

Woocommerce Salesforce CRM Integration

Thank you for purchasing my plugin. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thanks so much!

Created: 01/10/2017 | By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/97>

Introducing to Woocommerce Salesforce integration

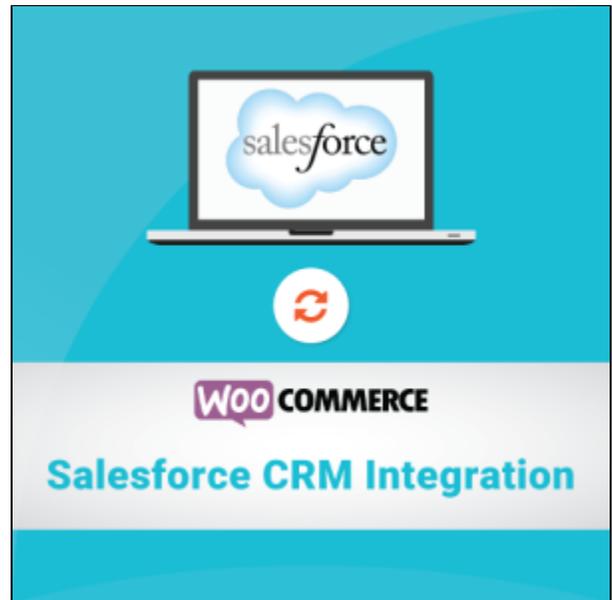
The Woocommerce Salesforce integration Plugin is an indispensable tool to help you synchronize data instantly between Woocommerce and Salesforce. The plugin allows to synchronize register customers in Woocommerce to Lead in Salesforce, order in Woocommerce to Account and Contact in Salesforce.

Features:

- Synchronize Register Customer in Woocommerce to Lead in Salesforce
- Synchronize Order in Woocommerce to Account in Salesforce
- Synchronize Order in Woocommerce to Contact in Salesforce
- Synchronize Order Products in Woocommerce to Products in Salesforce
- Synchronize Order in Woocommerce to Order in Salesforce
- Choose Equeue Sync or Auto Sync
- Report Sync data between Woocommerce and Salesforce.

The plugin page: <https://store.magenest.com/woocommerce-plugins/woocommerce-salesforce-crm-integration.html>

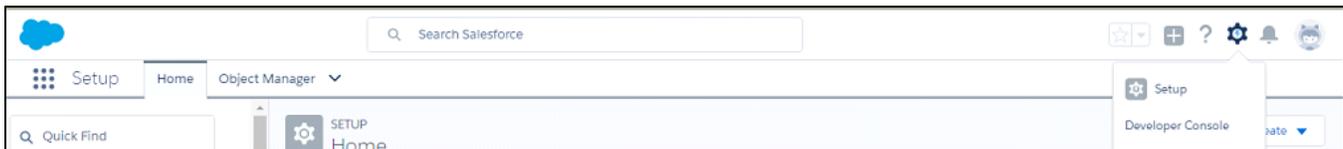
The live demo: <http://mysalesforce.demo.izysync.com>



