

B2C eCommerce with Salesforce and Magento

Installation Guide

Business & Enterprise Subscription Plans

(Monthly and Yearly)

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1. Introduction

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.

- Integration of Customers, Orders, Products and Shipping Information between Magento and Salesforce
- Track abandoned shopping carts to create Exact Target Journey to convert shoppers into Buyers
- Track frequently viewed products by customers to create intelligent marketing campaigns

ForceGento provides a two way data sync from Magento to Salesforce and vice versa. With ForceGento, customers, orders, products and inventory is synced between Magento and Salesforce. Magento to Salesforce integration made easy. Flexibly map data on both applications depending on your business needs. Integrate orders, products, customers, inventory in Magento with Salesforce.

There are two subscription plans available in ForceGento

- Business Plan Monthly/Yearly
- Enterprise Plan Monthly/Yearly

Visit to our website for more information about extension: <http://www.forcegento.com>

2. Features

- Allows synchronizing and updating Customers from Magento store into Salesforce CRM Contacts, Accounts and vice versa.
- Allows synchronizing and updating Products from Magento store into Salesforce CRM Product2 and vice versa.
- Allows synchronizing Product Categories from Magento store into Salesforce CRM Custom Category.
- Allows synchronizing Orders from Magento store into Salesforce CRM Opportunity and vice versa.
- Allows synchronizing Abandoned Cart from Magento store into Salesforce CRM Opportunity as “Prospect” status.
- Allows synchronizing Wishlist from Magento store into Salesforce CRM Opportunity as “Wishlist” status.
- Allows synchronizing Invoices from Magento store into Salesforce CRM Custom Invoices.
- Allows synchronizing Shipment from Magento store into Salesforce CRM Custom Shipment.
- Allows synchronizing Credit Memo from Magento store into Salesforce CRM Custom Credit Memo.
- Allows admins to select conditions to transfer old data from Magento store into Salesforce CRM.
- Supports mapping smartly and manually between Magento attributes and Salesforce fields or custom fields.
- Admin can view the log to see what is synchronized between two apps.
- Allows synchronizing Newsletter from Magento store into Salesforce CRM Custom Newsletter.
- Allows synchronizing Visitors Log from Magento store into Salesforce CRM Custom Visitors Log.
- Allows synchronizing Visitors URL from Magento store into Salesforce CRM Custom Visitors URL.
- Allows synchronizing Ticket from Magento store into Salesforce CRM Case.
- Allows synchronizing Contact Form from Magento store into Salesforce CRM Lead.
- Allows synchronizing Manage Website, Store & Store View from Magento store into Salesforce CRM Custom Manage Website, Store & Store View.

3. System Requirement

The module works base on using API, so make sure your salesforce edition had API by check the using version:

- Enterprise Edition (API default)
- Unlimited Edition (API default)
- Developer Edition (API default)
- Performance Edition (API default)
- Professional Edition (API purchase separately)

4. Installation

Note: Before installing Magento package you need to take a backup of your files and database.

- Turn off Compilation mode
 - If compilation mode in your Magento is enabled in your Magento store, you have to turn it off, otherwise your store and admin site would be inaccessible after installing the extension.
 - To disable Magento Compilation, go to **System >>Tools >> Compilation**.
 - Also, make sure you have backed up your Magento files and databases in case things go rogue.
- Turn on cache
 - It is highly recommended that your configuration cache is turned on to prevent early installation, as it could be a reason for errors.
 - Go to **System >> Cache Management**
 - Switch **Action** to **Enable** and hit **Submit**.

- Perform the Installation

Install Magento Package: After successful purchase, we will provide you with the extension's zip file. Unzip the extension into a directory of your choice

- Unzip the downloaded file (ForceGento_Connector_Enterprise_Plan-3.1.1.tgz or ForceGento_Connector_Business_Plan-3.1.1.tgz)
- Read the installation document present in the Docs folder.
- Once the required zip file is downloaded and unzipped, all related files would be available in your local machine.
- Now it is required to follow instructions mentioned below to copy the necessary files from your local machine to your Magento instance in the server box.
 - Navigate to **app\code\community** and Place **ForceGento** folder.
 - Navigate to **app\design\frontend\rwd** and Place **forcegento** folder.
 - Navigate to **app\design\adminhtml\default\default\template** and Place **forcegento** folder.
 - Navigate to **app\design\adminhtml\default\default\layout** and Place **forcegento** folder.
 - Navigate to **app\etc\modules** and Place **ForceGento_Connector.xml** file.
 - Navigate to **lib** and Place **soapclient** folder.

