



How to install and configure ForceGento App using AppExchange

This guide will walk you through the installation process of TechnoMile’s ForceGento Application for your Salesforce Organization.

ForceGento is **B2C ecommerce** application that provides a high performance, scalable ecommerce solution for businesses. It is B2C ecommerce app that is an online store which is compatible with web/mobile app.

This app provides online merchants with a flexible **shopping cart system**, as well as control over the look, content and functionality of their online store. **Users can register select products for shopping and place orders.**

Important: Once installation is complete, you must deploy the standard objects additional picklist values, Opportunity Stage & Product Family and finish your installation by following the instructions in Part II.

Part I

1. Enter your Salesforce Credentials login into AppExchange i.e. **Username & Password**.

ForceGento - B2C Ecommerce with Salesforce and Magento

Leverage power of Salesforce and Magento eCommerce platform!

★★★★★ (No Rating)

Free - [Details below](#)

OVERVIEWDETAILSREVIEWS PROVIDER

♥ Save

➔ Get It Now

To get this app, select one of the below options

Log in to the AppExchange

Use your Salesforce credentials

I don't have a login

Continue as a guest

2. Select where you would like to install the application. In this example, we will be selecting **Install in Production**, however the instructions are the same for either option.

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OVERVIEW DETAILS REVIEWS PROVIDER

How would you like to continue?

 **Install in production**
Includes active, trial or developer orgs

 **Install in sandbox**
Test in a copy of your production org

Save Get It Now

- 3 Check **I have read and agree to the terms and conditions** checkbox. Then, click **Confirm and Install**

i Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE ForceGento - B2C Ecommerce with Salesforce and Magento	ORGANIZATION Technomile
VERSION ForceGento (ForceGento / 1.3.0)	EDITION Developer
SUBSCRIPTION Free	USER NAME [REDACTED]
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

☒ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#) **Confirm and Install!**

- 4 The Next step involves setting up the accessibility settings for the app. Salesforce provides us with the following three options to define the accessibility for the app:-
- **Install for Administrations Only** :- Selecting this option means that the app is available only for the users having the profile of a System Administration. All the other users will not have access to the app.
 - **Install for All Users** :- Selecting this option means that all the users in the Salesforce App will have access to the app regardless of their User profile. This means that you cannot restrict any user from having access to the installed app.
 - **Install for Specific Profile** :- This option allows you to grant users access to the app based on their users profiles.


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
ForceGento - B2C Ecommerce with Salesforce and Magento	TechnoMile	ForceGento	1.3