Configuration

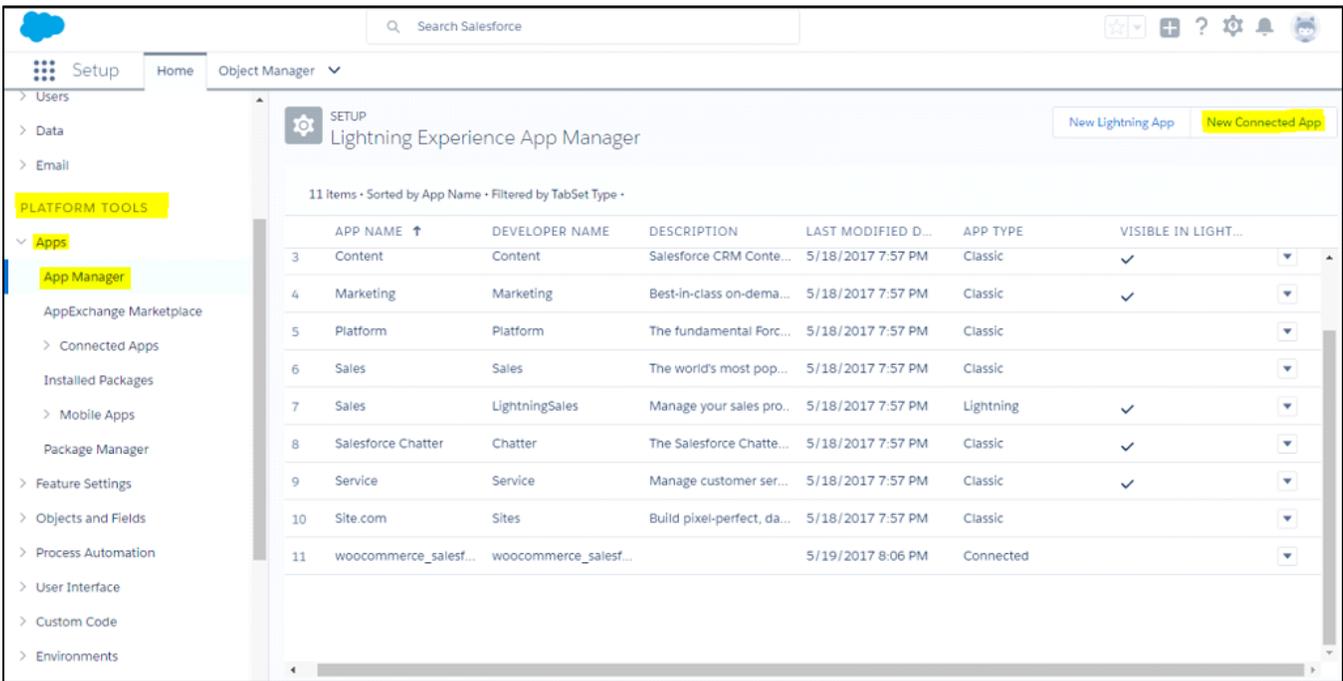
Create a connected app to get keys and token

Sign in to Salesforce CRM and go to the Setup option in the dashboard.



In your Salesforce Dashboard, go to **Platform tools > App manager**.

Press **New Connected App** button in Connected App to create a new connected app

