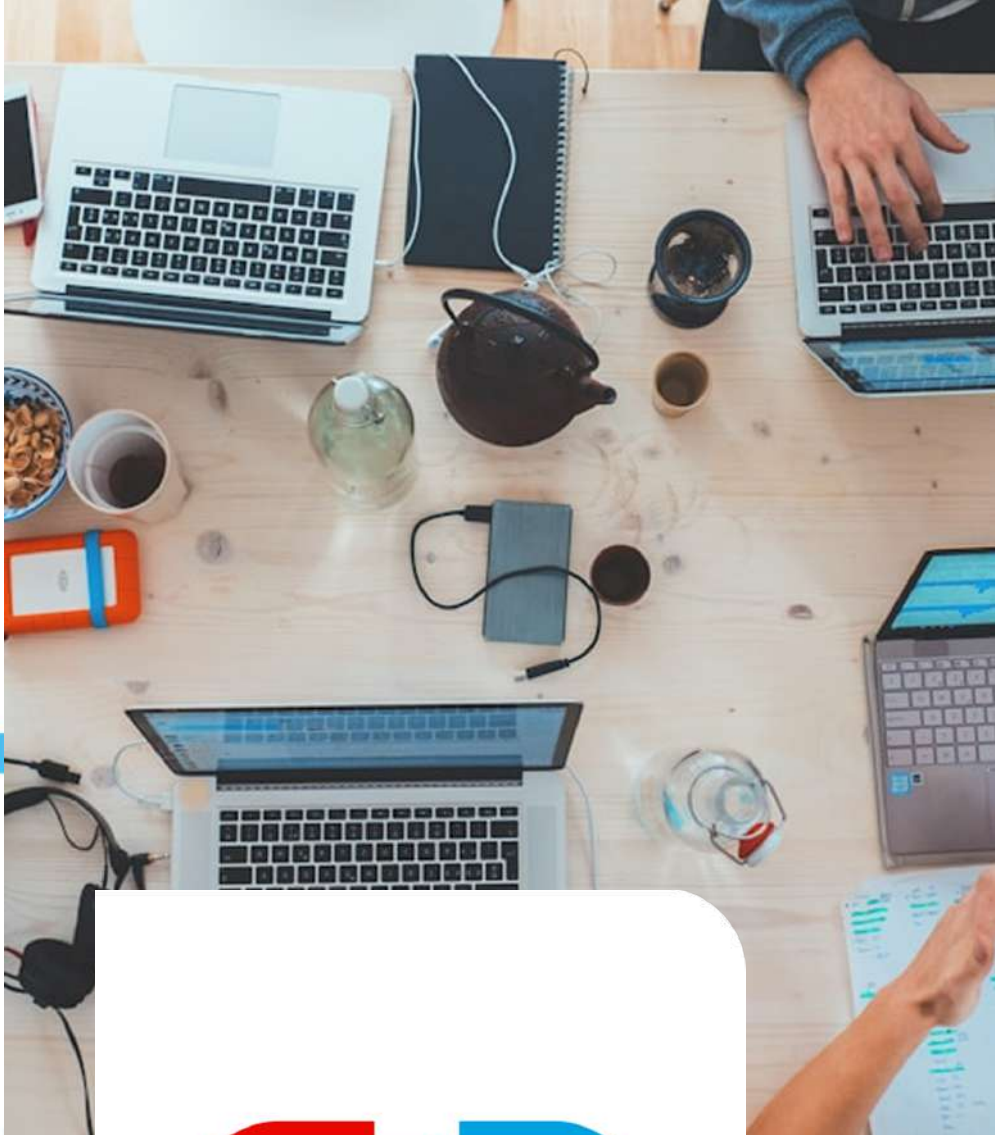


USER GUIDE



MAGELINK SALESFORCE CONNECTOR

User Guide



Contents

1. Overview.....	3
2. Features.....	3
3. Installation.....	4
4. Configuration.....	5
4.1. Configure User Sync from Salesforce to Magento.....	5
4.1.1 Update the User Page Layout.....	5
4.1.2 Update the Magento Website values.....	5
4.1.3 Update the Remote Site URL.....	6
4.1.4 Update the Named Credentials URL and Authorization Token.....	6
4.1.5 Permission Set Assignments.....	8
4.1.6 Custom Setting Record.....	9
4.2. Configure the Contact Sync from Magento to Salesforce.....	9
4.2.1 Connected App Creation and Oauth Settings.....	9
5. Reports.....	13

1. Overview

Welcome to **MageLink Salesforce Connector by QBurst** for Salesforce.