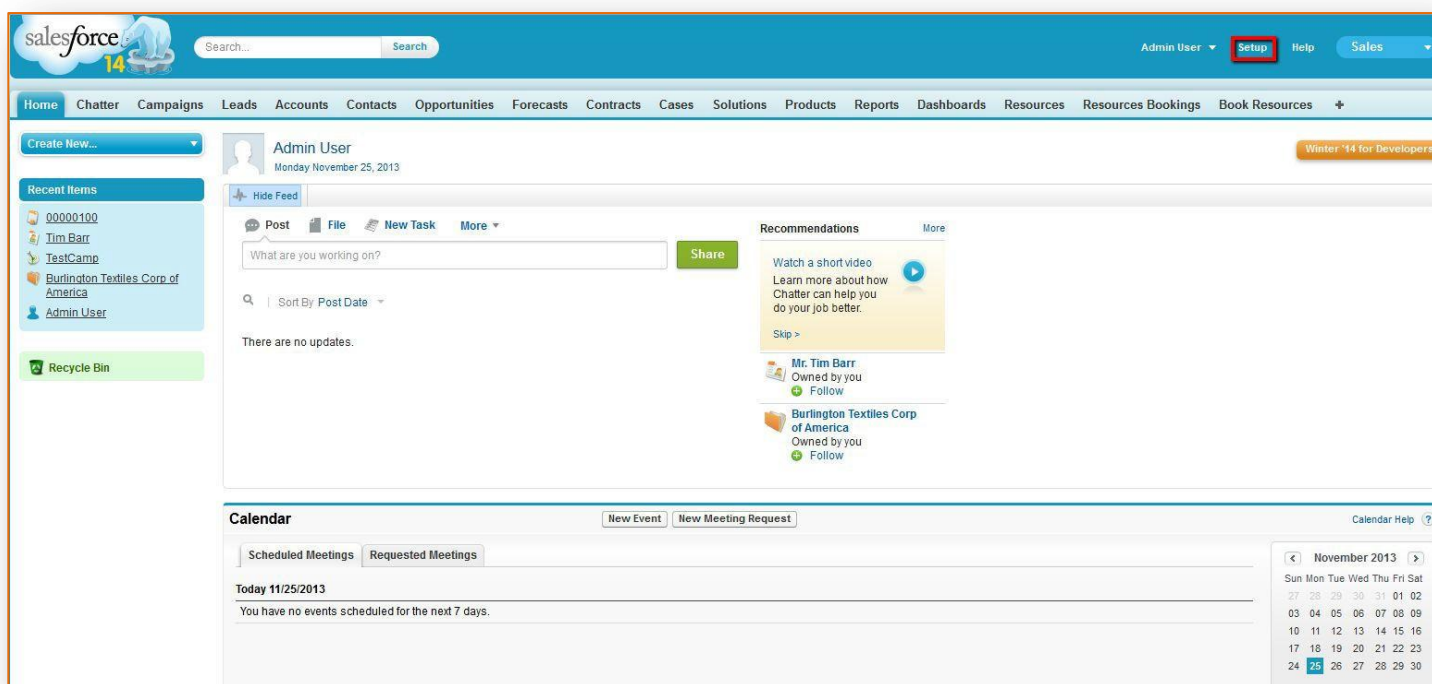
Description

ForceGento provides two way integration for Customers, Products and Orders. This extension helps to easily link the Salesforce and Magento with generic feature which are needed for any business who works on CRM and Ecommerce independently.