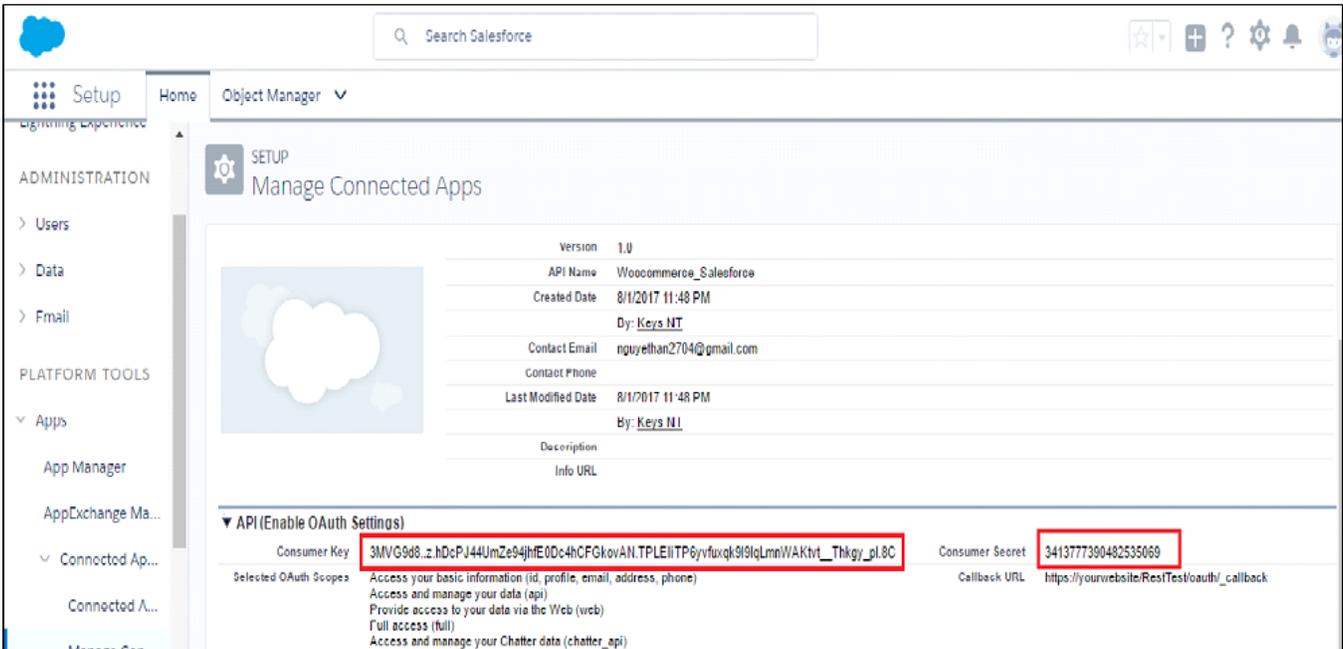


Then enter information in the required fields:

- **Connected App Name:** Enter the name for your connected app. Example: woocommerce_salesforce_integration
- **API Name:** data from this field is auto synced from Connected App Name
- **Contact Email:** fill your Salesforce email
- **Check Enable OAuth Settings box**
- **Fill Callback URL:** Fill like example: https://yourwebsite/RestTest/oauth/_callback
- **Selected OAuth Scopes :** select Full Access option and click Add button