Install Salesforce Package: Copy link below and paste in your browser for installing Salesforce Package on your Salesforce Org.

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04to00000000CYVU>

- Post-installation
 - You should refresh Magento's cache to provide Magento with the ability to register a new extension.
 - To prevent an "Access Denied" error, you have to re-enter to the backend. Log in with a full administrator account to get the new permissions.
 - Now you should check whether your website and your new module works as expected.

5. Configuration

- In order to get Enterprise WSDL, go to **Setup >> Develop >> API** and click on the link Generate Enterprise WSDL

The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Salesforce1 Setup', 'Force.com Home', 'System Overview', 'Personal Setup', 'App Setup', 'Create', 'Develop', and 'API'. The 'API' link is highlighted. The main content area is titled 'API WSDL' and contains information about WSDL and Client Certificates. It lists several WSDL types: Enterprise WSDL, Partner WSDL, Apex WSDL, Metadata WSDL, Tooling WSDL, and Delegated Authentication WSDL. The 'Generate Enterprise WSDL' link is highlighted with a red box.

- In order to get Security Token, go to **My Setting >> Personal >> Reset My Security Token**

The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Salesforce1 Setup', 'Force.com Home', 'System Overview', 'Personal Setup', 'My Personal Information', 'Change My Password', 'Reset My Security Token', and 'My Groups'. The 'Reset My Security Token' link is highlighted. The main content area is titled 'Reset Security Token' and contains a warning message about invalidating the existing token. It also includes instructions on how to reset the security token and a 'Reset Security Token' button, which is highlighted with a red box.

- Setup contact us form setting in Magento
 - Create Custom Field for Contact Us form in Magento
 - Login to Magento Admin panel.
 - Go to System >> Transactional Emails >> Add New Template
 - Select 'Contact Form' from Template drop down
 - Click on 'Load Template'.

New Email Template Back Reset Preview Template Save Template

Load default template

Template *

Locale *

Load Template

Template Information

Template Name *

Template Subject *

Insert Variable...

Template Content *

- Add "Company: {{var data.company}}" in the template content, to add a new Company field in the form.
- Click on 'Save Template'.

- Set up the Salesforce account to integrate with Magento
 - Go to **System >> Configuration >> Salesforce API Extension setting**

General		
Enable API	Enable	[GLOBAL]
Username*	*****	[STORE VIEW]
Password*	*****	[STORE VIEW]
Token*	*****	[STORE VIEW]
WSDL File*	lib/soapclient/enterprise.wsdl.xml ▲ Path to your WSDL file, relative to web root. Eg. lib/soapclient/enterprise.wsdl.xml	[STORE VIEW]
Client Type	Enterprise ▲ IMPORTANT: Salesforce WSDL type, please refer to your Salesforce manual.	[GLOBAL]
Validate Salesforce Connection	Check Salesforce Connection ? ▲ Click and validate Only after saving Salesforce credentials	[STORE VIEW]

License		
License Key:	21e7d01680494da02f73528ee02555e5 ▲ Validate your package with License key	[GLOBAL]
Validate License	Check License ? ▲ Click and validate Only after saving Salesforce credentials	[STORE VIEW]

Log		
Enable Log	Disable ▲ Magento Log has to be enabled for this to work.	[GLOBAL]

- **Username:** Your Salesforce login email
- **Password:** Your Salesforce password
- **Security token :** Receive via email register. Get from My Settings >> Personal >> Reset My Security Token
- Specify the path of WSDL file.
- Select the client type (Enterprise)
- Hit **Save config**, your data configuration is ready to use
- This will connect the magento app to Salesforce through SOAP.
- Add to cart product and register for the License Key from here.
<http://www.forcegento.com>

6. Data Integration Settings

- In order to map Lead, go to **System >>Configuration >> Salesforce Lead Mapping** and map Magento Contact fields to respective Salesforce Lead fields then Click 'Save Config' button.