Our integration suite offers a robust solution for seamlessly connecting Salesforce and Magento. Users can effortlessly synchronize Salesforce Contact data with Magento Customer data, ensuring consistency across both platforms. The suite operates bidirectionally, eliminating the need for manual intervention.

All you need to do is to configure the settings and you can continue working on Salesforce as usual, without worrying about synchronizing Contact data with Magento.

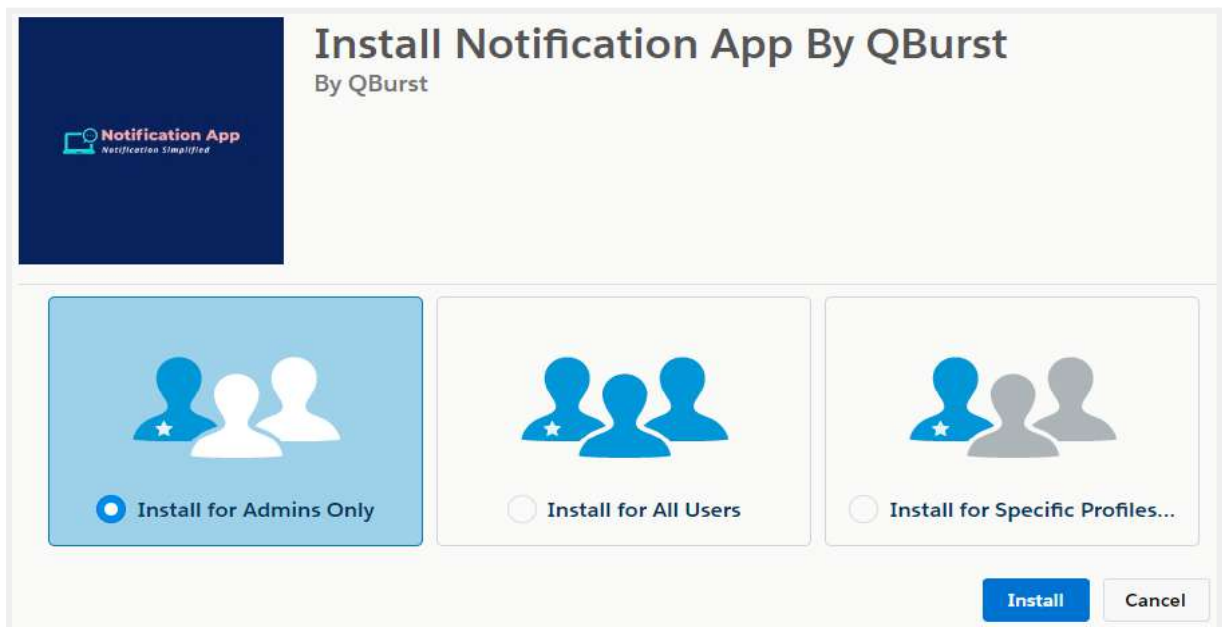
This app also exposes a REST API endpoint that handles requests from Magento and performs customer-related CRUD operations.

2. Features

1. **Bidirectional Data Synchronization:** Ensure that customer data is consistent across both platforms with seamless synchronization in real-time.
2. **Perform Bulk Operations:** Easily perform bulk create, update, and delete operations for customers. This process is bidirectional, making it both time- and cost-efficient.
3. **Robust Error Handling:** Our module includes robust error-handling mechanisms to ensure data integrity and provide detailed logs for easy troubleshooting.
4. **Secure Connection:** Prioritize the security of your data with a secure, encrypted connection between your Salesforce and Magento 2 store.
5. **Supports Magento Multi-store Functionality:** Using this module you can create/update customers across multiple stores and keep them synced in both systems.

3. Installation

1. Go to AppExchange, type 'MageLink Salesforce Connector by QBurst' in the Search bar, and select to install.
2. Install the 'MageLink Salesforce Connector' package in your Salesforce organization and log in to Salesforce. Once logged in, you will see the following image.



3. Select **Install for All Users** and click on **Install**. It will validate and install the app.
4. Click Done.

4. Configuration

4.1. Configure User Sync from Salesforce to Magento

This module helps you sync users from Salesforce to Magento and vice versa. After successful installation, the **Salesforce System Administrator** should configure the following settings.

