

A user manual to understand Commissionly
integration with Salesforce

Commissionly for Salesforce App

Salesforce Integration User Manual

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Launching Commissionly

1. From the App Launcher, search for **Commissionly for Salesforce** and select it.

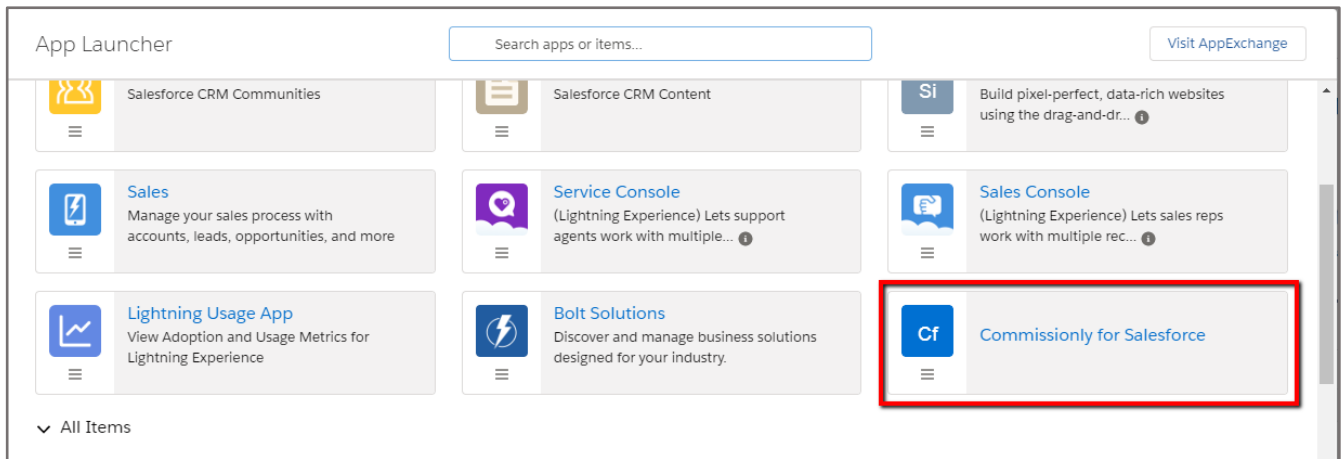


Figure 1

Add Objects and Fields

1. To add Commissionly Objects, click **Commissionly Object** and click **New** button from top right of screen.

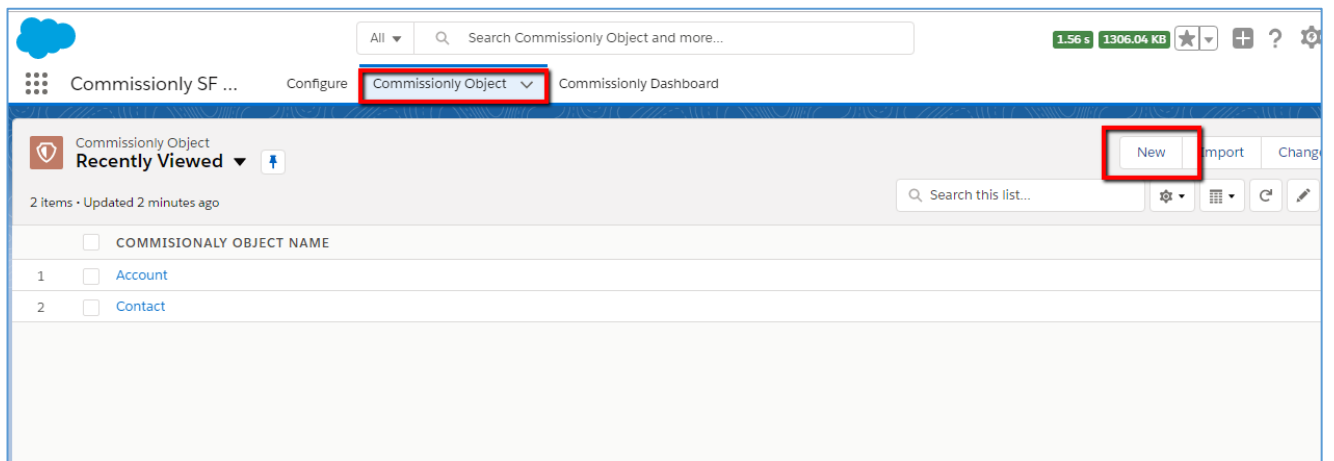


Figure 2

2. Enter the details required in the form. Commissionly Object Name has to be the exact name used in Commissionly database. For the exact name, please refer the API document provided by Commissionly