Mapping to Salesforce Leads		
First Name:	FirstName ▼ ? ▲ Select Salesforce Lead Field 'FirstName'	[STORE VIEW]
Last Name*:	LastName ▼ ? ▲ Select Salesforce Lead Field 'LastName'	[STORE VIEW]
Email:	Email ▼ ? ▲ Select Salesforce Lead Field 'Email'	[STORE VIEW]
Telephone:	Phone ▼ ? ▲ Select Salesforce Lead Field 'Phone'	[STORE VIEW]
Comment:	Description ▼ ? ▲ Select Salesforce Lead Field 'Description'	[STORE VIEW]
Company:	Company ▼ ? ▲ Select Salesforce Lead Field 'Company'	[STORE VIEW]

- In order to map Account, go to **System >> Configuration >> Salesforce Account Mapping** and map Magento Customer fields to respective Salesforce Account fields then Click 'Save Config' button.

Customer Mapping to Salesforce Accounts		
Name*:	Name ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'Name'	
Type:	Type ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'Type'	
Billing Street:	BillingStreet ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'BillingStreet'	
Billing City:	BillingCity ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'BillingCity'	
Billing State:	BillingState ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'BillingState'	
Billing Country:	BillingCountry ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'BillingCountry'	
ZipPostal Code:	BillingPostalCode ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'BillingPostalCode'	
Shipping Street:	ShippingStreet ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ShippingStreet'	
Shipping City:	ShippingCity ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ShippingCity'	
Shipping State:	ShippingState ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ShippingState'	
Shipping Country:	ShippingCountry ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ShippingCountry'	
ZipPostal Code:	ShippingPostalCode ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ShippingPostalCode'	
Phone:	Phone ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'Phone'	
Associate to Website:	Associate_to_Website__c ▼ ? [STORE VIEW] ▲ Select Salesforce Account Field 'ForceGento__Associate_to_Website__c'	

- In order to map Account, go to **System >>Configuration >> Salesforce Account Mapping** and map Magento Customer fields to respective Salesforce Contact fields then Click 'Save Config' button.

Mapping to Salesforce Contact		
First Name*:	FirstName ▼ ▲ Select Salesforce Contact Field 'FirstName'	? [STORE VIEW]
Last Name*:	LastName ▼ ▲ Select Salesforce Contact Field 'LastName'	? [STORE VIEW]
Email:	Email ▼ ▲ Select Salesforce Contact Field 'Email'	? [STORE VIEW]
Phone:	Phone ▼ ▲ Select Salesforce Contact Field 'Phone'	? [STORE VIEW]

- In order to map Product, go to **System >> Configuration >> Salesforce Product Mapping** and map Magento Customer fields to respective Salesforce Product fields then Click 'Save Config' button.

Mapping to Salesforce Product2		
Name	Name	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'Name'	
Product Model	ProductCode	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'ProductCode'	
Description	Description	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'Description'	
Short Description	ForceGento__Short_Description__c	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'Short Description'	
Product Type	Family	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'Family'	
Weight	ForceGento__Weight__c	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'ForceGento__Weight__c', Note its a custom attribute created in salesforce	
Tax Class	ForceGento__Tax_Class__c	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'ForceGento__Tax_Class__c', Note its a custom attribute created in salesforce	
Active	IsActive	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'IsActive'	
Backorder	ForceGento__Backorders__c	[?] [GLOBAL]
	▲ Select Salesforce Product2 Field 'Backorder'	
Quantity	ForceGento__Quantity__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'Quantity__c', Note its a custom attribute created in salesforce	
Stock Availability	ForceGento__Stock_Availability__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Stock_Availability__c', Note its a custom attribute created in salesforce	
Thumbnail Image	Thumbnail_Image__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Thumbnail_Image__c', Note its a custom attribute created in salesforce	
Small Image	Small_Image__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Small_Image__c', Note its a custom attribute created in salesforce	
Large Image	Large_Image__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Large_Image__c', Note its a custom attribute created in salesforce	
Color	Color__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Color__c', Note its a custom attribute created in salesforce	
Size	Size__c	[?] [GLOBAL]
	▲ Select Salesforce Product Field 'ForceGento__Size__c', Note its a custom attribute created in salesforce	

- In order to map PriceBook, go to **System >>Configuration >> Salesforce Product Mapping** and map Magento Product fields to respective Salesforce Pricebook fields then Click 'Save Config' button.