4.1.1 Update the User Page Layout

- 1) Go to Object Manager>Contact>Page Layout.
- 2) Create a section for Magento and add the following fields to the Contact page layout where required:
 - Website
 - Response Message
 - Successfully Synced in Magento
 - Successfully Synced in SF
 - Magento-Salesforce Sync Timestamp
 - Salesforce-Magento Sync Timestamp
- 3) Make sure all fields are set to “Read-only” in the page layout, except the **Website** lookup field.
- 4) Click on **Save**.

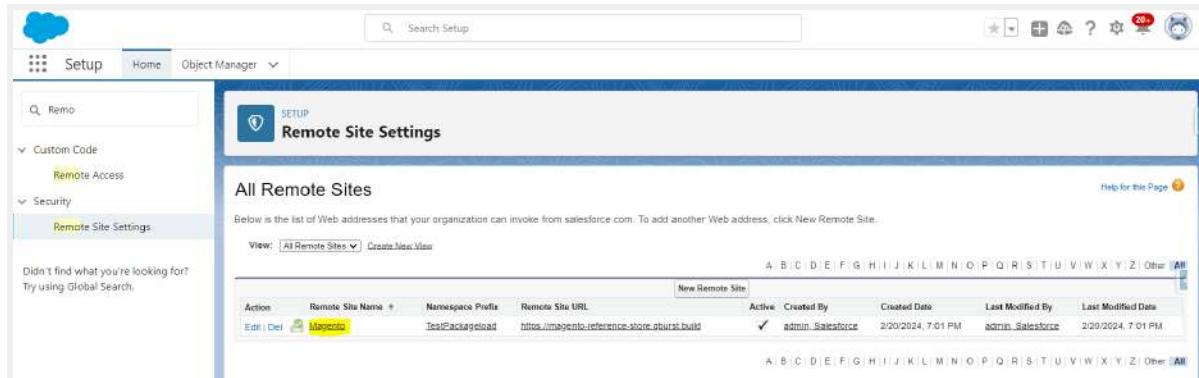
4.1.2 Update the Magento Website values

Go to ‘Website’ tab and create the Website Records

- Create the website records with Website name and website code same as the values provided by the Magento System Admin. (Case sensitive).

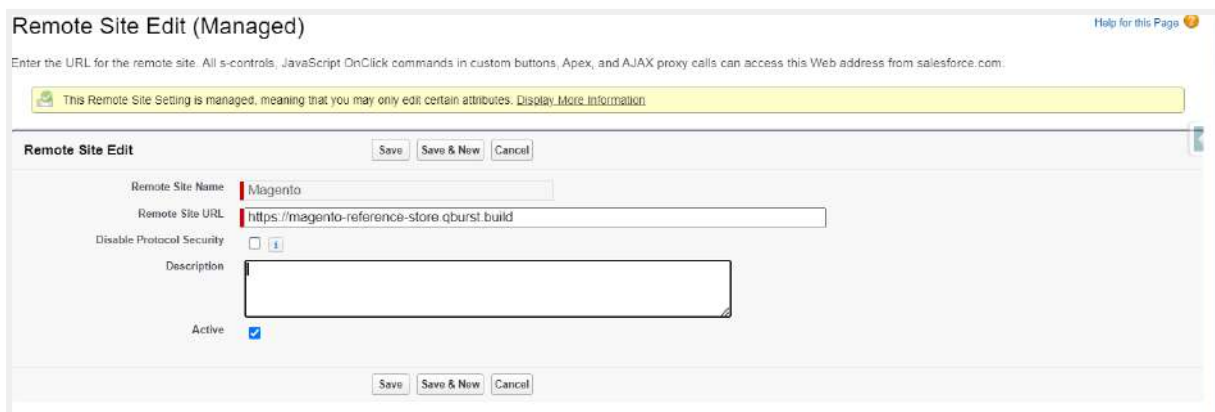
4.1.3 Update the Remote Site URL

- 1) Go to **Set Up > Quick Find> Remote Site Settings**



- 2) Click on Edit next to “Magento” and update the Remote Site URL with the Magento URL which is responsible for handling the requests sent from Salesforce. (You will need to get the URL from the Magento Admin).

NOTE: Salesforce only accepts the URL which contains HTTPS.



