Vendor EDI Org: Admin Setup Guide

Installation and Setup Instructions

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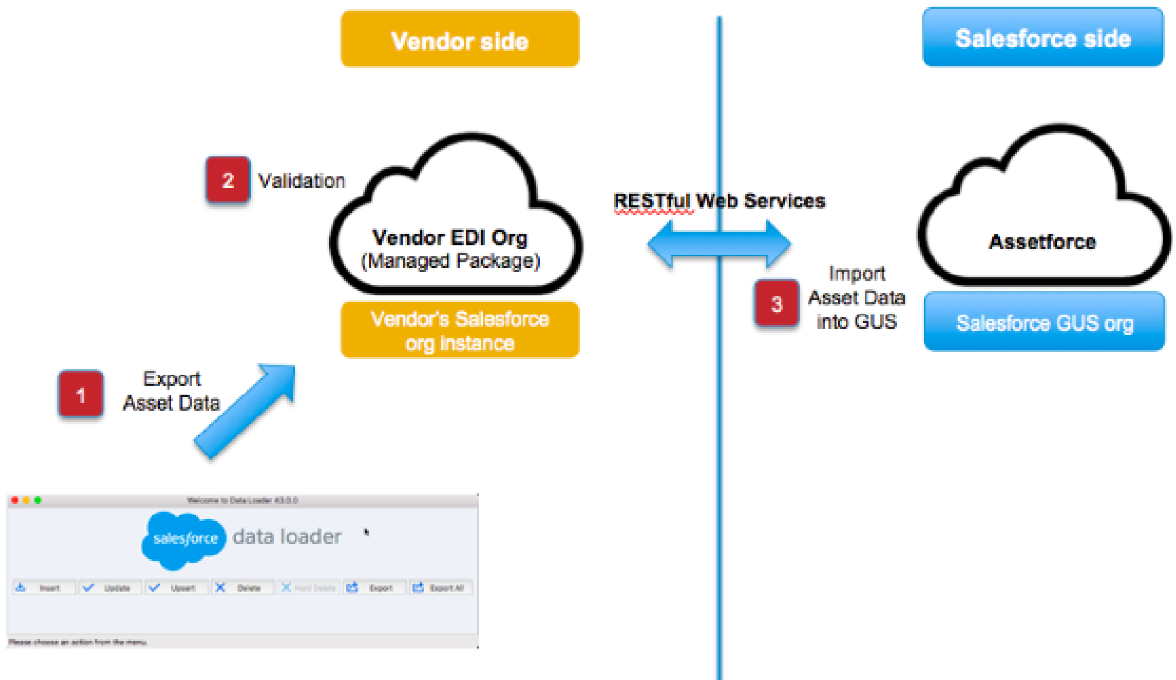
Vendor EDI Org Managed Package

This guide is for Salesforce administrators at vendor companies—companies from whom Salesforce procures its assets. It describes how to install and configure a vendor EDI org for exchanging asset data from a vendor to Salesforce.

The SFDC Vendor EDI managed package contains software that automatically validates asset data, alerts the vendor regarding faulty asset data, and stores the validated data that is periodically pulled into the Salesforce Asset Management system. To use this guide, you must be familiar with basic Salesforce administration.

The diagram shows a high-level view of the asset data flow from a vendor to Salesforce.



Salesforce Data Loader

Installing the Vendor EDI Org Managed Package

Installing the SFDC Vendor EDI managed package requires the following:

- Salesforce Sales Cloud with a Lightning Enterprise license or higher (sign up here).
- A minimum of three user licenses
    - One administrator account (Admin account) for installing the managed package.
    - One user account (Uploader account) for the vendor to upload asset data to the vendor EDI org.
    - One user account (Sync account) for Salesforce to access the vendor EDI org via APIs.

Salesforce Account Usernames and Email Addresses

A Salesforce username is in the form of an email address: name@domain.com.
The username does not have to be a real email address, but it must be unique within the Salesforce org.

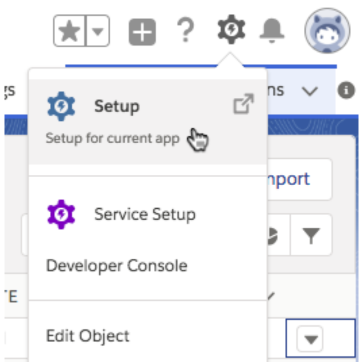
However, a Salesforce account must have a real email address associated with it.
The email address is used when Salesforce needs to contact the user, such as to send a password-reset email.

One advantage of this system is that you can use the same real email address for multiple usernames, because only the username needs to be unique. During installation and setup make sure that you are providing the correct information for the username or email address.

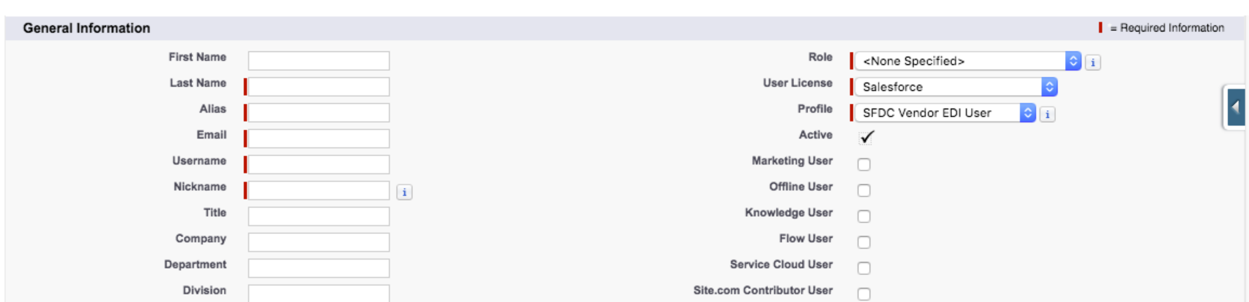
Create a Profile and User Accounts for the EDI Sync and Uploader Accounts

The EDI Sync account allows Salesforce to connect to this org and pull data.

1. Log into the Vendor EDI org with your Admin account.
2. Select **Setup** from the gear icon.



3. From Setup, in the Quick Find box, type `Profiles`, and then select **Profiles**.
4. Click **New Profile.**
5. For Existing Profile, select **Standard User**.
6. For Profile Name, enter `SFDC Vendor EDI User`.
7. Click **Save**.
8. From Setup, in the Quick Find box, type `Users`, and then select **Users > Users**.
9. Click **New User**.
10. Enter the user account information.
11. For User License , select **Salesforce**.
12. For Profile, select **SFDC Vendor EDI User**.
13. For Username, create a username that will remind you this is the Sync account, such as `vendoredisync@yourcompany.com`.