Mapping to Salesforce PricebookEntry	
Price	UnitPrice ▼ ? [GLOBAL] ▲ Select Salesforce PricebookEntry Field 'UnitPrice'
Active	IsActive ▼ ? [GLOBAL] ▲ Select Salesforce PricebookEntry Field 'IsActive'

- In order to map Order, go to **System >> Configuration >> Salesforce Order Mapping** and map Magento Order fields to respective Salesforce Opportunity fields then Click 'Save Config' button.

Order Mapping to Salesforce Opportunity		
Name:	Name	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'Name'
Status:	StageName	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'StageName'
Amount:	Amount	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'Amount'
Total Qty:	TotalOpportunityQuantity	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'TotalOpportunityQuantity'
Web:	LeadSource	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'LeadSource'
Close date:	CloseDate	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'CloseDate'
Order Number:	ForceGento__OrderNumber__c	[?] [STORE VIEW] ▲ Select Salesforce Opportunity Field 'ForceGento__OrderNumber__c'
Payment Method:	Payment_Method__c	[?] [STORE VIEW] ▲ Select Salesforce Payment Method Field 'ForceGento__Payment_Method__c'
Select Store:	Select_Store__c	[?] [STORE VIEW] ▲ Select Salesforce Payment Method Field 'ForceGento__Select_Store__c'
Coupon Code:	Coupon_Code__c	[?] [STORE VIEW] ▲ Select Salesforce Payment Method Field 'ForceGento__Coupon_Code__c'
Discount Amount:	Discount_Amount__c	[?] [STORE VIEW] ▲ Select Salesforce Payment Method Field 'ForceGento__Discount_Amount__c'

- In order to map Order Line Items, go to **System >> Configuration >> Salesforce Order Mapping** and map Magento Order Line Items fields to respective Salesforce Opportunity Line Item fields then Click 'Save Config' button.

Order Product Mapping to Salesforce OpportunityLineItem		
Quantity:	Quantity ▼ ?	[STORE VIEW]
▲ Select Salesforce OpportunityLineItem Field 'Quantity'		
Total Price:	TotalPrice ▼ ?	[STORE VIEW]
▲ Select Salesforce OpportunityLineItem Field 'TotalPrice'		
Service Date:	ServiceDate ▼ ?	[STORE VIEW]
▲ Select Salesforce Opportunity Field 'ServiceDate'		

7. Sync Process

- **Customer Configuration in Magento**
 - In 'ForceGento Connector API Extension' section, click on Customer Configuration'.
 - Select the respective fields which you want to enable for syncing data.

Contact		
Synchronize Customers	Enable ▼	[GLOBAL]
▲ Enable/Disable synchronization of Magento customers.		
Create as Lead	Disable ▼	[GLOBAL]
▲ Create a Lead first. When customer converting by placing an order. Convert to Contact an Account		

Lead		
Synchronize Lead	Enable ▼	[GLOBAL]
▲ Enable/Disable synchronization of Magento Contact Us.		
Lead Source	Web ▼	[GLOBAL]
▲ Lead source to be set in salesforce when Lead created.		
Lead Status	Contacted ▼	[GLOBAL]
▲ Lead status to be set in salesforce when Lead created.		

Others (Visitor Logs, Newsletters, Tickets)

Synchronize Visitor Log	Enable ▼ ▲ Enable/Disable synchronization of Magento Visitor Log.	[GLOBAL]
Synchronize Visitor Log URL	Enable ▼ ▲ Enable/Disable synchronization of Magento Visitor Log URL.	[GLOBAL]
Synchronize Newsletter	Enable ▼ ▲ Enable/Disable synchronization of Magento Newsletter.	[GLOBAL]
Synchronize Ticket	Enable ▼ ▲ Enable/Disable synchronization of Magento Ticket.	[GLOBAL] ?