- 3) Click on **Save**.

4.1.4 Update the Named Credentials URL and Authorization Token

- 1) Go to **Set Up> Quick Find> Named Credentials**



2) Click on **Magento Named Credentials** and select “Edit”.

Edit Magento Named Credential

* Label: * Name:

* URL:

Enabled for Callouts: ☒

Authentication

* External Credential:

Client Certificate:

Callout Options

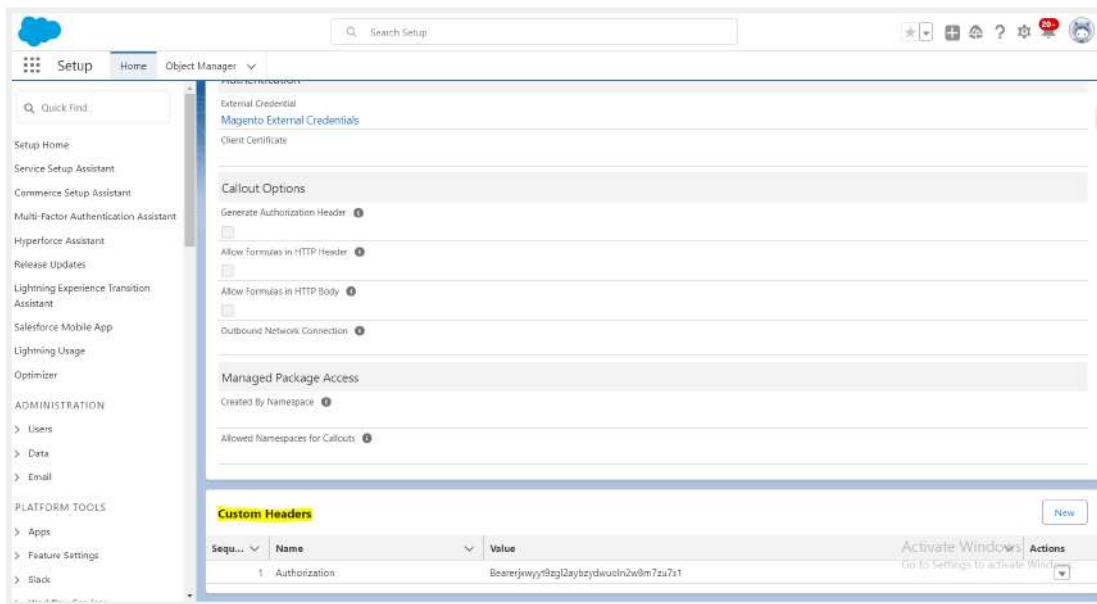
Generate Authorization Header: ☐

Allow Formulas in HTTP Header: ☐

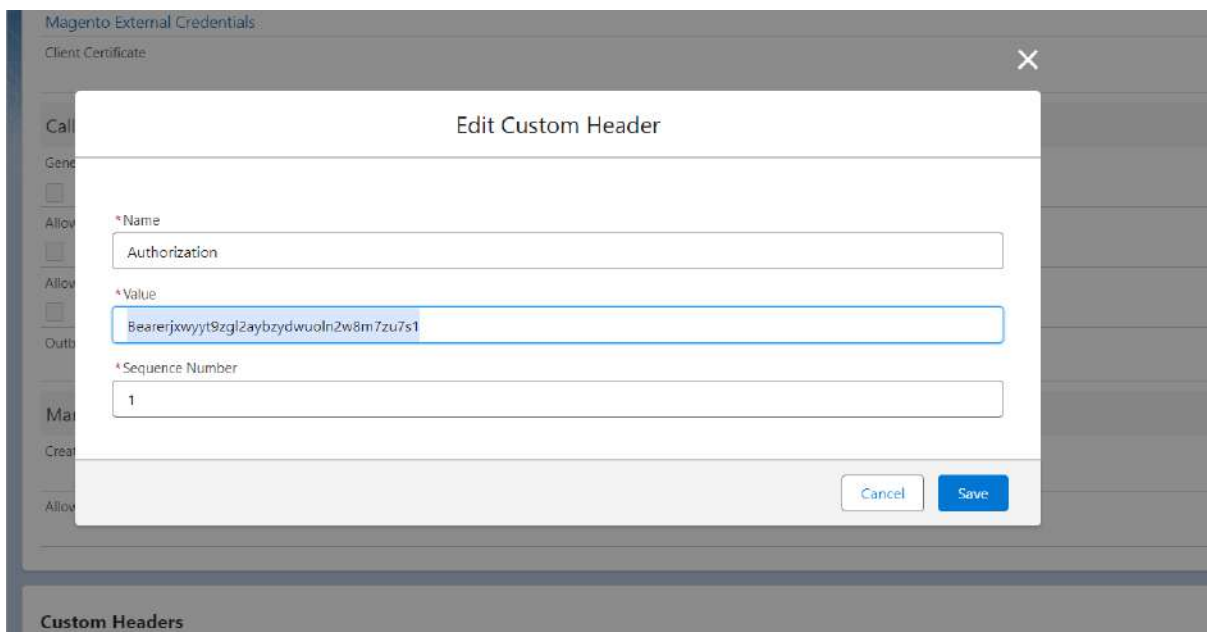
[Cancel](#) [Save](#)