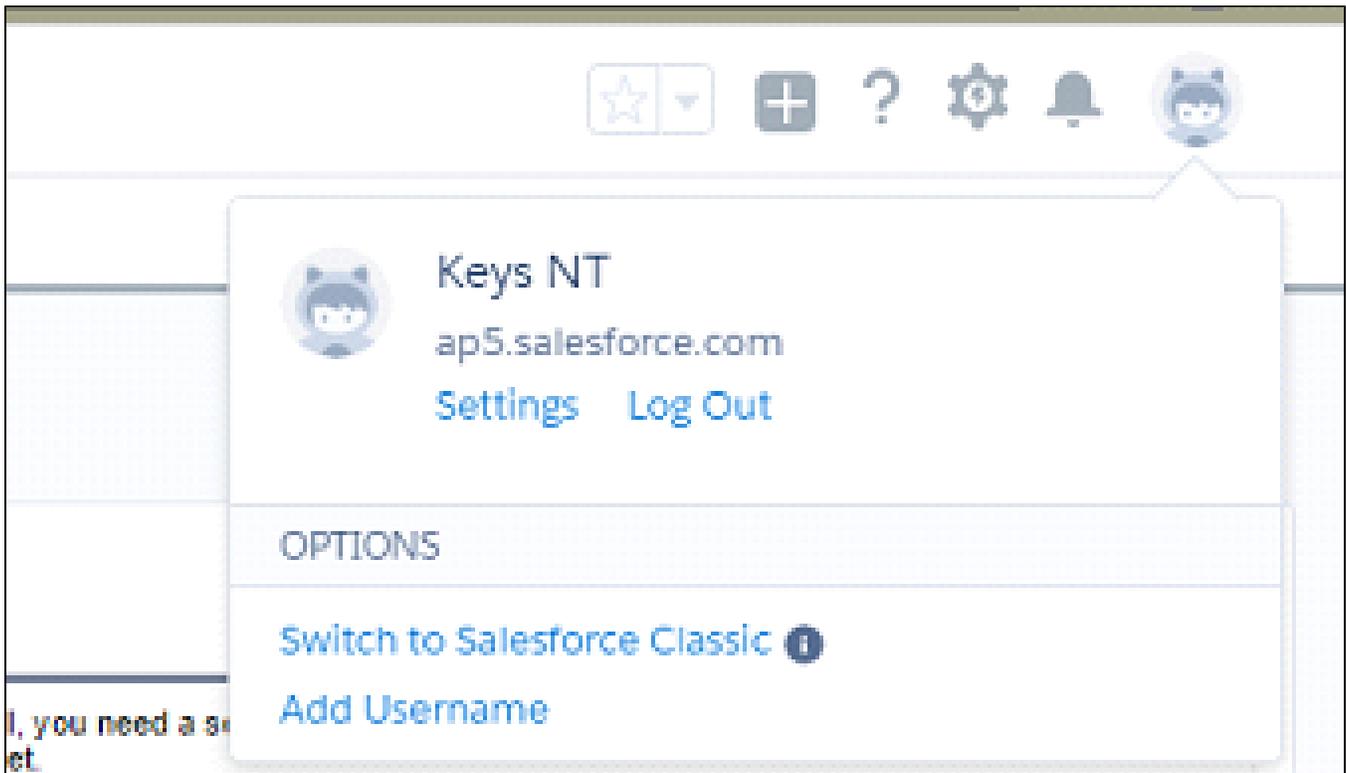
Click Save button

After finish, your connected app will displayed like this:

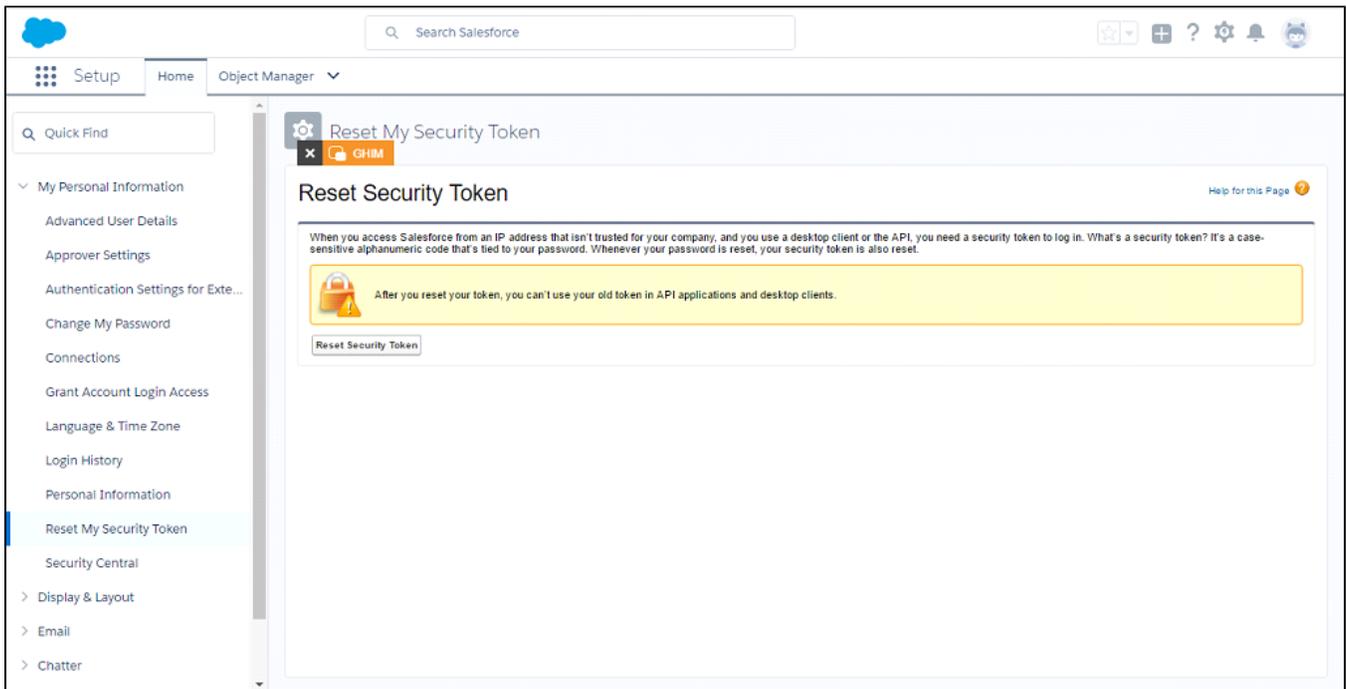


You will get your client ID and client secret key from here.

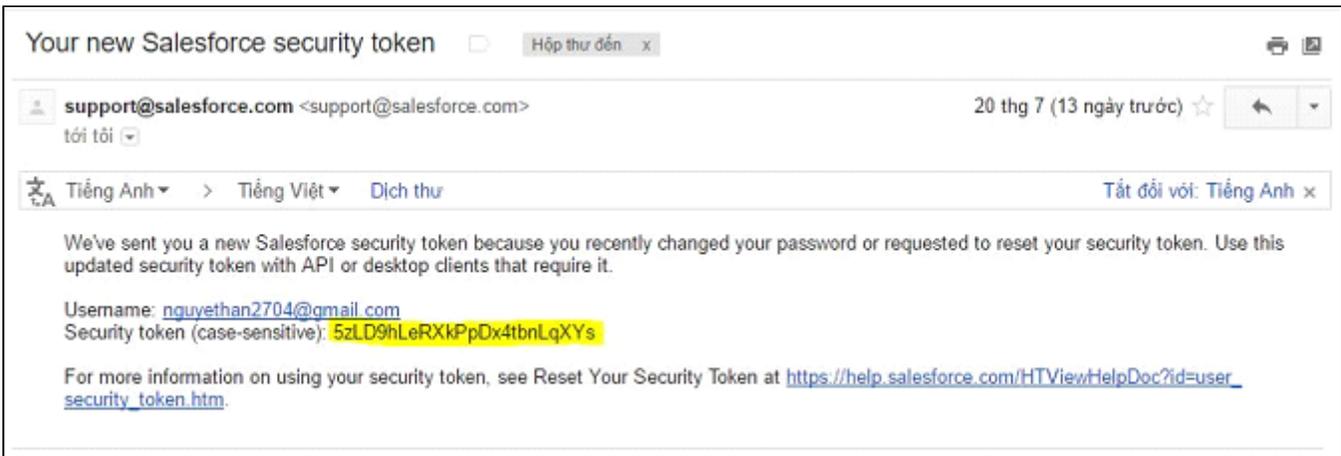
Now, go to **Settings**



Go to **My Personal Information** > **Reset My Security Token** choose **Reset Security Token** button.

