

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.

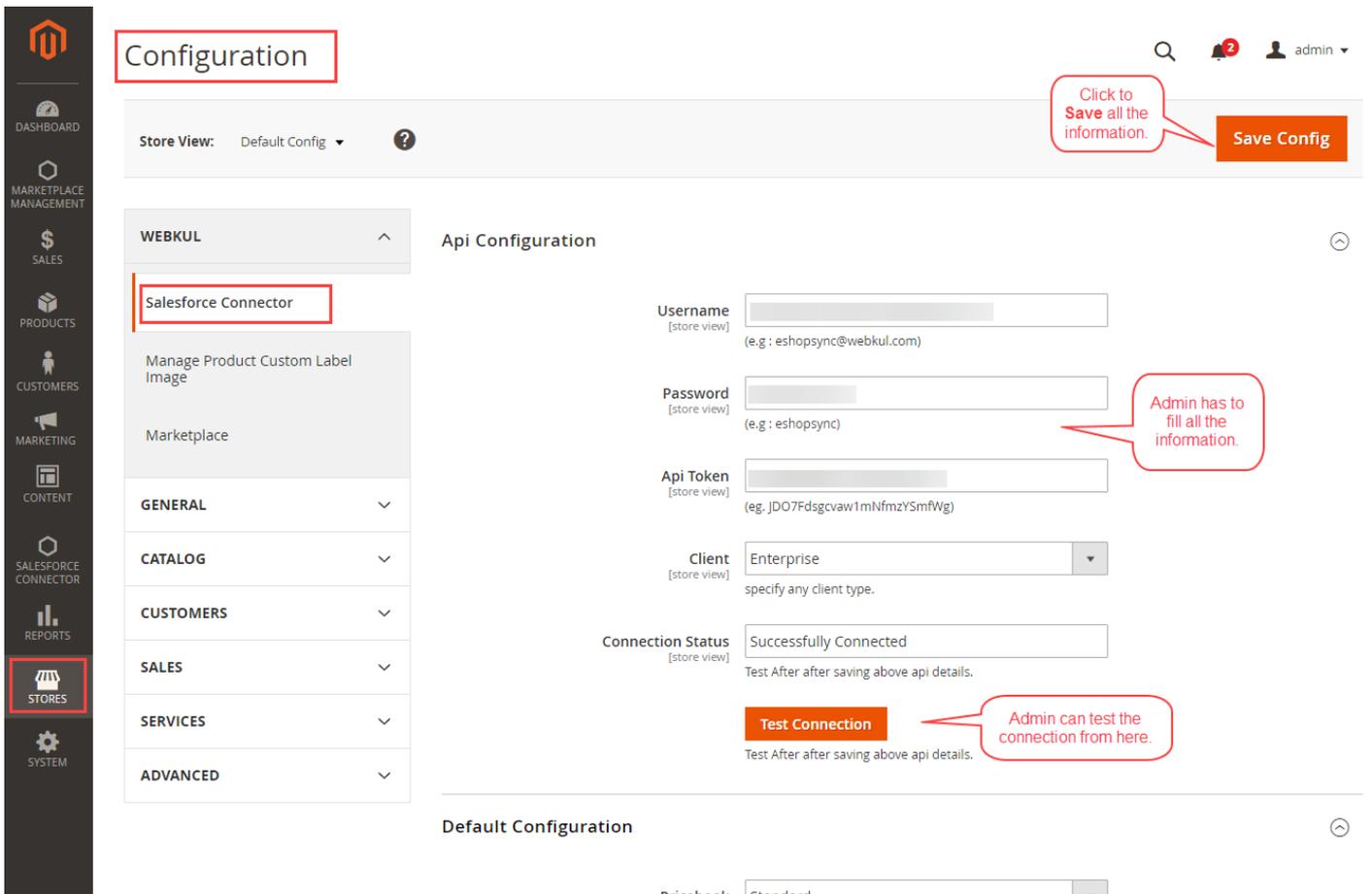
Please Note – Before installing this module on your Magento store, you have to open an account on Salesforce and add a Salesforce global app i.e. “[eShopSync for Magento](#)” in Salesforce account.

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**.