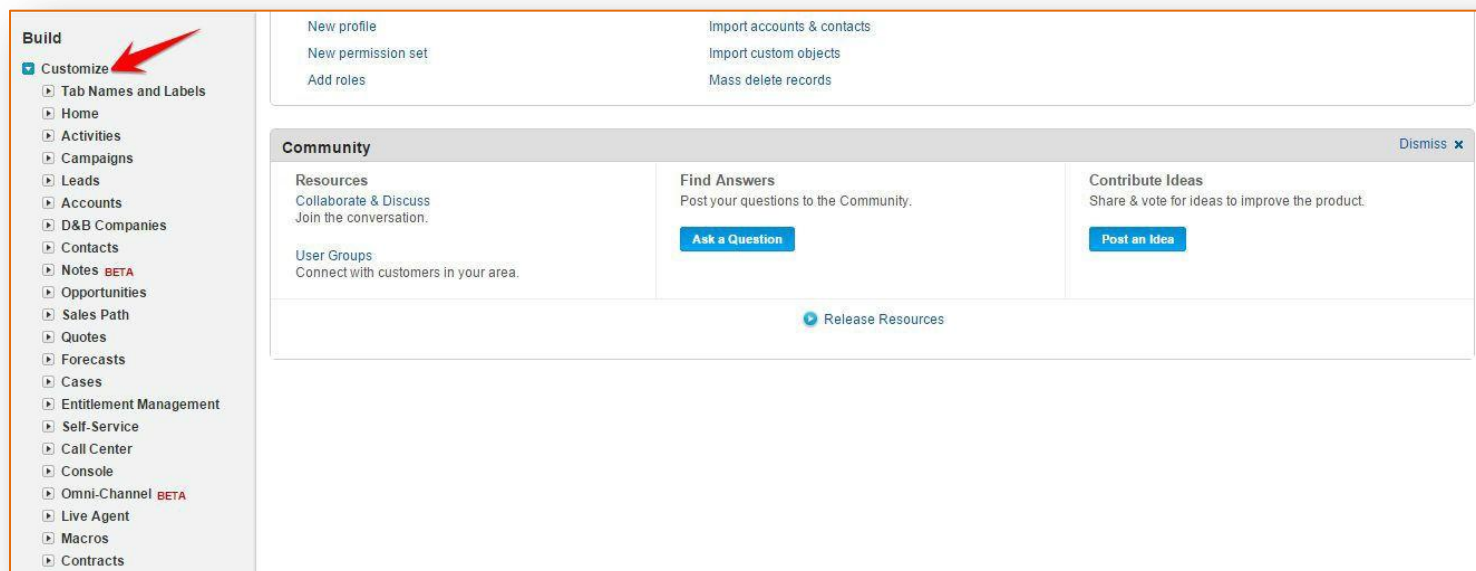
Part II

Please complete the following steps to finish the configuration of the application.

1. Click on Setup in the upper right-hand corner of your browser.



2. Click on the down arrow next to "Customize".



3. Click on the down arrow next to "Account" to expose the "Fields" menu then click on "Type" field for adding additional picklist values.

Step 1

Customize

- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Accounts**

Fields

- Related Lookup Filters
- Validation Rules
- Triggers
- Partner Roles
- Contact Roles
- Page Layouts
- Field Sets
- Compact Layouts
- Search Layouts
- Buttons, Links, and Actions
- Record Types
- Limits
- Account Teams
- Settings

Action	Field Name	Field Type	Field Format
Edit	Fax	Fax	Fax
Replace Edit	Industry	Industry	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	NAICS Code	NaicsCode	Text(8)
Edit	NAICS Description	NaicsDesc	Text(120)
Replace Edit	Ownership	Ownership	Picklist
Edit	Parent Account	Parent	Hierarchy
Edit	Phone	Phone	Phone
Replace Edit	Rating	Rating	Picklist
	Shipping Address	ShippingAddress	Address
Edit	SIC Code	Sic	Text(20)
Edit	SIC Description	SicDesc	Text(80)
Edit	Ticker Symbol	TickerSymbol	Content(20)
Edit	Tradestyle	Tradestyle	Text(255)
Replace Edit	Type	Type	Picklist
Edit	Website	Website	URL(255)
Edit	Year Started	YearStarted	Text(4)

Account Custom Fields & Relationships New Field Dependencies

Step 2

Account Type Picklist Values New Reorder Replace Printable View Chart Colors Account Type Picklist Values Help

Action	Values	Default	Chart Colors	Modified By
Edit Del	Prospect	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Customer - Direct	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Customer - Channel	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Channel Partner / Reseller	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Installation Partner	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Technology Partner	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit Del	Other	☐	Assigned dynamically	Admin User, 8/13/2015 11:36 PM

Step 3

Add Picklist Values

Account Type

Add one or more picklist values below. Each value should be on its own line.

Registered - Ecommerce
Customer - Ecommerce

Save

Cancel

4. Click on the down arrow next to “Opportunity” to expose the “Fields” menu then click on “Stage” field for adding additional picklist value ‘Wishlist’.

Step 1

Build

Customize

Tab Names and Labels

Home

Activities

Campaigns

Leads

Accounts

D&B Companies

Contacts

Notes

Opportunities

Fields

Related Lookup Filters

Validation Rules

Triggers

Contact Roles on Opportunities

Competitors

Page Layouts

Field Sets

Compact Layouts

Search Layouts

Buttons, Links, and Actions

Sales Processes

Edit	Primary Campaign Source	Campaign	Lookup(Campaign)
Edit	Private	IsPrivate	Checkbox
Edit	Probability (%)	Probability	Percent(3, 0)
Edit	Quantity	TotalOpportunityQuantity	Number(16, 2)
Replace Edit	Stage	StageName	Picklist
Edit	Synced Quote	SyncedQuote	Lookup(Quote)
Replace Edit	Type	Type	Picklist