- Click 'Save Config' button.

- **Order Configuration in Magento**

- In 'ForceGento Connector API Extension' section, click on Order Configuration'.
- Select the respective fields which you want to enable for syncing data.

Default		
Synchronize Orders	Enable ▼ ▲ Enable/Disable synchronization of Magento orders.	[GLOBAL]
Synchronize Products	Enable ▼ ▲ Enable/Disable synchronization of Magento products.	[GLOBAL]
Synchronize Invoices	Enable ▼ ▲ Enable/Disable synchronization of Magento invoices.	[GLOBAL]
Synchronize Shipments	Enable ▼ ▲ Enable/Disable synchronization of Magento invoices.	[GLOBAL]
Synchronize Credit Memo	Enable ▼ ▲ Enable/Disable synchronization of Magento Credit Memo.	[GLOBAL]
Synchronize Category	Enable ▼ ▲ Enable/Disable synchronization of Magento categories.	[GLOBAL]

Opportunity Customer Role		
Enable	Enable ▼ ▲ Enable Opportunity Customer Integration Role.	[GLOBAL]
Opportunity Customer Role	Technical Buyer ▼	[GLOBAL]

Opportunity Products		
Yes: Allows you to attach ordered items to Opportunity and Enables you to sync Magento products with Salesforce. No: Opportunity in Salesforce will still be created but products wont be passing along.		
Enable	Enable	[GLOBAL]
Default Pricebook	Standard Price Book	[GLOBAL]
▲ Default pricebook to be used with products.		

Sync Old Records		
Select Salesforce Object	All	[GLOBAL]
▲ Enable/Disable synchronization of selected object.		
From Date (YYYY-mm-dd H:i:s)	2015-01-01 00:00:00	[STORE VIEW]
To Date (YYYY-mm-dd H:i:s)	2016-08-01 00:00:00	[STORE VIEW]

- Click 'Save Config' button.

8. Decode Source Guardian Code

- Check PHP Configuration in the server to see whether it has any Source Guardian modules or not?
- In order to check, you need to create a test file in the document root with the following script with the name **phpinfo.php**
E.g.: <http://www.domainname.com/phpinfo.php>
<? php
phpinfo ();
?>
- Search for **Source Guardian** from out. If the module exists, then skip next Step else proceed with next Step
- The Source Code of ForceGento Connector extension is encrypted. In regarding to that, you need a Source Guardian Loaders to load the ForceGento Connector connect successfully.
- Open the following link to download the specific Source Guardian Loader & follow the instructions <http://www.sourceguardian.com/ixeds/download.php>
- In order to detect the required loader and know how to install it, please enter the phpinfo link to the phpinfo () page that is running on your server. E.g.:
<http://www.domainname.com/phpinfo.php>
- Download the required loader ixed.xx.lin on the Server
- Move the downloaded file ixed.xx.lin to the location mentioned in the steps given by Source Guardian
- Open your php.ini file from the location
- Restart the web server

9. Uninstall ForceGento Connect

- Login into Magento Admin
- Go to System >> Configuration >> ForceGento Connector >> Extension Options.
- Select No from the drop down and Click on Save Config. Or
- Go to FTP Client.
- Go to Magento Folders.
- Follow the path app\etc\modules and select file ForceGento_Connector.xml & Right Click the file to EDIT.
- Press Ctrl+F and change TRUE with FALSE
- Save the ForceGento_Connector.xml.

10. Support

- ForceGento (TechnoMile LLC) offers the response time can be up to **3-5 days**.
- We offers **lifetime support free for all of our year paid plans**. Support includes answering questions related to our products, bug/error fixing to make sure our products work well in your site exactly like our demo.
- Support **DOES NOT** include other services as customize our product to fit your own needs, installation service, un installation service. We **ONLY** support you with exist features of module