The screenshot displays the Magento Admin Configuration page for the Salesforce Connector module. The page is titled "Configuration" and shows the "Api Configuration" section. The "STORES" menu item in the left sidebar is highlighted. The "Save Config" button is highlighted with a callout: "Click to Save all the information." The "Password" field is highlighted with a callout: "Admin has to fill all the information." The "Test Connection" button is highlighted with a callout: "Admin can test the connection from here." The "Connection Status" field shows "Successfully Connected".

The screenshot displays the configuration page for the Salesforce connector in Magento. At the top, there are dropdown menus for 'Pricebook' (set to 'Standard') and 'Folder' (set to 'Eshopsync'). Below this is the 'Automatic Synchronization' section, which contains five toggleable options, all currently set to 'Yes':

- Order Synchronization:** if yes, then order will sync automatically after save.
- Contact us to Lead Synchronization:** if yes, then every contact us request will be synced as a salesforce lead.
- Category Synchronization:** if yes, then category will sync automatically.
- Product Synchronization:** if yes, then product will sync automatically.
- Customer Synchronization:** if yes, then Customer will sync automatically as an account.

The 'Reset Salesforce Mapping' section features a prominent orange button labeled 'Reset All Mapping Data'. A callout box explains: 'Admin can reset all the Mapping Data from Magento.' Below the button, a warning message states: 'Use It when you want to Change Salesforce Connection with new API. Warning!!! It'll Reset All Base Salesforce Mapping Data from Magento.'

The 'Upload WSDL File' section includes a file selection interface with a 'Choose file' button and the text 'No file chosen'. A callout box notes: 'If no file is selected then default file will be uploaded.' Another callout box explains: 'Admin can upload the WSDL file here which he will get from the Salesforce to connect the API.'

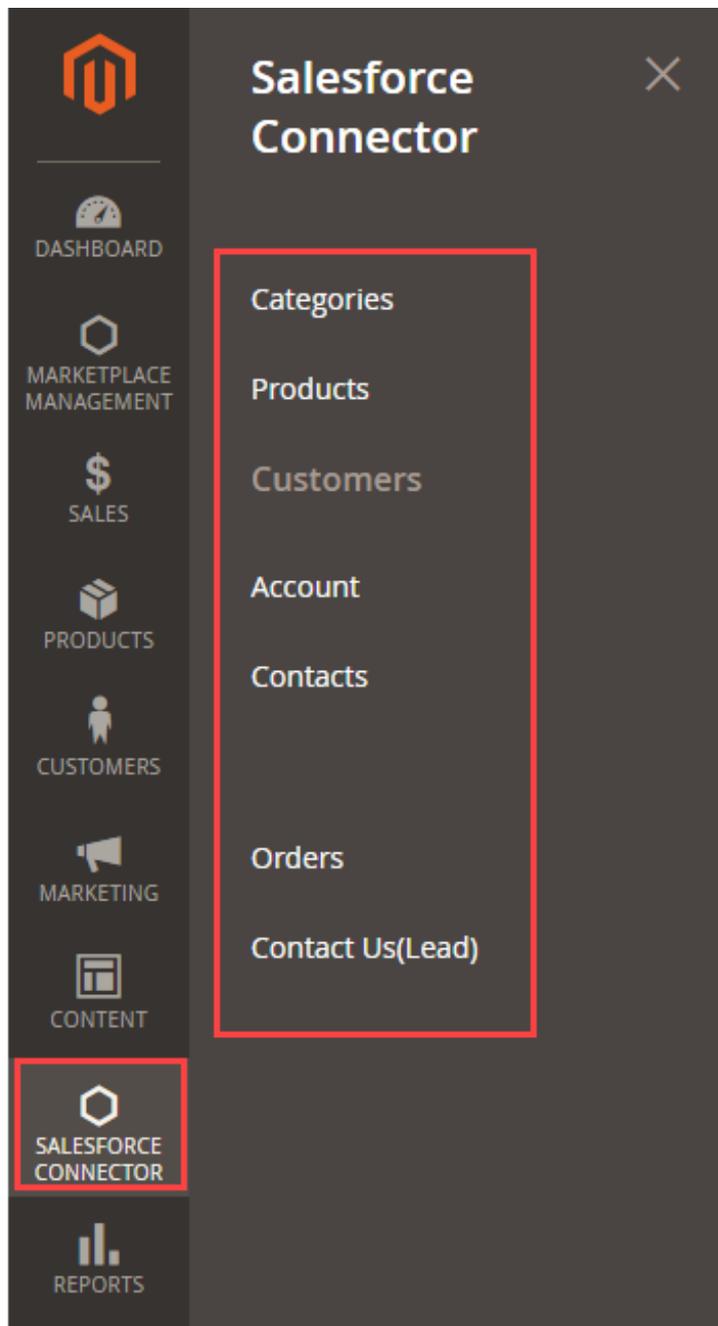
At the bottom of the page, the footer contains the copyright notice 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and the version information 'Magento ver. 2.1.1' with a link to 'Report Bugs'.

