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.

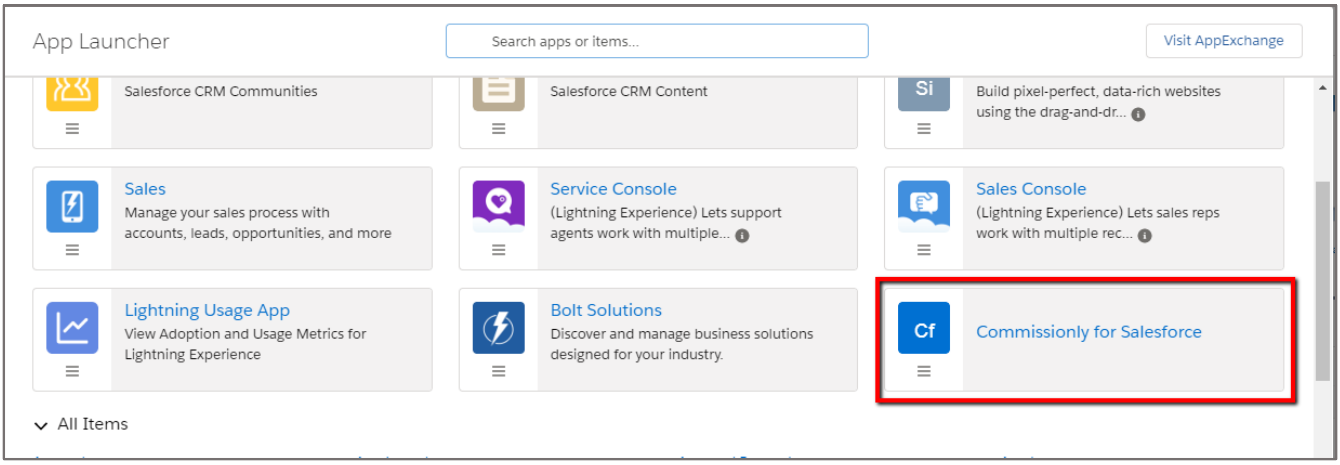

Figure 1

Add Objects and Fields

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

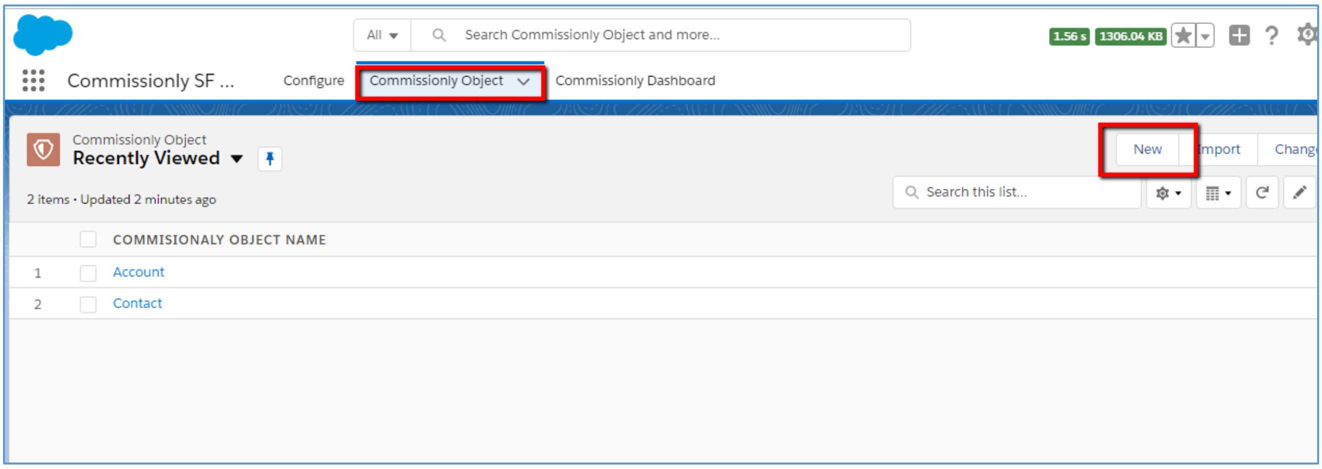

Figure 2

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

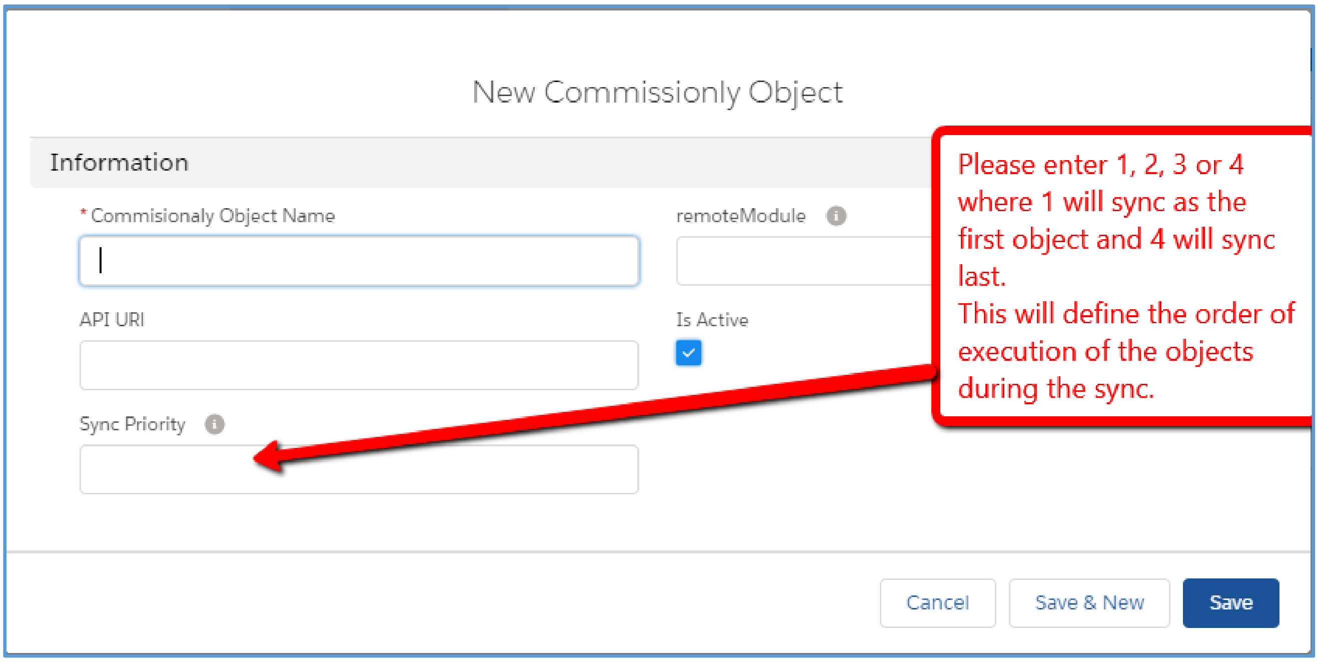

Figure 3

