

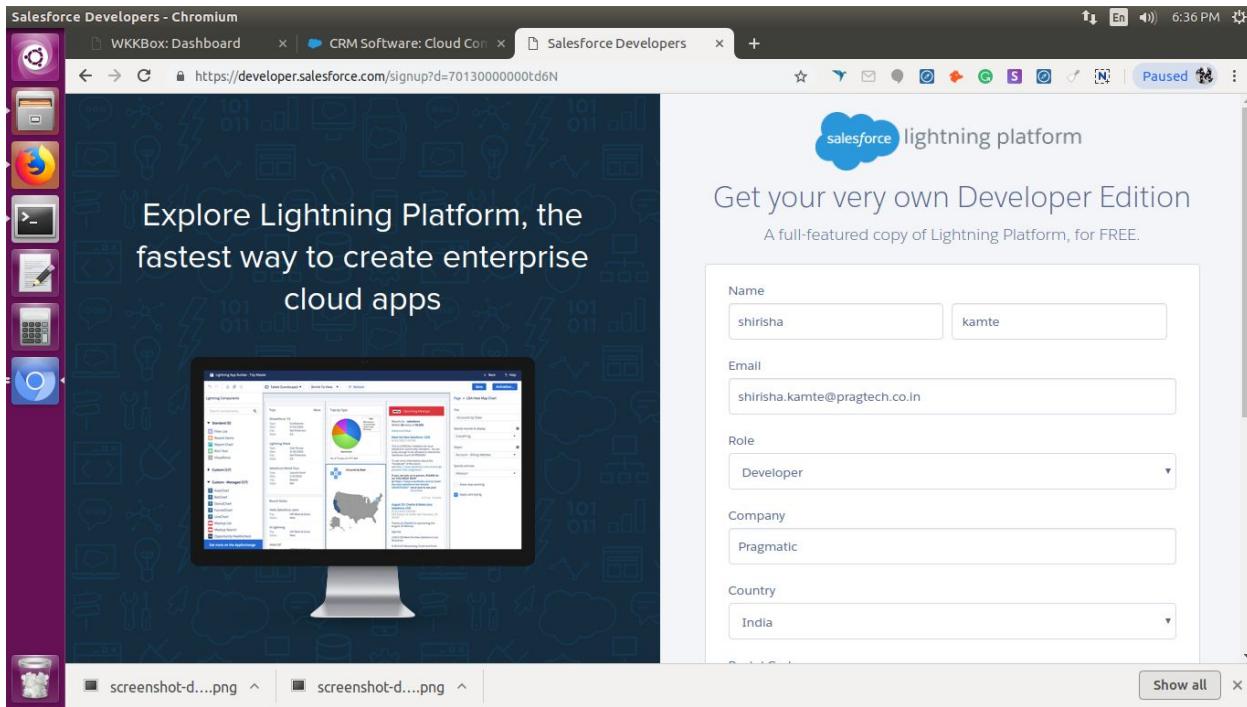
Odoo-SalesForce Online Connector User Manual



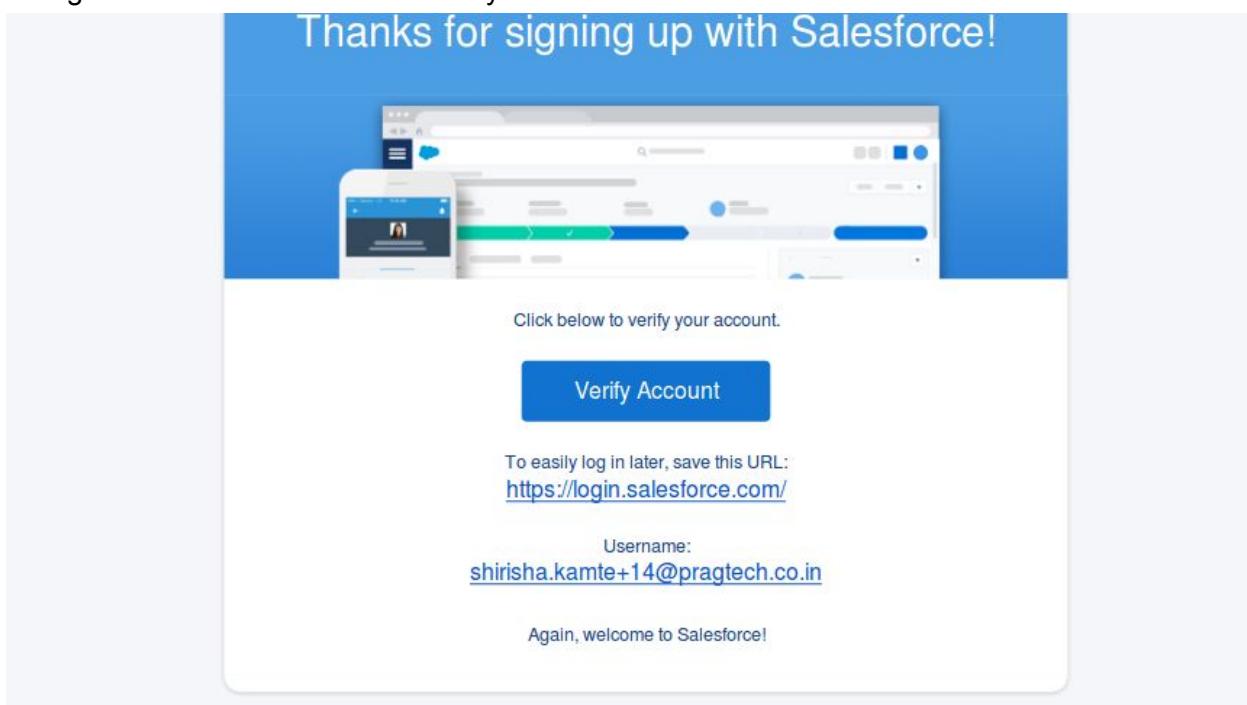
- **Salesforce Interface:**

Step 1: Go to <https://developer.Salesforce.com> and click signin menu. Fill username, details and click on signin button (If you are already have an Account or else continue with Signup process)





Step 2: Click on Sign-up, a verification email will be sent on Email ID which has been registered during account creation. Click on Verify Account



Step 3: After verification, it will ask to change the password, enter the password as shown in the below screen and change it. It will then Navigate to your account.

Change Your Password

Enter a new password for
shirisha.kamte+14@pragtech.co.in. Your password
must have at least:

- 8 characters
- 1 letter
- 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

▼ In what city were you born?