3) Update the URL with the URL that is responsible for handling the requests sent from Salesforce. (Get the URL from the Magento Admin; this should be the **same URL** added in the Remote Site settings). Click on **Save**.

4) Now scroll down to the “Custom Header” section under the Named Credentials.



5) Click on the **Actions** drop-down and select Edit.



6) Update **Value** with the value of the authorization token provided by Magento Admin.

4.1.5 Permission Set Assignments

1. Go to Set Up> Quick Find> Permission Set.

2. Select “Magento Named Credential access” and assign all the users who need access to sync to this permission set.
3. Select and assign the “Magento Website and Contact Field Permissions” to all the users who need access to sync to this permission set.

4.1.6 Custom Setting Record

1. Go to the “MagentoSyncRunBatch” custom setting.
2. Click on **Manage** and create a record with the **Name** “Sync Run” and enter “7” for **Sync Fails in Last N Days** as displayed in the screenshot.

This is to run the sync failed records in batches.

4.2. Configure the Contact Sync from Magento to Salesforce

4.2.1 Connected App Creation and Oauth Settings

- 1) Go to Set Up> App Manager > New Connected App
- 2) Enter the connected app’s name. (You can name it “Magento”)
- 3) Enter the API name used when referring to your app from a program. It defaults to a version of the name without spaces. Only letters, numbers, and underscores are allowed. So if the original app name contains any other characters, edit the default name.
- 4) Enter the contact email for Salesforce to use in case we want to contact you or your support team.
- 5) Check the Enable OAuth Settings checkbox.
- 6) Enter the Callback URL. (The Callback URL can be the Salesforce Organization's Domain URL)
- 7) Select Full (access) in the Available OAuth Scopes.