The screenshot shows a web form titled "New Commissionly Object". It has a tab labeled "Information". The form contains the following fields and controls:

- *Commissionly Object Name**: A text input field.
- remoteModule**: A text input field with an information icon.
- API URI**: A text input field.
- Is Active**: A checkbox that is currently checked.
- Sync Priority**: A text input field with an information icon.

A red callout box points to the "Sync Priority" field with the following text:

Please enter 1, 2, 3 or 4 where 1 will sync as the first object and 4 will sync last. This will define the order of execution of the objects during the sync.

At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

Figure 3

- API URL can be entered as a combination of URL and Commissionly Object name. For example, Commissionly object name is opportunity and URL is <https://extentia.commissionly.io/api/public/> then API URL to be entered should be <https://extentia.commissionly.io/api/public/opportunity>.
 - Enter remote Module for uniquely identifying in the Commissionly External Service Table which can be referred from API Document provided by Commissionly.
 - Enter the API URL and Save the form. If more than one object is required to be created selected **SAVE & NEW** and repeat the process.
3. Once the Object is created, open the Object and click on **Related** to add Fields and Base Object. To add a new field, click on **NEW** under Commissionly Fields.

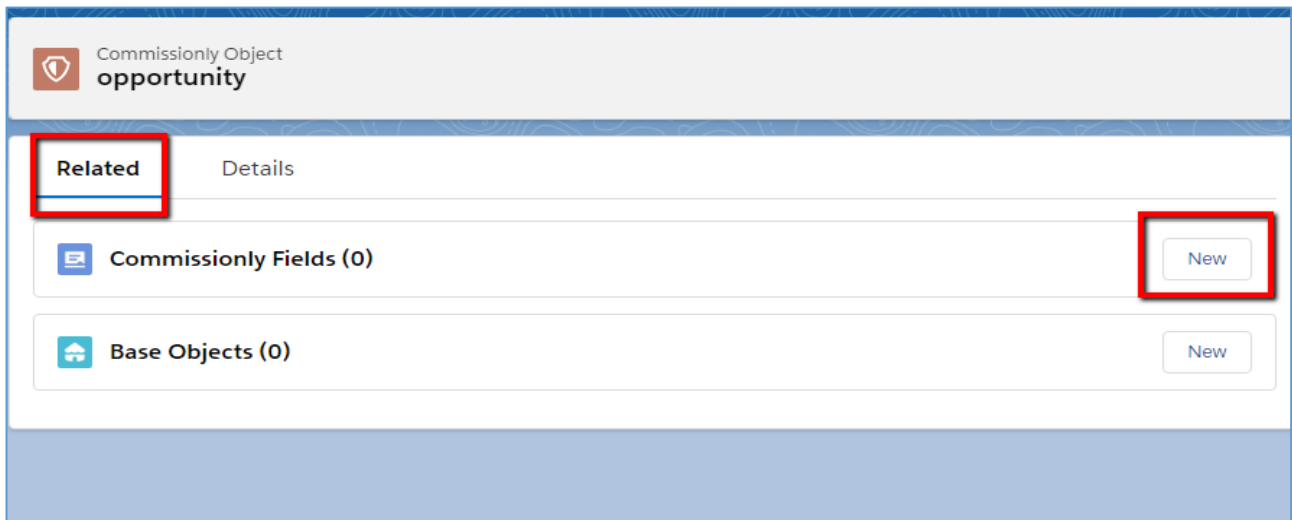


Figure 4

- A new form will open where Field can be added. Enter **Commissiononly Field Name** which should be same as the field name from Commissiononly Database and **Save**.

Figure 5

- All the primary Fields are required to be added here as a mandatory step. Please find the list of Mandatory and Non-Mandatory fields of each object at the API Documentation provided by Commissiononly.
- For creating more than one field, click on **Save & New** and repeat the process.

