

B2C eCommerce with Salesforce and Magento User Guide

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Customer Module

1. Magento To Salesforce

- Customer created and updated from Magento to Salesforce through frontend and backend.
- Customer Address created and updated with same Billing & Shipping Address from Magento to Salesforce through frontend and backend.
- Checkout as Guest Customer will get sync to Salesforce.
- Register and Checkout Customer will get sync to Salesforce.
- Synchronize customer created and updated data from one or multiple Magento websites with a single or multiple Salesforce ORGs.

2. Salesforce To Magento

- Customer created and updated from Salesforce to Magento.
- Customer Address created and updated with same Billing & Shipping Address from Salesforce to Magento.
- Customer having name with no space in Salesforce than same name will be last name in Magento .If it's with space than it will be divided as first name and last name.
- In case of customer having no email id in Salesforce while creating Account, a default email id is generated as per the following standard: 'Accountid@gmail.com.
- Customer Associate to Website created and updated from Magento to Salesforce.

3. Below are the attributes will get sync to Salesforce and Magento.

- **Name:** is account name in Salesforce and customer name in Magento .
- **Type:** is account type in Salesforce.
- **Billing Street:** is Billing Street in Salesforce and Street Address in Magento.
- **Billing City:** is Billing City in Salesforce and City in Magento.
- **Billing State:** is Billing State/Province in Salesforce and State/Province in Magento.
- **Billing Country:** is Billing Country in Salesforce.
- **ZipPostal Code:** is Billing Zip/Postal Code in Salesforce and Zip/Postal Code in Magento.
- **Shipping Street:** is Shipping Street in Salesforce and Street Address in Magento.
- **Shipping City:** is Shipping City in Salesforce and City in Magento.
- **Shipping State:** is Shipping State/Province in Salesforce and State/Province in Magento.
- **Shipping Country:** is Shipping Country in Salesforce.
- **ZipPostal Code:** is Shipping Zip/Postal Code in Salesforce and Zip/Postal Code in Magento.
- **Phone Number:** is Phone in Salesforce and Telephone in Magento.
- **Associate to Website:** is associated Custom ForceGento__Associate_to_Website__c in Salesforce and Manage Website in magento

Product Module

1. Magento To Salesforce

- Product created and updated with all product type from Magento to Salesforce through backend.
- By default product type will be family type in Salesforce.
- Synchronize product created and updated data from one or multiple Magento websites with a single or multiple Salesforce ORGs.

2. Salesforce to Magento

- Product created and updated from Salesforce to Magento.
- Only simple products will get sync from Salesforce to Magento
- If Weight is blank in Salesforce then it will sync value as 1 in Magento
- Tax ID is configured in Magento Configuration based on client selection Tax Id will be process for Product
- All the products which will sync from Salesforce to Magento will have visibility 'Catalog, Search' in Magento.

3. Below are the attributes will get sync to Salesforce and Magento.

- **Name:** is Name in Salesforce and Magento
- **Product Model:** is ProductCode in Salesforce and SKU in Magento.
- **Description:** is Description in Salesforce and Description in Magento
- **Short Description:** is Custom ForceGento__Short_Description__c in Salesforce and Description in Magento
- **Product Type:** is Family in Salesforce and Product Type in Magento
- **Weight:** is Custom ForceGento__Weight__c in Salesforce and Weight in Magento
- **Tax Class:** is Custom ForceGento__Tax_Class__c in Salesforce and Tax Class in Magento
- **Stock Availability:** is Custom ForceGento__Stock_Availability__c in Salesforce and Stock Availability in Magento
- **Active:** is IsActive in Salesforce and Status in Magento
- **Backorder:** is Custom Custom ForceGento__Backorder__c in Salesforce and Backorder in Magento.
- **Quantity:** is Custom ForceGento__Quantity__c in Salesforce and Qty in Magento.
- **Thumbnail Image:** is Custom ForceGento__Thumbnail__c Image in Salesforce and Thumbnail Image in Magento.
- **Small Image:** is Custom ForceGento__Small Image__c in Salesforce and Small Image in Magento.
- **Large Image:** is Custom ForceGento__Large__c Image in Salesforce and Base Image in Magento.
- **Price:** is UnitPrice in Salesforce PricebookEntry and Price in Magento
- **Active:** is IsActive in Salesforce PricebookEntry and Status in Magento

Order Module

1. Magento To Salesforce

- Order Creation from Magento to Salesforce.
- Order Creation with new Customer from Magento Front End will get sync.
- Order Creation with a Registered Customer from Magento Front End with Same Billing & Shipping Addresses.
- Order Creation from Checkout as Guest Customer will get sync to Salesforce.
- Order Creation from Register and Checkout Customer will get sync to Salesforce.
- Order Creation with Registered Customer from Magento Backend.
- Order Creation with Registered Customer from Magento Backend with Same Billing & Shipping Addresses.
- Order Created in Salesforce will have the status Closed Won.
- Order created in Salesforce Closing date will have today's date.
- Synchronize order created and updated data from one or multiple Magento websites with a single or multiple Salesforce ORGs.