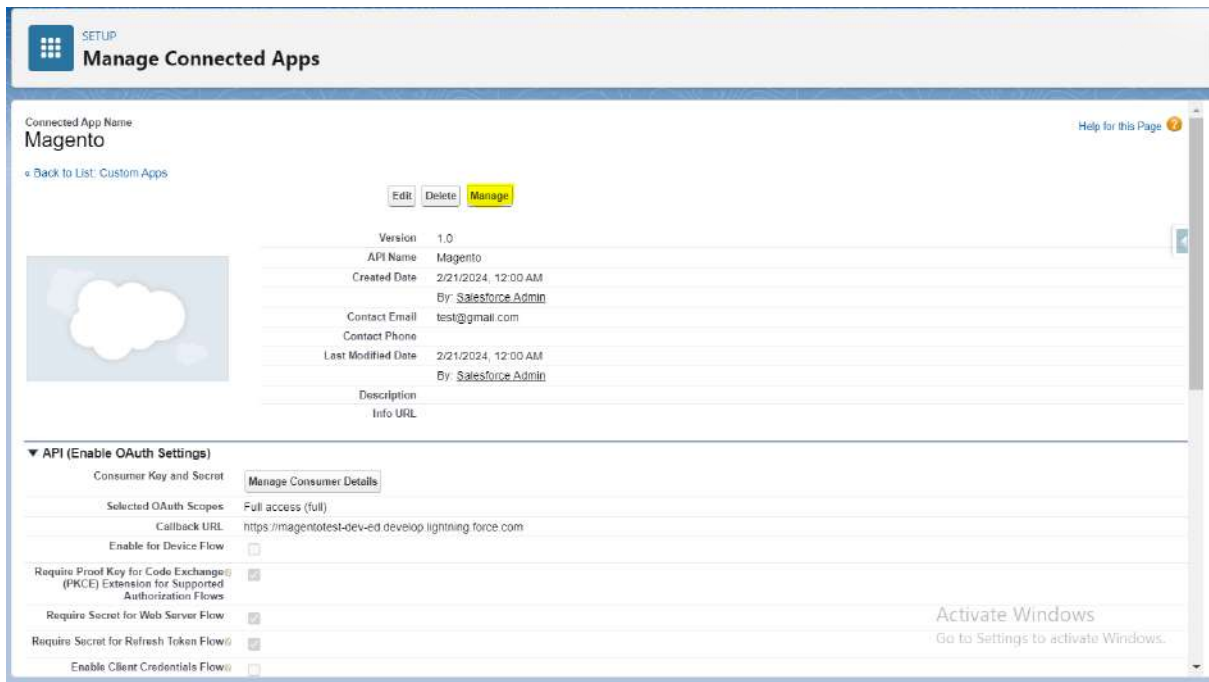
The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with 'Setup' and 'Home' tabs, and a search bar. The main content area is titled 'Manage Connected Apps'. Below this, there's a section for 'Connected App Name: Magento'. The 'Basic Information' section includes fields for 'Connected App Name' (Magento), 'API Name' (Magento), 'Contact Email' (test@gmail.com), 'Contact Phone', 'Logo Image URL', 'Icon URL', 'Info URL', and 'Description'. There are 'Save' and 'Cancel' buttons. Below the 'Basic Information' section, there's a section for 'API (Enable OAuth Settings)' with checkboxes for 'Enable OAuth Settings' (checked), 'Enable for Device Flow', and 'Use digital signatures'. A 'Callback URL' field is also present with the value 'https://magentotest-dev-ed.develop.lightning.force.com'. An 'Activate Windows' watermark is visible in the bottom right corner.

The screenshot shows the Salesforce Setup interface for 'Manage Connected Apps'. The 'Selected OAuth Scopes' section is visible, showing a list of 'Available OAuth Scopes' and a list of 'Selected OAuth Scopes'. The 'Available OAuth Scopes' list includes: 'Access Analytics REST API Charts Geodata resources (eclair_api)', 'Access Analytics REST API resources (wave_api)', 'Access Connect REST API resources (chatter_api)', 'Access Einstein GPT services (einstein_gpt_api)', 'Access Headless Forgot Password API (forgot_password)', 'Access Headless Passwordless Login API (pwdless_login_api)', 'Access Headless Registration API (user_registration_api)', 'Access Interaction API resources (interaction_api)', 'Access Lightning applications (lightning)', and 'Access Visualforce applications (visualforce)'. The 'Selected OAuth Scopes' list currently contains 'Full access (full)'. There are 'Add' and 'Remove' buttons between the two lists. Below the 'Selected OAuth Scopes' section, there are several checkboxes for OAuth settings, including 'Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows' (checked), 'Require Secret for Web Server Flow' (checked), 'Require Secret for Refresh Token Flow' (checked), 'Enable Client Credentials Flow', 'Enable Authorization Code and Credentials Flow', 'Enable Token Exchange Flow', 'Enable Refresh Token Rotation', 'Issue JSON Web Token (JWT)-based access tokens for named users', 'Introspect All Tokens', 'Configure ID Token', and 'Enable Asset Tokens'. An 'Activate Windows' watermark is visible in the bottom right corner.

8) Click on **Save**.

9) Now Go to Set Up>Quick Find>App Manager

10) Click the Action drop-down and select "View" and click "Manage".



Manage Connected Apps

Connected App Name: **Magento**

Back to List: Custom Apps

Buttons: Edit, Delete, **Manage**

Version: 1.0

API Name: Magento

Created Date: 2/21/2024, 12:00 AM

By: [Salesforce Admin](#)

Contact Email: test@gmail.com

Contact Phone:

Last Modified Date: 2/21/2024, 12:00 AM

By: [Salesforce Admin](#)

Description:

Info URL:

API (Enable OAuth Settings)

Consumer Key and Secret: [Manage Consumer Details](#)

Selected OAuth Scopes: Full access (full)