* Answer

Pune

Change Password

Step 4: After successful login, click Set-up menu then click Create new app button.
Goto→ Apps → App Manager

Lightning Experience App Manager

New Lightning App New Connected App

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIE...	APP T...	VI...
1 Site.com	Sites	Build pixel-perfect, data-rich websites using t...	23/2/2018 2:09 PM	Classic	▼
2 Service Console	LightningService	(Lightning Experience) Lets support agents ...	23/2/2018 2:09 PM	Lightning	✓
3 Service	Service	Manage customer service with accounts, co...	23/2/2018 2:09 PM	Classic	✓
4 Salesforce_Connector	Salesforce_Connector	This connector is used to connect Odoo wit...	26/11/2018 3:02 PM	Connected	▼
5 Salesforce Chatter	Chatter	The Salesforce Chatter social network, inclu...	23/2/2018 2:09 PM	Classic	✓
6 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work ...	23/2/2018 2:09 PM	Lightning	✓
7 Sales	Sales	The world's most popular sales force automa...	23/2/2018 2:09 PM	Classic	▼
8 Sales	LightningSales	Manage your sales process with accounts, le...	23/2/2018 2:09 PM	Lightning	✓
9 Platform	Platform	The fundamental Lightning Platform	23/2/2018 2:09 PM	Classic	▼
10 Marketing	Marketing	Best-in-class on-demand marketing automati...	23/2/2018 2:09 PM	Classic	✓

After, clicking enter the app name, enter the Auth Code as “Full Access” and save it as shown below

App Manager

New Connected App

Basic Information

Connected App Name

API Name

Contact Email

Contact Phone

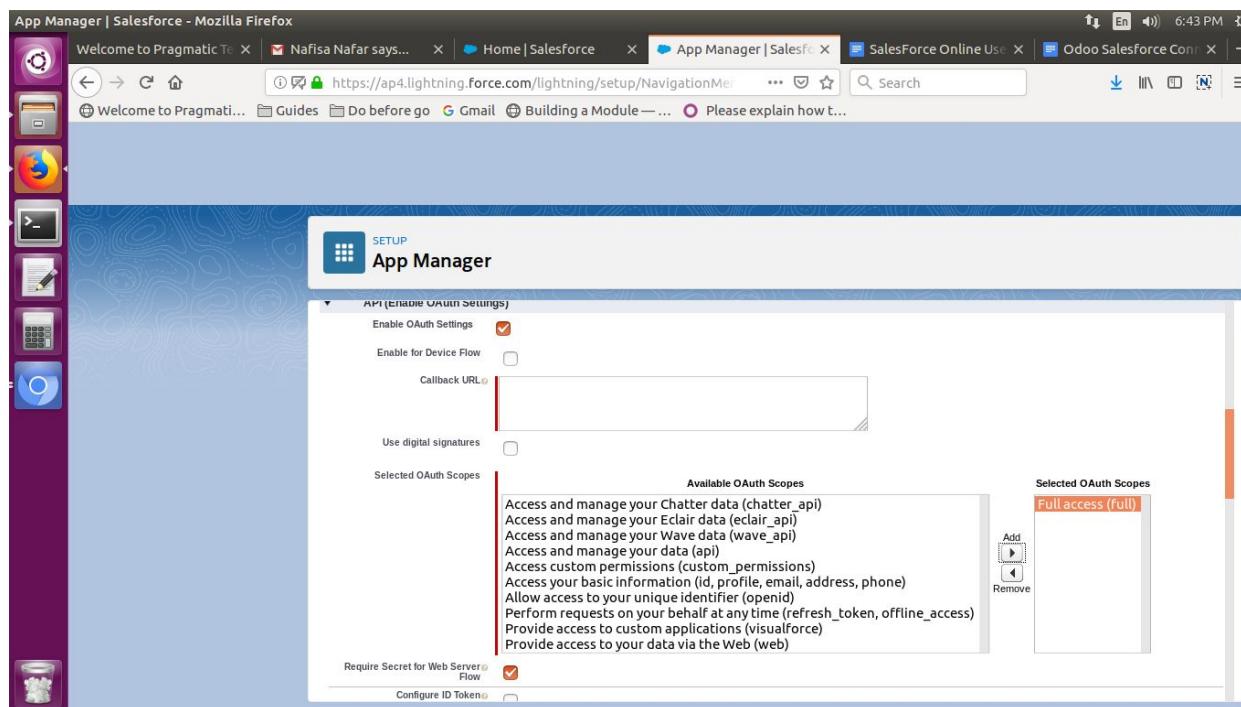
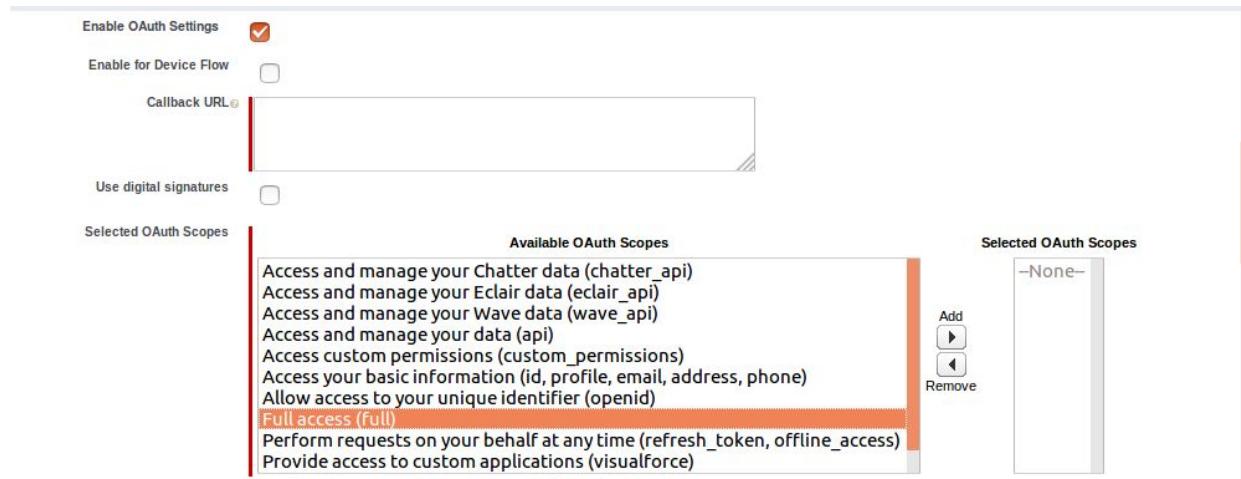
Logo Image URL Upload logo image or Choose one of our sample logos

