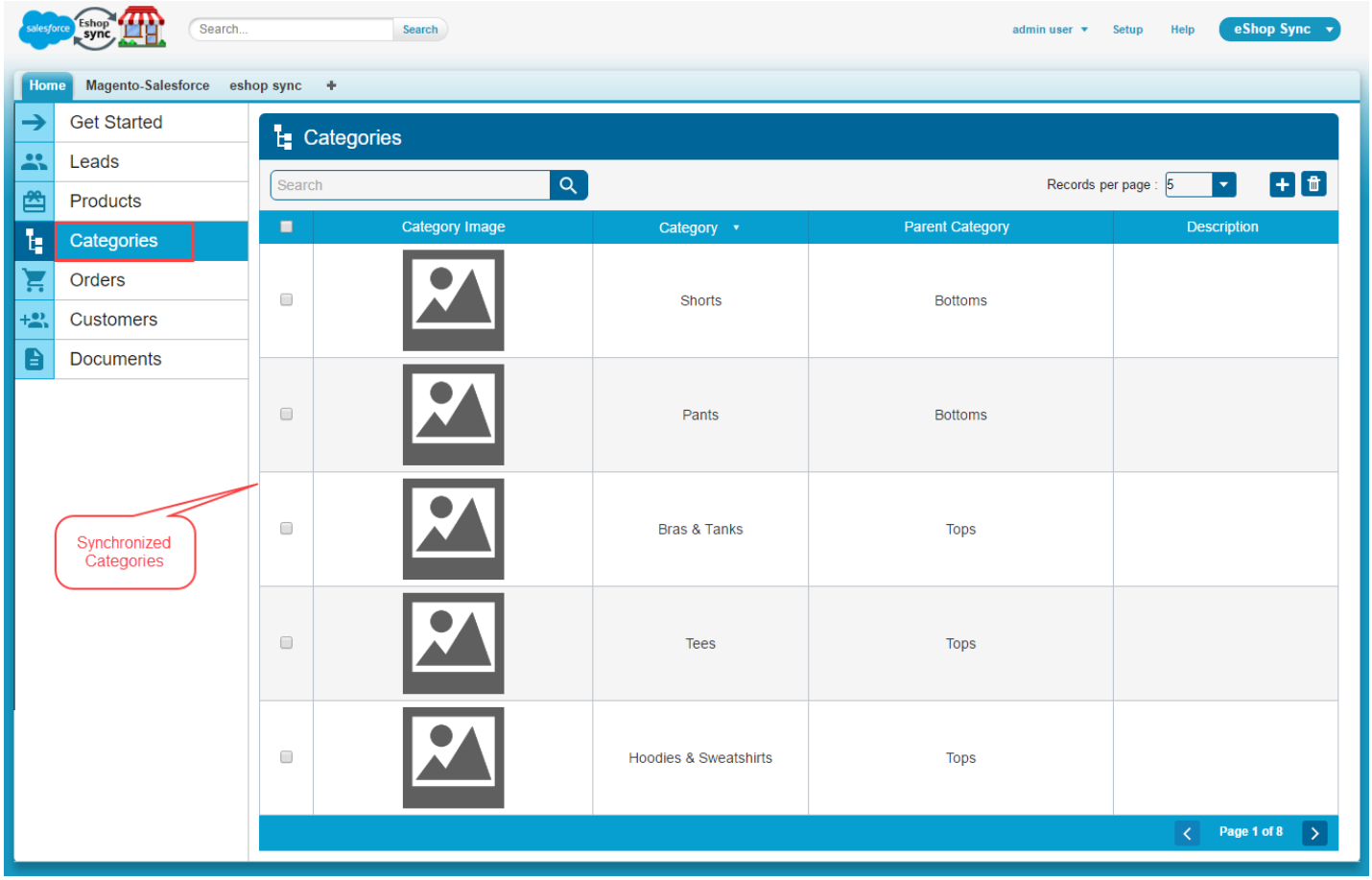
Magento ver. 2.1.1
Report Bugs

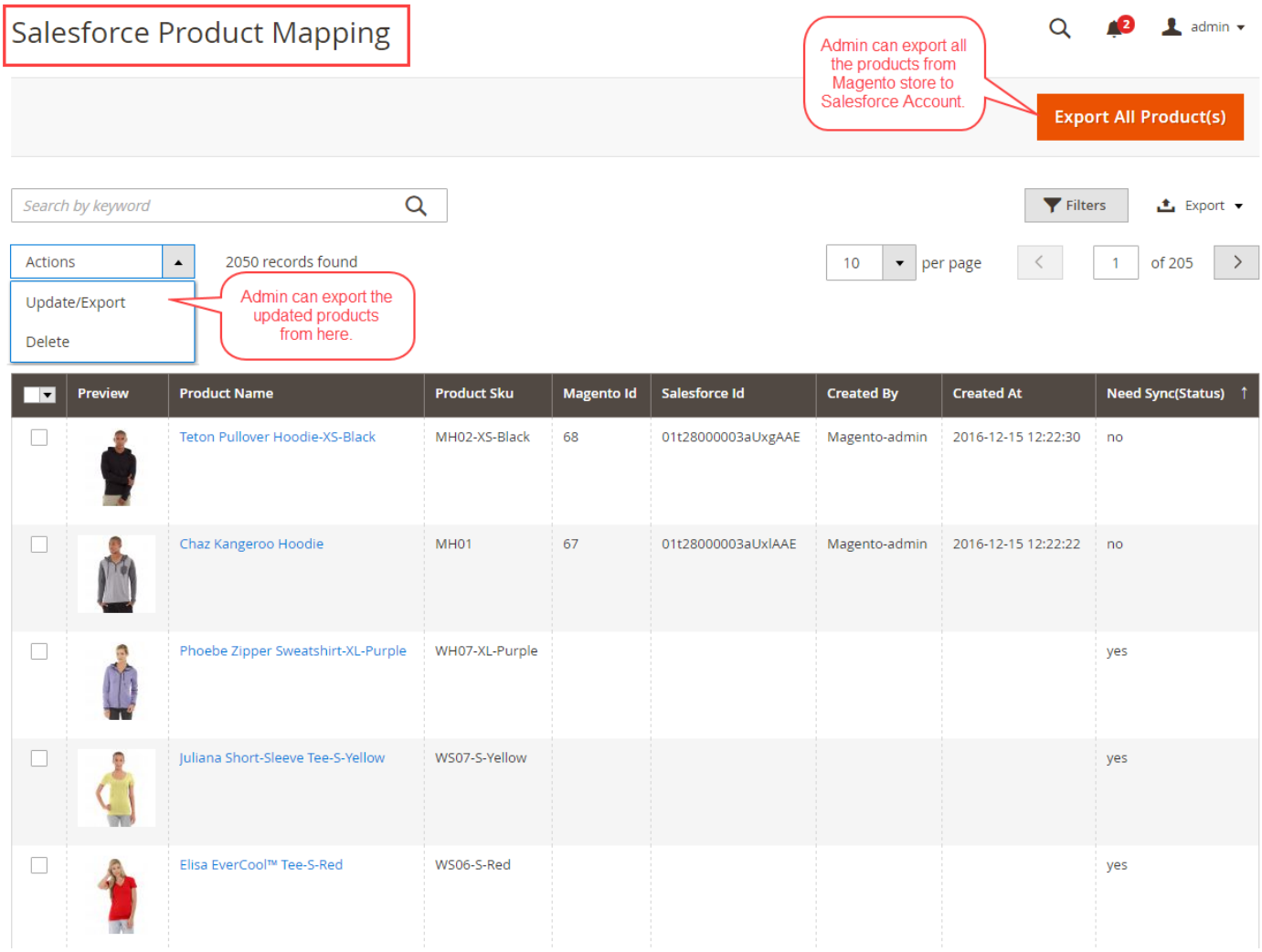
Salesforce



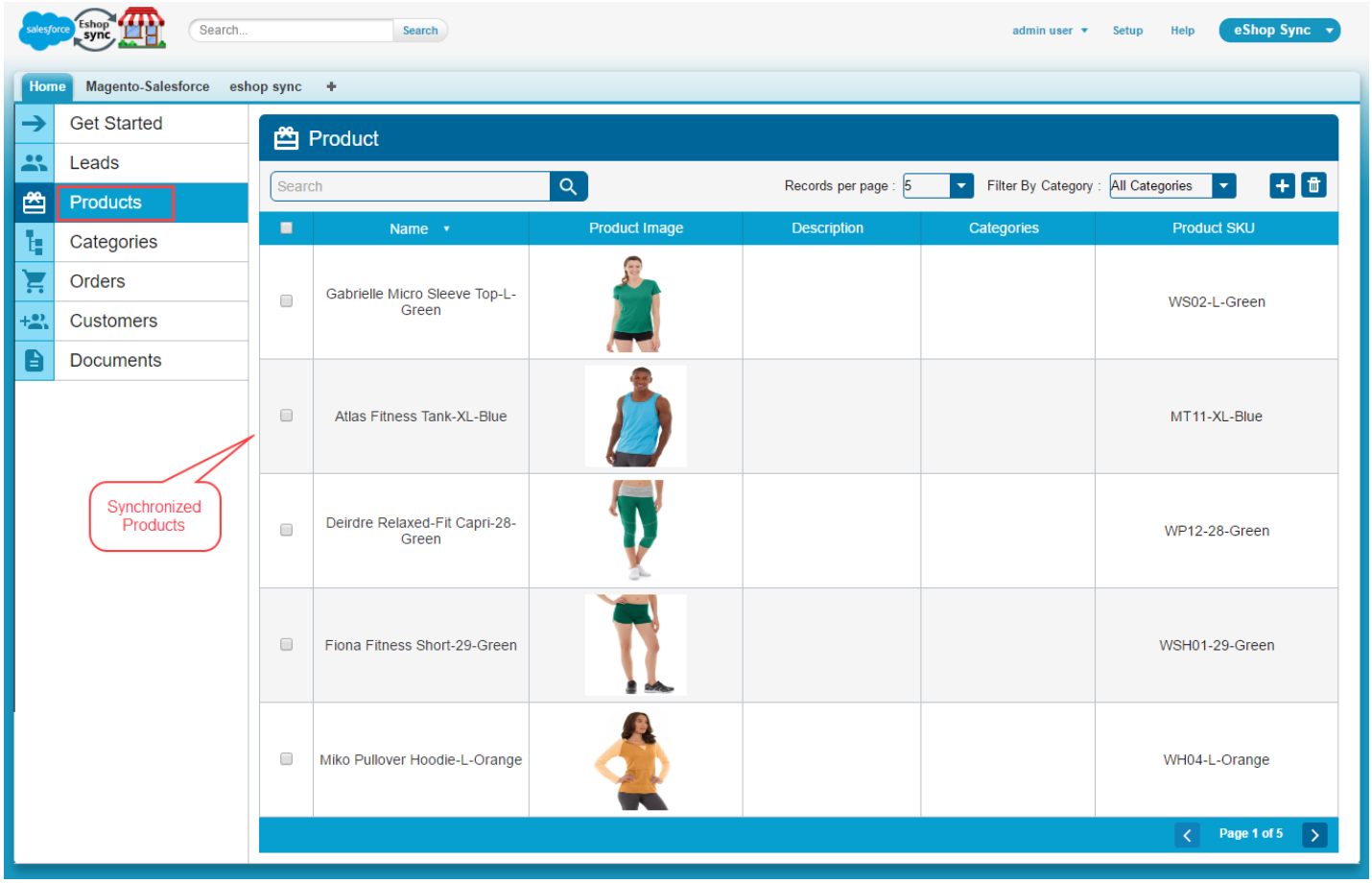
Products

When automatic Product Synchronisation is disabled, then admin can synchronize the products manually in a single click by clicking on “**Export All Products**“. Admin can synchronize changes made to an existing product by selecting the updated products and then clicking on “**Update/Export**” for updating all products.

If in case admin selects 2 products, out of which one product is updated and the other product is not exported then the updated product will get synchronized and the other product will get exported to the Salesforce account.