- 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**.**

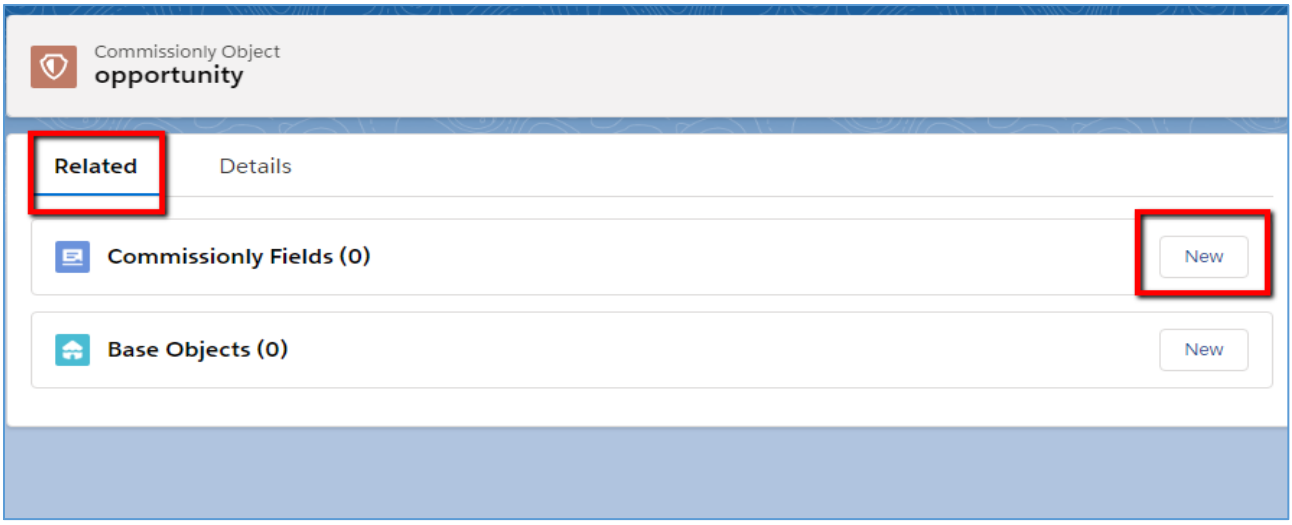

Figure 4

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

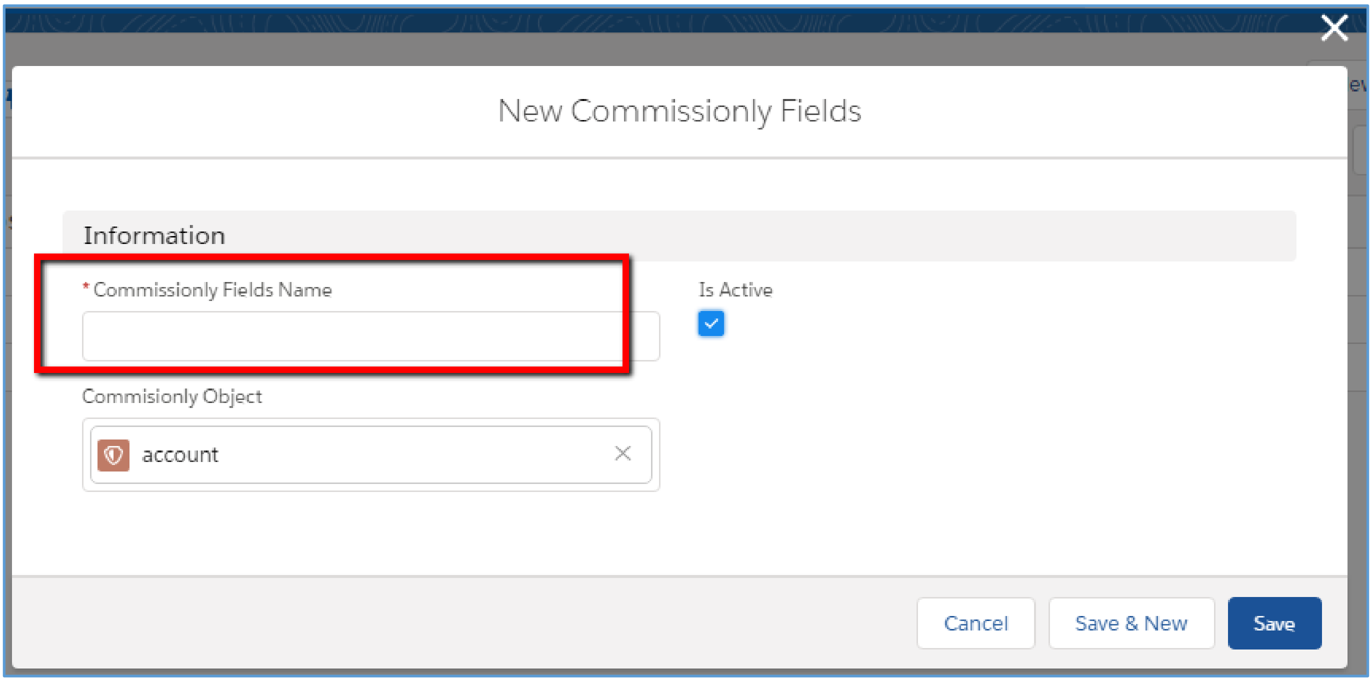

Figure 5

- 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 Commissionly.
- 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.**