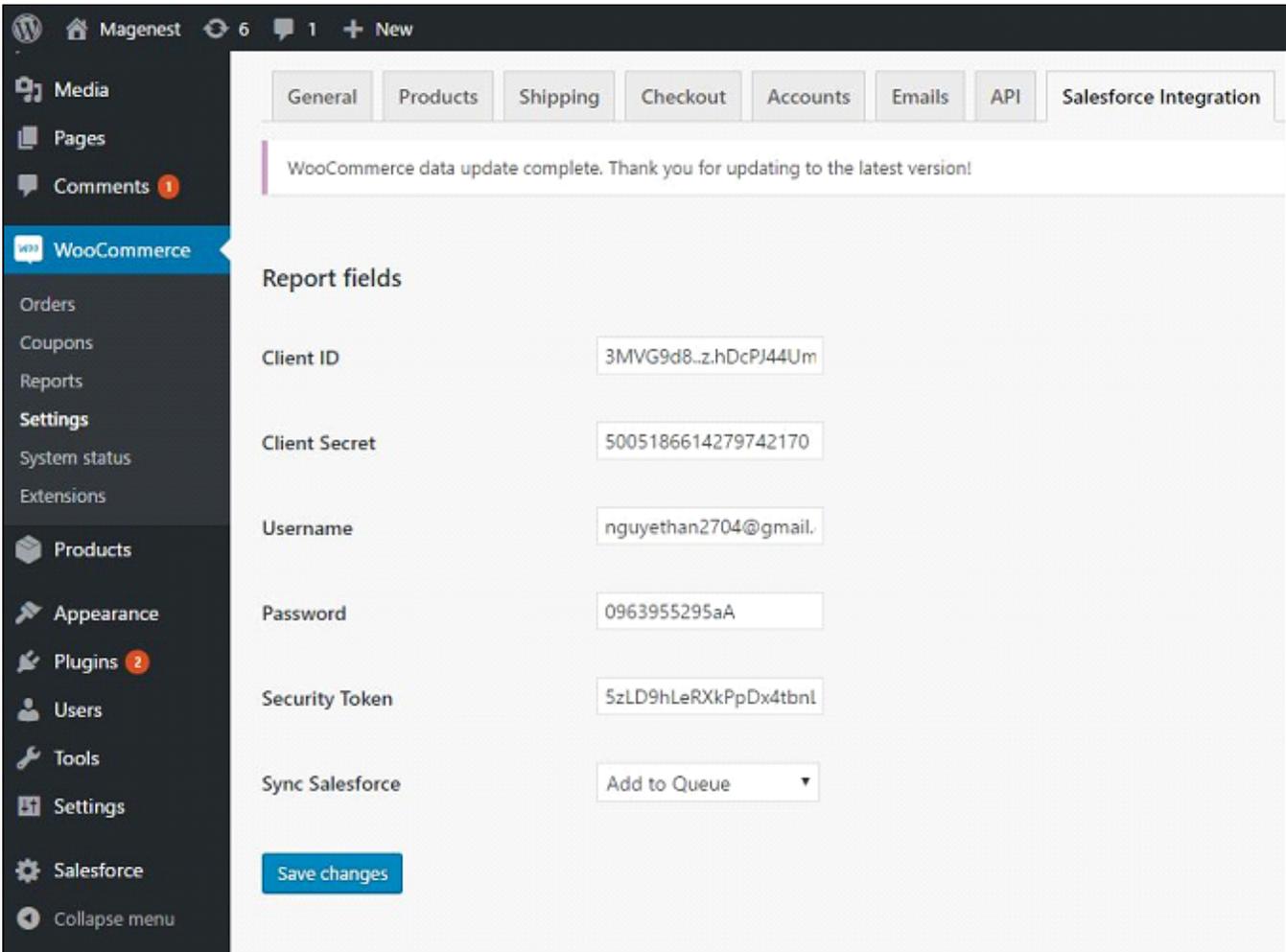


mail:



Set up the Salesforce account to integrate with Woocommerce

You can access configuration page by clicking Settings of Woocommerce, then click Salesforce integration tab



- **Client ID:** Enter your consumer Key of Connected App
- **Client Secret:** Enter your consumer Secret of Connected App
- **Username:** Enter your username of your salesforce account
- **Password:** Enter your password of your salesforce account
- **Security Token:** Enter your security token from your email
- **Sync Salesforce:** Choose Add to Queue or Auto Sync
- Click Save changes button.

Example of usages

1. Customer register

My Account

Login

Username or email address *

Password *

Remember me

[Lost your password?](#)

Register

Email address *

Password *

My Account

Hello **hangnt2704** (not **hangnt2704**? [Log out](#))

From your account dashboard you can view your recent orders, manage your shipping and billing addresses and edit your password and account details.