Configure Commissionly Salesforce Connector

App Configuration

1. Click on **Configure** Object in Salesforce. And Enter Username, Password and API details under **App Configuration** and **Save**.

The screenshot displays the 'App Configuration' section of the Salesforce interface. The top navigation bar includes 'Commissionly for ...', 'Home', 'Configure', 'Commissionly Object', and 'Commissionly Dashboard'. Below this, there are tabs for 'App Configuration', 'Object Configuration', 'Sync Setup', and 'Manual Sync'. The 'App Configuration' tab is active, showing a form with the following fields:

- * User Name: patrick@commissionly.io
- * Password: (masked with dots)
- Endpoint URL: (empty)

Red arrows point to the 'User Name' and 'Password' fields with labels 'Enter Commissionly username' and 'Enter Commissionly Password' respectively. At the bottom of the form are two buttons: 'Verify Setup' and 'Update Secret Key'.

Figure 6

- Enter your Commissionly credentials and End Point URL (provided by Commissionly) to configure the App. This should be same domain as added in remote site setting by Admin.

- Based on provided Username & Password, system generate secrete key which is required to authenticate the Commissionly API's"

Object Configuration

1. Click on **Object Configuration** and **Map New Object**.

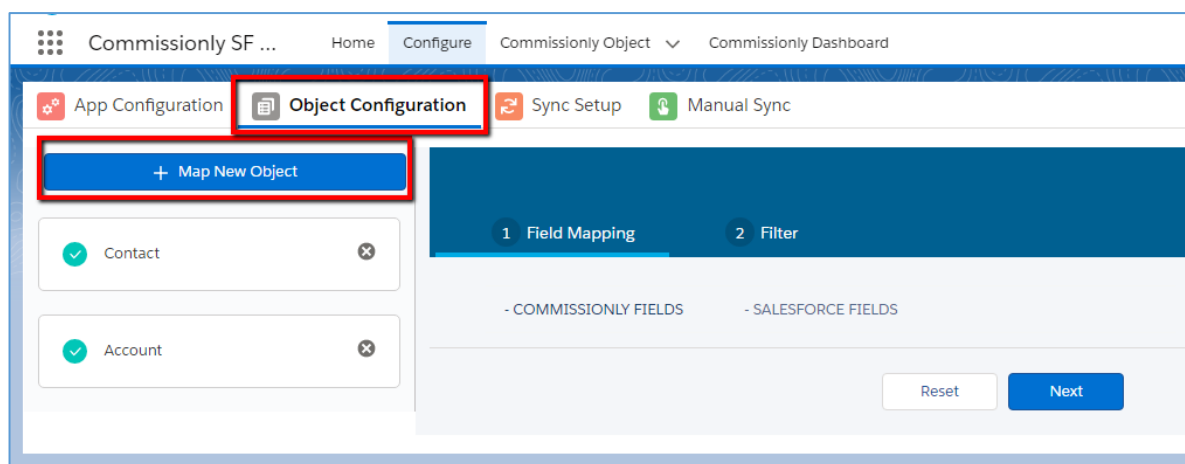
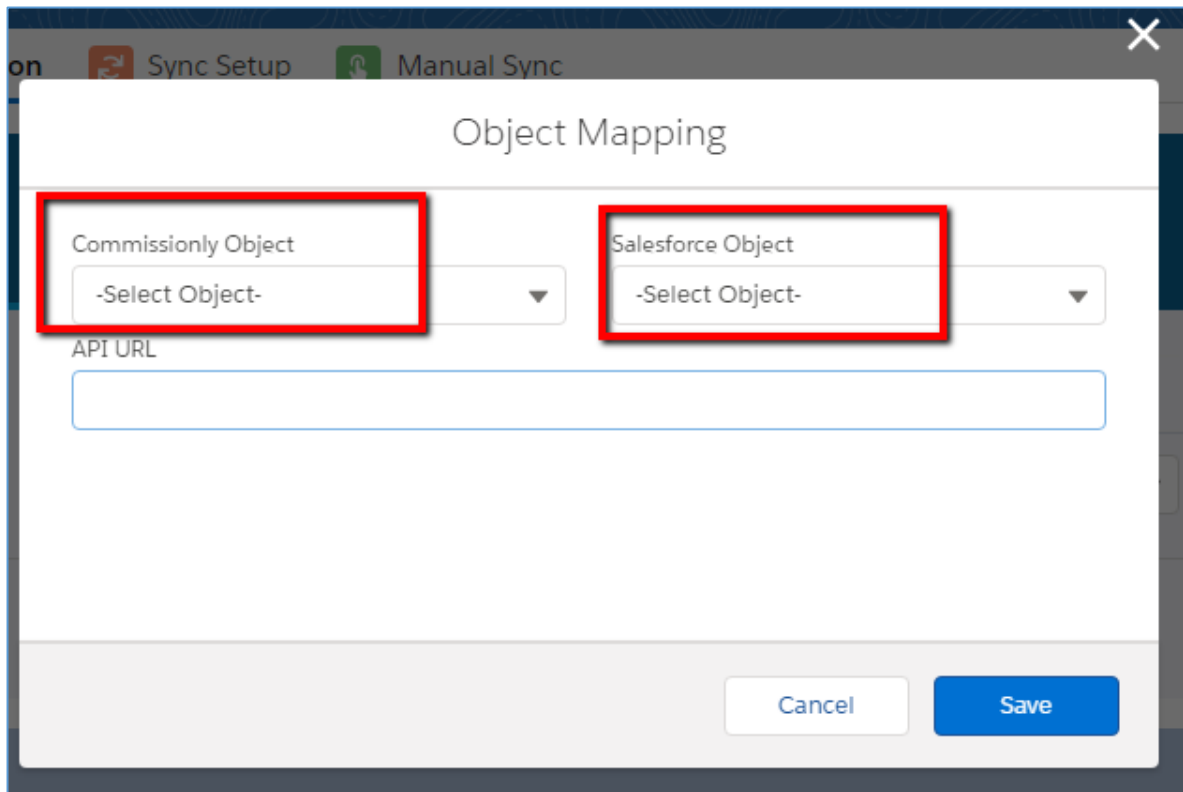