2. Salesforce to Magento

- Order creation from Salesforce to Magento.
- Order will get sync to Salesforce with number of product and price.
- Currency is configured in Magento Configuration based on client selection Currency will be process for Order.
- No shipping Method will get sync to Magento
- Payment Method will be Purchase Order
- No Order will get Sync to Magento , If Particular customer and Product doesn't exist in Magento
- Order created in Magento by default it will have status as processing

3. Below are the attributes will get sync to Salesforce and Magento.

- **Name:** is Name in Salesforce and Name in Magento
- **Status:** is StageName in Salesforce and Order Status in Magento
- **Amount:** is Amount in Salesforce and Grand Total in Magento
- **Total Qty:** is TotalOpportunityQuantity in Salesforce and Qty Ordered in Magento
- **Web:** is LeadSource in Salesforce
- **Close date:** is CloseDate in Salesforce and Order Date in Magento
- **Order Number:** is ForceGento__OrderNumber__c in Salesforce and Order Increment Id in Magento
- **Payment Method:** is ForceGento__Payment_Method__c in Salesforce and Payment Method Title in Magento
- **Select Store:** is ForceGento__Select_Store__c in Salesforce and Manage Store View in Magento
- **Coupon Code:** is ForceGento__Coupon_Code__c in Salesforce and Coupon Code in Magento
- **Discount Amount:** is ForceGento__Discount_Amount__c in Salesforce and Discount Amount in Magento
- **Probability:** by default will be 100 %
- **Quantity:** is Quantity in Salesforce and Qty Ordered in Magento
- **Total Price:** is TotalPrice in Salesforce and Grand Total in Magento
- **Service Date:** is ServiceDate in Salesforce and Order Date in Magento

Leads

1. Magento To Salesforce

- Magento contact us information will get sync to Salesforce as a Lead.
- Leads will get sync to Magento to Salesforce only

2. Below are the attributes will get sync to Salesforce and Magento.

- **Name:** is Name in Salesforce and Name in Magento contact us
- **Email:** is Email in Salesforce and Email in Magento contact us
- **Telephone:** is Phone in Salesforce and Telephone in Magento contact us
- **Comment:** is Description in Salesforce and Comment in Magento contact us
- **Company:** is Company in Salesforce and in Company in Magento contact us

Limitations

1. General Limitations

- Only mapped fields will be synced.
- Any data already existing with your current system i.e. Customers/Orders/Products/Newsletters, etc. are not synced with ForceGento Connector by default. Synchronization of old data is an additional effort.
- TechnoMile will not be responsible for any conflicts between a third party module/ extension and ForceGento Connect. We assume there are no modifications in Magento core files. In case of such modifications which are affecting the module functionality it will be considered as an additional effort.
- TechnoMile's ForceGento Connect will not fix or is not responsible for any of Magento related bugs or custom code related bugs.
- In the default set-up, TechnoMile's ForceGento Connect supports localization for USA only. In other words the localization factors are not supported by default in the connector.
- TechnoMile's ForceGento Connect will not support the operations made using "Professionals Tools" like item modifier, item combiner, etc in Salesforce and Shipworks, StoreManager, Shipstation, Shipmanager etc in Magento.

2. Customer limitations

- Customer deleted in Magento will not delete the Salesforce customer and vice-versa.
- Customer Billing and Shipping Address deleted in Magento will not delete in Salesforce and vice-versa. In other words, if you delete a 'Customer, Customer Billing and Shipping Address' from Magento, you will have to manually delete it from Salesforce and vice-versa.
- Only Customer Billing Address will get sync from Salesforce to Magento and Shipping Address will have Billing Address of Salesforce.
- Only a Customer's 'First Name', 'Last Name' and 'Email Address' are considered for creating a customer in the Magento to Salesforce sync process.
- Customer billing and shipping addresses will get updated to Salesforce only if customer is resaved or updated.
- The current scheduler is not scheduled to work with huge updates for products, customers, orders, etc, in such cases this will take a longer time than expected.
- A customer with NO email address in Salesforce will be created with a dummy email address in Magento, in the following format: AccountId@gmail.com

- Duplicate Customers with the same email address will not be updated in Magento because only one customer can be created per email in Magento.
- Customer configuration should be set globally and not per website.
- Customer Group will not get sync from Magento to Salesforce and vice versa.
- Customer Region will get sync from Salesforce to Magento based on state and county provided in Salesforce to get the region Id.

3. Product limitations

- Products deleted in Magento will not delete the Salesforce Products and vice-versa. In other words, if you delete a 'Product' from Magento, you will have to manually delete it from Salesforce and vice-versa.
- Group, Special and Tier Price will not get sync to Salesforce.
- Product Image URLs will get sync to Salesforce.
- Products imported (using Profilers or any tools) to Magento cannot be synced to Salesforce. Products created/updated by any means will not be synced automatically if the product creation & updating dates are not updated suitably in Salesforce.
- Products created from Salesforce to Magento will be assigned to default Attribute set in Magento
- Renaming product SKU(Product code) in Salesforce will create a new product in Magento.
- Duplication of product in Magento and Salesforce cannot be synced either ways.

4. Order limitations

- Orders deleted in Magento will not delete the Salesforce Orders and vice-versa. In other words, if you delete a 'Order' from Magento, you will have to manually delete it from Salesforce and vice-versa.
- Editing of Orders is not supported at both ends as editing an order in Magento will cancel the existing order and create a new order.
- Order will get sync to Magento if no product selected in Salesforce.
- No Shipping Method will get sync to Magento.
- No Payment Method will get sync to Magento.
- No invoice and shipment will get sync to Magento.
- No Credit Memo/Refunds will get sync to Magento.
- Order created in Magento with new customer, than no billing and shipping address will get sync.
- Order Hold, Order Void and Order Cancellation in Magento are not synced to Salesforce Vice versa.