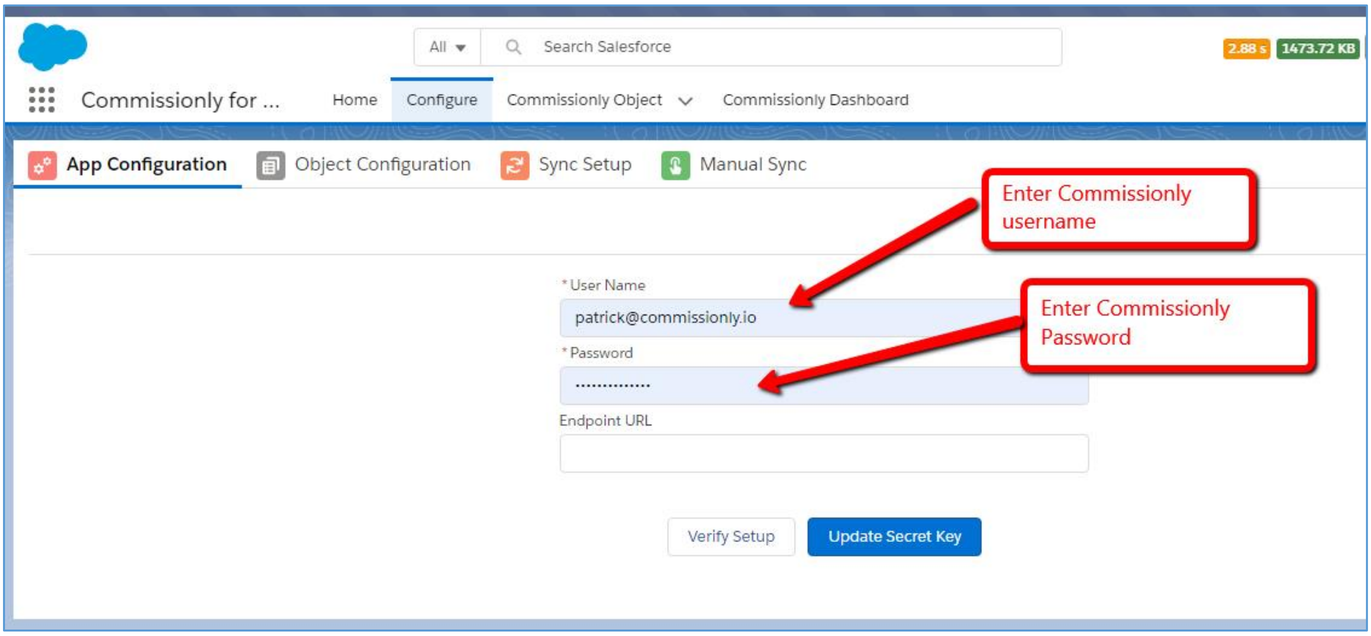

Figure 6

- 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.**

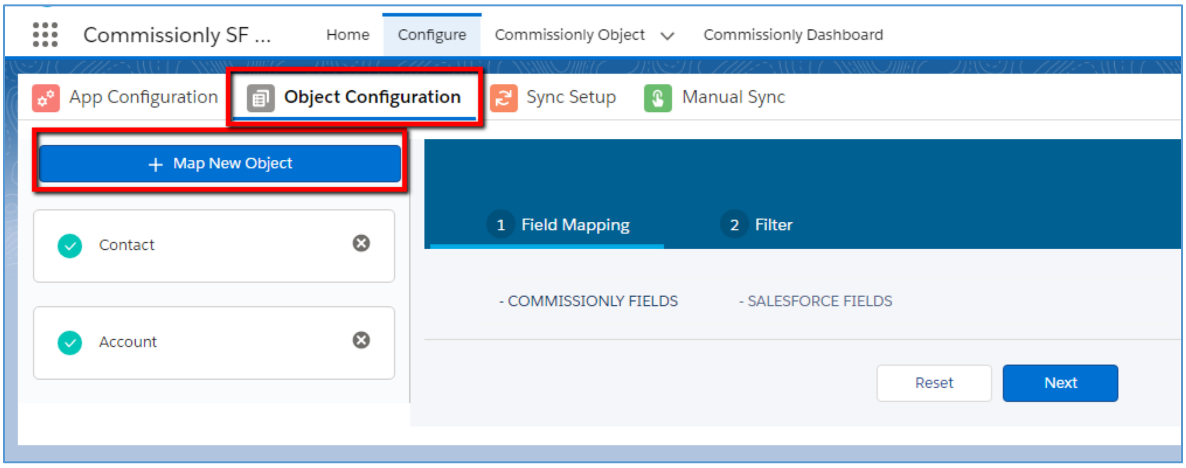

Figure 7

