

D-Tools SI

Salesforce Integration

User Guide

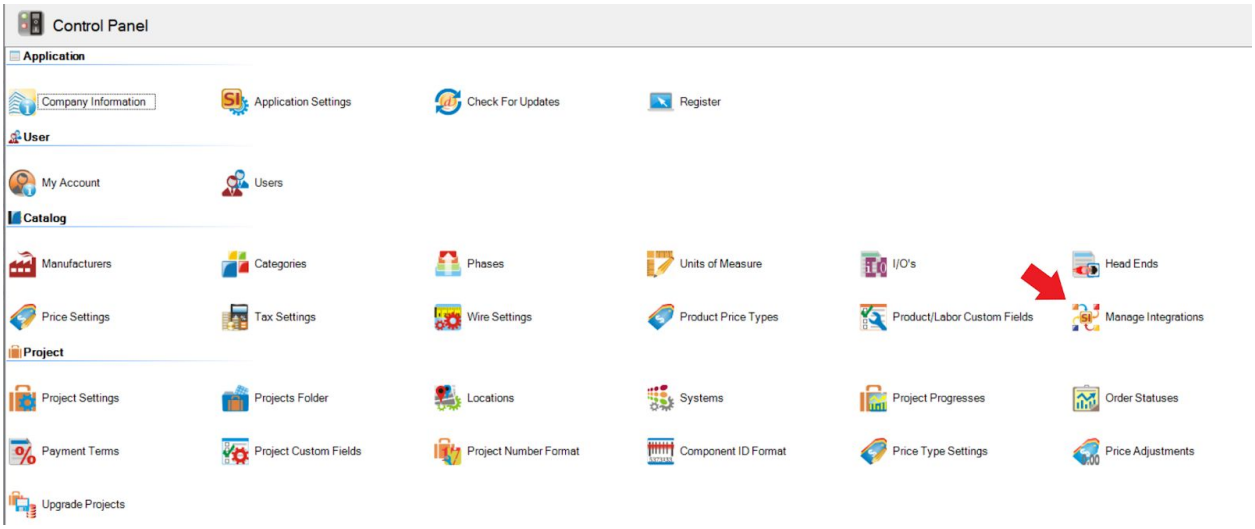
Contents

- ➢ Configuration
  - ○ D-Tools
  - ○ Salesforce
- ➢ Exporting a Projects
- ➢ Exporting Products

1. Configuration

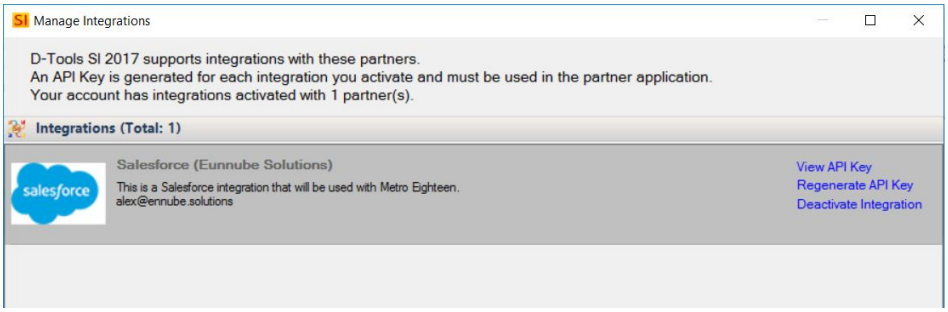
D-Tools System Integration

After downloading the D-Tools SI Connector from the Salesforce AppExchange you will first need your API key from D-Tools SI Client. You can find your API key by navigating to the "Control Panel" and clicking on "Manage Integrations".



You must be a SI administrator to manage integrations.

The Manage Integrations dialog box will display a list of available integrations.



To activate integration, click on "Activate Integration". Once an integration is activated an API Key is generated for the integration. An activated integration will have the option to "View API Key", "Re-generate API Key", and "Deactivate Integration".

*You will use the produced API key in Salesforce in the D-Tools Configuration tab in the next step.

Salesforce

Login to your Salesforce instance with the D-Tools SI Connector installed.