Icon URL Choose one of our sample logos

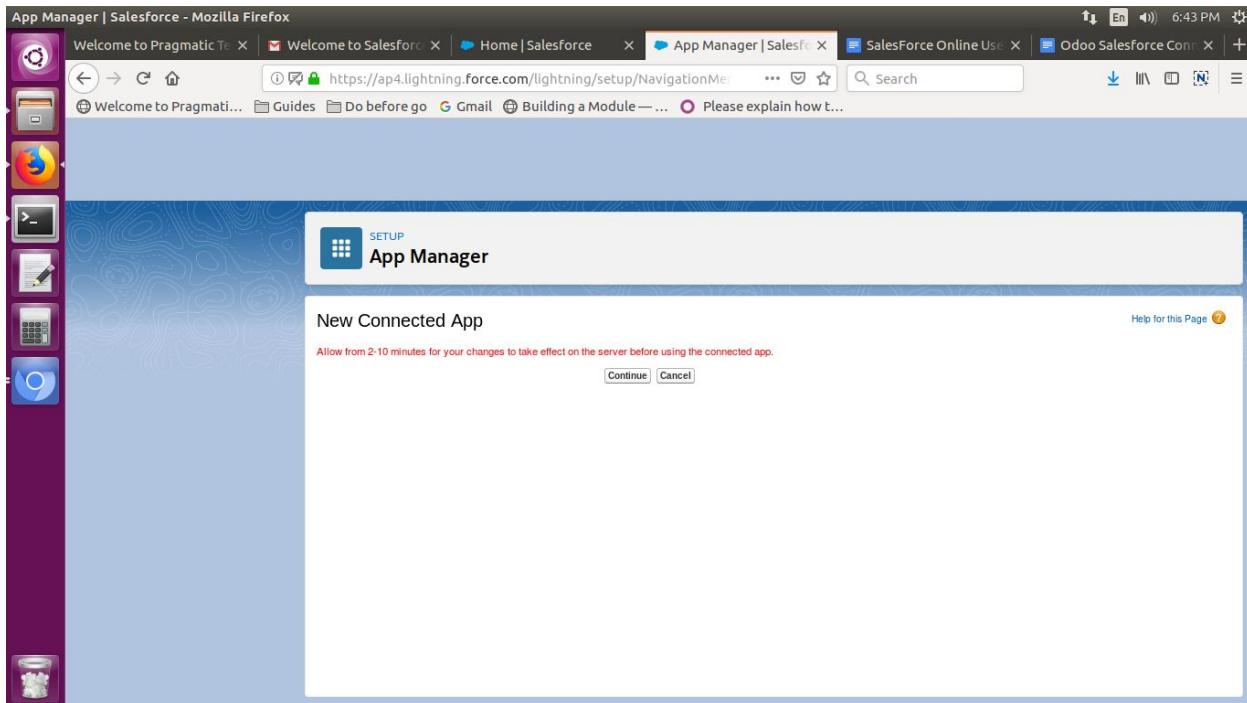
Info URL

Description

Save Cancel



Below Message will be shown after successful creation of app. It will take 2 to 10 mins to affect the changes



Step 5: After 10 mins Now,

Click on App → App Manager → Click on the app created and click on view. It will enter in the detail view of the created app.

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIE...	APP T...	V1...
1 Site.com	Sites	Build pixel-perfect, data-rich websites using t...	23/2/2018 2:09 PM	Classic	
2 Service Console	LightningService	(Lightning Experience) Lets support agents ...	23/2/2018 2:09 PM	Lightning	
3 Service	Service	Manage customer service with accounts, co...	23/2/2018 2:09 PM	Classic	
4 Salesforce_Connector	Salesforce_Connector	This connector is used to connect Odoo wit...	26/11/2018 3:02 PM	Connected	
5 Salesforce Chatter	Chatter	The Salesforce Chatter social network, inclu...	23/2/2018 2:09 PM	Classic	
6 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work ...	23/2/2018 2:09 PM	Lightning	
7 Sales	Sales	The world's most popular sales force automa...	23/2/2018 2:09 PM	Classic	
8 Sales	LightningSales	Manage your sales process with accounts, ie...	23/2/2018 2:09 PM	Lightning	

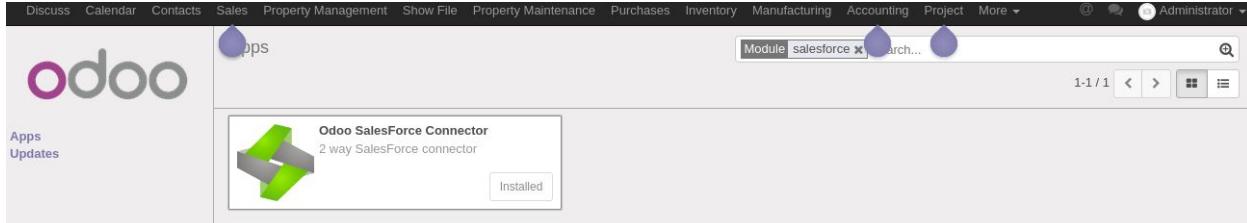
Here, Consumer Key, Consumer Secret and Callback URL will be required to sync the same in Odoo as highlighted below:

•Odoo Interface:-

Step 1:- Login in Odoo:Admin Account

Goto → Apps → Search for Salesforce Module. As shown in below fig.

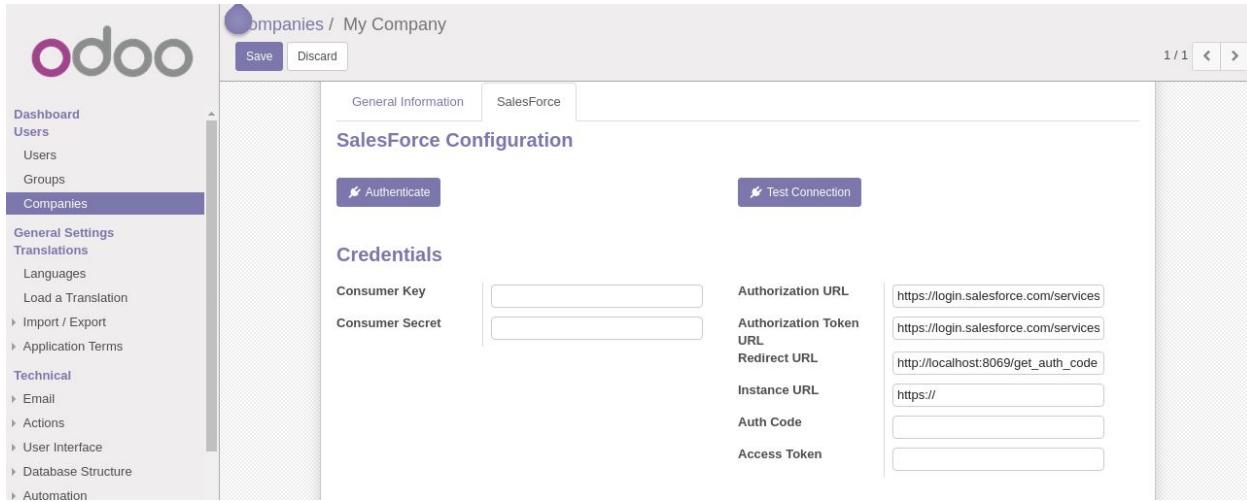
Click to Install Pragmatic Salesforce Connector Odoo App. It is available for odoo version 10.0 and 11.0



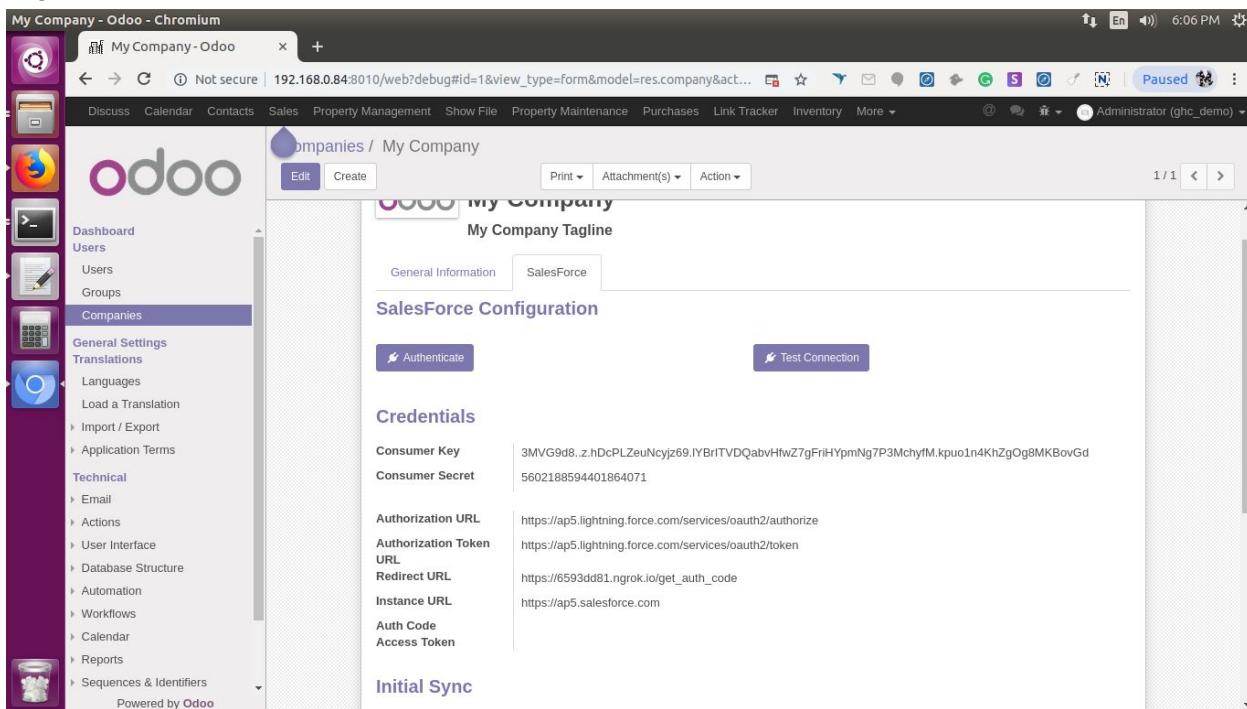
Step 6:- Sign In to Odoo Admin Account -> Go to Settings -> Companies