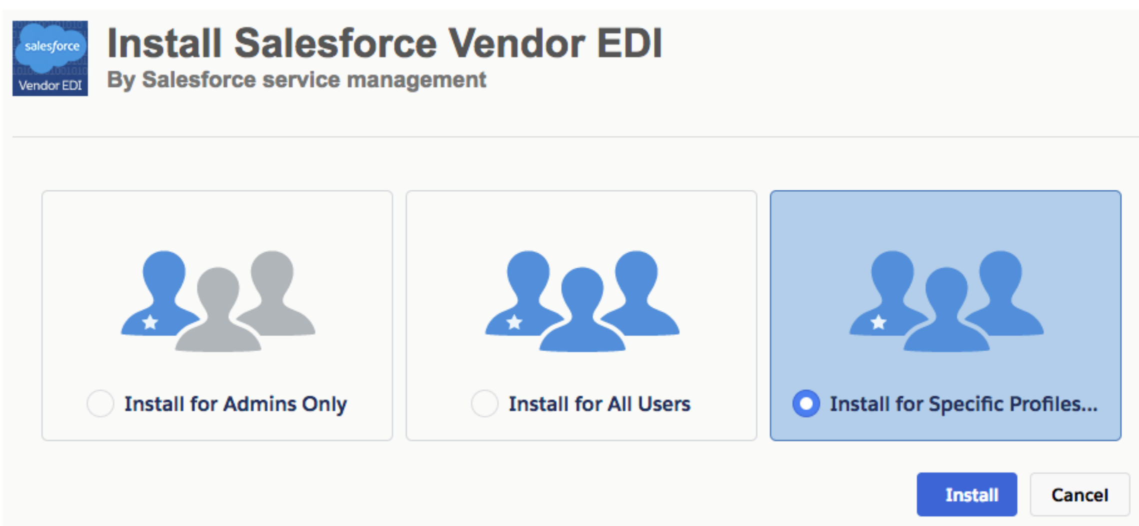


14. Complete the other mandatory fields as appropriate.
15. Click **Save** to create the SFDC Vendor EDI User Sync account.
16. Check the email associated with this account, and respond to the Verify Account email. Follow the instructions to update the password for this account.
17. Save the account information for the new SFDC Vendor EDI Sync user. You will need to provide it to the Salesforce Asset Management Team when you Create the Connected App. Salesforce uses this account to synchronize data from the org.
18. Repeat steps 8–16 to create a second user account. Create a username that will remind you this is the Uploader account, such as `vendorediuploader@yourcompany.com`. This user uploads asset data to the vendor EDI org.

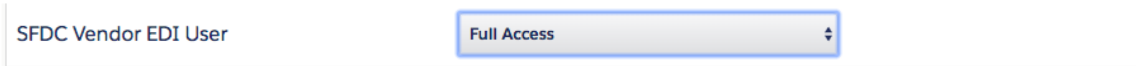
Install the Vendor EDI Managed Package

1. Copy and paste the managed package URL into your browser address bar.
   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1P000000ElQW

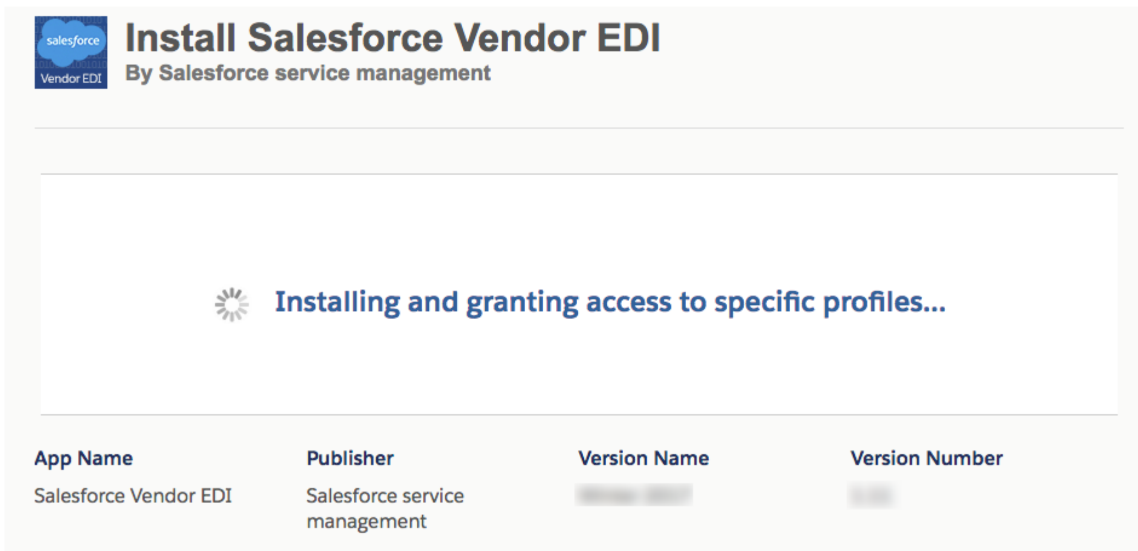
2. On the Install screen, click **Install for Specific Profiles**. Do not click **Install** yet.



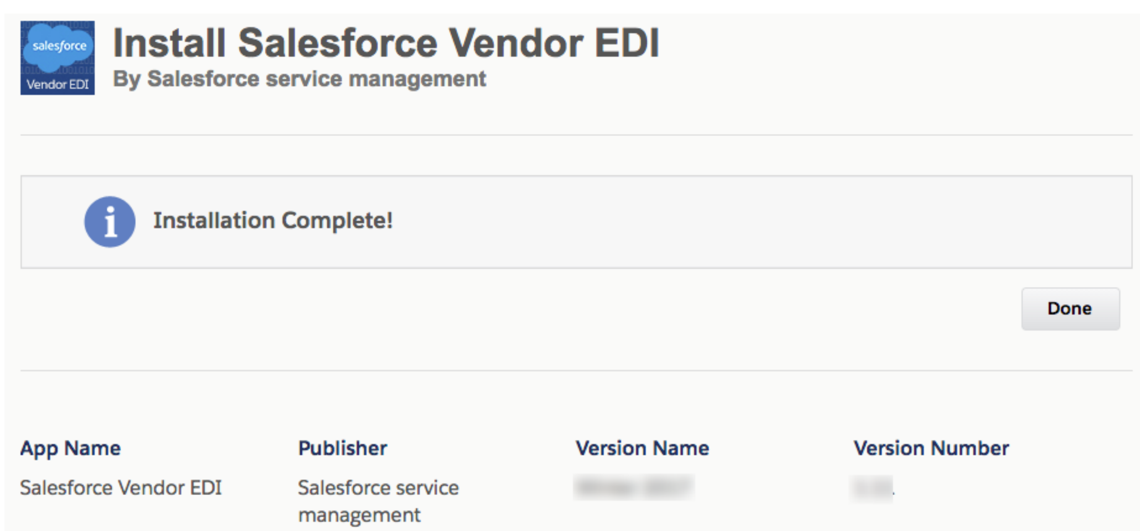
3. Scroll down the page and select **Full Access** for the SFDC Vendor EDI User.