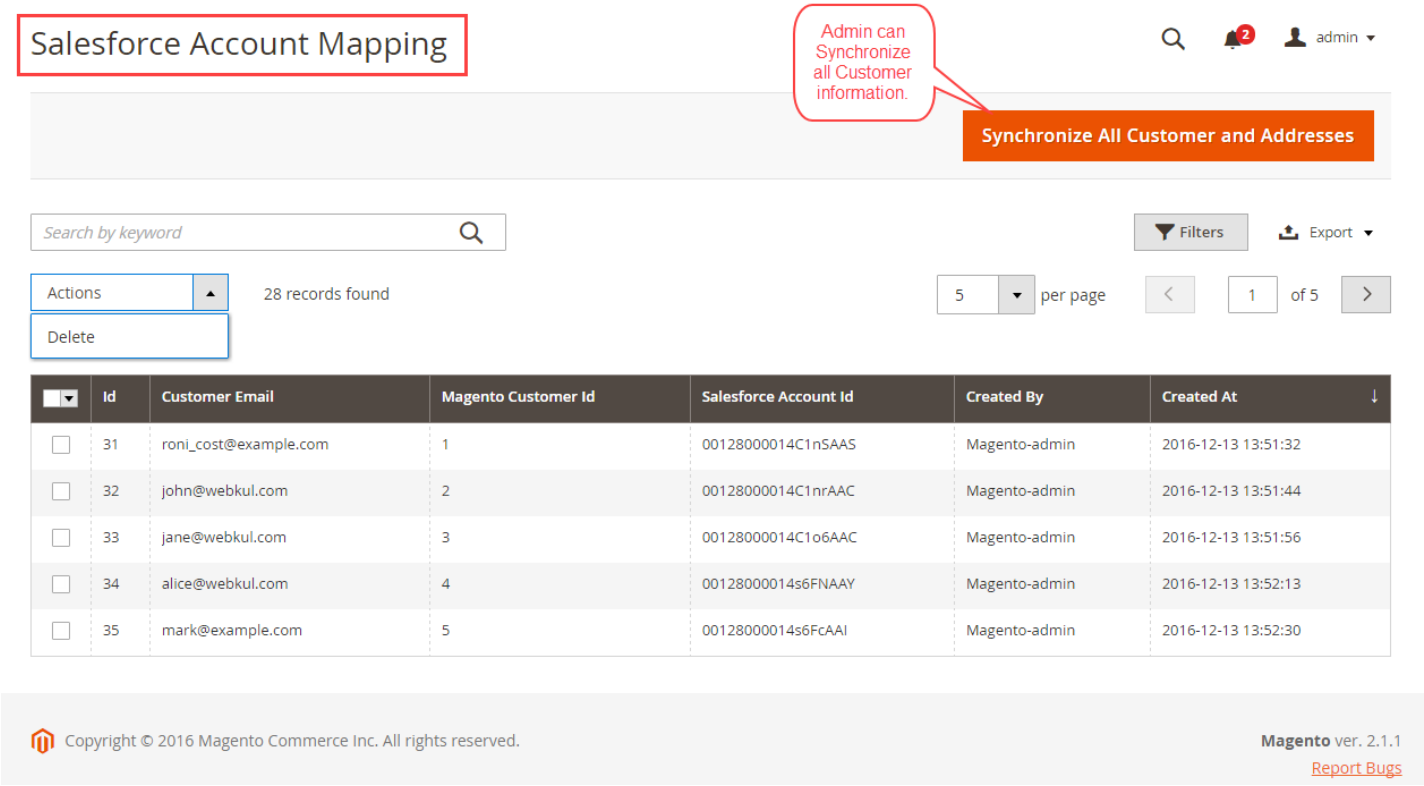

Salesforce Product Mapping
admin
Admin can export all the products from Magento store to Salesforce Account.
Export All Product(s)
Search by keyword
Filters
Export
Actions
2050 records found
10
per page
1
of 205
Update/Export
Delete
Admin can export the updated products from here.
Preview
Product Name
Product Sku
Magento Id
Salesforce Id
Created By
Created At
Need Sync(Status)
Teton Pullover Hoodie-XS-Black
MH02-XS-Black
68
01t28000003aUxgAAE
Magento-admin
2016-12-15 12:22:30
no
Chaz Kangeroo Hoodie
MH01
67
01t28000003aUxlAAE
Magento-admin
2016-12-15 12:22:22
no
Phoebe Zipper Sweatshirt-XL-Purple
WH07-XL-Purple
yes
Juliana Short-Sleeve Tee-S-Yellow
WS07-S-Yellow
yes
Elisa EverCool™ Tee-S-Red
WS06-S-Red
yes