Pragmatic Salesforce Connector is a Odoo App which allows following operations:

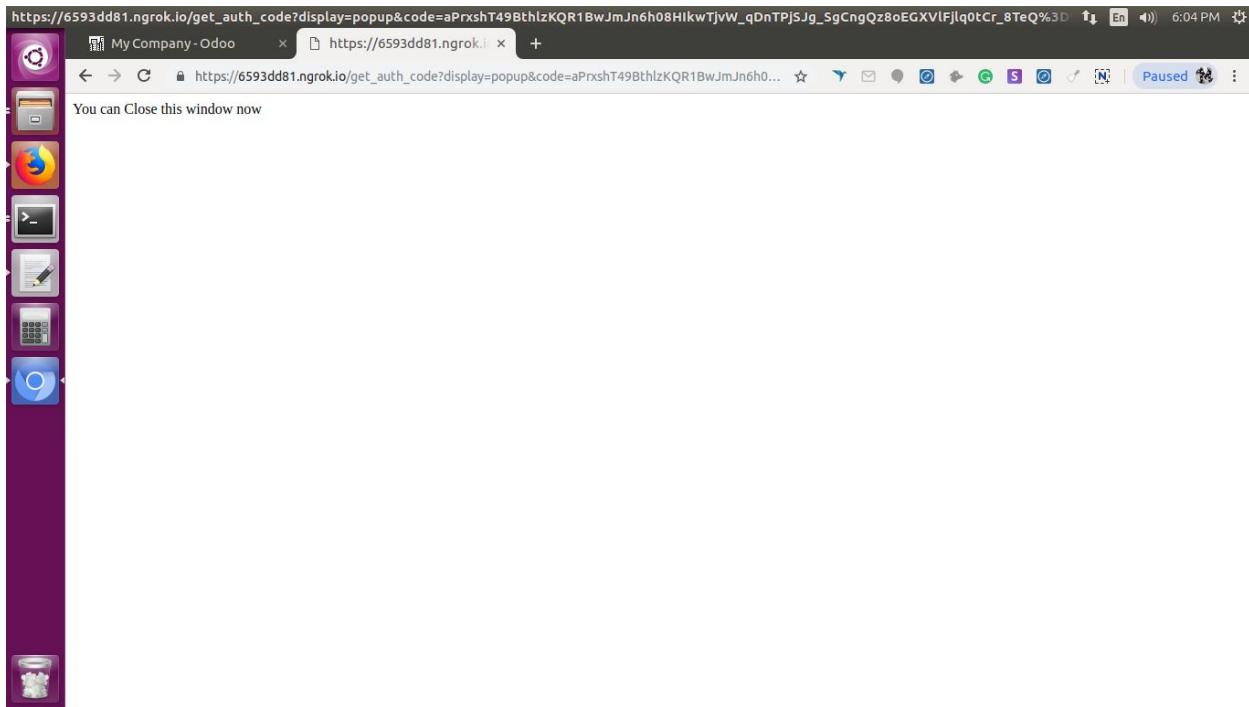
Enter the consumer key, Consumer Secret , CallbackURL as shown below from the Sales force account.



Once all the details are entered, click on “Authenticate” it will then navigate to Salesforce login page. Enter the username and Password.



If Authentication is successful then the below message will come.



Odoo has the following import features which will import data from Salesforce to Odoo.

1 Import Accounts	Account Last Modified Time :- 10/27/2020 16:13:38
2 Import Contacts	Contact Last Modified Time :- 01/13/2021 11:51:47
3 Import Products	Product Last Modified Time :- 10/27/2020 21:11:21
4 Import Quotations	Quotation Last Modified Time :- 01/09/2021 18:15:55
5 Import Sales Orders	Sale Order Last Modified Time :- 10/27/2020 16:13:35
6 Import Leads	Lead Last Modified Time :- 12/31/2020 14:24:46
7 Import Opportunity	Opportunity Last Modified Time :- 10/27/2020 20:14:54
8 Import Contract	Contract Last Modified Time :- 01/08/2021 17:09:55
9 Import Events	Event Last Modified Time :- 01/09/2021 12:02:17
10 Import Tasks	Task Last Modified Time :- 01/11/2021 18:23:36

Exporting data from odoo to salesforce:-

Go to Settings > Actions > Server Actions

In this Actions, you need to sync the data to be exported from Odoo to Salesforce for Selected Master.

Server Actions enable the Export to Salesforce options in Action Item.

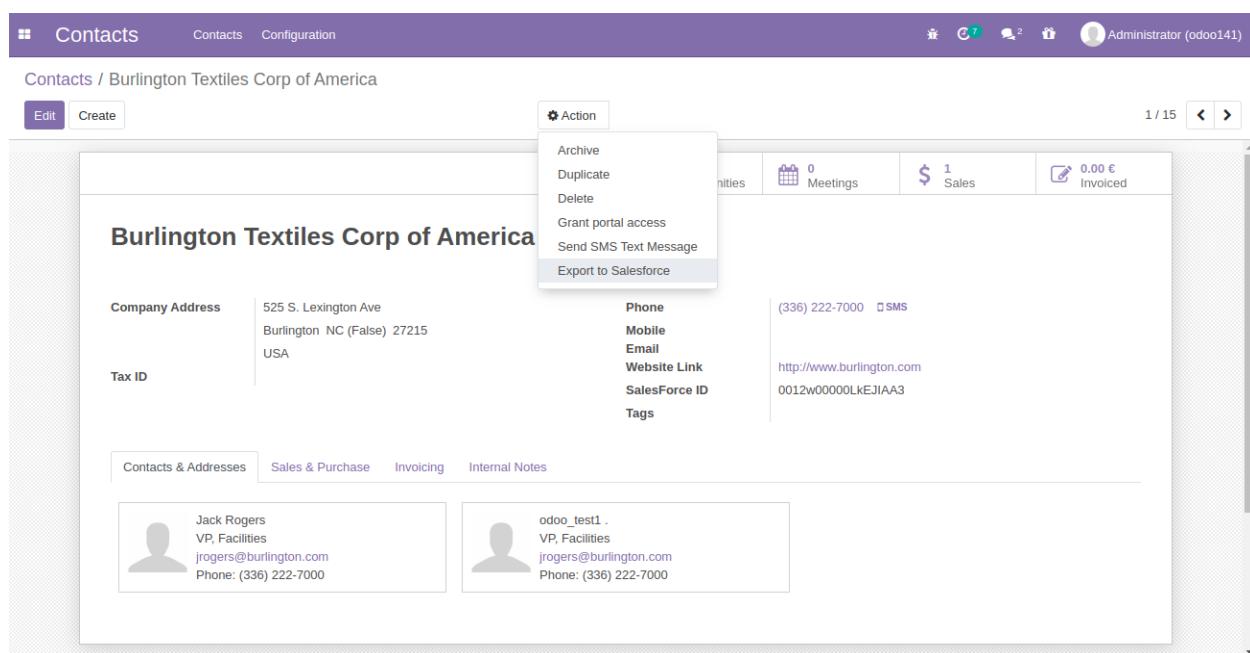
Contact Export:- To export Contact from odoo to Salesforce, click on the Contact you want to export.