<u>Setup Permissions</u>

1. Navigate to the Salesforce Setup page
2. Type Permission Sets in the Quick Search bar
3. Click to open Permissions sets you will find "DTools Permission Set"
4. Click Manage Assignments
5. Click Add Assignments
6. Assign this permission set to the System Administrator configuring the integration

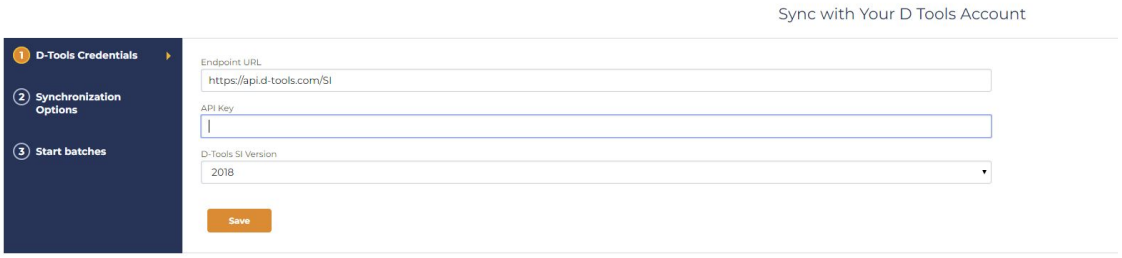
*Make sure this user also has read/write access to the "Account #" field in the Account Object

<u>Setup Sync</u>

Go to the **D-Tools Configuration** tab in the Org. This tab shows you 3 steps to sync with your D Tool Account.

1. <u>D Tool Credentials-</u>

   Provide Endpoint URL and API Key.
   Endpoint Url - https://api.d-tools.com/SI
   API Key - *See Previous Section to find API Key*



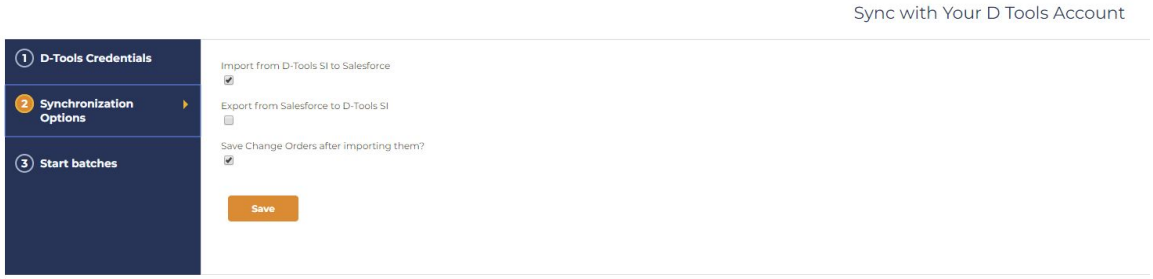
   Select your version of SI: 2017** or 2018

   ** Only supports syncs from 1 D-Tools server*

   ***Change Orders are not supported in 2017*

Click on Synchronization Options.

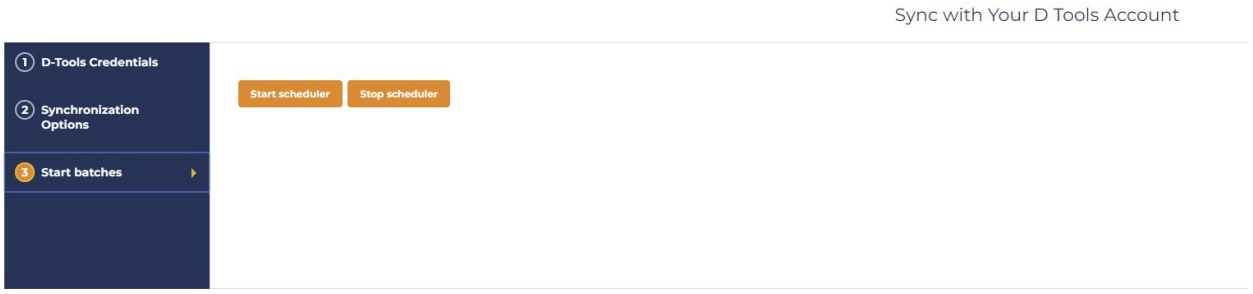
2. <u>Synchronization Options</u>
   Choose which sync options you would like to use.
   - <u>Import from D-Tools to Salesforce</u>
     - Will bring in D-Tools projects as Opportunities within Salesforce, along with product information, client, and contact information
   - <u>Export from Salesforce to D-Tools</u>
     - ***Still in development***
   - <u>Save Change Orders after importing them?</u>
     - When syncing a change order from D-Tools to Salesforce a child opportunity will be created. If checked the child opportunity will be saved, if unchecked the child opportunity will be deleted and the parent opportunity will reflect the changes from the change order.



3. <u>Start Batches</u>

   This tab allows you to start & stop the schedulers. The batches will start executing after 5 minutes after the start button is clicked and once it is started it will refresh every 5 minutes. It will then fetch the Account, Opportunity, Product and Pricebook data. It may take up to 15 minutes for all the project details to populate into Salesforce.