Callback URL: https://magentotest-dev-ed.develop.lightning.force.com

Enable for Device Flow: ☐

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows: ☒

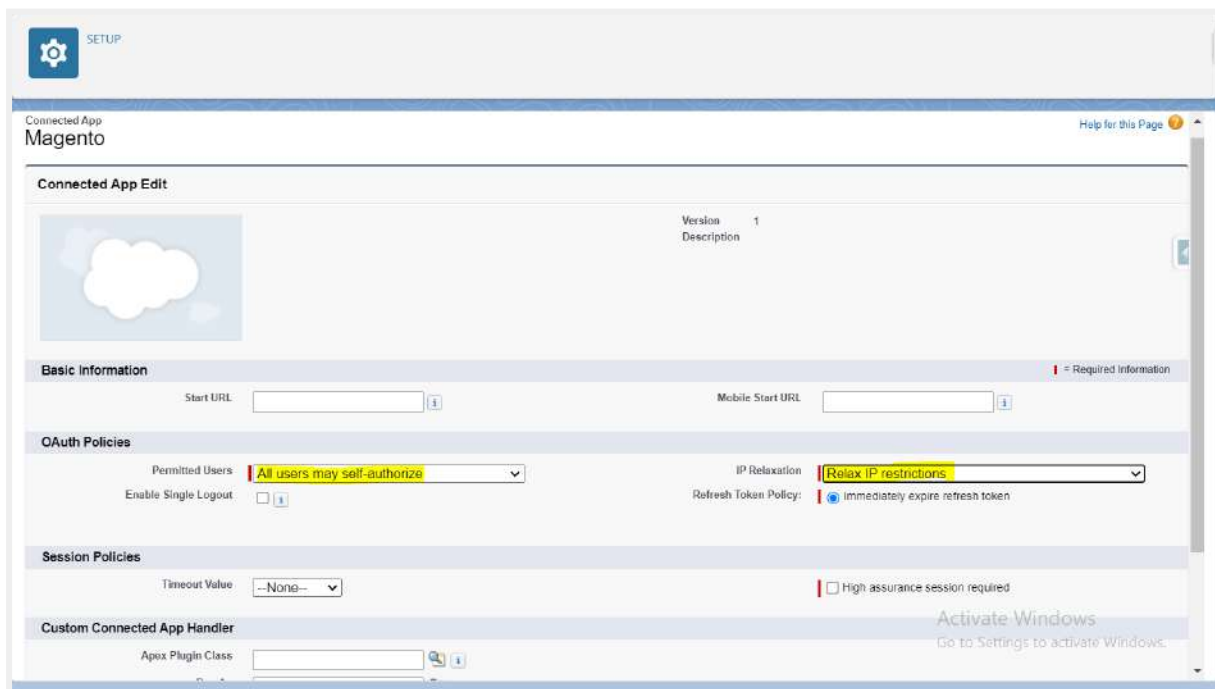
Require Secret for Web Server Flow: ☒

Require Secret for Refresh Token Flow: ☒

Enable Client Credentials Flow: ☐

Activate Windows
Go to Settings to activate Windows.

11) Click “Edit Policies” and make sure the **Permitted Users** option is selected as “All users may self authorize” and **IP Restrictions** is selected as “Relax IP restrictions” and save the changes.



Connected App Edit

Version: 1

Description:

Basic Information

Start URL:

Mobile Start URL:

OAuth Policies

Permitted Users: **All users may self authorize**

Enable Single Logout: ☐

IP Relaxation: **Relax IP restrictions**

Refresh Token Policy: ☒ immediately expire refresh token

Session Policies

Timeout Value: **None**

☐ High assurance session required

Custom Connected App Handler

Apex Plugin Class:

Activate Windows
Go to Settings to activate Windows.

- 12) Now Go to Set Up>Quick Find>App Manage and click the Action drop-down. Select “View” and click on “Manage Consumer Details”. Share the Consumer key and Consumer Secret as Client Id and Password with the Magento Admin and also provide the Salesforce URL as custom domain URL; you can get the URL from set up>My domain.

Example : <https://magentopackagetest-dev-ed.develop.my.salesforce.com>

- 13) Now go to Set Up> Quick Find> OAuth and OpenID Connect Settings.

- 14) Make sure the “Allow OAuth Username-Password Flows” is enabled.

5. Reports

As part of the package there are four Reports related to Synced Magento contacts. You will need to grant access to the “Magento Reports” folder for users to access the reports.