In Contact form select the Action button at the top. Then select the Export to Salesforce option in the drop down menu and your Contact gets exported to Salesforce successfully.

Similarly, if there is any change you have made in Odoo under Contact then it can be successfully updated in salesforce through this option.

Account Export:-

To export accounts from odoo to salesforce, click on the contact of the type company you want to export. In contact form select the Action button at the top.

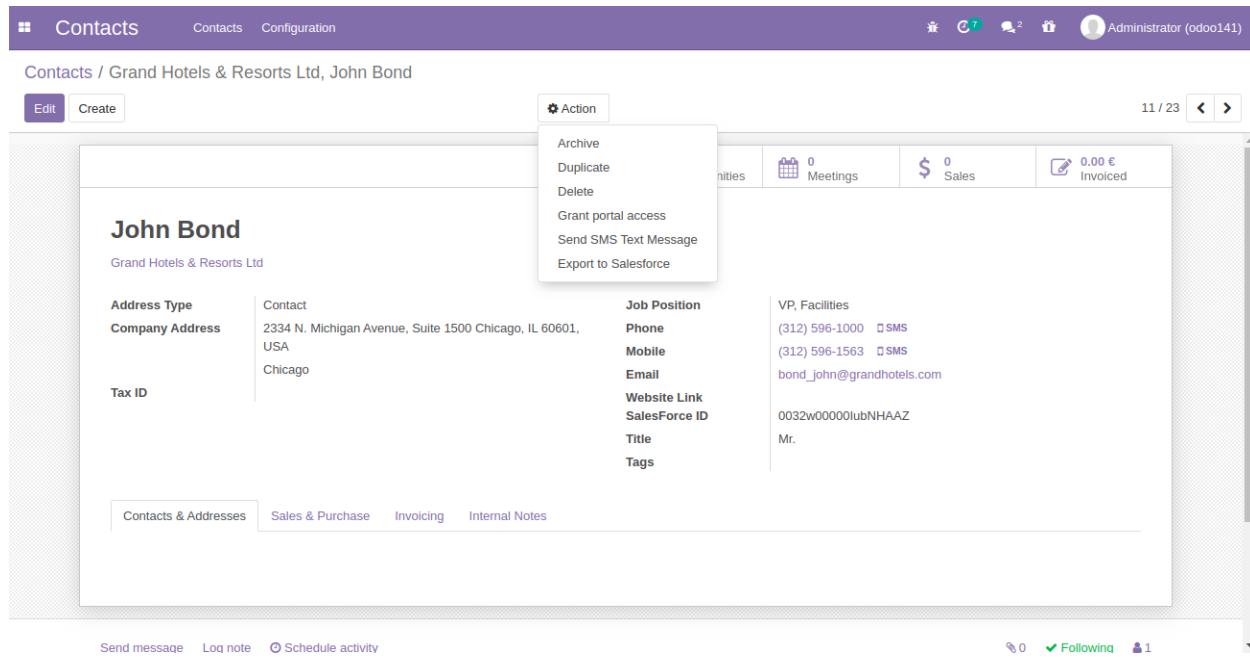


The screenshot shows the Odoo Contacts module. At the top, there is a purple header bar with the 'Contacts' icon, 'Contacts', 'Configuration', and a user icon for 'Administrator (odoo141)'. Below the header, the main content area shows a contact record for 'Burlington Textiles Corp of America'. The contact details include: Company Address (525 S. Lexington Ave, Burlington NC (False) 27215, USA), Tax ID, Phone (555-555-1234), Mobile, Email, Website Link (http://www.burlington.com), SalesForce ID (0012w000000LKEJIAA3), and Tags. Below the contact details, there are tabs for 'Contacts & Addresses', 'Sales & Purchase', 'Invoicing', and 'Internal Notes'. At the top right of the contact card, there is an 'Action' button with a gear icon. A dropdown menu is open from this button, showing options: 'Archive', 'Duplicate', 'Delete', 'Grant portal access', 'Send SMS Text Message', and 'Export to Salesforce'. The 'Export to Salesforce' option is highlighted. At the bottom of the contact card, there are two small boxes showing contact information for 'Jack Rogers' and 'odoo_test1'.

Then select the Export to salesforce option in the drop down menu and your account gets exported to salesforce successfully.

Contact Export:-

To export Contact from odoo to salesforce, click on the contact of the type individuals you want to export. In contact form select the Action button at the top.



The screenshot shows the Odoo Contacts module. At the top, there is a navigation bar with 'Contacts' (highlighted in purple), 'Contacts', and 'Configuration'. On the right, there are icons for a star, a green circle with '7', a speech bubble with '2', a gift box, and a user profile for 'Administrator (odoo141)'. Below the navigation bar, the page title is 'Contacts / Grand Hotels & Resorts Ltd, John Bond'. There are 'Edit' and 'Create' buttons. On the right, there is a summary card with '0' Meetings, '0' Sales, and '0.00 € Invoiced'. The main content area shows a contact record for 'John Bond' from 'Grand Hotels & Resorts Ltd'. The contact details include: Address Type (Contact), Company Address (2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA, Chicago), Tax ID, Job Position (VP, Facilities), Phone (312) 596-1000, Mobile (312) 596-1563, Email (bond_john@grandhotels.com), Website Link (0032w00000lubNHAAZ), SalesForce ID, Title (Mr.), and Tags. Below the contact details, there are tabs for 'Contacts & Addresses', 'Sales & Purchase', 'Invoicing', and 'Internal Notes'. At the bottom, there are buttons for 'Send message', 'Log note', 'Schedule activity', and a following status (0 following, 1 follower). A dropdown menu titled 'Action' is open, showing options: Archive, Duplicate, Delete, Grant portal access, Send SMS Text Message, and Export to Salesforce.

Then select the Export to salesforce option in the drop down menu and your contact gets exported to salesforce successfully.

Products Export:-

To export Product from odoo to salesforce, click on the product you want to export. In product form select the Action button at the top.

