

Salesforce Connector

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

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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.

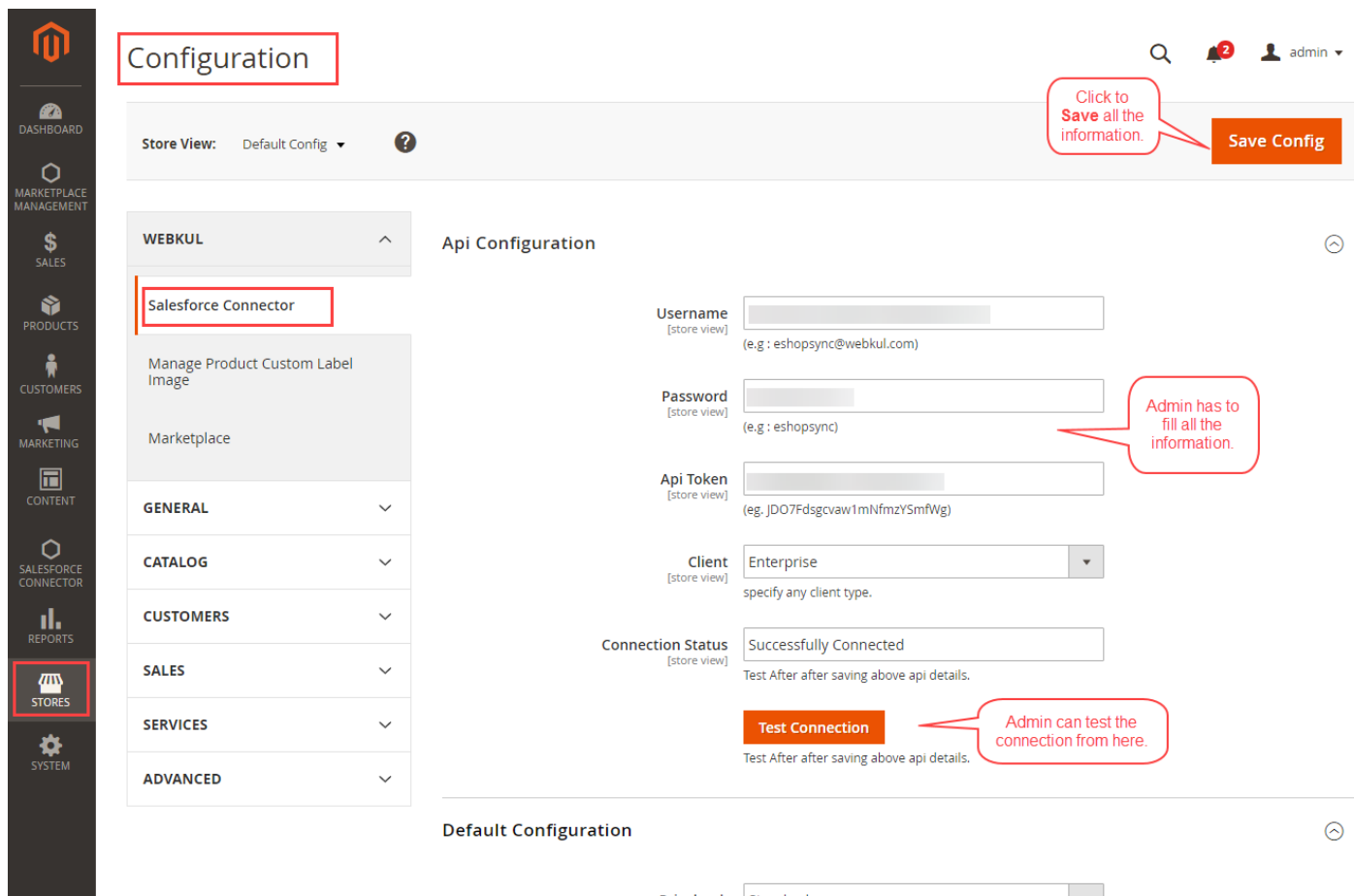
Please Note – Before installing this module on your Magento store, you have to open an account on Salesforce and add a Salesforce global app i.e. “[eShopSync for Magento](#)” in Salesforce account.

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**.



The screenshot displays the Magento 2 admin interface for configuring the Salesforce Connector. The left sidebar shows the navigation menu with 'STORES' highlighted. The main content area shows the 'Configuration' section for 'Salesforce Connector'. The 'Api Configuration' tab is active, displaying fields for Username, Password, Api Token, Client, and Connection Status. A 'Save Config' button is visible in the top right. Red callout boxes highlight the 'Save Config' button, the 'Admin has to fill all the information.' note, and the 'Test Connection' button.