Salesforce

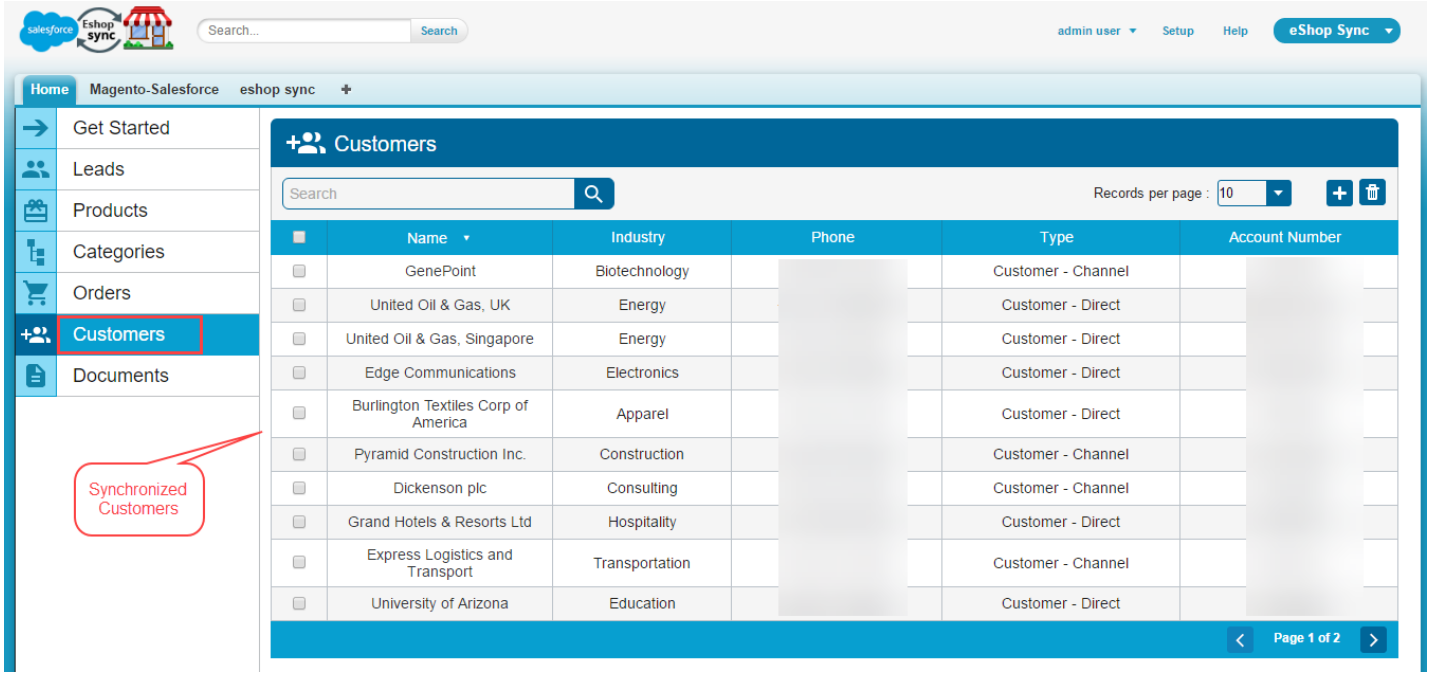

Search...
Search
admin user
Setup
Help
eShop Sync
Home
Magento-Salesforce
eshop sync
Get Started
Leads
Products
Categories
Orders
Customers
Documents
Synchronized Products
Product
Search
Records per page : 5
Filter By Category : All Categories
Name
Product Image
Description
Categories
Product SKU
Gabrielle Micro Sleeve Top-L-Green
WS02-L-Green
Atlas Fitness Tank-XL-Blue
MT11-XL-Blue
Deirdre Relaxed-Fit Capri-28-Green
WP12-28-Green
Fiona Fitness Short-29-Green
WSH01-29-Green
Miko Pullover Hoodie-L-Orange
WH04-L-Orange
Page 1 of 5

Account

When automatic Customer Synchronisation is disabled, then admin can synchronise the Customer details manually in a single click by clicking on “**Synchronize All Customer and Addresses** “.