   **If you are replacing an API Key make sure you Click on Save in step 2 Batch Configurations before Starting your scheduler.*

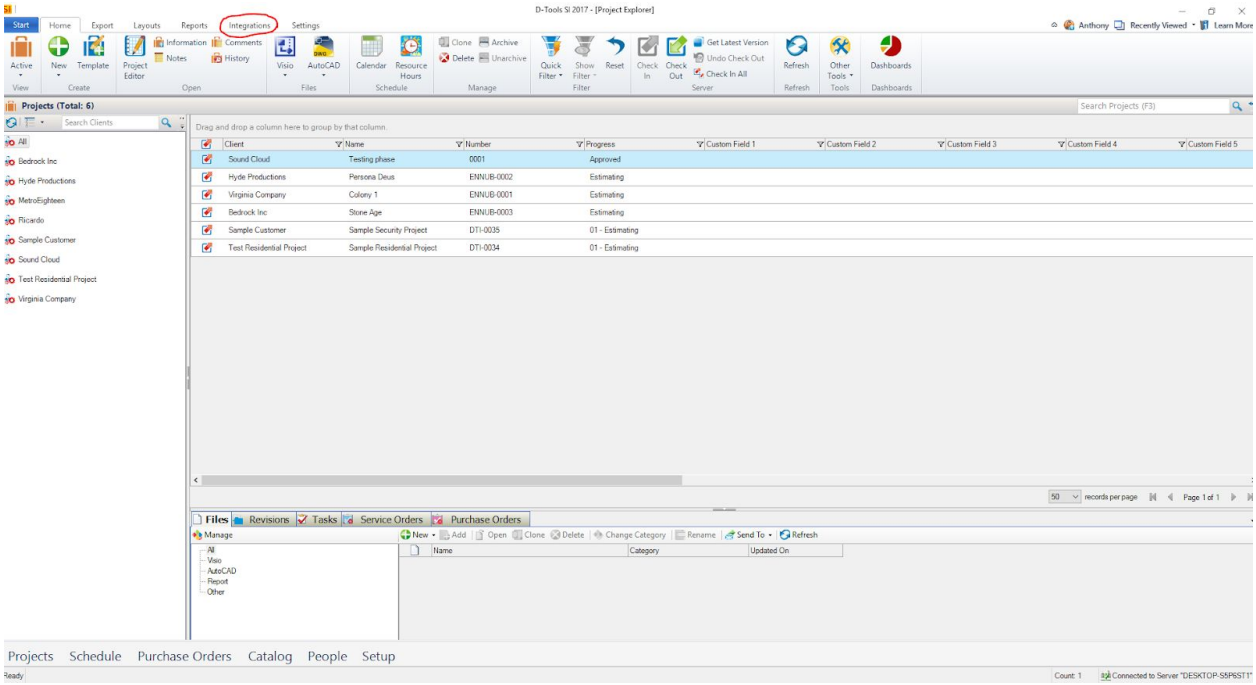


2. Exporting a Project

D-Tools Salesforce Support Page:
http://support.d-tools.com/Integrations_Support/Third_Party_Integrations/SalesForce