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.**

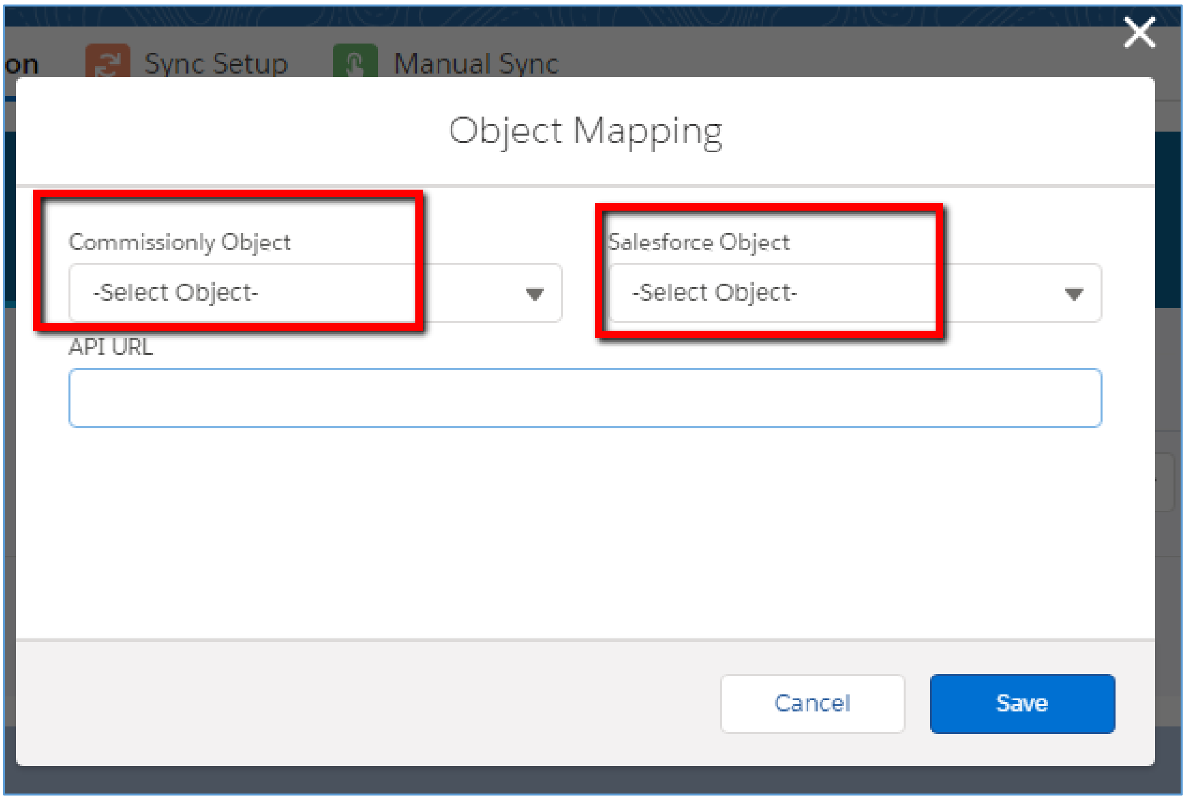

Figure 8

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

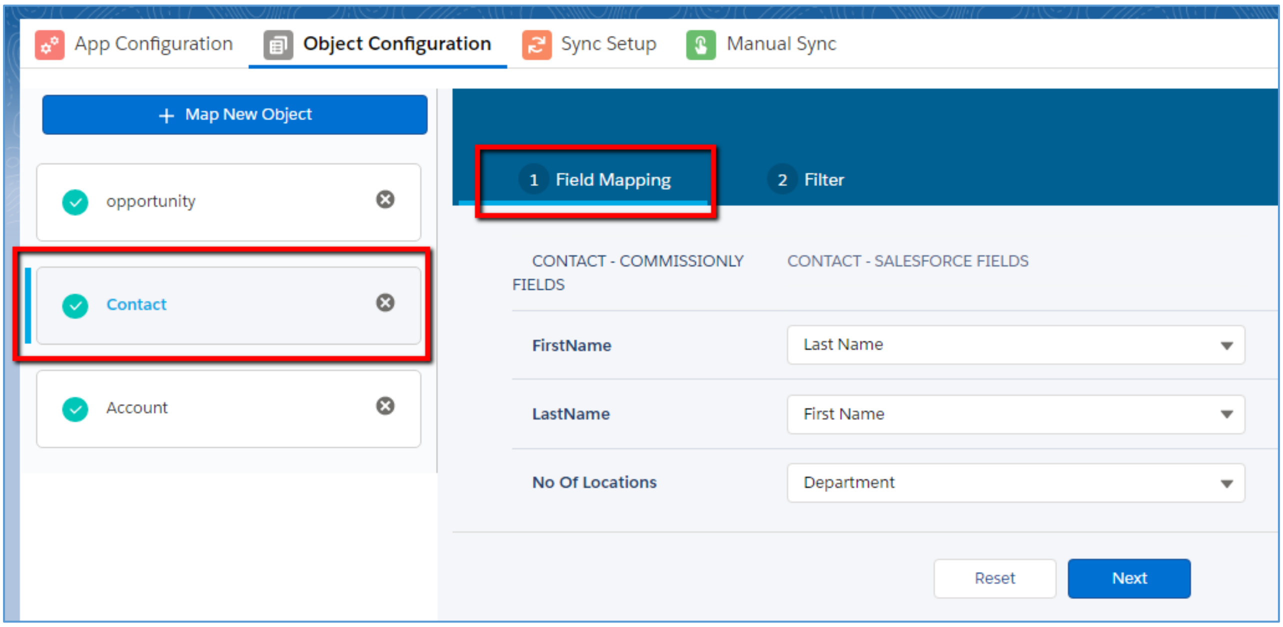