4. Click **Install**.



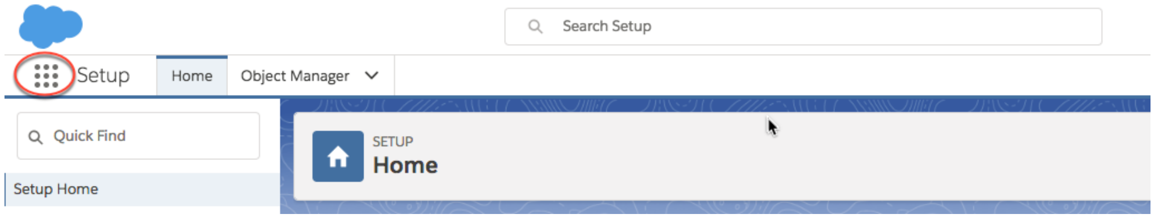
5. You see this message when the installation is complete.



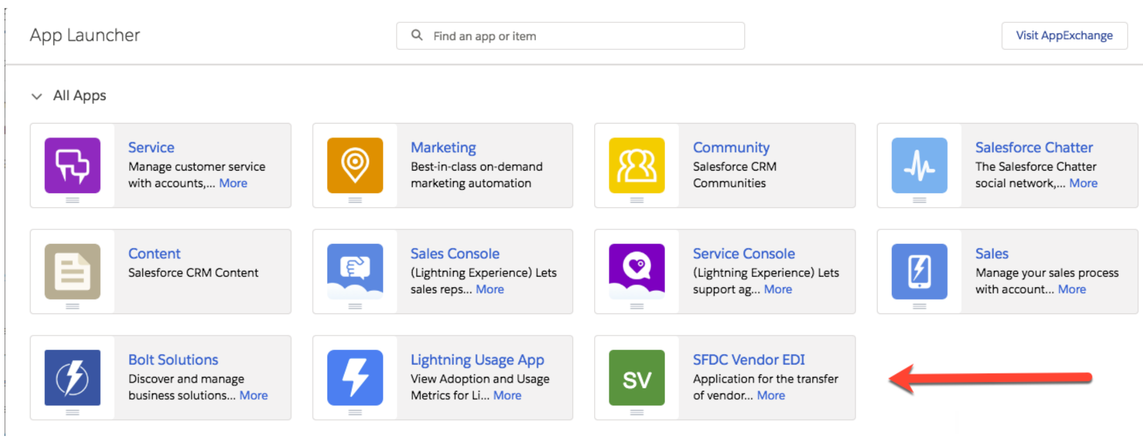
Test the Managed Package

Test the managed package installation by creating an asset record.

1. Open the App Launcher by clicking the dot icon in the upper left.

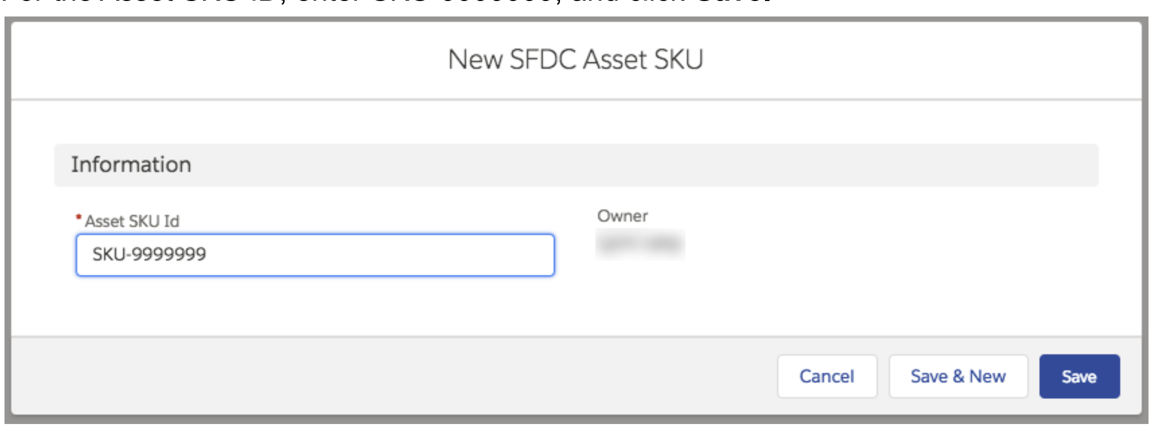


2. In the App Launcher, click the SFDC Vendor EDI tile. If the SFDC Vendor EDI tile is not visible, use the search bar to locate the app.



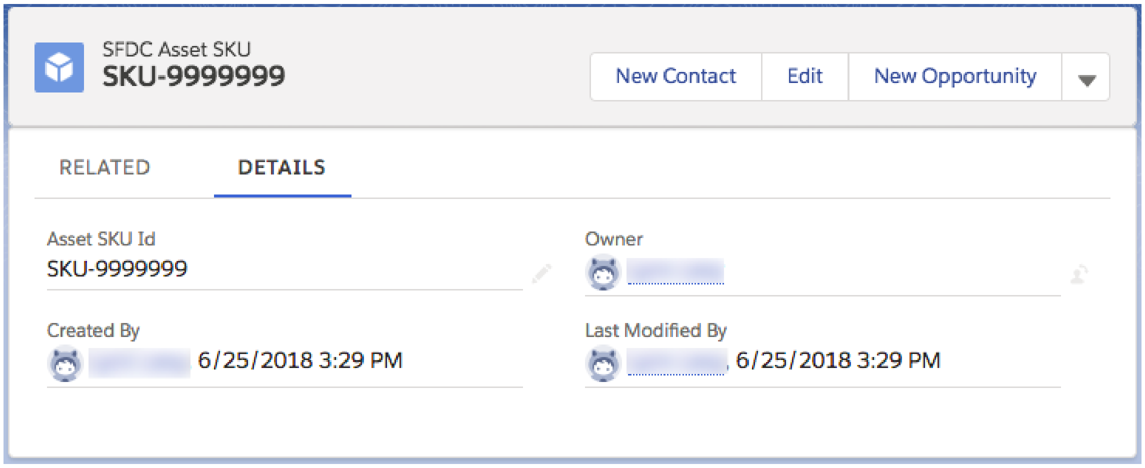
3. On the SFDC Assets SKUs tab, click **New** to test creating an entry.

