



SALESFORCE SALES CLOUD CONNECTOR BY MOZU

Configuration Guide

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Sales Cloud Connector by Mozu Configuration Guide

Welcome to Sales Cloud and Mozu

[Sales Cloud](#), by Salesforce, provides a cloud service to track customer information and interactions, complete and review purchases, manage leads, and much more. Salesforce features that support all areas of your business has moved into the cloud with the capability of managing all customer, product, marketing, and order interactions and data within your business. Through the Sales Cloud, your business records, customers, transactions, inventory, and email messaging is maintained with processes and workflows via any device and browser.

[Mozu](#) offers an app to leverage your Sales Cloud account, services, workflows, and data. Through the app, you can sync all customer accounts and contacts, products, price lists, orders, and returns between Mozu and your current Sales Cloud account and features. Once integrated, all new customers and orders automatically transfer into Sales Cloud.

Install Sales Cloud Connector by Mozu on Your Tenant

After purchasing the Sales Cloud Connector by Mozu, call your sales or professional services representative and request installation on your tenant. Mozu staff will install the app to your tenant, making it available for further configuration and usage in your storefront.

This custom app integrates Sales Cloud with Mozu to support the following:

- Authenticate your Sales Cloud account with Mozu to sync customer accounts and contacts, products, price lists, orders, and returns.
- Export one or more products, customers, and orders (including returns) from Mozu into Sales Cloud. Existing content will need to be exported from Mozu after initial authentication.
- Map Mozu order status with Sales Cloud status. You can map multiple Mozu order statuses to one Sales Cloud status to refine order processing.
- Add Mozu fields to Sales Cloud receipts and forms to display synced data including Order Discount, Order Adjustment, Order Shipping Total, Order Shipping Adjustment, Order Shipping Discount, and Order Tax Total and additional fields for products, status, and account attributes.

Data syncs between Mozu and the Sales Cloud app as follows:

- You can manually export existing data for products, customers, and orders directly into Sales Cloud.
- Once authenticated, the system will share data as customers are created, products are created and updated, and orders are submitted through to completion.

- You can modify and map content on-the-fly between the systems for custom attributes, changes in mappings, and page layout content in your Sales Cloud forms.

CONFIGURATION REQUIREMENTS

To configure Sales Cloud to work seamlessly with Mozu, you need specific items installed and settings provided. This guide details each step from requirements to final configuration for managing shipments.

You must meet the following criteria to configure the Sales Cloud app:

- You must have the Sales Cloud Application by Mozu installed into your tenant.
- You must have access to modify and update your store settings in Sales Cloud.
- You must have an active Sales Cloud account. You will authenticate this account to link both systems together.

Configure the Application

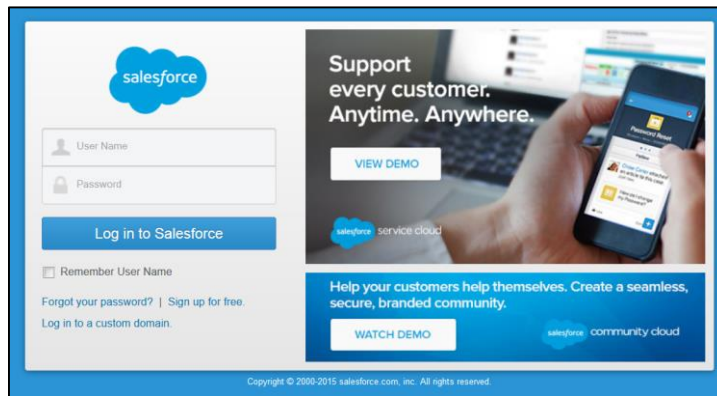
To integrate your Sales Cloud services with Mozu, you will authenticate your Salesforce account with the app and configure any settings as needed. Additional work may be needed in your Salesforce account outside of the app to complete mapping and export of data.

When your account is authenticated, the Info tab will display the maximum limit of daily API calls allowed by Salesforce and your currently available amount.