Products / [GC1040] GenWatt Diesel 200kW

Action

- Archive
- Duplicate
- Delete
- Generate Pricelist
- Export to Salesforce

Print | 5 / 27 | Product Moves | Putaway Rules | 0.00 Units Sold

GenWatt Diesel 200kW

Can be Sold
 Can be Purchased

General Information Variants Sales Point of Sale Purchase Inventory Accounting

Product Type	Consumable	Sales Price	25,000.00 € → Extra Prices
Product Category	Service Packages	Customer Taxes	0.00 € per Units
Internal Reference	GC1040	Cost	Units
Barcode		Unit of Measure	Units
		Purchase Unit of Measure	Units

Internal Notes

prod desc

Then select the Export to salesforce option in the drop down menu and your product gets exported to salesforce successfully.

Quotation Export:-

To export Quotation from odoo to salesforce, click on the Quotation you want to export. In Quotation form select the Action button at the top.

Quotations / S00012

Action

- Duplicate
- Delete
- Generate a Payment Link
- Share
- Mark Quotation as Sent
- Export to Salesforce

Send by Email | Send PRO-FORMA Invoice | Confirm | Cancel | 1 / 12 | Quotation | Quotation Sent | Sales Order | Customer Preview

S00012

Customer: Edge Communications
 312 Constitution Place
 Austin, TX 78767
 USA
 Austin

Invoice Address: Edge Communications

Delivery Address: Edge Communications

Quotation Template:

Expiration	Quotation Date	01/18/2021 14:02:38
Pricelist	Public Pricelist (EUR)	
Payment Terms	Salesforce Id	0Q02w000000Q1G5CAK
Salesforce Id	Contract	00000102

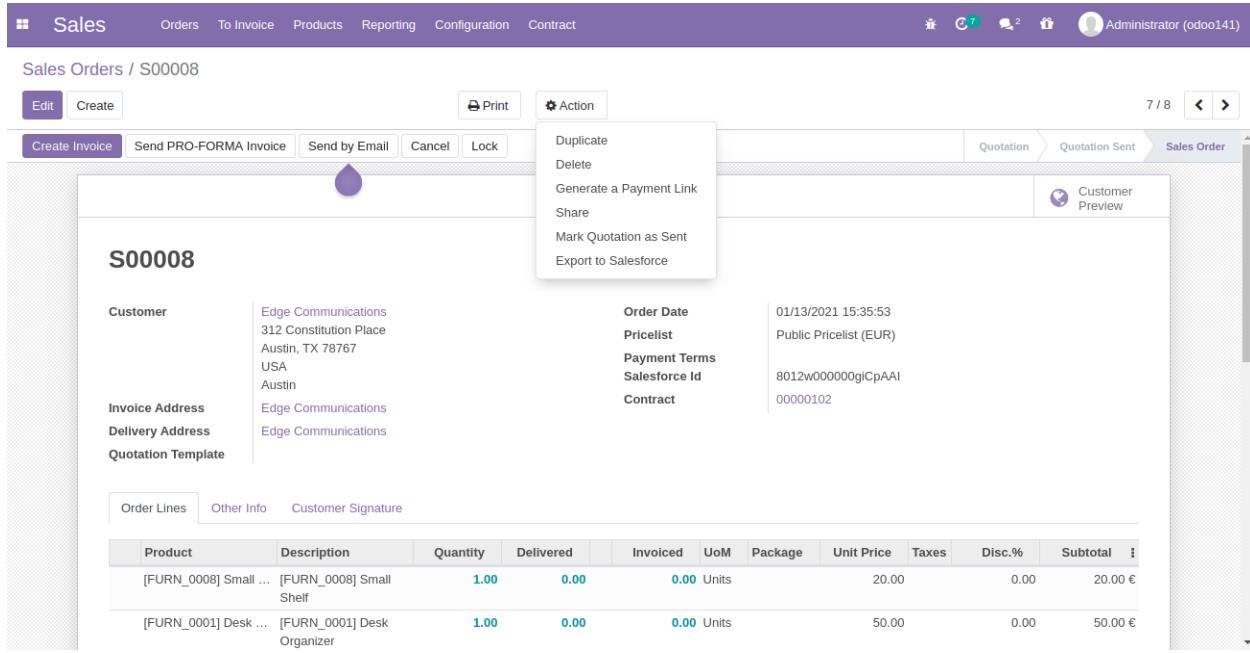
Order Lines | Optional Products | Other Info | Customer Signature

Product	Description	Quantity	UoM	Package	Unit Price	Taxes	Disc.%	Subtotal	
[FURN_0001] Desk Organizer	[FURN_0001] Desk Organizer	5.00	Units		200.00	0.00	1,000.00 €		
[CONS_0001] Whiteboard Pen	[CONS_0001] Whiteboard Pen	10.00	Units		1,000.00	0.00	10,000.00 €		

Then select the Export to salesforce option in the drop down menu and your Quotation gets exported to salesforce successfully.

SaleOrder Export:-

To export SaleOrder from odoo to salesforce, click on the SaleOrder you want to export. In SaleOrder form select the Action button at the top.



The screenshot shows the Odoo Sales Orders interface. A SaleOrder with the number S00008 is displayed. At the top, there is a toolbar with buttons for Edit, Create, Print, and Action. The Action button is currently open, showing a dropdown menu with options: Duplicate, Delete, Generate a Payment Link, Share, Mark Quotation as Sent, and Export to Salesforce. The main content area shows the customer information (Edge Communications, 312 Constitution Place, Austin, TX 78767, USA, Austin), order details (Order Date: 01/13/2021 15:35:53, Pricelist: Public Pricelist (EUR)), and payment terms (Payment Terms: Salesforce Id: 8012w000000giCpAAI, Contract: 00000102). Below this, the Order Lines section is visible, showing two items: [FURN_0008] Small ... [FURN_0008] Small Shelf (Quantity: 1.00, Delivered: 0.00, Invoiced: 0.00, Unit Price: 20.00, Subtotal: 20.00 €) and [FURN_0001] Desk ... [FURN_0001] Desk Organizer (Quantity: 1.00, Delivered: 0.00, Invoiced: 0.00, Unit Price: 50.00, Subtotal: 50.00 €). The interface also includes tabs for Other Info and Customer Signature, and a sidebar with a Customer Preview section.

Then select the Export to salesforce option in the drop down menu and your SaleOrder gets exported to salesforce successfully.

Lead Export:-

To export Lead from odoo to salesforce, click on the Lead you want to export. In Lead form select the Action button at the top.

Leads / Eugena Luce

Action

- Archive
- Duplicate
- Delete
- Send email
- Send SMS Text Message
- Enrich
- Export to Salesforce

Eugena Luce
50.00 %

Customer
Company Name: Pacific Retail Group
Address: USA
Website: [Pacific Retail Group](#)
Language: English
Salesforce Id: 00Q2w000004d5TrnEAI
SF Status: Closed - Not Converted

Salesperson
Administrator
Salesforce Id: 0052w000004d5TrnEAI
Sales Team: Sales

Contact
Name: Eugena Luce Ms
Email: eluce@pacificretail.com
Email cc: [eluce@pacificretail.com](#)
Job Position: [Sales Representative](#)
Phone: (781) 270-6500
Mobile: [\(781\) 270-6500](#) SMS

Priority: ★ ★ ★
Tags: Sales

Internal Notes | Extra Info

Then select the Export to salesforce option in the drop down menu and your Lead gets exported to salesforce successfully.