4. For the Asset SKU ID, enter SKU-9999999, and click **Save.**

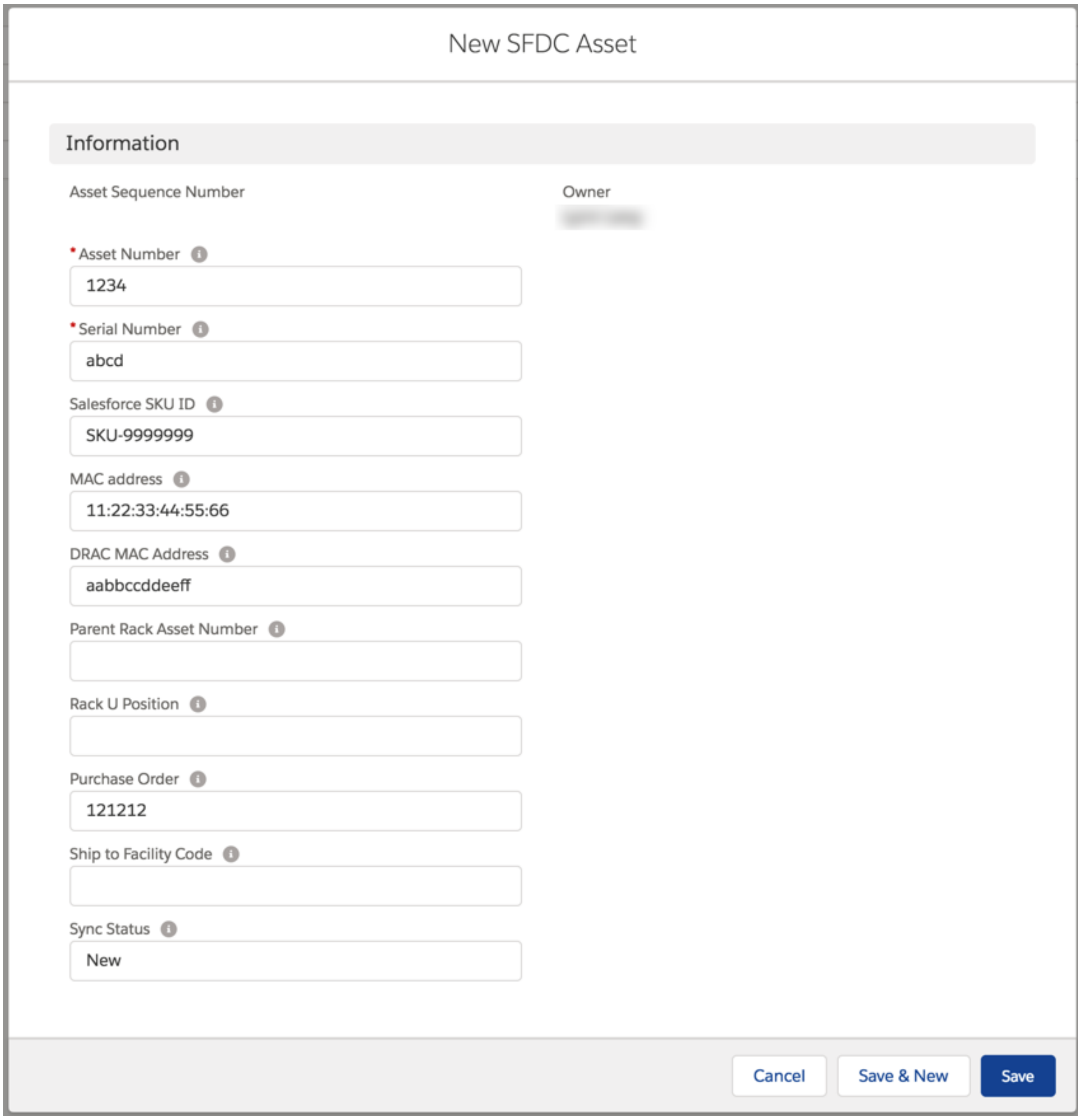


5. Confirm that the SFDC Asset SKU record is created.

If the record is not created, contact the Supply Chain Fulfillment team at Salesforce.



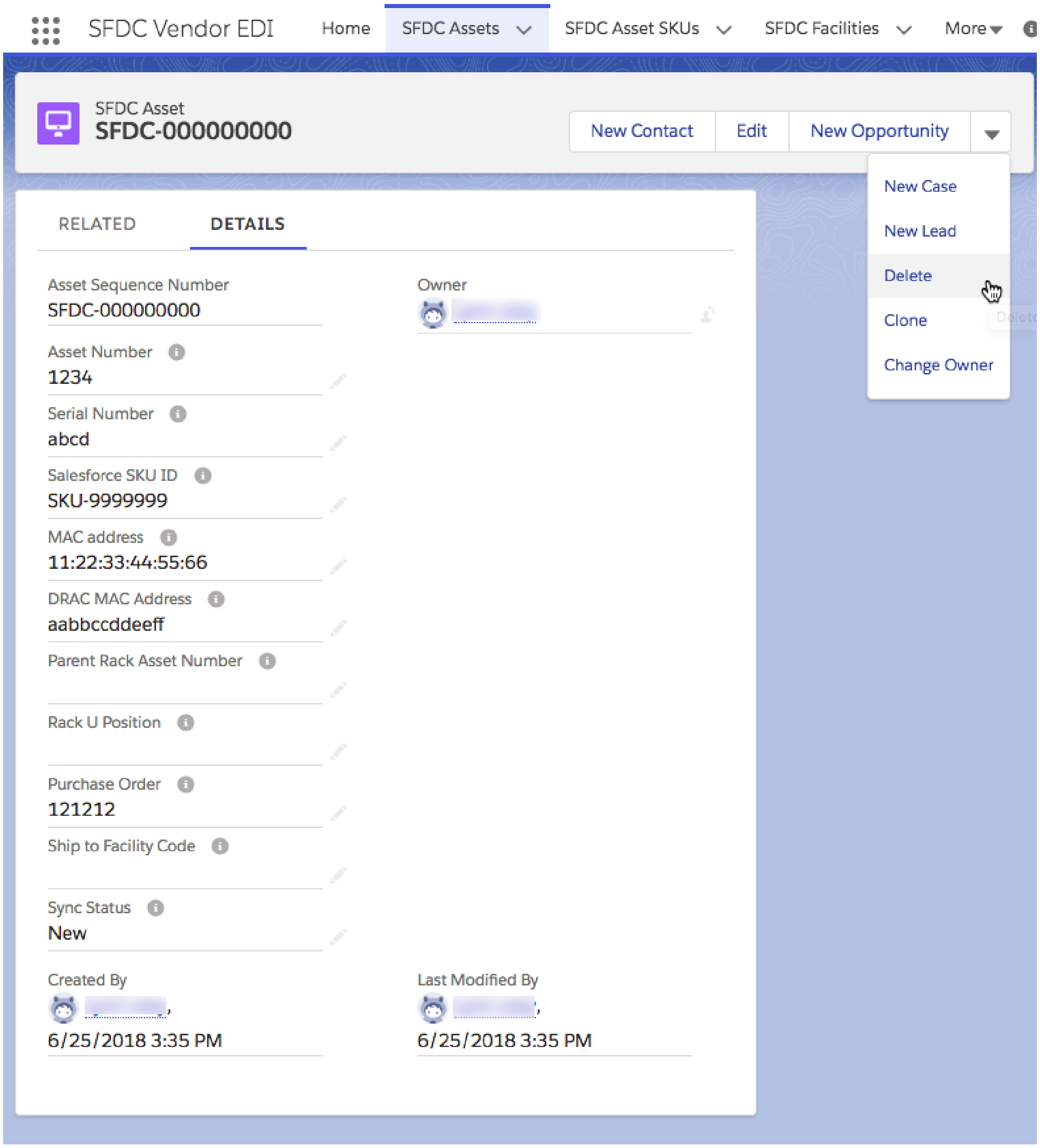
6. On the SFDC Assets tab, click New to create an SFDC asset using the following values.