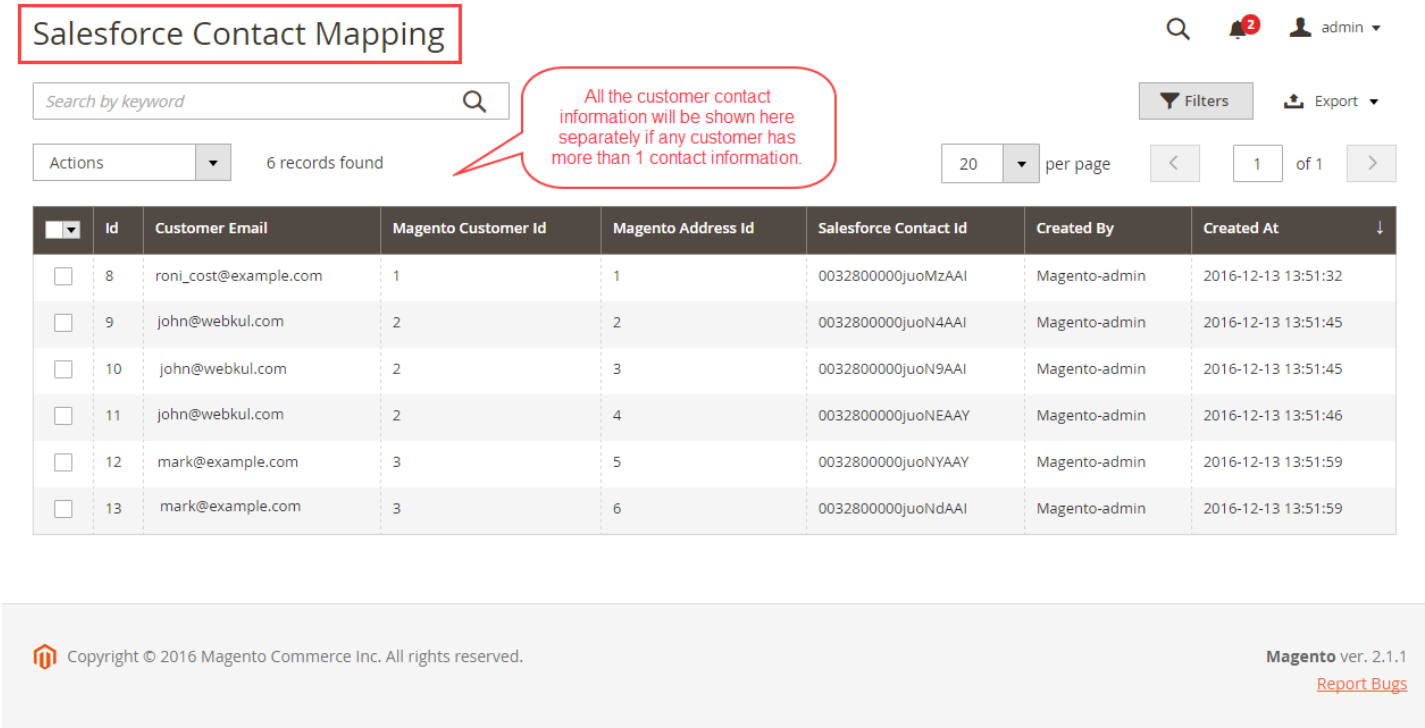


Salesforce



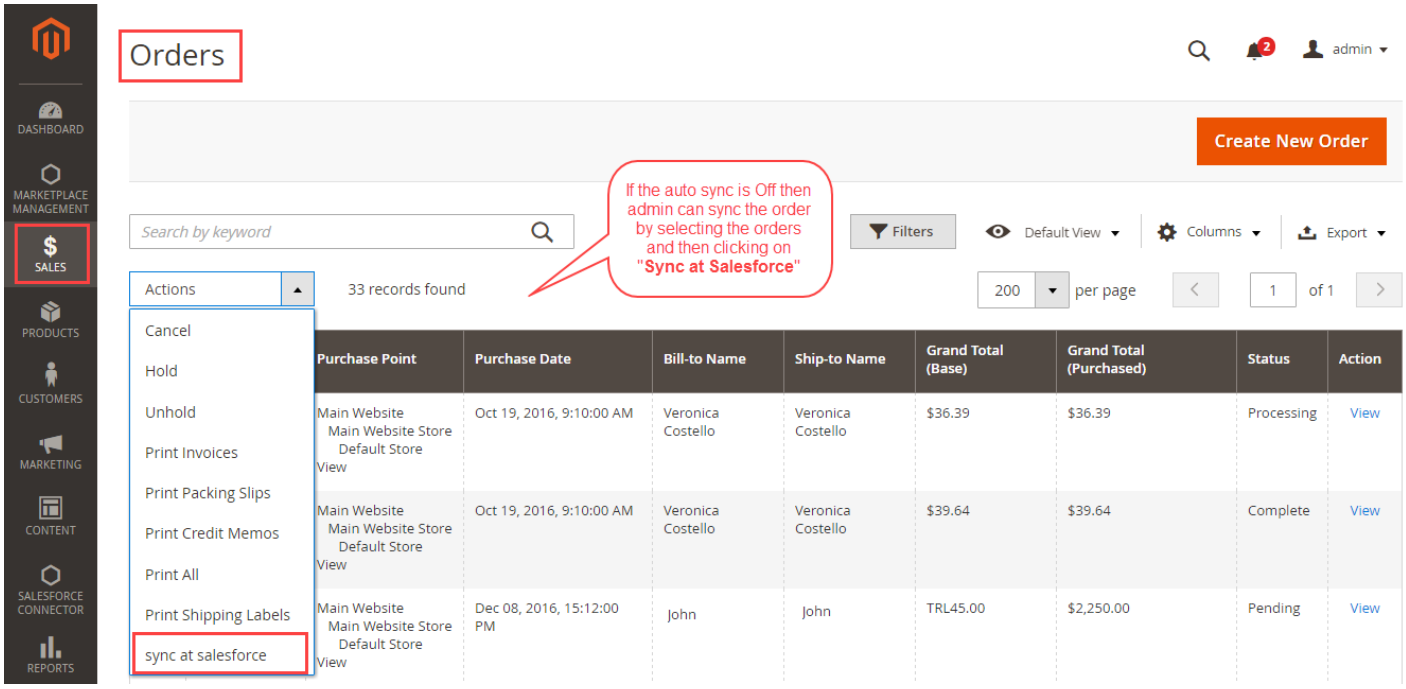
Contact

In Magento when a registered customer is having multiple addresses, then a new account is created for the corresponding customer and for the different addresses corresponding contact is created for synchronization.