Opportunity Export:-

To export Opportunity from odoo to salesforce, click on the Opportunity you want to export. In Opportunity form select the Action button at the top.

Pipeline / United Oil Plant Standby Generators

Action

- Archive
- Duplicate
- Delete
- Send email
- Send SMS Text Message
- Enrich
- Export to Salesforce

United Oil Plant Standby Generators
0.00 € + 0.00 € at 99.86 %

Customer
Email: [eluce@pacificretail.com](#)
Phone: [\(781\) 270-6500](#)

Salesperson
Administrator
Salesforce Id: 0052w000004d5TrnEAI
Sales Team: Sales

Needs Analysis → **Negotiation**

Opportunity Phases:
Needs Analysis → Proposal/Price Quote → Prospecting → Qualified → Proposition → Won
Closed Lost: 0 / 1 Quotations

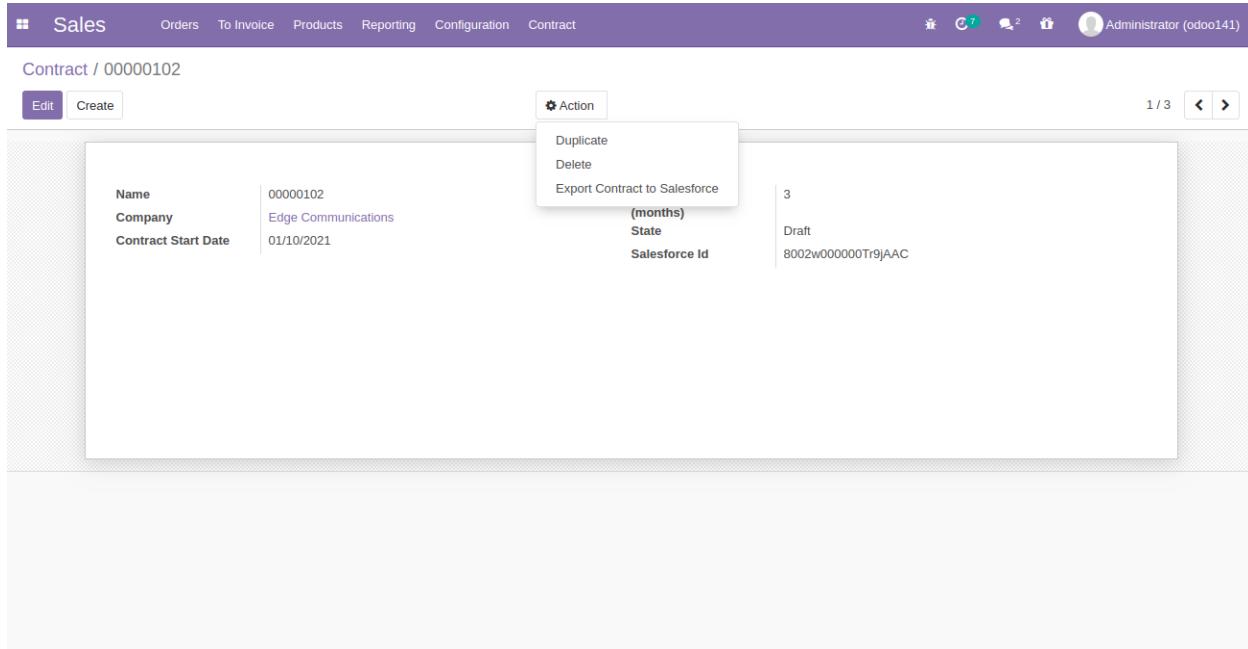
Expected Closing: 07/31/2020
Priority: ★ ★ ★
Tags: Sales

Internal Notes | Extra Information

Then select the Export to salesforce option in the drop down menu and your Opportunity gets exported to salesforce successfully.

Contract Export:-

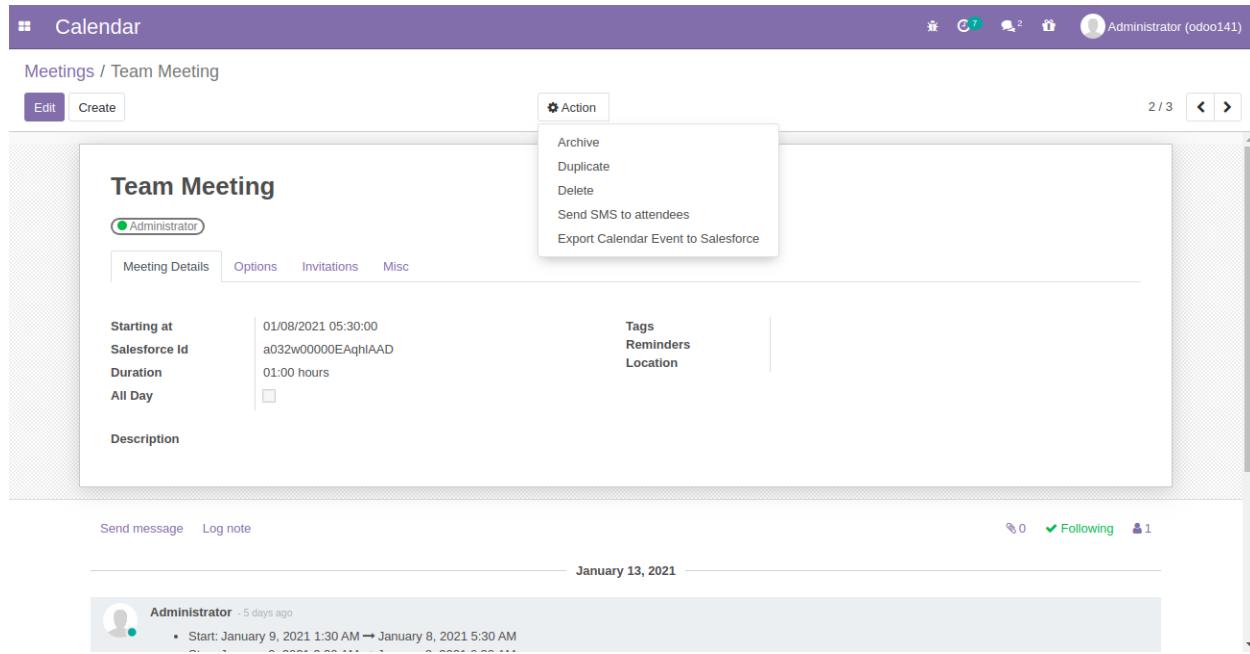
To export Contract from odoo to salesforce, click on the Contract you want to export. In Contract form select the Action button at the top.



Then select the Export to salesforce option in the drop down menu and your Contract gets exported to salesforce successfully.

Events Export:-

To export Events from odoo to salesforce, click on the calendar event you want to export. In Events form select the Action button at the top.