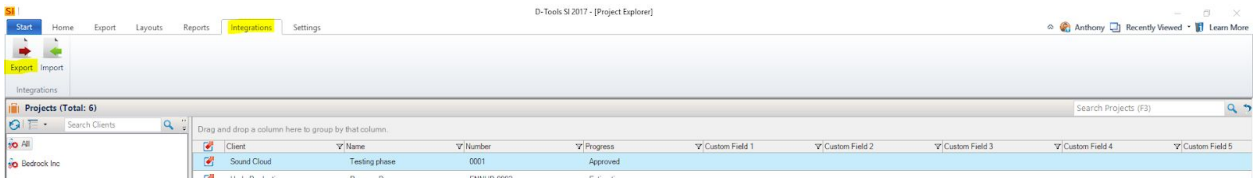
When exporting a project to Salesforce

In D-Tools SI client go to the Project Explorer

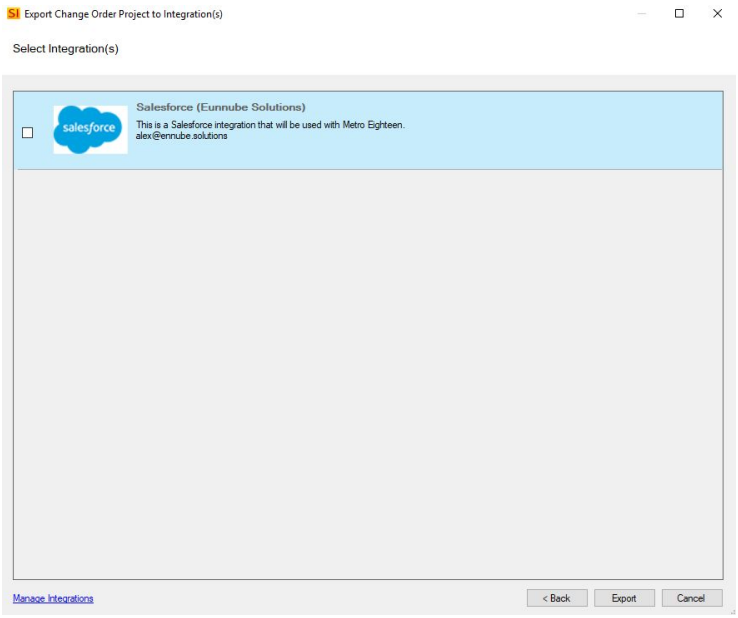


Select the project(s) to export

Click on the integrations tab at the top of the Project Explorer and then click on the 'Export' button.



Select the Salesforce Integration and click Export

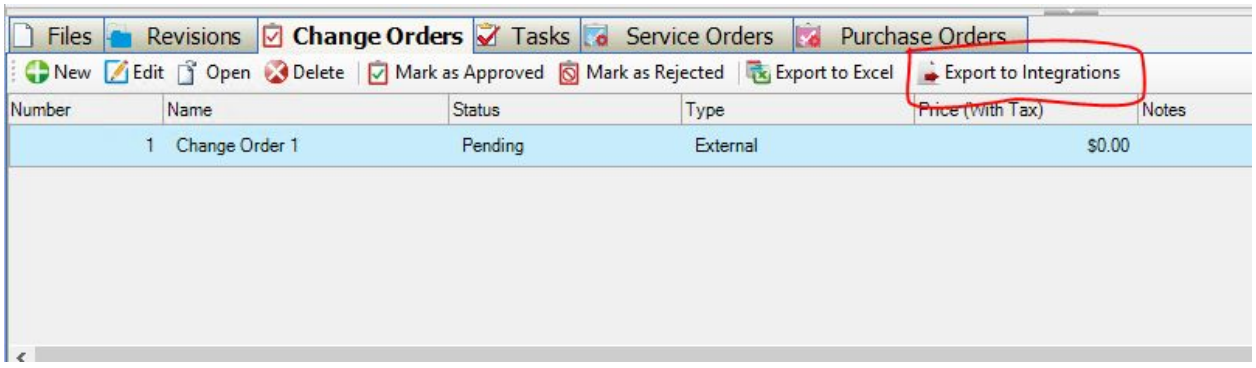


Salesforce captures the project as an opportunity, automatically creating an account for the company and contact for the project client. You can find the field mapping in the appendix at the end of this guide.

Change Orders

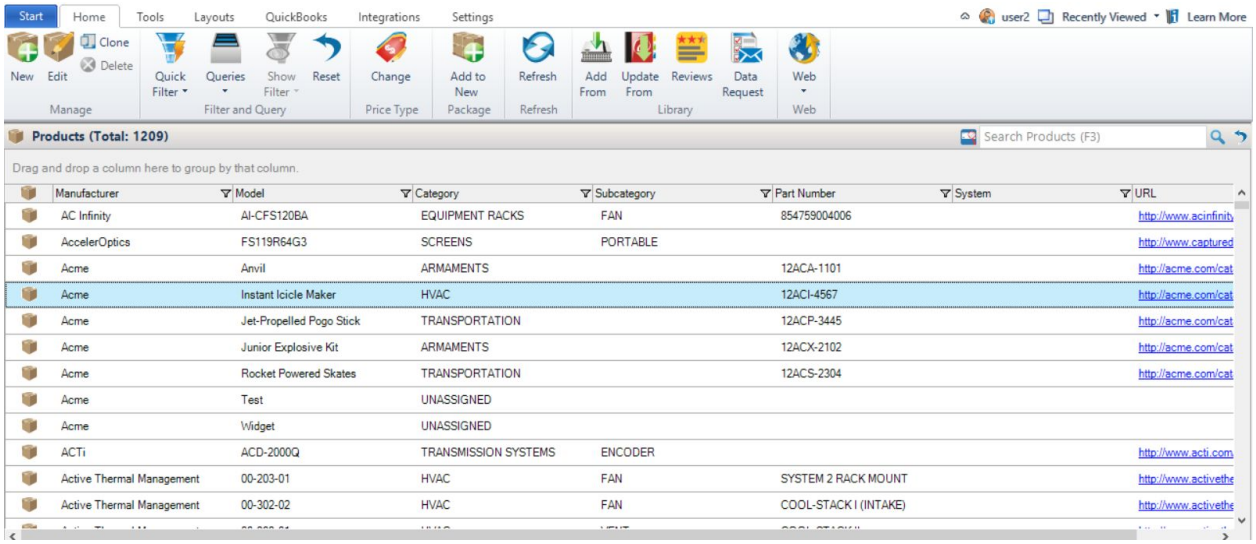
D-Tools Support Page for Change Order:
http://support.d-tools.com/001_SI_2018_Documentation/User_Guide/04_Projects/01_Project_Explorer/07_Change_Orders