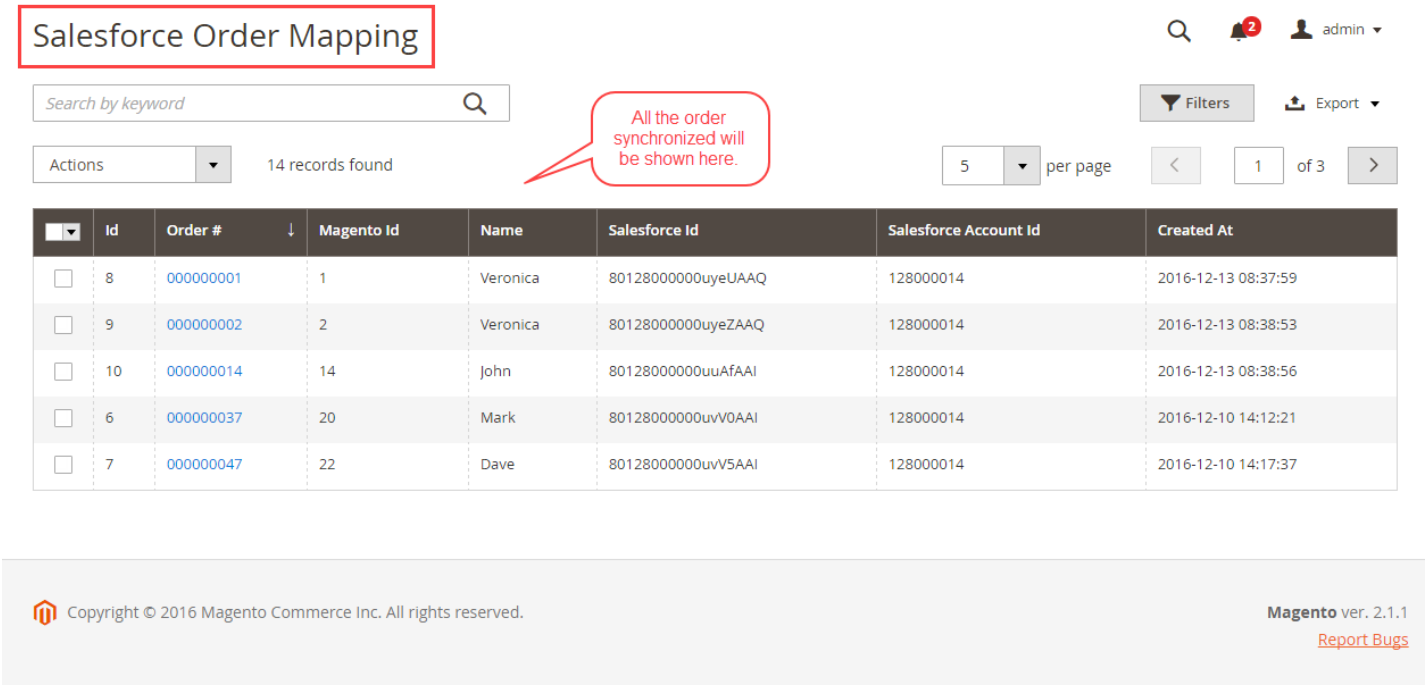


Order

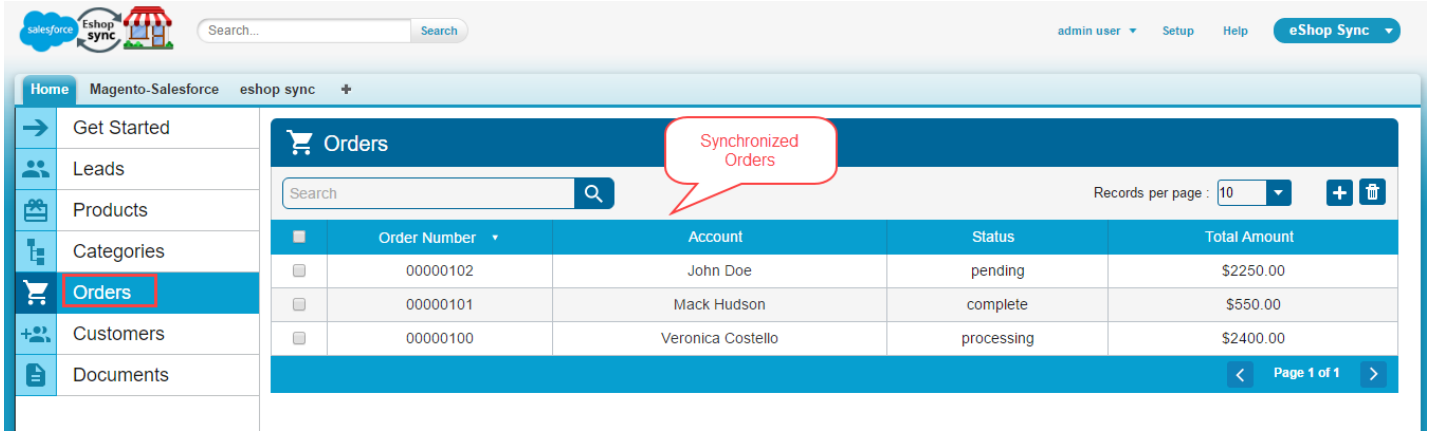
If the auto Order synchronization is disabled then admin can synchronize the orders by going to **Sales > Order**. Here admin can select the orders and then can choose the action "**Sync at Salesforce**" to sync the orders to Salesforce account.



In case of active automatic sync, admin don't need to do anything, orders will be automatically synchronised from Magento to Salesforce.