Figure 9

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

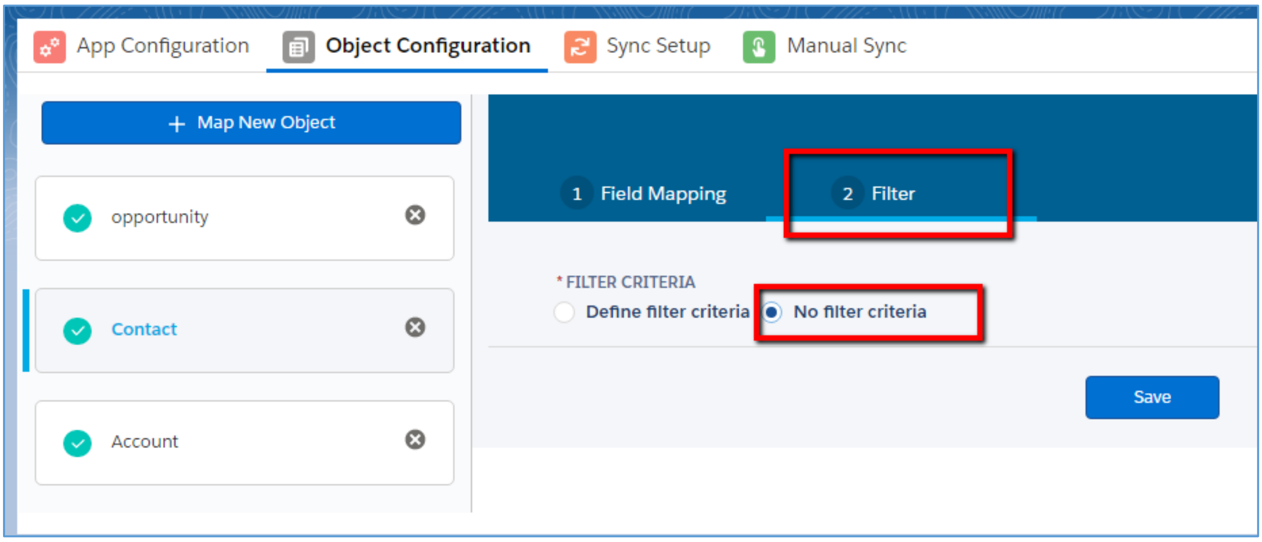

Figure 10

- 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.