Configuration

Store View: Default Config

WEBKUL

- Dashboard
- Marketplace Management
- Sales
- Products
- Customers
- Marketing
- Content
- Salesforce Connector
- Reports
- Stores**
- System

Salesforce Connector

Manage Product Custom Label Image

Marketplace

GENERAL

CATALOG

CUSTOMERS

SALES

SERVICES

ADVANCED

Api Configuration

Username [store view] (e.g : eshopsync@webkul.com)

Password [store view] (e.g : eshopsync)

Api Token [store view] (e.g. JDO7Fdsgcvaw1mNfmzYSmfWg)

Client [store view] Enterprise specify any client type.

Connection Status [store view] Successfully Connected Test After after saving above api details.

Test Connection Admin can test the connection from here.

Save Config Click to Save all the information.

Default Configuration

Pricebook Standard

Pricebook [store view] Standard Select Pricebook

Folder [store view] Eshopsync Select Folder

Automatic Synchronization

Order Synchronization [store view] Yes
if yes, then order will sync automatically after save.

Contact us to Lead Synchronization [store view] Yes
if yes, then every contact us request will be synced as a salesforce lead.

Category Synchronization [store view] Yes
if yes, then category will sync automatically.

Product Synchronization [store view] Yes
if yes, then product will sync automatically.

Customer Synchronization [store view] Yes
if yes, then Customer will sync automatically as an account.

Reset Salesforce Mapping

Reset All Mapping Data
Use It when you want to Change Salesforce Connection with new API. Warning!!! It'll Reset All Base Salesforce Mapping Data from Magento.

Upload WSDL File

Choose file No file chosen
Upload WSDL File

If no file is selected then default file will be uploaded.

Admin can enable or disable the automatic synchronization from here.

Admin can reset all the Mapping Data from Magento.

Admin can upload the WSDL file here which he will get from the Salesforce to connect the API.

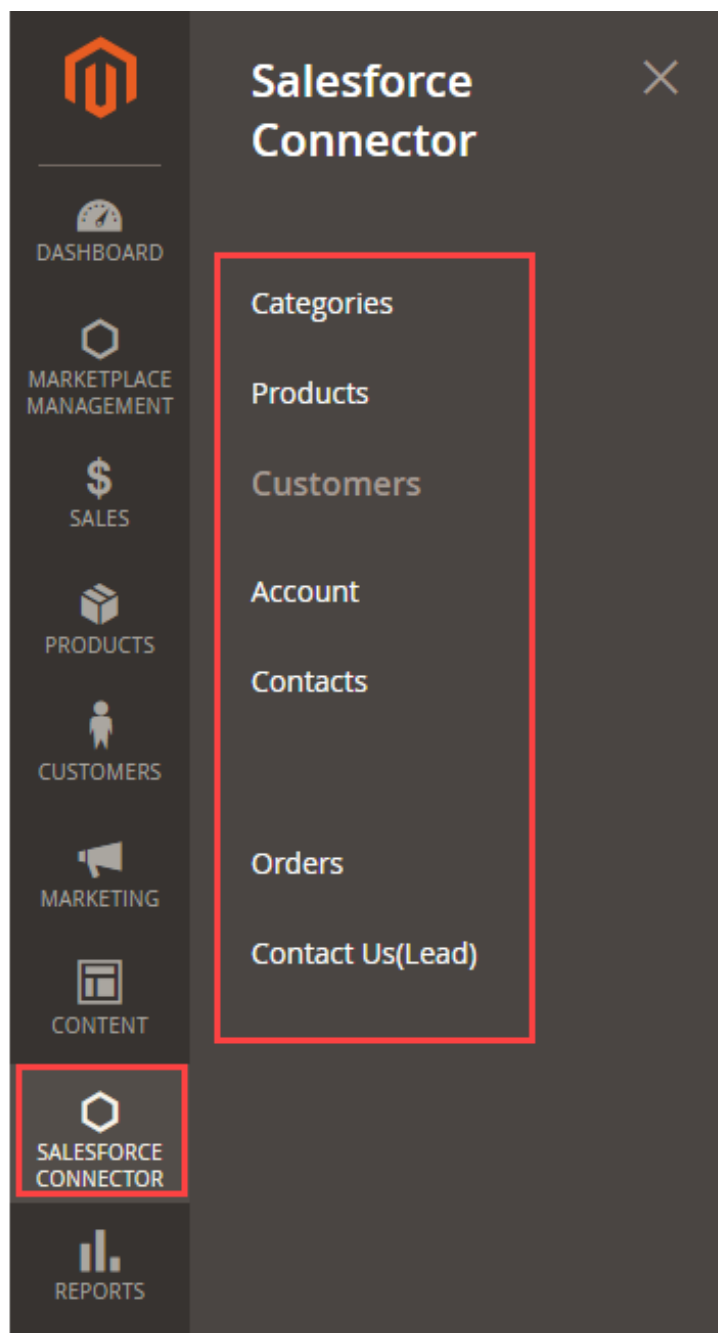
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Under configurations, the admin has to fill all the credentials.