Figure 7

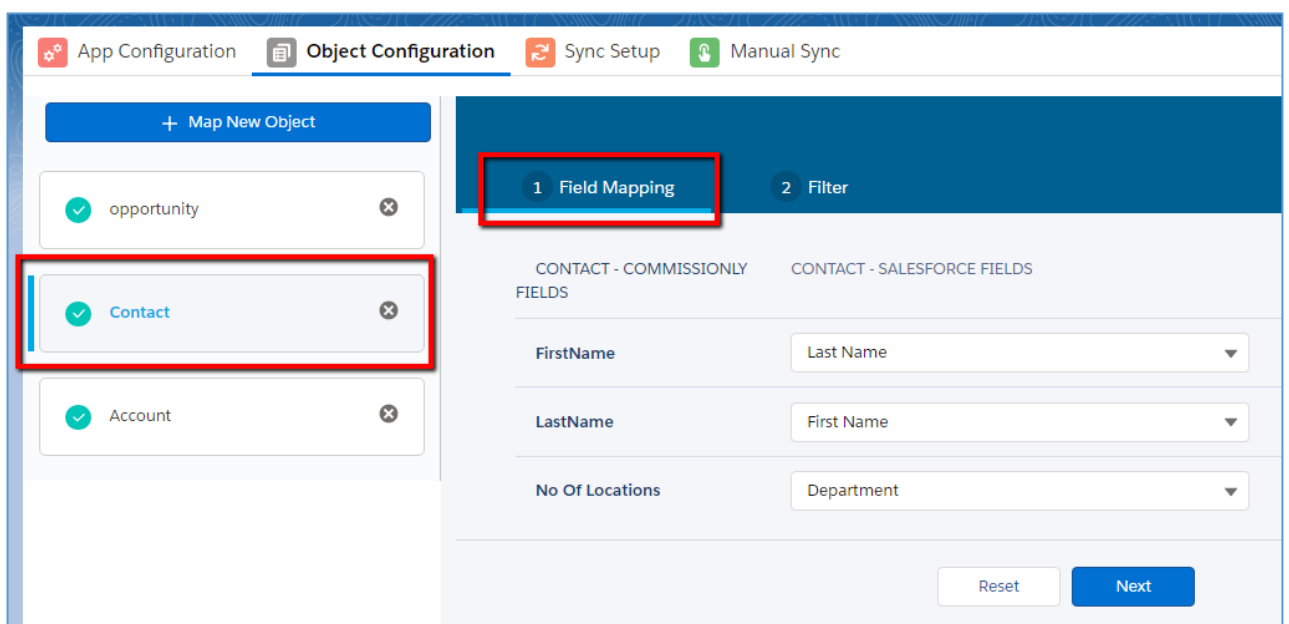
2. Enter Commissionly Object name and Salesforce Object name which is required to be synched in the pop up of **Object Mapping**, Enter **API URL** provided by Commissionly and **Save**.



