



Dotsquares

**Salesforce CRM
Integration Suite**

Effortlessly synchronize your store data with Salesforce CRM, one of the world's most trusted and widely used customer relationship management systems. This seamless integration allows you to bridge the gap between your business operations and Salesforce, ensuring that all essential customer-related data is accurately and consistently synchronized. Whether its purchase history, customer preferences, or interaction records, this integration brings all critical data into one centralized platform. By automating data updates and eliminating manual processes, you not only save time but also reduce the risk of errors, paving the way for a more efficient and streamlined workflow.

With this enhanced connectivity, managers are equipped with the full potential of their customer data. They can boost sales by identifying new opportunities, enhance customer service through personalized interactions, and implement targeted marketing strategies to reach the right audience at the right time. This integration empowers businesses to make informed decisions, strengthen customer relationships, and stay ahead in today's competitive market. By aligning your store data with Salesforce CRM, you gain the ability to elevate your business performance and deliver exceptional customer experiences.

Key Features

- **Official Salesforce Partner:** Trusted collaboration with Salesforce ensures reliable integration.
- **Comprehensive Data Syncing:** Sync products, orders, campaigns, accounts, leads, contacts, and opportunities.
- **Flexible Synchronization Modes:** Choose between real-time updates, Cron job scheduling, or manual syncing.
- **Customizable Field Mapping:** Easily map data fields between Magento 2 and Salesforce with support for over 100 fields.
- **Data Tracking and Export:** Monitor synced data and export records in XML/CSV formats.

Effortless Integration Steps

1. Sign up for a Salesforce pricing plan.
2. Obtain an API key from your Salesforce account.
3. Enter the API key into Magento 2's Salesforce Integration settings.
4. Click **Connect** to establish the integration.

Sfconnector Authentication Account

Connection Status <small>[global]</small>	NOT CONNECTED
Email <small>[global]</small>	<input type="text" value="dotsquaresdays@dotsquares.com"/> ?
Password <small>[global]</small>	<input type="password" value="••••••"/> ?
Consumer Key <small>[global]</small>	<input type="text" value="3MVG9n_HvETGhr3B1npxWLoEY6z3ns1x6VbV_xZKSE_nKiCqekwAtcDC57_Tu8IWer"/> ?
Consumer Secret <small>[global]</small>	<input type="text" value="7606A3075E6E037A41618009516279BCC7CBFF3BDD05E2050BA0DE2EBC04FE79"/> ?
Security Token <small>[global]</small>	<input type="text" value="K15v6K5mrn8MDJGwO2EIUOhP"/> ?
Salesforce Environment <small>[global]</small>	<input type="text" value="Production Environment"/> ▼
<input type="button" value="Get Access"/>	

Sfconnector Authentication Account

Connection Status <small>[global]</small>	CONNECTED
Access Token <small>[global]</small>	<input type="text" value="00D2w00000MjbfAIAREAQGKnC6zKotjFhgVvc8EvhNGkiQDd_oc87k03Hdx6TAnu.gF"/> ?
Instance URL <small>[global]</small>	<input type="text" value="https://dotsquares26-dev-ed.develop.my.salesforce.com"/> ?
<input type="button" value="Disconnect"/>	

Synchronization Modes

Real-Time Automatic Syncing

- Automatically sync updates for products, customers, and orders as changes occur.
- Ideal for dynamic businesses requiring fast decision-making.

Scheduled Cron Job Syncing

- Schedule syncing intervals as short as 5 minutes.
- Queue data for batch processing to minimize server load, especially for stores with extensive SKUs.

← View Request Daily View Reports **Sync Now**

Filters Default View Columns Export

Actions 49 records found 20 per page 1 of 3

ID	Magento Entity Id	Enqueue Time	Type	Priority
4375	57	2024-12-03 11:58:15	Contact	1
4374	56	2024-11-19 09:09:32	Contact	1
4373	55	2024-11-19 09:02:37	Contact	1
4372	54	2024-11-19 08:52:43	Contact	1
4371	53	2024-11-19 08:47:31	Contact	1
4370	52	2024-11-19 08:45:08	Contact	1
4369	51	2024-11-19 07:19:06	Contact	1
4368	50	2024-11-19 06:49:20	Contact	1
4367	49	2024-11-19 06:48:09	Contact	1
4366	48	2024-11-19 06:30:40	Contact	1
4365	47	2024-11-19 06:26:52	Contact	1

Manual Syncing

- Sync data proactively with a single click or individually (e.g., specific customers, products, or orders).
- Manage the syncing queue for better control over data transfer.

Detailed Synchronization Capabilities

Product Data

- Sync key product details, including name, SKU, price, and quantity.
- Update product data in Salesforce when changes occur in Magento 2.

Product

Enable [global] Yes ?

Sync Mode [global] Add to Queue

Queue Auto Sync Time [global] Sync manually

Sync All Products Now

Customer Data

- Automatically sync new customer accounts and profile updates.
- Map customer data to appropriate Salesforce modules (Leads, Contacts and Accounts).

⏪ Contact

Enable [global] Yes ▼ ?