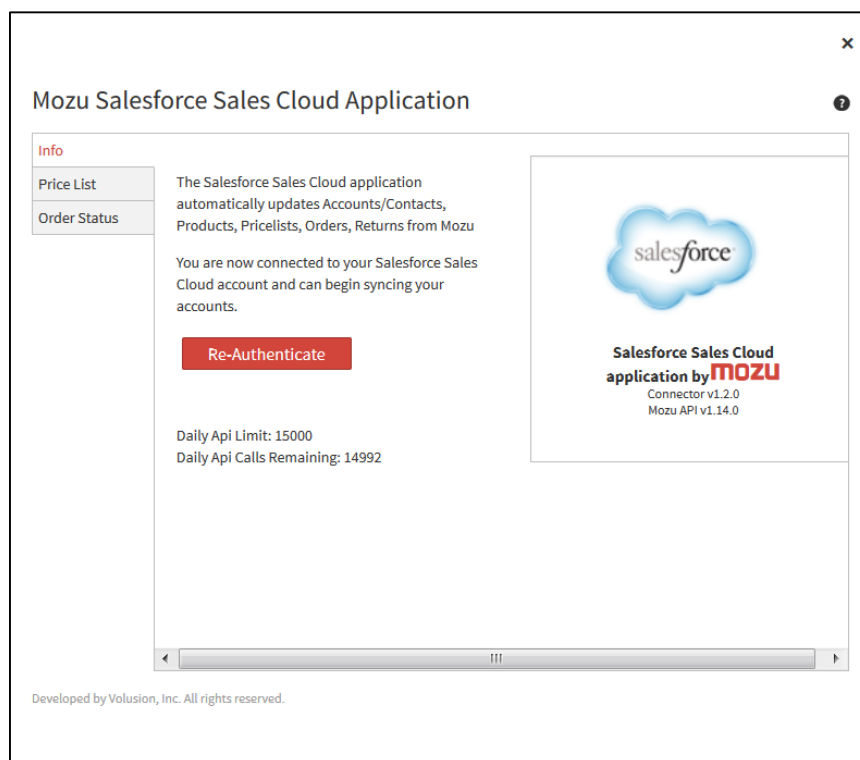
Once your accounts are authenticated, any current data in Mozu should be exported directly to Sales Cloud. Any new entries automatically populate into Sales Cloud, including products, customer accounts/contacts, and orders. See additional sections for this data export, mapping, and syncing.

CONFIGURE SALES CLOUD CONNECTOR IN MOZU

1. On the Mozu Admin top bar, select **Settings>Applications**.
2. Double-click **Sales Cloud**.
3. Click the **Configuration** link to open the app.
4. On the Info tab, you need to connect and authenticate your Salesforce Sales Cloud.
5. Click **Authenticate**. The Salesforce Account Login page opens. Enter your credentials to login and authenticate. If you do not have an account, you can create a new account through the same page.



6. The Info tab updates indicating your account has been authenticated. You can Re-Authenticate to login as needed.



ENABLE SALES CLOUD APPLICATION BY MOZU

1. On the Mozu Admin top bar, select **Settings > Applications**.
2. Double-click **Sales Cloud**.
3. Click **Enable App** on the Info tab to enable the app.

Map Order Status

Mozu includes a number of order statuses: Abandoned, Accepted, Cancelled, Closed, Completed, Pending, Processing, Rejected, and Submitted. You can map these status values in the app with available Sales Cloud status options. You can add and remap order status as needed.

CREATE SALES CLOUD STATUS

You can create new or edit current order status options in Sales Cloud at any time. If you do not need to create new status options, continue to the next section.

1. Log into your Sales Cloud account in a web browser.
2. Click **Setup**.
3. In the left-side nav options, scroll under Build to expand sections.
4. Expand Customize > Orders and click **Fields**.
5. Scroll through the list of fields to locate Status. Click the linked name to edit the field content.
6. On the Order Field Status page, you can scroll to the Order Status Picklist Values.

Order Field Status

Back to Order Fields

Edit

Field Information

Field Label	Status	Field Name	Status
Data Type	Picklist		
Help Text			

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Order Status Picklist Values

Action	Values	Status Category	Chart Colors	Modified By
Edit Del	Draft		Assigned dynamically	ben.katz, 1/19/2015 12:59 PM
Edit Del	Activated	Activated	Assigned dynamically	ben.katz, 1/19/2015 12:59 PM

7. Click **New** to add a status. You can also click **Edit** per existing status.
8. On the Picklist Edit Order Status, enter a name for the **Order Status**.
9. Select the Status Category, typically as **Activated**. If you select none, Draft is used by default.
10. Optionally, select a color. Salesforce will select a color automatically.

Picklist Edit Order Status

Enter a name for the picklist value below.