The image shows a dialog box titled "Object Mapping". At the top, there are two tabs: "Sync Setup" and "Manual Sync". The dialog contains two dropdown menus, one labeled "Commissiononly Object" and the other "Salesforce Object", both with the placeholder text "-Select Object-". These two dropdowns are highlighted with red rectangular boxes. Below the dropdowns is a text input field labeled "API URL". At the bottom right of the dialog are two buttons: "Cancel" and "Save".

Figure 8

3. Click on newly Mapped Objects and under **Field Mapping**, select Salesforce Field Name against displayed Commissiononly Field name.



The image shows the "Object Configuration" screen. At the top, there are four tabs: "App Configuration", "Object Configuration", "Sync Setup", and "Manual Sync". On the left side, there is a list of objects: "opportunity", "Contact", and "Account". The "Contact" object is highlighted with a red rectangular box. On the right side, there are two tabs: "1 Field Mapping" and "2 Filter". The "1 Field Mapping" tab is highlighted with a red rectangular box. Below the tabs, there are two columns: "CONTACT - COMMISSIONONLY FIELDS" and "CONTACT - SALESFORCE FIELDS". The "CONTACT - COMMISSIONONLY FIELDS" column has three rows: "FirstName", "LastName", and "No Of Locations". The "CONTACT - SALESFORCE FIELDS" column has three rows: "Last Name", "First Name", and "Department". Each row in the "CONTACT - SALESFORCE FIELDS" column has a dropdown menu. At the bottom right of the screen are two buttons: "Reset" and "Next".

Figure 9

- Click on Next under Field Mapping and Apply Filters. If no filters are required, please select **No Filter criteria** and **Save**.

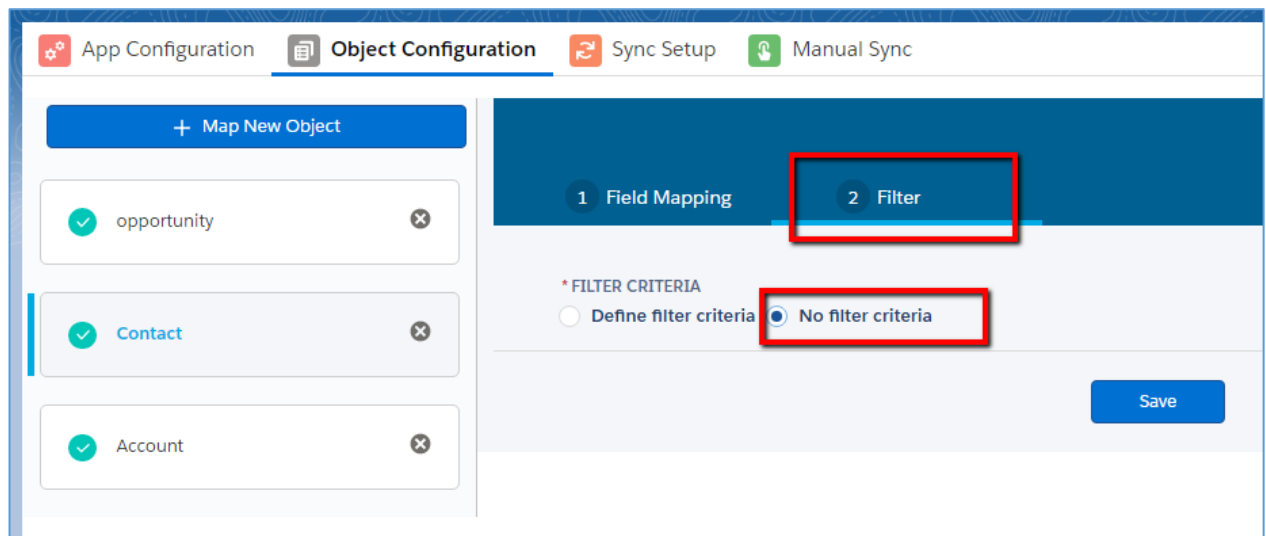


Figure 10

- Click on **Define filter criteria**, if any filters are required to be created and provide an appropriate name to the filter, select field, condition and value.