When ready to export a Change Order to Salesforce, click on Export to Integrations button in the Change Orders Section. Please note, only approved change orders can be sent to Salesforce.



Exporting Products

To export products navigate to Start | Catalog | Manage Products



On the Manage Products screen go to the Integrations tab on the top of the Dtools Application.



On the Export drop down select All. This feature will export all the products in your catalog.

*Packages are not exported but Accessories to a product are.

Field Mapping

D-Tools Client Details	
Client Name	Text
Client #	Text
DT Client ID	Text

SF Account Field
Account Name
Account Number
DT Client ID (Custom)

D-Tools Project Contact Details	
Site Street 1	Text
Site Street 2	Text
Site City	Text
Site State	Text
Site Postal Code	Text
Site Country	Text
Site Phone	Phone
Site Fax	Phone
Billing Street 1	Text
Billing Street 2	Text
Billing City	Text
Billing State	Text
Billing Postal Code	Text
Billing Country	Text
Billing Phone	Phone
Billing Fax	Phone

SF Opportunity Field
EnnDTools__Site_Street_1__c
EnnDTools__Site_Street_2__c
EnnDTools__Site_City__c
EnnDTools__Site_State__c
EnnDTools__Site_Postal_Code__c
EnnDTools__Site_Country__c
EnnDTools__Site_Phone__c
EnnDTools__Site_Fax__c
EnnDTools__Street_1__c
EnnDTools__Street_2__c
EnnDTools__City__c
EnnDTools__State__c
EnnDTools__Postal_Code__c
EnnDTools__Country__c
EnnDTools__Phone__c
EnnDTools__Fax__c

D-Tools Project Details	
Project ID	Text
Installation Price	Text
Project Name	Text
Stage	Text

SF Opportunity Field
EnnDTools__DT_Project_Id__c
Amount
Name
StageName

D-Tools Catalog Details	
Catalog ID	Text

SF Catalog Field
EnnDTools__DT_CatalogId__c

D-Tools Product Details	
Short Description	Text
Subcategory	Text
Category	Picklist
Model	Text
Manufacturer	Text
Labor Hours	Number
Part Number	Text
Phase	Picklist
Product ID	Text
Accounting Item name	Text

SF Product Field
EnnDTools__Description__c
EnnDTools__Subcategory__c
EnnDTools__Category__c
EnnDTools__Model__c
EnnDTools__Manufacturer__c
EnnDTools__Labor_Hours__c
EnnDTools__Part_Number__c
EnnDTools__Phase__c
EnnDTools__DT_ProductId__c
EnnDTools__Accounting_Item_Name__c

D-Tools Project Product Details	
List Price	Currency
Install Price	Currency
Sales Price	Currency
Quantity	Number
Net Price	Currency
Phase	Text
IP Address	Text
Tax Id	Text
Taxable	Checkbox
Location ID	Text
Non-Billable	Checkbox
Owner Furnished Equipment	Text

SF Opportunity Product Field
ListPrice
EnnDTools__Install_Price__c
UnitPrice
Quantity
TotalPrice
EnnDTools__Phase__c
EnnDTools__IP_Address__c
EnnDTools__TaxId__c
EnnDTools__IsTaxable__c
EnnDTools__LocationID__c
EnnDTools__IsNonBillable__c
EnnDTools__IsOfe__c

D-Tools Contact Details	
Name	Text
Primary Contact	Checkbox
Title	Text
Address	Text
Phone	Phone
Mobile	Phone
Email	Text
Fax	Phone

SF Contact Field
EnnDTools__Name__c
EnnDTools__Is_Primary__c
Title
MailingAddress
Phone
MobilePhone
Email
Fax