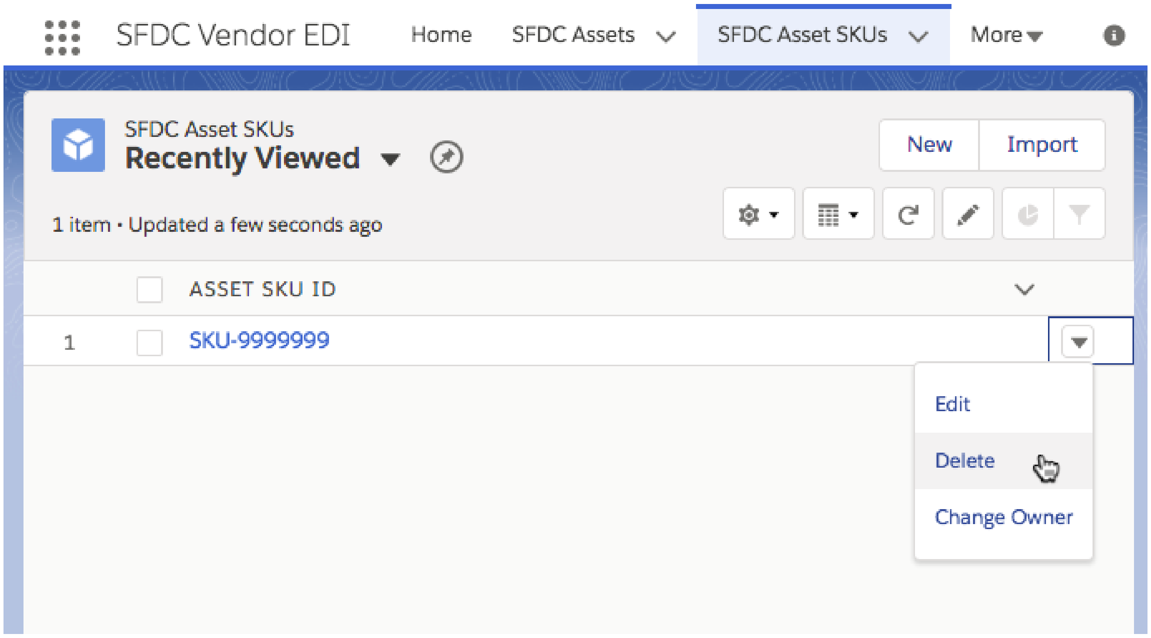
7. Click **Save** to create the SFDC Asset record.

   After you confirm that the asset was created, delete the test content.

8. On the new asset record, click the down arrow in the upper right, and select **Delete**. When asked to confirm, click **Delete**..



9. On the SFDC Asset SKUs tab, click the down arrow to the right of SKU-9999999, and select **Delete**. When asked to confirm, click **Delete**.

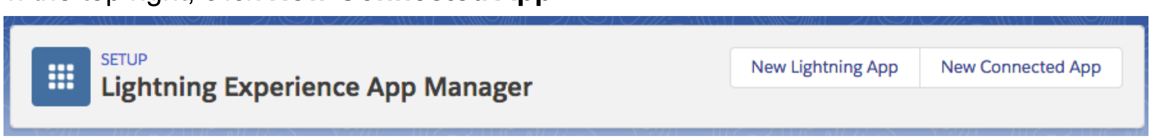


Create the Connected App

Create a connected app to integrate the SFDC Vendor EDI managed package with Assetforce, the salesforce asset management system, using the standard OAuth protocol.

A connected app uses APIs to integrate an application with Salesforce.

1. Log into the Vendor EDI org as the Admin account user.
2. From Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
3. In the top right, click **New Connected App**.