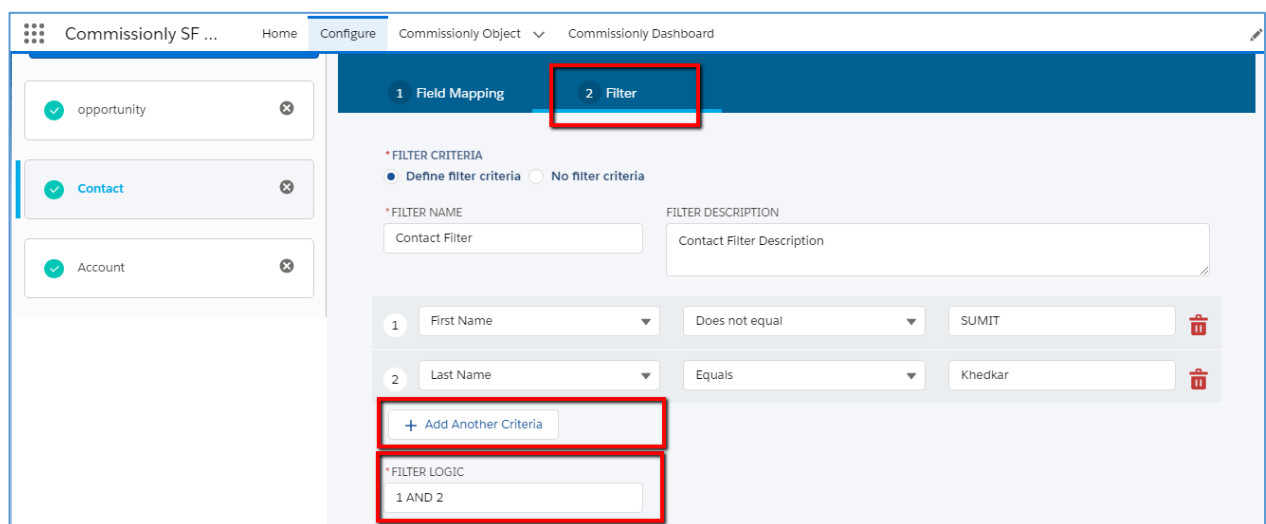


Figure 11

- You can also create multiple filters by clicking on **Add another criteria** and enter **Filter logic** between Criteria and **save**.

1. Click on **Sync Setup** and select **Yes, Sync automatically after setup** and select Sync on Insert or Update or Both or if you want to sync it manually later, you can select the **No, I will sync it manually** option and **Save Setting**.

App Configuration Object Configuration **Sync Setup** Manual Sync

Start sync operation immediately after the setup?

☒ Yes, sync automatically after the setup ☐ No, I will sync it manually

At what occasions do you want to sync the Salesforce data?

☐ Sync on Insert ☐ Sync on Update

select if you want to Insert or Update or both

Save Setting

Figure 12

Manual Sync

- If you have selected No, I will sync it manually, Click on **Manual Sync** and click on **Start Sync** to start the synch process:

Commissiononly for ... Home Configure Commissiononly Object Commissiononly Dashboard

App Configuration Object Configuration **Manual Sync**

Sync initiated successfully!
This is a long process, we will notify you my email after completion.