Calendar

Meetings / Team Meeting

Action

- Archive
- Duplicate
- Delete
- Send SMS to attendees
- Export Calendar Event to Salesforce

Team Meeting

Administrator

Meeting Details Options Invitations Misc

Starting at 01/08/2021 05:30:00 Tags

Salesforce Id a032w00000EAqhlIAAD Reminders

Duration 01:00 hours Location

All Day

Description

Send message Log note

January 13, 2021

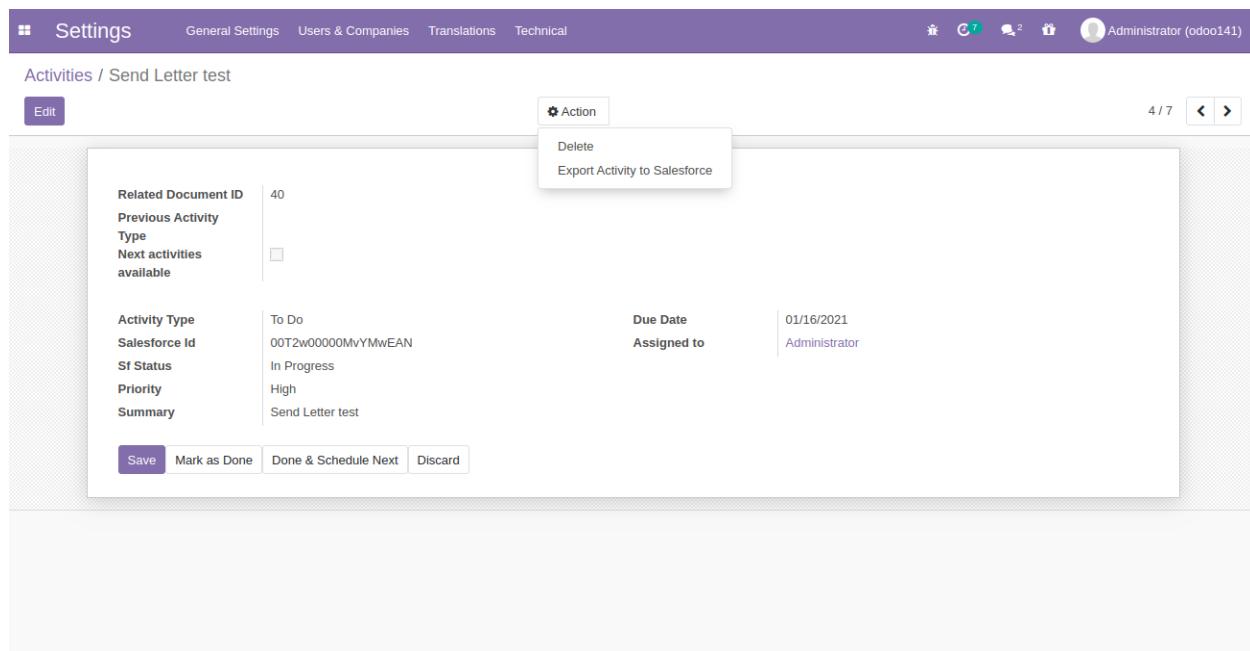
Administrator - 5 days ago

- Start: January 9, 2021 1:30 AM → January 8, 2021 5:30 AM

Then select the Export Calendar Event to salesforce option in the drop down menu and your Events gets exported to salesforce successfully.

Tasks Export:-

To export tasks from odoo to salesforce, click on the Activities you want to export. In activity form select the Action button at the top.



Settings

General Settings Users & Companies Translations Technical

Administrator (odoo141)

Activities / Send Letter test

Action

- Delete
- Export Activity to Salesforce

Related Document ID 40

Previous Activity

Type

Next activities available

Activity Type To Do Due Date 01/16/2021

Salesforce Id 00T2w00000MvYMwEAN Assigned to Administrator

Sf Status In Progress

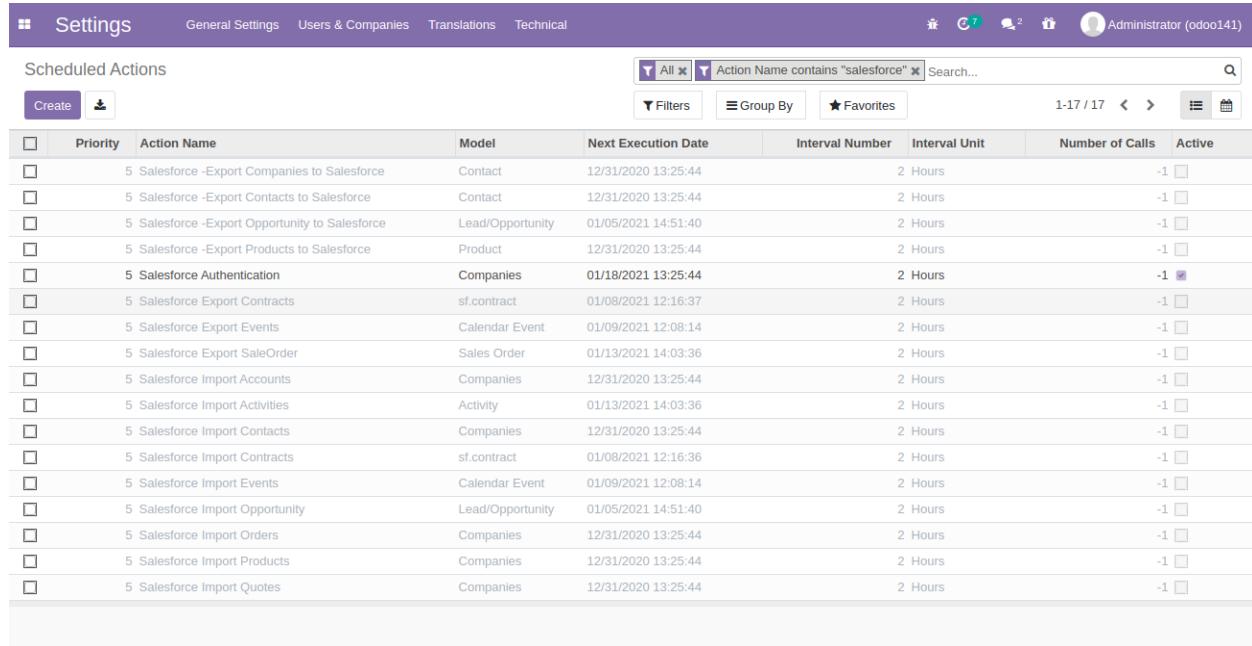
Priority High

Summary Send Letter test

Save Mark as Done Done & Schedule Next Discard

Then select the Export Activity to salesforce option in the drop down menu and your activity gets exported to salesforce successfully.

Scheduled Actions For Import and Export :-



Priority	Action Name	Model	Next Execution Date	Interval Number	Interval Unit	Number of Calls	Active
<input type="checkbox"/>	5 Salesforce -Export Companies to Salesforce	Contact	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce -Export Contacts to Salesforce	Contact	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce -Export Opportunity to Salesforce	Lead/Opportunity	01/05/2021 14:51:40		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce -Export Products to Salesforce	Product	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Authentication	Companies	01/18/2021 13:25:44		2 Hours	-1 <input checked="" type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Export Contracts	sf.contract	01/08/2021 12:16:37		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Export Events	Calendar Event	01/09/2021 12:08:14		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Export SaleOrder	Sales Order	01/13/2021 14:03:36		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Accounts	Companies	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Activities	Activity	01/13/2021 14:03:36		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Contacts	Companies	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Contracts	sf.contract	01/08/2021 12:16:36		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Events	Calendar Event	01/09/2021 12:08:14		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Opportunity	Lead/Opportunity	01/05/2021 14:51:40		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Orders	Companies	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Products	Companies	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	
<input type="checkbox"/>	5 Salesforce Import Quotes	Companies	12/31/2020 13:25:44		2 Hours	-1 <input type="checkbox"/>	

=====End of the Document=====