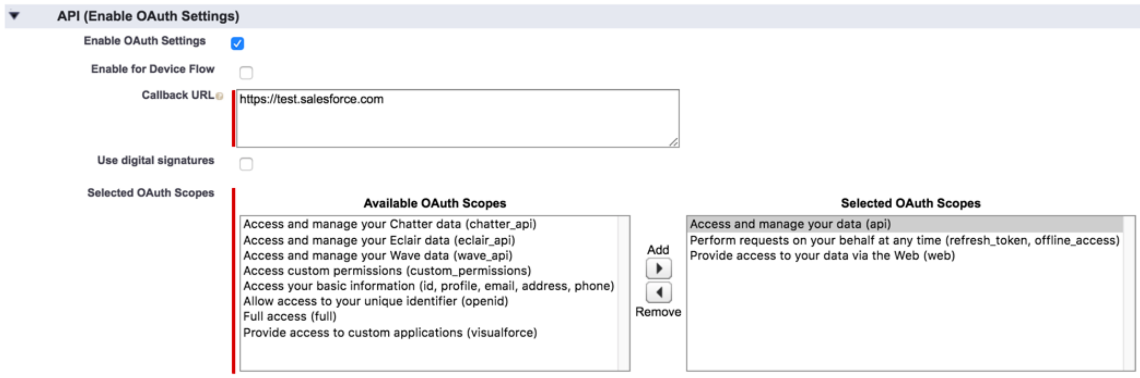


4. For Connected App Name, enter `SFDC Vendor Connection`.

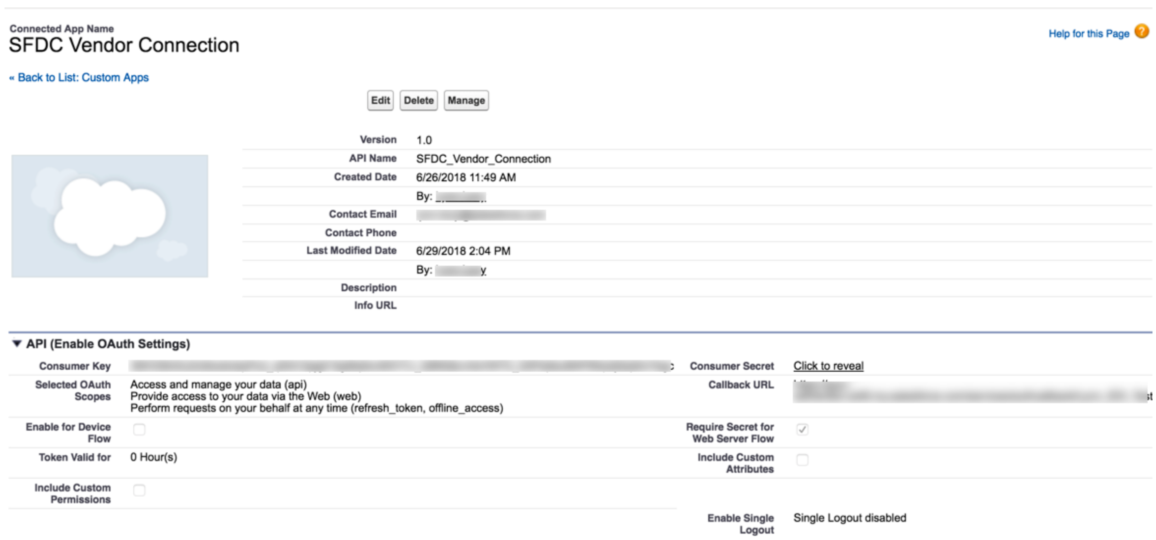
    The connected app name is used to auto-generate the API name.

5. For Contact Email, enter an email address.
6. Select **Enable OAuth Setting.**
7. For Callback URL, enter https://test.salesforce.com as a placeholder value. You will update this value later.
8. Add these OAuth scopes to **Selected OAuth Scopes,** and then click **Save**.
    - Access and manage your data (api)

- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to your data via the Web (web)



9. Click **Save**.
10. Click **Continue.**
    The connected app is created. The SFDC Vendor Connection app page is displayed.



11. Collect the following information to send to the Salesforce Service Management Team.

Consumer Key	
Consumer Secret	
Username of the Sync Account	
Password of the Sync Account	
Contact Email for Sync Results	

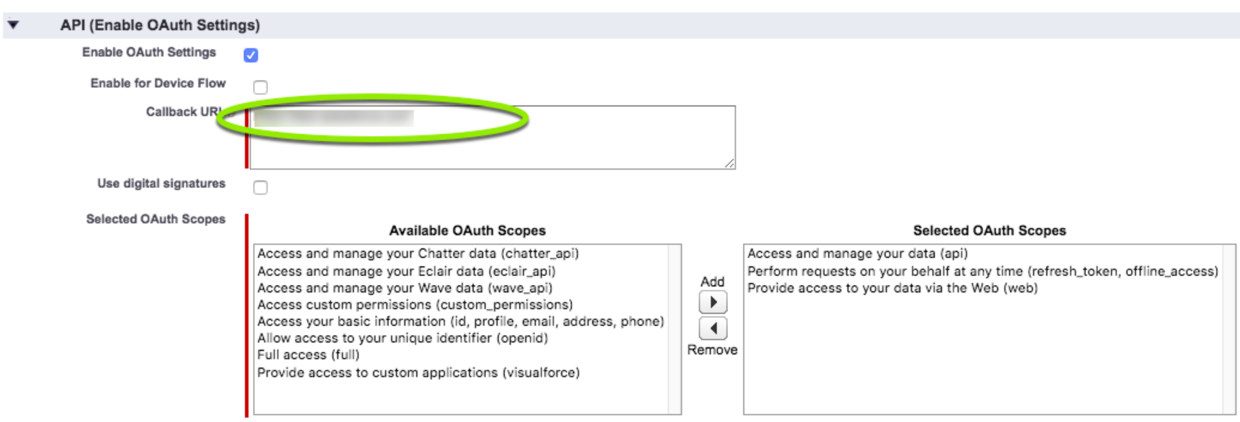
a. On the SFDC Vendor Connection app page, find the consumer key from the API (Enable OAuth Settings) section, and copy it to the table.
b. On the SFDC Vendor Connection app page, click the **Consumer Secret** link to reveal the secret, and copy it to the table.
c. From Setup, in the Quick Find box, enter `Users`, and then select **Users > Users**.
d. Copy the username and email of the Sync user account to the table.
e. Enter the Sync account password in the table.

12. To get your Callback URL, email the table to the Salesforce Service Management Team at vendoredi@salesforce.com.

    Your Callback URL will arrive via email within one week.

Add the Callback URL to your OAuth Settings

1. Log into the Vendor EDI org with the Admin account.
2. From setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
3. Scroll to SFDC_Vendor_Connection, and select **Edit** from the dropdown.
4. Under API (Enable OAuth Settings), replace the placeholder Callback URL with the value provided by the Salesforce Service Management Team.

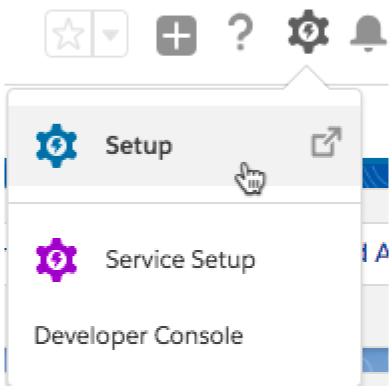


5. Click **Save.**

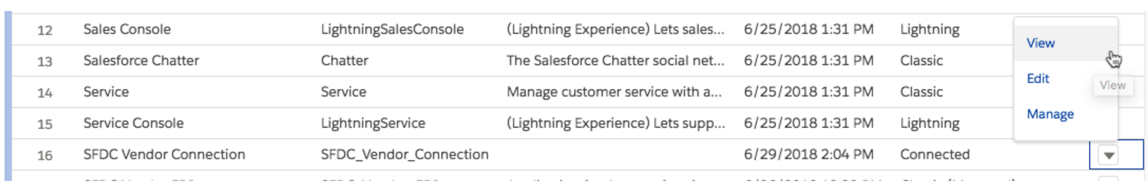
Get Consumer Key and Consumer Secret After App Creation

If you did not collect the consumer key and secret information while creating your connected app, you can still get the values.