Sync Mode [global] Add to Queue ▼

Queue Auto Sync Time [global] Sync manually ▼

Order Data

- Sync new orders and updates to existing orders in real-time.
- Map order data to Salesforce modules like Opportunities or Sales Orders.

⏪ Order

Enable [global] Yes ▼ ?

Sync Mode [global] Add to Queue ▼

Queue Auto Sync Time [global] Sync manually ▼

Promotional Campaign Data

- Sync catalog price rules, including campaign names, dates, and discount values.
- Map promotion data to Salesforce's Campaign module for effective tracking.

⏪ Campaign

Enable [global] Yes ▼ ?

Sync Mode [global] Add to Queue ▼

Queue Auto Sync Time [global] Sync manually ▼

Enhanced Customization and Reporting

Field Mapping

- Map Magento 2 fields to Salesforce fields effortlessly, including custom fields with compatible data types.

Mapping

* Note: You should map the fields have the same name or the same data type

Product2	Save Mapping		
Magento Fields	Salesforce Fields	Description	Status
Activity	--Choose Fields--	<input type="text"/>	Enabled
Assign Product Id	--Choose Fields--	<input type="text"/>	Enabled
Category Gear	--Choose Fields--	<input type="text"/>	Enabled
Categories	--Choose Fields--	<input type="text"/>	Enabled
Climate	--Choose Fields--	<input type="text"/>	Enabled
Collar	--Choose Fields--	<input type="text"/>	Enabled
Color	--Choose Fields--	<input type="text"/>	Enabled
Assign product Id [Simple Product]	--Choose Fields--	<input type="text"/>	Enabled
Cost	--Choose Fields--	<input type="text"/>	Enabled
Country of Manufacture	--Choose Fields--	<input type="text"/>	Enabled
New Theme	--Choose Fields--	<input type="text"/>	Enabled

Mapping

* Note: You should map the fields have the same name or the same data type

Contact	Save Mapping		
Magento Fields	Salesforce Fields	Description	Status
Is Confirmed	--Choose Fields--	<input type="text"/>	Enabled
Created At	--Choose Fields--	<input type="text"/>	Enabled
Created From	--Choose Fields--	<input type="text"/>	Enabled
Default Billing Address	--Choose Fields--	<input type="text"/>	Enabled
Default Shipping Address	--Choose Fields--	<input type="text"/>	Enabled
Disable Automatic Group Change Based on VAT ID	--Choose Fields--	<input type="text"/>	Enabled
Date of Birth	--Choose Fields--	<input type="text"/>	Enabled
Email	Email (email)	<input type="text"/>	Enabled
Failures Number	--Choose Fields--	<input type="text"/>	Enabled
First Name	First Name (string)	<input type="text"/>	Enabled
First Failure Date	--Choose Fields--	<input type="text"/>	Enabled

Mapping

Note: You should map the fields have the same name or the same data type

Order	Save Mapping		
Magento Fields	Salesforce Fields	Description	Status
ID	--Choose Fields--		Enabled
State	--Choose Fields--		Enabled
Status	--Choose Fields--		Enabled
Coupon Code	--Choose Fields--		Enabled
Coupon Rule Name	--Choose Fields--		Enabled
Increment ID	--Choose Fields--		Enabled
Created At	--Choose Fields--		Enabled
Customer ID	--Choose Fields--		Enabled
Customer First Name	--Choose Fields--		Enabled
Customer Middle Name	--Choose Fields--		Enabled
Customer Last Name	--Choose Fields--		Enabled

Syncing Reports

- View daily synchronization reports, including successful and failed records.
- Monitor syncing performance with detailed success and error metrics.

View Report

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← View Request Daily

Filters Default View Columns Export

Actions 4255 records found

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ID	Record ID in SalesforceCRM	Salesforce Table	Magento ID	Action	Username	Email	Datetime	Status	Message
4255	View on Salesforce	Contact	8	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4254	View on Salesforce	Contact	7	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4253	View on Salesforce	Contact	6	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4252	View on Salesforce	Contact	5	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4251	View on Salesforce	Contact	4	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4250	View on Salesforce	Contact	3	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4249	View on Salesforce	Contact	2	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4248	View on Salesforce	Contact	1	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:38:18	SUCCESS	
4247	View on Salesforce	Contact	7	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:33:08	SUCCESS	
4246	View on Salesforce	Contact	6	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:33:08	SUCCESS	
4245	View on Salesforce	Contact	5	update	Admin Admin	gayalal@dotsquares.com	2024-10-09 10:33:08	SUCCESS	

Request Report

Requests Made Today

Total API Request Today

REST API Request: No request has been made today

BULK API Request: No request has been made today

Detail

Accounts:	No request has been made today
Contacts:	No request has been made today
Campaigns:	No request has been made today
Leads:	No request has been made today
Orders:	No request has been made today
Products:	No request has been made today

Request Records

Detail

	Date	REST API Requests	BULK API Requests
Highest Request:	2024-08-07	20	No request has been made
Lowest Request:	2024-08-08	1	No request has been made

Request Report