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

The screenshot shows the Salesforce user interface for a user named 'admin user'. The top navigation bar includes 'Home', 'Chatter', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', 'Orders', 'Cases', 'Solutions', 'Products', 'Reports', and 'Dashboards'. The 'Sales' dropdown menu is open, showing options like 'Call Center', 'Marketing', 'App Launcher', 'Community', 'Site.com', 'Salesforce Chatter', 'Content', 'eShop Sync' (highlighted with a red box and a callout bubble saying 'Go to eShop Sync'), 'AppExchange', 'Developer Community', and 'Success Community'. The main content area shows a 'Post' section with a 'Share' button, a 'Recycle Bin' button, and a 'Calendar' section with 'New Event' and 'New Meeting Request' buttons. The 'Calendar' section shows 'Today 12/19/2016' and 'You have no events scheduled for the next 7 days.' The 'My Tasks' section shows 'You have no open tasks scheduled for this period.' The 'Items to Approve' section shows 'No records to display'.

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.

Search 2 admin

Export All Category(s)

Update All Category(s)

Search by keyword



Filters

Export

Actions

Delete

Change Status

Admin can change the Sync status from here.

From here admin can export all the categories to the Salesforce account.

10 per page

Synchronization Status

<input type="checkbox"/>	Category Name	Id	Magento Category Id	Salesforce Category Id	Created By	Created At	Need Sync(Status) ↓
<input type="checkbox"/>	Gear	209	3	a012800000uZpkGAAS	Magento-admin	2016-12-12 08:28:15	no
<input type="checkbox"/>	Hoodies & Sweatshirts	242	24	a012800000uZpwcAAC	Magento-admin	2016-12-12 08:31:02	no
<input type="checkbox"/>	Bottoms	225	22	a012800000uZprWAAS	Magento-admin	2016-12-12 08:29:38	no
<input type="checkbox"/>	Collections	210	7	a012800000uZplGAAS	Magento-admin	2016-12-12 08:28:19	no
<input type="checkbox"/>	Tees	243	25	a012800000uZpwqAAC	Magento-admin	2016-12-12 08:31:07	no
<input type="checkbox"/>	Women Sale	226	30	a012800000uZprkAAC	Magento-admin	2016-12-12 08:29:43	no
<input type="checkbox"/>	Training	211	9	a012800000uZplUAAS	Magento-admin	2016-12-12 08:28:24	no
<input type="checkbox"/>	Bras & Tanks	244	26	a012800000uZpxiAAC	Magento-admin	2016-12-12 08:31:11	no
<input type="checkbox"/>	Men Sale	227	31	a012800000uZprpAAC	Magento-admin	2016-12-12 08:29:48	no
<input type="checkbox"/>	Pants	228	32	a012800000uZpscAAC	Magento-admin	2016-12-12 08:29:53	no

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Salesforce

The screenshot shows the eShop Sync application interface. On the left, a sidebar contains navigation links: Get Started, Leads, Products, **Categories** (highlighted with a red box and a callout bubble labeled 'Synchronized Categories'), Orders, Customers, and Documents. The main content area is titled 'Categories' and features a search bar, a 'Records per page' dropdown set to 5, and a table of categories. The table has four columns: Category Image, Category, Parent Category, and Description. It lists five categories: Shorts (Parent: Bottoms), Pants (Parent: Bottoms), Bras & Tanks (Parent: Tops), Tees (Parent: Tops), and Hoodies & Sweatshirts (Parent: Tops). At the bottom right, it shows 'Page 1 of 8'.