- [Dashboard](#) 
- [Orders](#) 
- [Downloads](#) 
- [Addresses](#) 
- [Account details](#) 
- [Logout](#) 

Sync lead data from register:

- in dashboard admin

ID	User id	Account name	Email	Date create	Sync
1	8	ghjhqjg	ghjhqjg@gmail.com	2017-07-26 16:06:14	SYNC
2	9	doanh10b	doanh10b@gmail.com	2017-07-26 16:08:14	SYNC
3	10	doanh10bkjk	doanh10b+kjk@gmail.com	2017-07-26 16:18:42	SYNC
4	11	doanh10bhv	doanh10b+hv@gmail.com	2017-07-26 16:19:52	SYNC
5	12	doanh10bakjfkajfkija	doanh10b+akjfkajfkija@gmail.com	2017-07-26 16:20:56	SYNC
6	13	hangnt2704	hangnt2704@gmail.com	2017-08-02 14:24:44	SYNC

when admin press SYNC button:

NAME	TITLE	COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
hangnt2704		NA			hangnt2704@gmail.c...	Open - Not Contacted	KNT
dsfdgfhf		NA			dsfdgfhf@gmail.com	Open - Not Contacted	KNT
dsfdgfhf		NA			dsfdgfhf@gmail.com	Open - Not Contacted	KNT
dfgryrut		NA			dfgryrut@gmail.com	Open - Not Contacted	KNT
yrfhgfhjgh		NA			yrfhgfhjgh@gmail.c...	Open - Not Contacted	KNT
tyulyuoulo		NA			tyulyuoulo@gmail.com	Open - Not Contacted	KNT
dedwfeyhrth		NA			dedwfeyhrth@gmail.c...	Open - Not Contacted	KNT
aswer		NA			aswer@gmail.com	Open - Not Contacted	KNT
ahng234		NA			ahng234@gmail.com	Open - Not Contacted	KNT
nguyethan2704		NA			nguyethan2704@gma...	Open - Not Contacted	KNT
hangnt		NA			hangnt@magenest.com	Open - Not Contacted	KNT
cophongsuong2704		NA			cophongsuong2704@...	Open - Not Contacted	KNT

2. When customer buy product

Order received

Thank you. Your order has been received.

ORDER NUMBER:

300

DATE:

02/08/2017

TOTAL:

\$12,00

PAYMENT METHOD:

Direct bank transfer

Order details

PRODUCT	TOTAL
Premium Quality x 1	\$12,00
Subtotal:	\$12,00
Shipping:	Flat rate
Payment method:	Direct bank transfer
Total:	\$12,00

Dashboard admin:

Mageneest 6 1 + New Equeue sync Salesforce Howdy, admin admin

Dashboard

Posts

Media

Pages

Comments 1

WooCommerce

Products

Appearance

Plugins 2

Users

Tools

Settings

Salesforce

Salesforce

Report sync data

Collapse menu

Equeue order sync Salesforce

Equeue order sync Salesforce

Order id	Account name	Email	Product	Order amount	Order date	Sync
284		doanh10b@gmail.com	Woo Single #2	2	2017-07-26 16:10:57	SYNC
285		doanh10b+a@gmail.com	Woo Album #4	9	2017-07-26 16:15:47	SYNC
286		doanh10b+aa@gmail.com	Woo Single #1	3	2017-07-26 16:16:35	SYNC
287		doanh10b+afdf@gmail.com	Woo Single #1	3	2017-07-26 16:18:04	SYNC
288	doanh10bkjk	doanh10b+kjk@gmail.com	Woo Album #3	9	2017-07-26 16:18:42	SYNC
289	doanh10bhv	doanh10b+hv@gmail.com	Woo Single #1	3	2017-07-26 16:19:53	SYNC
290	doanh10bakjflkajflkja	doanh10b+akjflkajflkja@gmail.com	Woo Album #3	9	2017-07-26 16:20:57	SYNC
300		keys27@gmail.com	Premium Quality	12	2017-08-02 15:29:29	SYNC

when admin press SYNC button, Salesforce:

order:

ORDERS

Recently Viewed

50+ Items - Updated a few seconds ago

New

Settings Grid Refresh Edit Sync Filter

	ORDER NUMBER	ACCOUNT NAME	ORDER AMOUNT	ORDER START DATE	STATUS	CONTRACT NUMBER
1	00000211	keys27	\$12.00	8/2/2017	Draft	
2	00000210	angnuyen11	\$9.00	8/2/2017	Draft	
3	00000209	luonghuyenmy95	\$3.00	7/27/2017	Draft	
4	00000208	admin	\$53.00	7/27/2017	Draft	
5	00000207	doanh10b	\$9.00	7/26/2017	Draft	
6	00000206	ghjhjgig	\$9.00	7/26/2017	Draft	
7	00000205	gbnhkhjk	\$12.00	7/26/2017	Draft	
8	00000204	dsfdfghf	\$53.00	7/26/2017	Draft	
9	00000203	nguyenhang	\$35.00	7/22/2017	Draft	
10	00000202	nguyenhang	\$38.00	7/25/2017	Draft	
11	00000201	nguyenhang	\$18.00	7/25/2017	Draft	
12	00000200	nguyethan2704	\$18.00	7/24/2017	Draft	
13	00000199	nguyenhang	\$35.00	7/22/2017	Draft	
14	00000198	nguyenhang	\$30.00	7/25/2017	Draft	

order product:

ORDER PRODUCT

Premium Quality

Unit Price	Quantity	Total Price
\$12.00	1.00	\$12.00

RELATED DETAILS

Order

00000211

Product

Premium Quality

List Price

\$12.00

Unit Price

\$12.00 ✎

Quantity

1.00 ✎

Total Price

\$12.00

Created By

Keys NT, 8/2/2017 1:34 AM

Last Modified By

Keys NT, 8/2/2017 1:34 AM

Line Description

3. Report Sync data

Magenest 6 1 + New
Howdy, admin admin

WordPress 4.8 is available! [Please update now.](#) An automated WordPress update has failed to complete - [please attempt the update again now.](#)

WooCommerce data update complete. Thank you for updating to the latest version! ✕ Dismiss

Report sync Salesforce

ID	Woo ID	Salesforce ID	Type	Create date
1	281	01u7F000001QziKQAS	Product from order	2017-07-26 16:05:15
2	281	01u7F000001QziPQAS	Product from order	2017-07-26 16:05:15
3	281	0017F000008242eQAC	Account from order	2017-07-26 16:05:15
4	281	0037F000005MlfnQAG	Contact from order	2017-07-26 16:05:15
5	282	01u7F000001R1AaQAK	Product from order	2017-07-26 16:58:17
6	282	0017F000008ZCttQAG	Account from order	2017-07-26 16:58:17
7	282	0037F000005MKqMQAW	Contact from order	2017-07-26 16:58:17
8	283	01u7F000001R1E3QAK	Product from order	2017-07-26 16:59:33
9	283	0017F0000082Cv3QAW	Account from order	2017-07-26 16:59:33
10	283	0037F000005MKqMQAW	Contact from order	2017-07-26 16:59:33
11	292	01u7F000001BRQIQAC	Product from order	2017-07-27 14:08:31

Summary

Once again, thank you so much for purchasing this plugin. As I said at the beginning, I'd be glad to help you if you have any questions relating to this plugin. No guarantees, but I'll do my best to assist. If you have a more general question relating to the plugin on Codecanyon, you might consider visiting the forums and asking your question in the "Item Discussion" section.

If you have want the further features that is not supported in current version, do not hesitate to contact us.