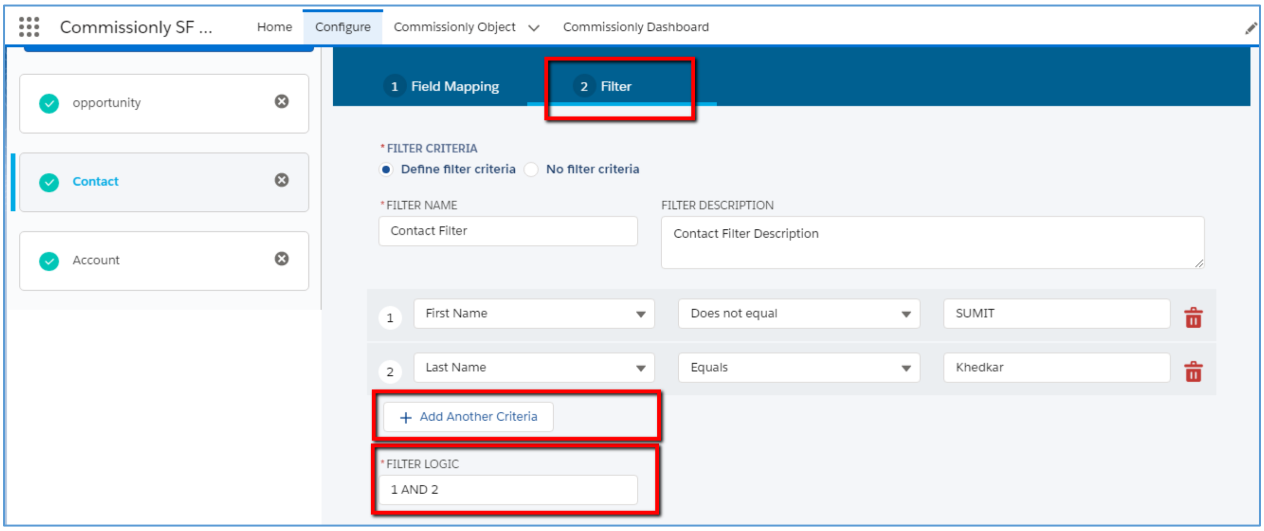

Figure 11

- 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.**

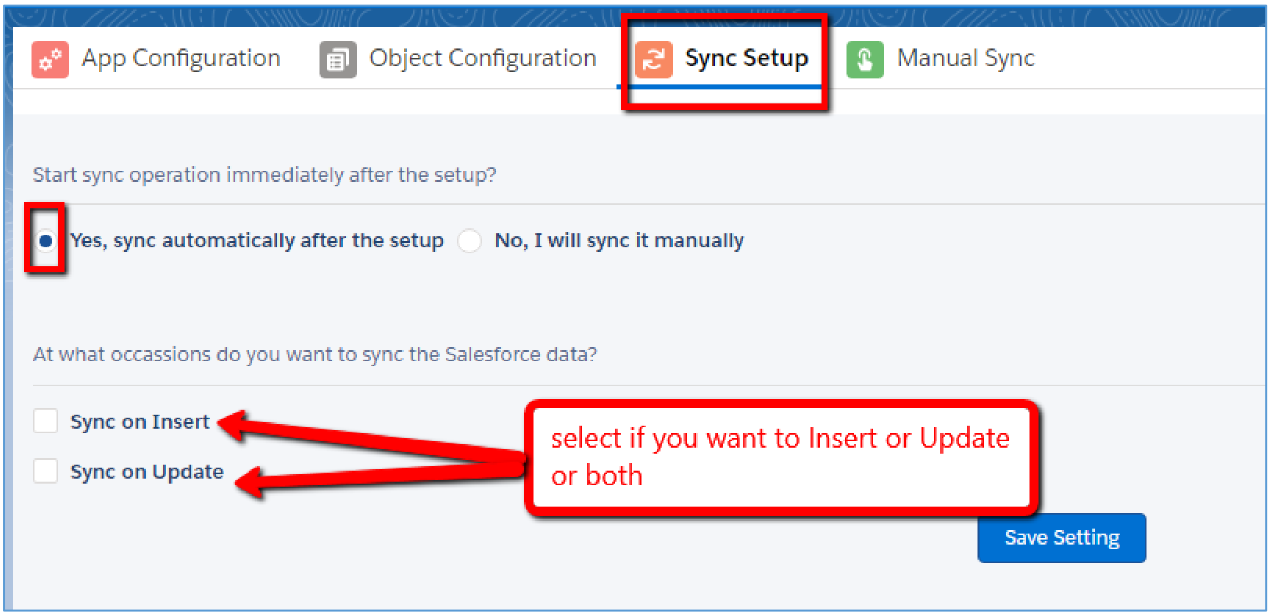

Figure 12

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:

