

D-Tools SI Salesforce Integration User Guide

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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".

Control Panel					
Application					
Company Information	Application Settings	Gheck For Updates	Register		
⊈User					
My Account	Users				
Catalog					
Manufacturers	Categories	Phases	Units of Measure	1/0's	Head Ends
Price Settings	Tax Settings	Wire Settings	Product Price Types	Product/Labor Custom Fields	Manage Integrations
Project					
Project Settings	Projects Folder	Sections	Systems	Project Progresses	Order Statuses
Payment Terms	Project Custom Fields	Project Number Format	Component ID Format	Price Type Settings	Price Adjustments
Upgrade Projects					

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.

Setup Permissions

- 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

Setup Sync

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

1. DTool Credentials-

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

Sync with Your D Tools Account

0 D-Tools Credentials	•	Endpoint URL
Synchronization Options		https://spid-tools.com/Sl
3 Start batches		D-Tools SI Version
		2018 •
		Save

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. Synchronization Options

Choose which sync options you would like to use.

- Import from D-Tools to Salesforce
 - Will bring in D-Tools projects as Opportunities within Salesforce, along with product information, client, and contact information
- Export from Salesforce to D-Tools
 - Still in development
- Save Change Orders after importing them?
 - 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.

1 D-Tools Credentials	Import from D-Tools SI to Salesforce
2 Synchronization Options	Export from Salesforce to D-Tools SI
3 Start batches	Save Change Orders after importing them?
	Save

Sync with Your D Tools Account

3. Start Batches

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

58			D-Tools SI 2017 - [Project Explorer]			- 0 ×
Start Home Export Layouts Re	eports Integrations Settings					a 🆓 Anthony 🛄 Recently Viewed * 🛐 Learn More
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so Ricardo	Sample Customer	Sample Security Project DTI-0035	01 - Estimating			
50 Sample Customer	Contential Project	Sample Residential Project DTI-0034	01 - Estimating			
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	Al	Name Name	Category	Updated On		
	- AutoCAD - Report					
	Other					
Projects Schedule Purchase	Orders Catalog People	e Setup				

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.

51				D-Tools SI 2017 - [Project Explorer]					- 0 ×
Start Home Export Layouts R	Reports Integrations	Settings						a 🍘 Anthony 🛄 Recently	/ Viewed 👻 🛐 Learn More
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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 Pr oject 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

Start	Home Tools	Layouts	QuickB	ooks	Integrations	Settings								a ඹ user2 🛄 Recently	Viewed 🔹 🛐 Learn I	More
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On the Manage Products screen go to the Integrations tab on the top of the Dtools Application.

Start	Home	Tools	Layouts	QuickBooks	Integrations	Settings	
-	-						
Export	Import						
Integr	ations						

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	SF Account Field
Client Nam	e Text	Account Name
Client #	Text	Account Number
DT Client I	D Text	DT Client ID (Custom)
D-Tools Project C	ontact Details	SF Opportunity Field
Site Street 1	Text	EnnDTools_Site_Street_1_c
Site Street 2	Text	EnnDTools_Site_Street_2_c
Site City	Text	EnnDTools_Site_City_c
Site State	Text	EnnDTools_Site_Statec
Site Postal Code	Text	EnnDTools_Site_Postal_Code
Site Country	Text	EnnDTools_Site_Country_c
Site Phone	Phone	EnnDTools_Site_Phone_c
Site Fax	Phone	EnnDTools_Site_Fax_c
Billing Street 1	Text	EnnDTools_Street_1_c
Billing Street 2	Text	EnnDTools_Street_2_c
Billing City	Text	EnnDTools_City_c
Billing State	Text	EnnDTools_State_c
Billing Postal Code	Text	EnnDTools_Postal_Codec
Billing Country	Text	EnnDTools_Country_c
Billing Phone	Phone	EnnDTools_Phone_c
Billing Fax	Phone	EnnDToolsFaxc
D-Tools Pro	oject Details	SF Opportunity Field
Project ID	Text	EnnDToolsDT_Project_Idc
Installation P	rice Text	Amount
Project Nan	ne Text	Name
Stage	Text	StareName
		Stagervarite

D-Tools Catalog	Details
Catalog ID	Text

SF C	atalog Field	
EnnDTools_	_DT_CatalogId_	с

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
EnnDToolsDescriptionc
EnnDTools_Subcategory_c
EnnDTools_Category_c
EnnDTools_Model_c
EnnDToolsManufacturerc
EnnDTools_Labor_Hours_c
EnnDTools_Part_Numberc
EnnDTools_Phase_c
EnnDToolsDT_ProductIdc
EnnDTools_Accounting_Item_Namec

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	Text	

SF Opportunity Product Field	
ListPrice	
EnnDTools_Install_Price_c	
UnitPrice	
Quantity	
TotalPrice	
EnnDTools_Phase_c	
EnnDTools_IP_Addressc	
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
EnnDToolsNamec
EnnDTools_Is_Primary_c
Title
MailingAddress
Phone
MobilePhone
Email

Fax