Category Image	Category	Parent Category	Description
	Shorts	Bottoms	
	Pants	Bottoms	
	Bras & Tanks	Tops	
	Tees	Tops	
	Hoodies & Sweatshirts	Tops	

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 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)
<input type="checkbox"/>		Teton Pullover Hoodie-XS-Black	MH02-XS-Black	68	01t28000003aUxgAAE	Magento-admin	2016-12-15 12:22:30	no
<input type="checkbox"/>		Chaz Kangaroo Hoodie	MH01	67	01t28000003aUxIAAE	Magento-admin	2016-12-15 12:22:22	no
<input type="checkbox"/>		Phoebe Zipper Sweatshirt-XL-Purple	WH07-XL-Purple					yes
<input type="checkbox"/>		Juliana Short-Sleeve Tee-S-Yellow	WS07-S-Yellow					yes
<input type="checkbox"/>		Elisa EverCool™ Tee-S-Red	WS06-S-Red					yes

Salesforce

Search...

admin user

Setup

Help

eShop Sync

Home

Magento-Salesforce

eshop sync

Get Started

Leads

Products

Categories

Orders

Customers

Documents






Product

Search

Records per page: 5

Filter By Category: All Categories

+ -

	Name	Product Image	Description	Categories	Product SKU
<input type="checkbox"/>	Gabrielle Micro Sleeve Top-L-Green				WS02-L-Green
<input type="checkbox"/>	Atlas Fitness Tank-XL-Blue				MT11-XL-Blue
<input type="checkbox"/>	Deirdre Relaxed-Fit Capri-28-Green				WP12-28-Green
<input type="checkbox"/>	Fiona Fitness Short-29-Green				WSH01-29-Green
<input type="checkbox"/>	Miko Pullover Hoodie-L-Orange				WH04-L-Orange

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Synchronized Products

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 Account Mapping

Admin can Synchronize all Customer information.

Synchronize All Customer and Addresses

Search by keyword

Filters

Export

Actions

28 records found

5 per page

1 of 5

	Id	Customer Email	Magento Customer Id	Salesforce Account Id	Created By	Created At
<input type="checkbox"/>	31	roni_cost@example.com	1	00128000014C1nSAAS	Magento-admin	2016-12-13 13:51:32
<input type="checkbox"/>	32	john@webkul.com	2	00128000014C1nrAAC	Magento-admin	2016-12-13 13:51:44
<input type="checkbox"/>	33	jane@webkul.com	3	00128000014C1o6AAC	Magento-admin	2016-12-13 13:51:56
<input type="checkbox"/>	34	alice@webkul.com	4	00128000014s6FNAAY	Magento-admin	2016-12-13 13:52:13
<input type="checkbox"/>	35	mark@example.com	5	00128000014s6FcAAI	Magento-admin	2016-12-13 13:52:30

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Salesforce

Search...

admin user Setup Help eShop Sync

Home Magento-Salesforce eshop sync

Get Started

Leads

Products

Categories

Orders

Customers

Documents

Customers

Search

Records per page: 10

	Name	Industry	Phone	Type	Account Number
<input type="checkbox"/>	GenePoint	Biotechnology		Customer - Channel	
<input type="checkbox"/>	United Oil & Gas, UK	Energy		Customer - Direct	
<input type="checkbox"/>	United Oil & Gas, Singapore	Energy		Customer - Direct	
<input type="checkbox"/>	Edge Communications	Electronics		Customer - Direct	
<input type="checkbox"/>	Burlington Textiles Corp of America	Apparel		Customer - Direct	
<input type="checkbox"/>	Pyramid Construction Inc.	Construction		Customer - Channel	
<input type="checkbox"/>	Dickenson plc	Consulting		Customer - Channel	
<input type="checkbox"/>	Grand Hotels & Resorts Ltd	Hospitality		Customer - Direct	
<input type="checkbox"/>	Express Logistics and Transport	Transportation		Customer - Channel	
<input type="checkbox"/>	University of Arizona	Education		Customer - Direct	

Page 1 of 2

Synchronized Customers

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.

Salesforce Contact Mapping

Search by keyword

Actions 6 records found

All the customer contact information will be shown here separately if any customer has more than 1 contact information.