Opportunity Custom Fields & Relationships

NewField Dependencies

Action	Field Label	API Name	Data Type
Edit Del	A&D Initiated	A_D_Initiated__c	Checkbox
Edit Del	Account's Billing City (Hidden)	Account_Billing_City__c	Formula (Text)
Edit Del	Account's Billing Country (Hidden)	Account_Billing_Country__c	Formula (Text)
Edit Del	Account's Billing State (Hidden)	Account_s_Billing_State__c	Formula (Text)
Edit Del	Account's Billing Street (Hidden)	Account_Billing_Street__c	Formula (Text)
Edit Del	Account's Billing Zip Code (Hidden)	Account_s_Billing_Zip_Code_Hidden__c	Formula (Text)
Edit Del	AC Rep Text	AC_Rep_Text__c	Text(50)

Step 2

Opportunity Stages Picklist Values

New

Reorder

Replace

Printable View

Chart Colors

Action	Stage Name	Type	Probability	Forecast Category	Chart Colors
Edit Del	Prospecting	Open	10%	Pipeline	Assigned dynamically
Edit Del	Qualification	Open	10%	Pipeline	Assigned dynamically
Edit Del	Needs Analysis	Open	20%	Pipeline	Assigned dynamically
Edit Del	Value Proposition	Open	50%	Pipeline	Assigned dynamically
Edit Del	Id. Decision Makers	Open	60%	Pipeline	Assigned dynamically
Edit Del	Perception Analysis	Open	70%	Pipeline	Assigned dynamically
Edit Del	Proposal/Price Quote	Open	75%	Pipeline	Assigned dynamically
Edit Del	Negotiation/Review	Open	90%	Pipeline	Assigned dynamically
Edit Del	Closed Won	Closed/Won	100%	Closed	Assigned dynamically
Edit Del	Closed Lost	Closed/Lost	0%	Omitted	Assigned dynamically

Step 3

Opportunity Stages

Help for this Page

Modify or Add the stage to fit your sales process. Note that the Type and Forecast Category values affect each other. The Forecast Category automatically determines how opportunities are tracked in a forecast, but these values can be revised when users update their forecasts.

Changing the Type or Forecast Category will update all opportunities that have this stage value.

Save

Save & New

Cancel

Stage Name

Wishlist

Type

Open

Description

Wishlist products from Shopping Cart.

Probability

10%

Forecast Category

Pipeline

Chart Color

Assigned dynamically

Save

Save & New

Cancel

- Click on the down arrow next to "Product" to expose the "Fields" menu. Then Click "Family" field for adding additional picklist values.

Step 1

Product Fields

This page allows you to specify the fields that can appear on the Product page. You can create up to 500 Product custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	Active	IsActive	Checkbox			☐
	Created By	CreatedBy	Lookup(User)			☐
	Last Modified By		Lookup(User)			☐
Edit	Product Code		Text(255)		✓	☐
Edit	Product Description		Text Area(4000)			☐
Replace Edit	Product Family		Picklist			☐
Edit	Product Name	Name	Text(255)		✓	☐

Product Custom Fields & Relationships

[New](#) [Field Dependencies](#)

No custom fields defined

Please click on Product Family for adding additional picklist value 'simple'

Step 2

Product Field

Product Family

[Back to Product Fields](#)

[Edit](#) [Set Field-Level Security](#)

Field Information

Field Label	Product Family
Data Type	Picklist
Help Text	

Field Dependencies

[New](#)

No dependencies defined.

Validation Rules

[New](#)

No validation rules defined.

Product Family Picklist Values

[New](#)

Action	Values	Default	Chart Colors
Edit	None	☐	Assigned dynamically

Step 3

Add Picklist Values

Product Family

Add one or more picklist values below. Each value should be on its own line.

Simple
Grouped
Configurable
Virtual
Bundle
Downloadable

Save

Cancel