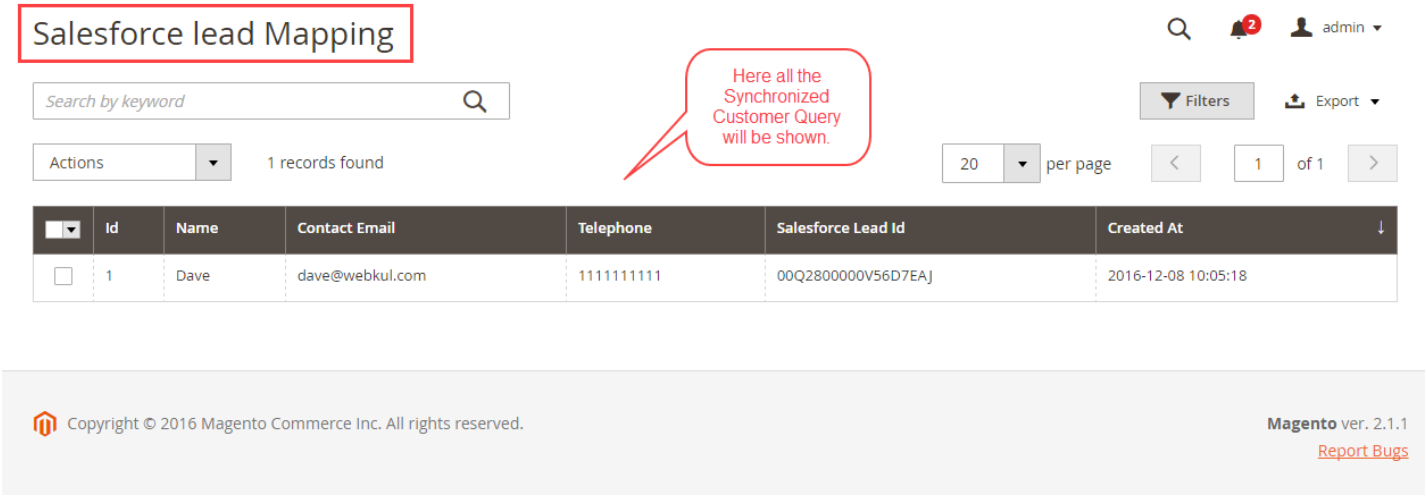


Salesforce

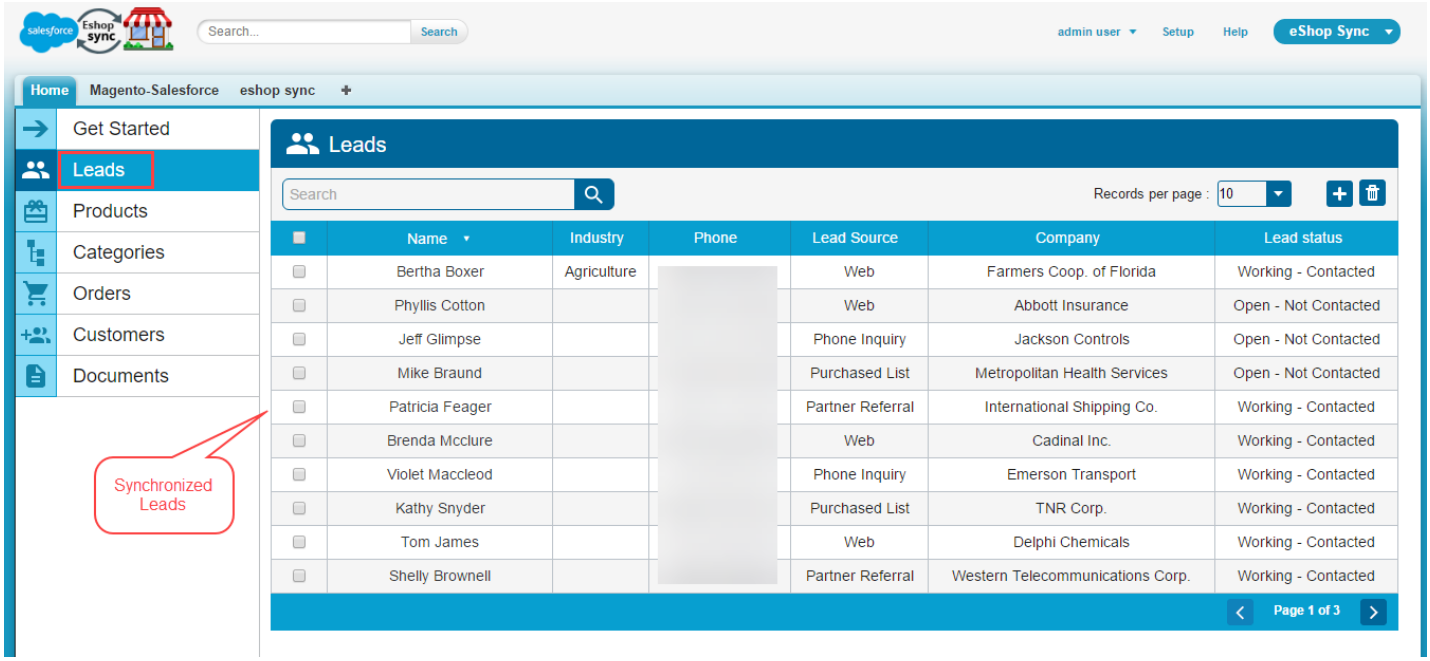


Contact Us (Lead)

When automatic Leads Synchronization is enabled then all the Contact Us Queries will be synchronized with the Salesforce leads. Admin can see the contact us details in inform view in a single click on the contact. A mapping table is maintained where you can check which contact is synchronized with which Salesforce id.



Salesforce



That's all for the **Salesforce Connector** if you still have any issue feel free to add a ticket and let us know your views to make the module better https://webkul.uvdesk.com/en/