Start Sync Last Synced Summary

Recent Data Synchronization Started on : 07/06/2019, 05:56 pm GMT+5:30

Figure 13

- If you wish to see the summary of Last Synced Batch, click on **Last Synced Summary**

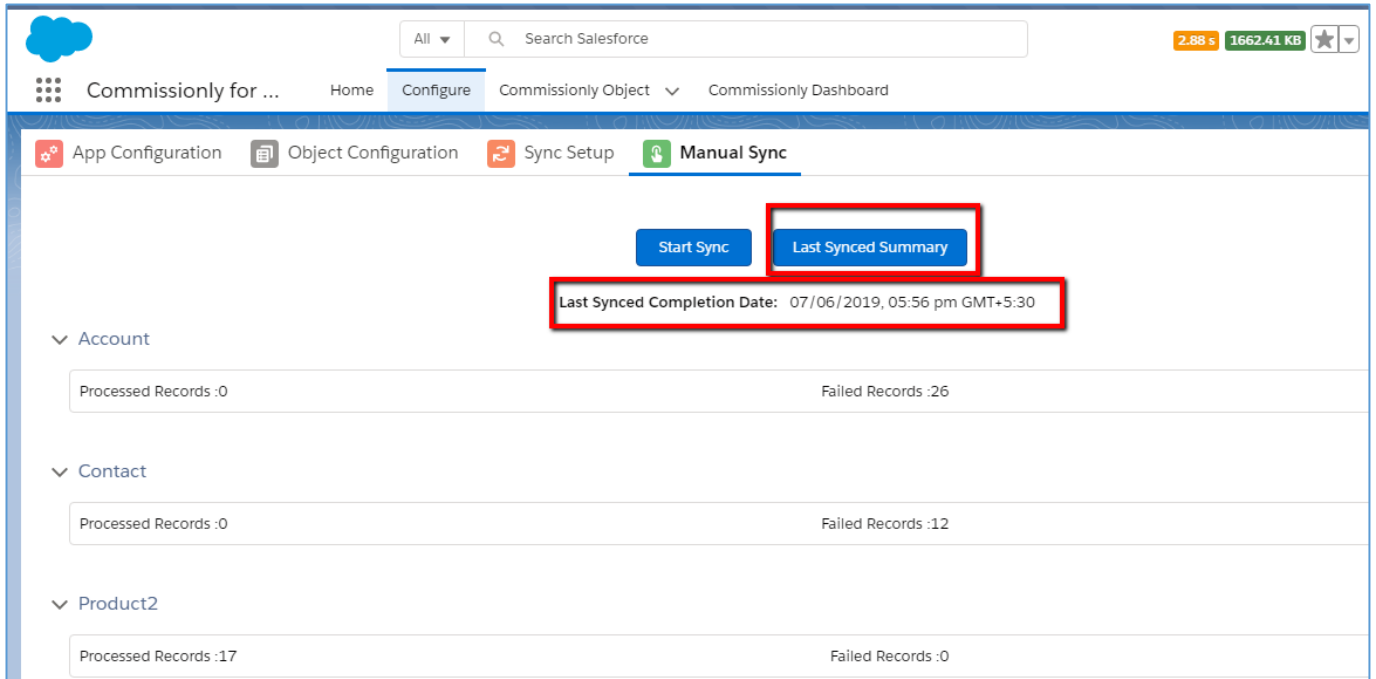


Figure 14

Commissionly Dashboard

1. If you wish to view Commissionly Dashboard within Salesforce, you can click on Object **Commissionly Dashboard** and select **Leave**