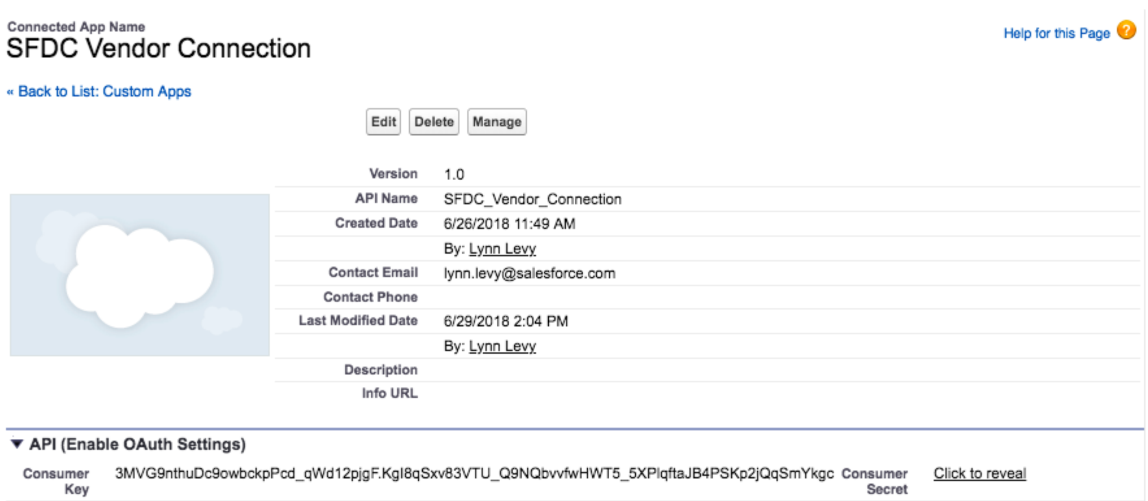
1. Open the **Setup** menu by clicking on the gear icon at the upper right, and choosing **Setup**.



2. From setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
3. Scroll to SFDC Vendor Connection, click the arrow, and select View.



4. Under API (Enable OAuth Settings), click **Click to reveal** to show the consumer secret.



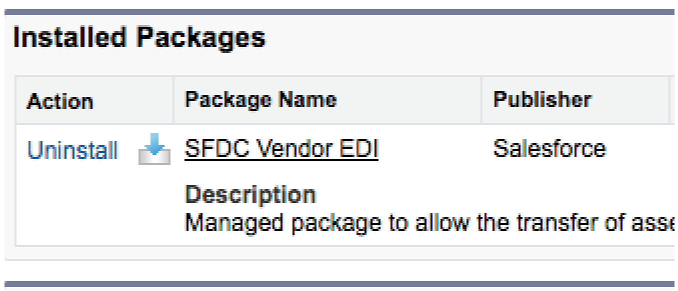
5. Copy the Consumer Key and Consumer Secret values to the table in [Create the Connected App](#).

Upgrading a Managed Package

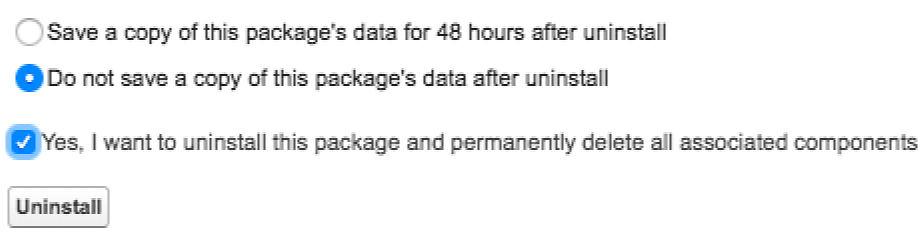
To upgrade a managed package, the preferred method is to uninstall the old package and install the new package. You can also upgrade the package without uninstalling the previous package, but this method is discouraged because it can require unique manual steps after each upgrade.

Uninstall an Old Package and Install a New Version

1. Log in to the vendor org as the Admin user.
2. Click **Setup.**
3. From setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
4. Find the SFDC Vendor EDI app and click **Uninstall**.



5. Scroll to the bottom, select **Yes, I want to uninstall this package and permanently delete all associated components**, and then click **Uninstall.**



6. Wait several minutes for the uninstall process to complete, and then refresh the screen.
7. To install the new version, see **Installation of Managed Package**.

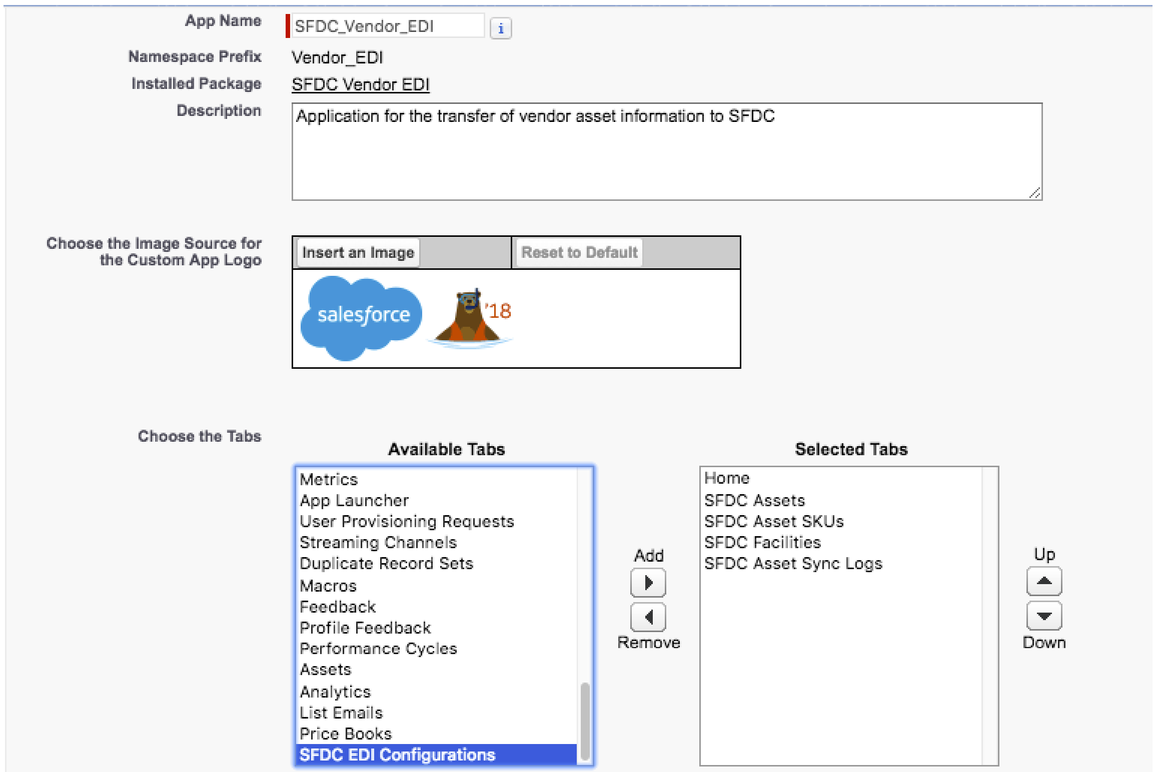
Important Note: After you have installed the new version, contact the Salesforce Asset Management Team at vendoredi@salesforce.com to request a forced sync to refresh data removed by the uninstall process.