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 displays the Salesforce user interface for an 'admin user' on Monday, December 19, 2016. The top navigation bar includes 'Home', 'Chatter', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', 'Orders', 'Cases', 'Solutions', 'Products', 'Reports', and 'Dashboards'. A search bar is located in the top left, and the user's name and profile picture are in the top right. A dropdown menu is open under the 'Sales' tab, listing various options: Call Center, Marketing, App Launcher, Community, Site.com, Salesforce Chatter, Content, **eShop Sync** (highlighted with a red box and a callout), AppExchange, Developer Community, and Success Community. The main content area features a 'Create New...' button, a 'Recent Items' list, and a 'Recycle Bin'. Below this is a 'Post' section with a text input field and a 'Share' button. A 'Recommendations' section follows, featuring a card for 'Get The Salesforce1 App' and two user profiles: 'Mr. Tim Barr' and 'United Oil & Gas Corp.'. The bottom section contains three dashboard widgets: 'Calendar' (showing 'Scheduled Meetings' and 'Requested Meetings' tabs, with a message 'You have no events scheduled for the next 7 days.'), 'My Tasks' (with a 'New' button and a message 'You have no open tasks scheduled for this period.'), and 'Items to Approve' (with a 'Manage All' button and a message '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.

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 1 of 4

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

Salesforce

The screenshot shows the 'Categories' management interface. The table contains the following data:

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)
	Teton Pullover Hoodie-XS-Black	MH02-XS-Black	68	01t28000003aUxgAAE	Magento-admin	2016-12-15 12:22:30	no
	Chaz Kangeroo Hoodie	MH01	67	01t28000003aUxIAAE	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

salesforce Eshop sync

admin user Setup Help eShop Sync

- Home
- Magento-Salesforce
- eshop sync
- Get Started
- Leads
- Products
- Categories
- Orders
- Customers
- Documents

Product

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

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

Actions 28 records found per page of 5

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

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:

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

20 per page 1 of 1

Filters Export

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

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

Search by keyword

33 records found

200 per page 1 of 1

Filters Default View Columns Export

Create New Order

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

Search by keyword

Actions 14 records found

5 per page 1 of 3

Filters

admin

<input type="checkbox"/>	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

All the order synchronized will be shown here.

Salesforce

Search...

admin user Setup Help eShop Sync

Home Magento-Salesforce eshop sync +

Get Started Leads Products Categories **Orders** Customers Documents

Orders Synchronized Orders

Search Records per page: 10

<input type="checkbox"/>	Order Number	Account	Status	Total Amount
<input type="checkbox"/>	00000102	John Doe	pending	\$2250.00
<input type="checkbox"/>	00000101	Mack Hudson	complete	\$550.00
<input type="checkbox"/>	00000100	Veronica Costello	processing	\$2400.00

Page 1 of 1

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

Search by keyword

Actions 1 records found

20 per page 1 of 1

Filters

admin

<input type="checkbox"/>	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

Here all the Synchronized Customer Query will be shown.

The screenshot shows the Salesforce interface with the 'Leads' section active. The sidebar on the left contains navigation items: Get Started, Leads (highlighted with a red box and a callout), Products, Categories, Orders, Customers, and Documents. The main content area displays a table of leads with columns for Name, Industry, Phone, Lead Source, Company, and Lead status. The table contains 10 rows of lead data. At the bottom of the page, it indicates 'Page 1 of 3'.

	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

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/>