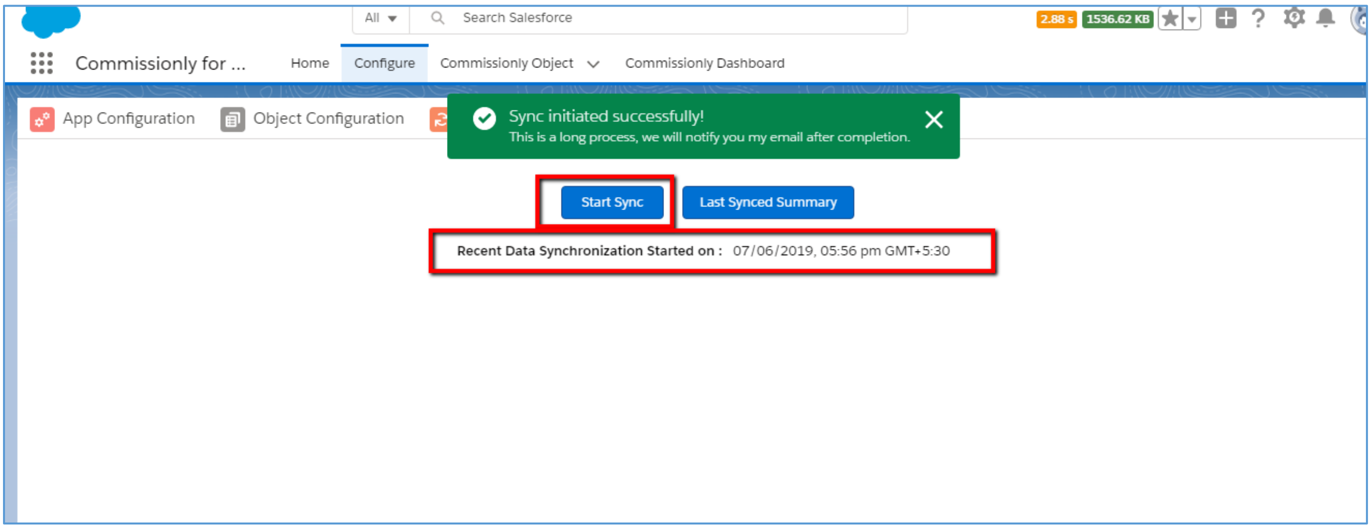

Figure 13

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

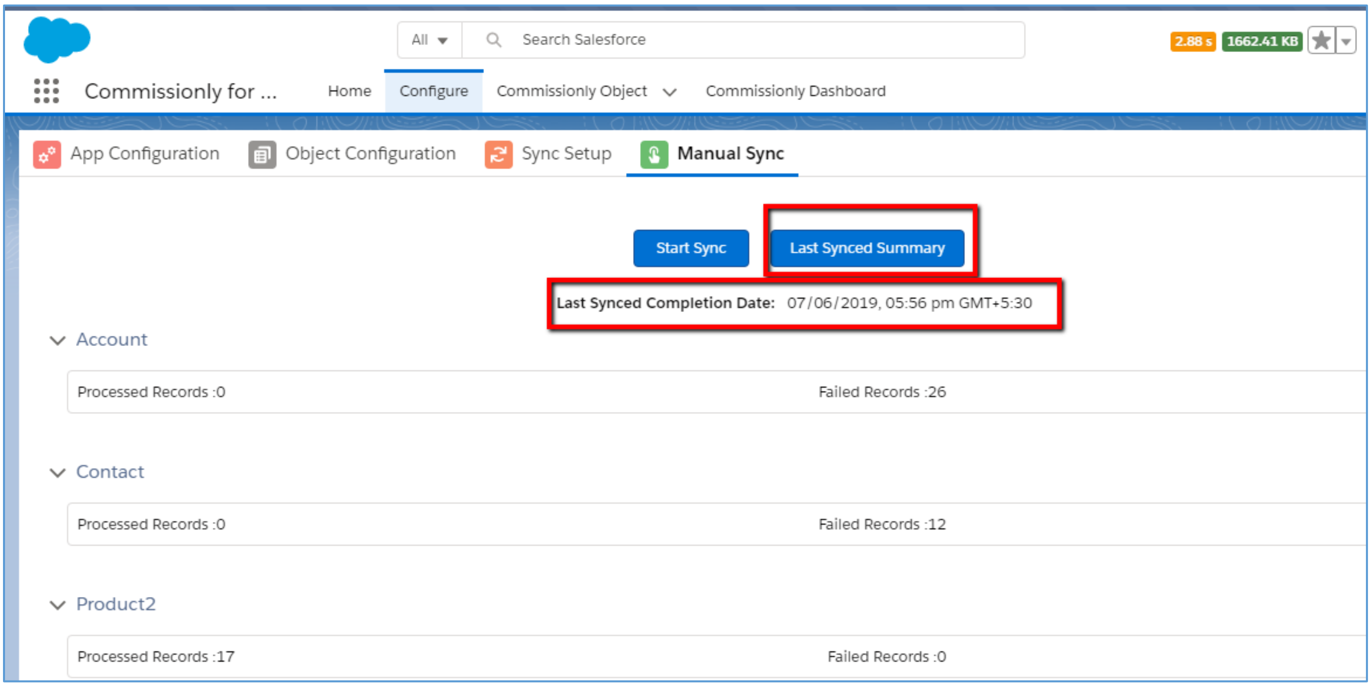

Figure 14

Commissionly Dashboard

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