20 per page 1 of 1

<input type="checkbox"/>	Id	Customer Email	Magento Customer Id	Magento Address Id	Salesforce Contact Id	Created By	Created At
<input type="checkbox"/>	8	roni_cost@example.com	1	1	0032800000juoMzAAI	Magento-admin	2016-12-13 13:51:32
<input type="checkbox"/>	9	john@webkul.com	2	2	0032800000juoN4AAI	Magento-admin	2016-12-13 13:51:45
<input type="checkbox"/>	10	john@webkul.com	2	3	0032800000juoN9AAI	Magento-admin	2016-12-13 13:51:45
<input type="checkbox"/>	11	john@webkul.com	2	4	0032800000juoNEAAY	Magento-admin	2016-12-13 13:51:46
<input type="checkbox"/>	12	mark@example.com	3	5	0032800000juoNYAAY	Magento-admin	2016-12-13 13:51:59
<input type="checkbox"/>	13	mark@example.com	3	6	0032800000juoNdAAI	Magento-admin	2016-12-13 13:51:59

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.

Orders

Create New Order

Search by keyword

Filters Default View Columns Export

200 per page 1 of 1

33 records found

If the auto sync is Off then admin can sync the order by selecting the orders and then clicking on "Sync at Salesforce"

Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
Main Website Main Website Store Default Store View	Oct 19, 2016, 9:10:00 AM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View
Main Website Main Website Store Default Store View	Oct 19, 2016, 9:10:00 AM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	View
Main Website Main Website Store Default Store View	Dec 08, 2016, 15:12:00 PM	John	John	TRL45.00	\$2,250.00	Pending	View

Actions

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- sync at salesforce

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

Salesforce Order Mapping


All the order synchronized will be shown here.

Export ▼

14 records found

5 per page

< 1 of 3 >

	Id	Order #	↓	Magento Id	Name	Salesforce Id	Salesforce Account Id	Created At
<input type="checkbox"/>	8	000000001		1	Veronica	80128000000uyeUAAQ	128000014	2016-12-13 08:37:59
<input type="checkbox"/>	9	000000002		2	Veronica	80128000000uyeZAAQ	128000014	2016-12-13 08:38:53
<input type="checkbox"/>	10	000000014		14	John	80128000000uuAfAAI	128000014	2016-12-13 08:38:56
<input type="checkbox"/>	6	000000037		20	Mark	80128000000uvV0AAI	128000014	2016-12-10 14:12:21
<input type="checkbox"/>	7	000000047		22	Dave	80128000000uvV5AAI	128000014	2016-12-10 14:17:37

Salesforce

The screenshot displays the eShop Sync application interface. On the left, a sidebar contains navigation links: Home, Get Started, Leads, Products, Categories, Orders (highlighted), Customers, and Documents. The main area is titled 'Orders' and features a search bar and a 'Records per page' dropdown set to 10. A table lists three orders with their respective details. A red callout bubble highlights the 'Synchronized Orders' header above the table.

Order Number	Account	Status	Total Amount
00000102	John Doe	pending	\$2250.00
00000101	Mack Hudson	complete	\$550.00
00000100	Veronica Costello	processing	\$2400.00

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 lead Mapping

Here all the Synchronized Customer Query will be shown.

Export ▼

1 records found

20 ▼ per page

< 1 of 1 >

	Id	Name	Contact Email	Telephone	Salesforce Lead Id	Created At 
<input type="checkbox"/>	1	Dave	dave@webkul.com	1111111111	00Q2800000V56D7EAJ	2016-12-08 10:05:18

Salesforce

Search...

admin user Setup Help eShop Sync

Home Magento-Salesforce eshop sync +

Get Started

Leads

Products

Categories

Orders

Customers

Documents

Synchronized Leads

Leads

Search

Records per page: 10 + -

	Name	Industry	Phone	Lead Source	Company	Lead status
<input type="checkbox"/>	Bertha Boxer	Agriculture		Web	Farmers Coop. of Florida	Working - Contacted
<input type="checkbox"/>	Phyllis Cotton			Web	Abbott Insurance	Open - Not Contacted
<input type="checkbox"/>	Jeff Glimpse			Phone Inquiry	Jackson Controls	Open - Not Contacted
<input type="checkbox"/>	Mike Braund			Purchased List	Metropolitan Health Services	Open - Not Contacted
<input type="checkbox"/>	Patricia Feager			Partner Referral	International Shipping Co.	Working - Contacted
<input type="checkbox"/>	Brenda Mcclure			Web	Cadinal Inc.	Working - Contacted
<input type="checkbox"/>	Violet Maccleod			Phone Inquiry	Emerson Transport	Working - Contacted
<input type="checkbox"/>	Kathy Snyder			Purchased List	TNR Corp.	Working - Contacted
<input type="checkbox"/>	Tom James			Web	Delphi Chemicals	Working - Contacted
<input type="checkbox"/>	Shelly Brownell			Partner Referral	Western Telecommunications Corp.	Working - Contacted

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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/>