Configure Email Alerts (Optional)

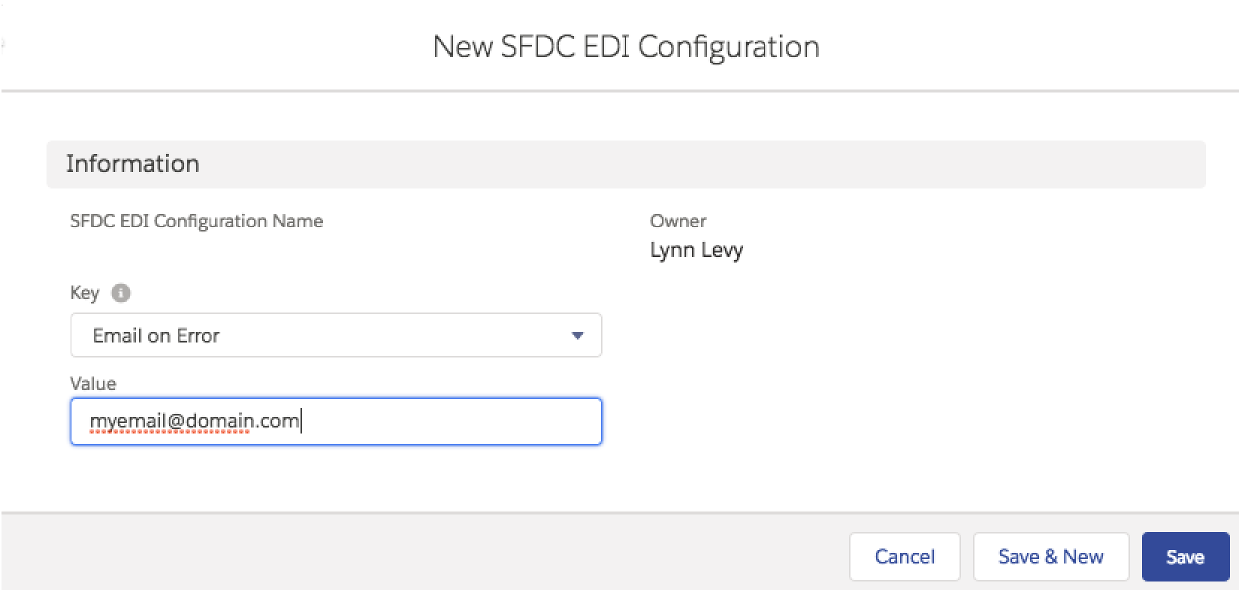
Most vendors don’t need to set up email alerts because both the SFDC Vendor EDI app and Data Loader provide feedback when an error occurs during an upload.

However, if your company has implemented alternative automation for uploading assets and your automation lacks error reporting, you can configure email alerts for upload failures.

1. Select **Settings** → **Apps** → **App Manager**.
2. Next to SFDC_Vendor_EDI, click **Edit**.
3. Under Choose the Tabs, add **SFDC EDI Configurations** to Selected Tabs, and save the change.



4. Return to the SFDC Vendor EDI app, and click the **SFDC EDI Configurations** tab.
5. Click **New.**
6. For Key, select **Email on Error**.
7. Enter the email address to be notified. To add more than one email address, separate them with a semicolon.

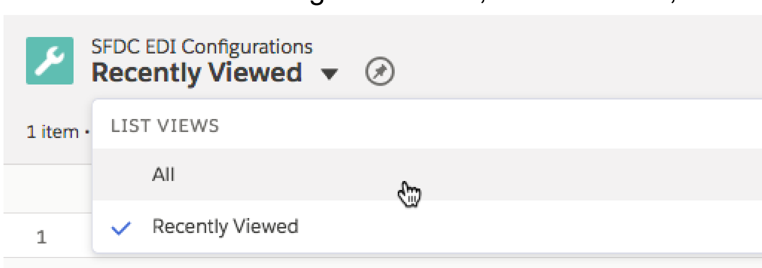


8. Click **Save**.

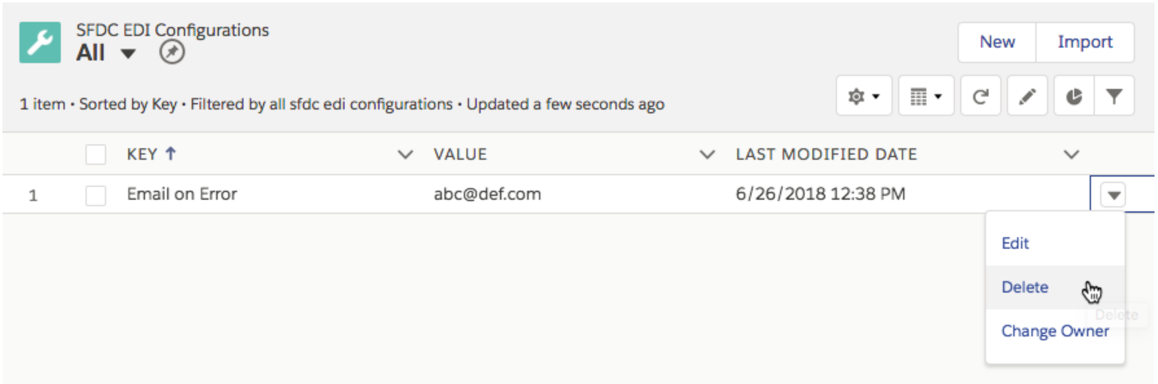
Note: If you create more than one Email on Error configuration, only the first one created is used.

To remove email alerts:

1. On the SFDC EDI Configurations tab, for List Views, select **All**.



2. Under Key, locate Email on Error, and select **Delete** from the dropdown on the right.



3. To confirm, click **Delete.**

Revision History

Version	Date	Modified By	Comments
1.0	Aug 5 2016	Ben Yick	Initial version for v1.0
1.1	Feb 14 2017	Ben Yick	New Features in Version 1.9. ● Ship To Facility Code ● Upsert functionality using External Id ● Support for PDU (power distribution units)
1.2	May 26 2017	Ben Yick	Update Upgrade section
1.3	June 9 2017	Ben Yick	Update the link to the 1.10 Managed Package - Fix to allow blank Rack U if Parent Rack Asset Number is N/A
1.4	Oct 14 2017	Ben Yick	Update changes for version 1.11 (*AppExchange Link*) - Auto population of PO from 0 to 000000 - Validation of Ship To Facility Code change from sensitive to insensitive
1.5		Ben Yick	Update for version 1.12 (*AppExchange Link*)
1.6	Apr 18 2018	Ben Yick	Updated the section on Salesforce license requirement from Essentials to Enterprise
1.7	Aug 25 2018	Lynn Levy	Updated screen grabs & instructions to Lightning. Clarifying edits.
1.8	May 3 2021	Ben Yick	Link to Managed Package (1.16) Functional enhancement to capture TK pub key

1.9	Sept 29 2021	Ben Yick	Link to Managed Package ([1.17](1.17)) Functional enhancements to capture Country of Origin, Import Classification and Export Classification
1.10	Nov 11 2021	Ben Yick	Link to Managed Package ([1.18](1.18)) Fix validation rule bug on Serial Numbers and Asset Numbers