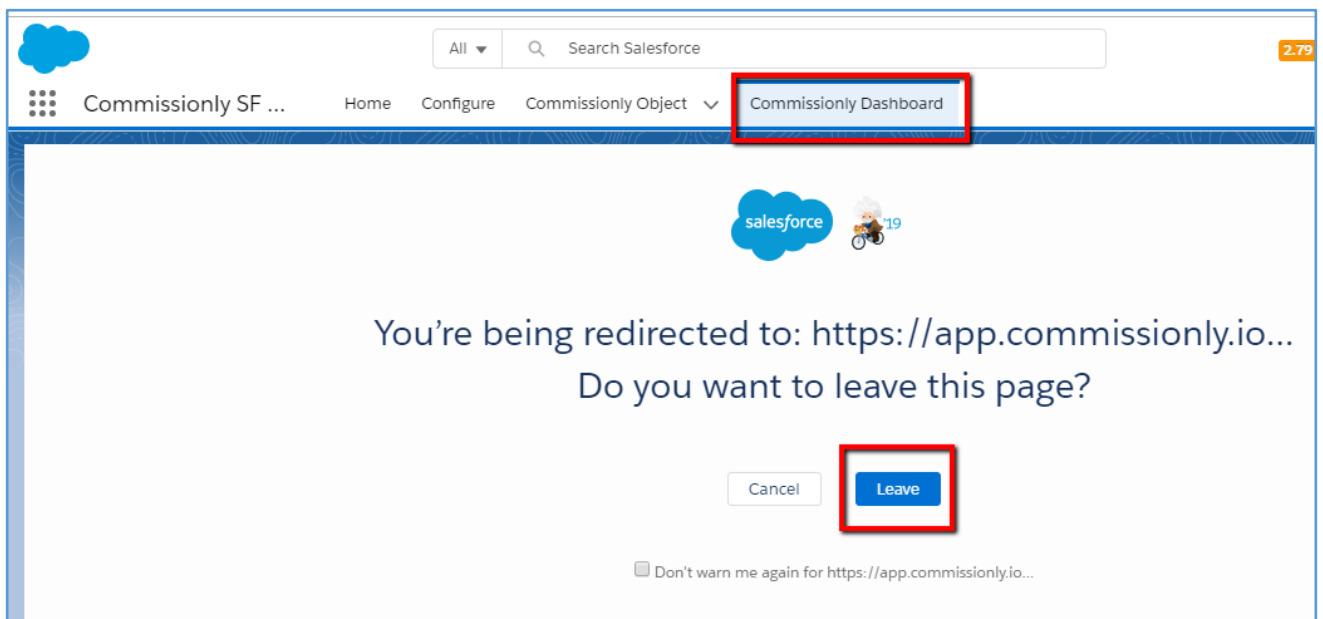


Figure 15

2. Enter Commissionly Credentials and View Dashboards mapped to user.

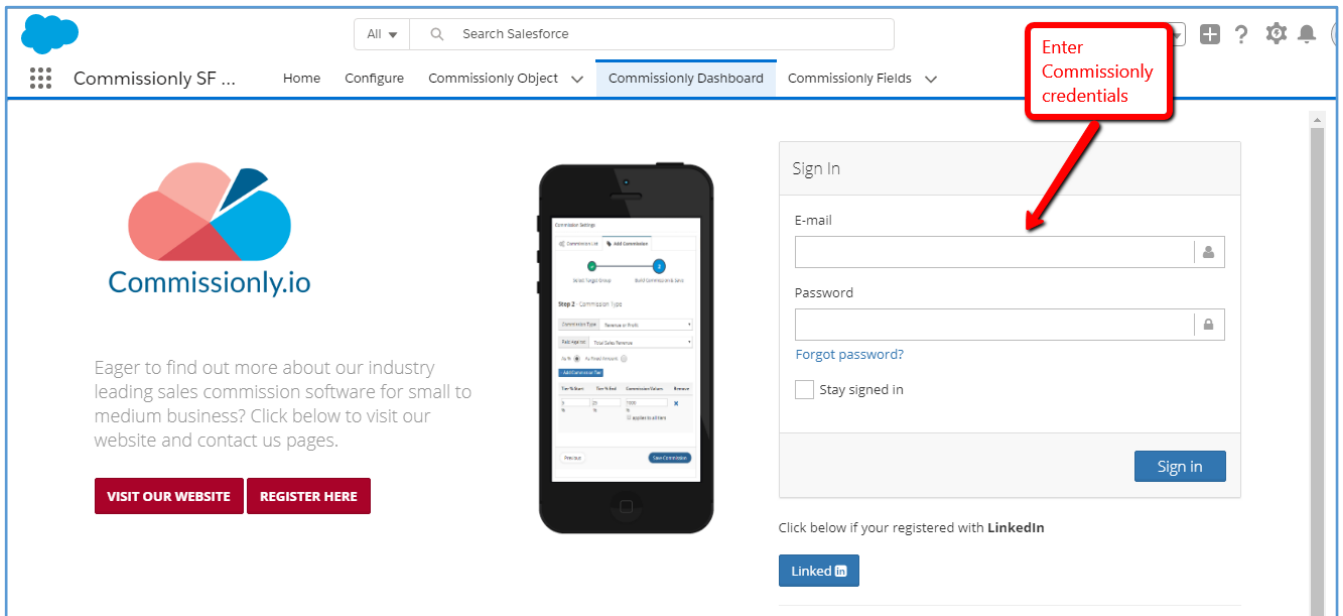


Figure 16

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