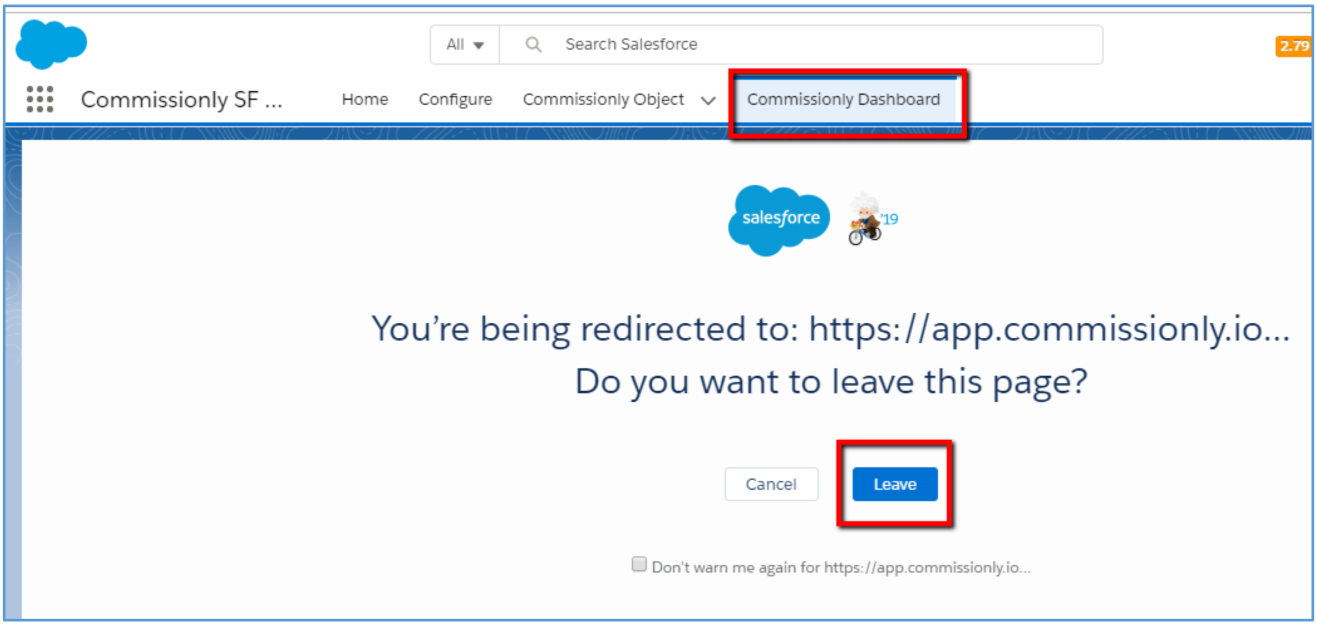

Figure 15

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

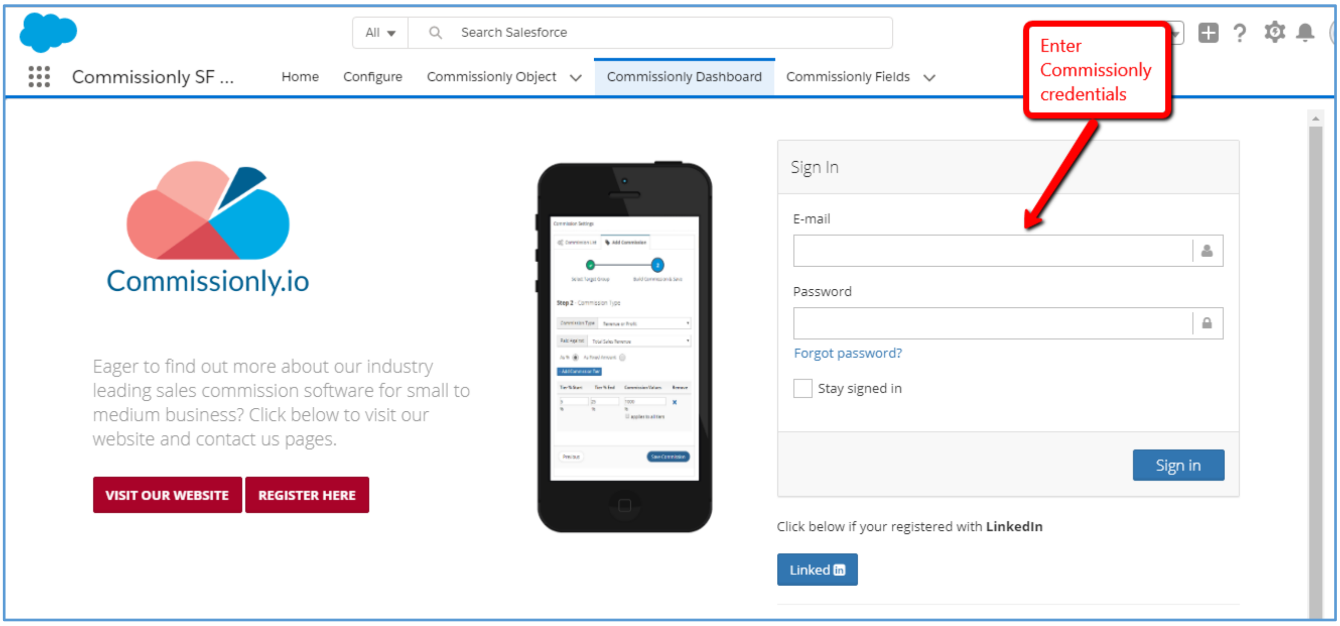

Figure 16

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