Order Status

Status Category: --None--

Chart Color: Assigned dynamically

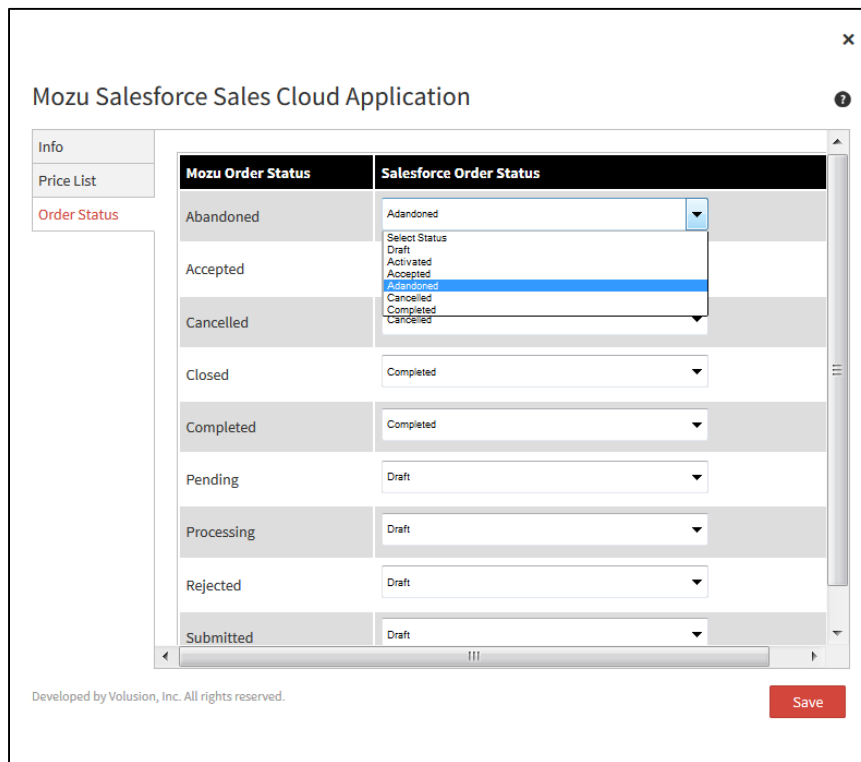
Save Save & New Cancel

11. Click **Save**. This new status can be selected in Mozu for mapping.

MAP ORDER STATUS IN MOZU

You can map more than one Mozu status to the same Sales Cloud status.

1. On the Mozu Admin top bar, select **Settings>Applications**.
2. Double-click **Sales Cloud**.
3. Click the **Configuration** link to open the app.
4. Click the **Order Status** tab.
5. For each Mozu Order Status, select an available Salesforce Order Status. You can map multiple Mozu statuses to the same Sales Cloud status.



Mozu Salesforce Sales Cloud Application

Info
Price List
Order Status

Mozu Order Status	Salesforce Order Status
Abandoned	Adandoned
Accepted	Select Status Draft Activated Accepted Adandoned Cancelled Completed Canceled
Cancelled	
Closed	Completed
Completed	Completed
Pending	Draft
Processing	Draft
Rejected	Draft
Submitted	Draft

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Save

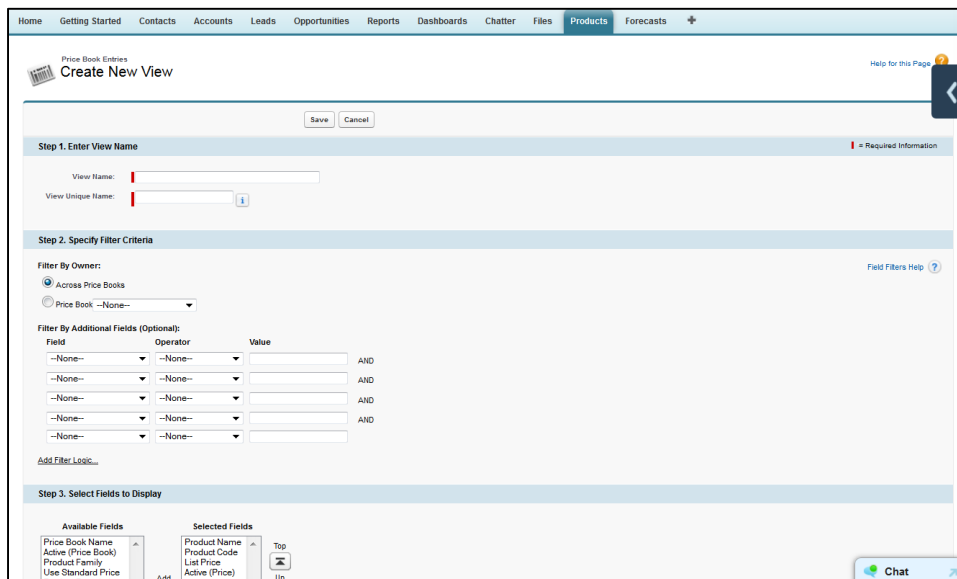
6. Click **Save**.

Map Price Books

You must create a new price book per each Mozu catalog. You can name these price books anything you like in Sales Cloud, though we recommend using similar names to those in Mozu. If you already have price books for each catalog in Mozu, make note of the names to map through the app. You can also edit the names of the price books as needed in Sales Cloud.

CREATE PRICE BOOKS

1. Log into your Sales Cloud account in a web browser.
2. Click the **Products** tab.
3. For Price Books, click **Create New View**.



4. Enter a **View Name** to match to a Mozu catalog.
5. The **View Unique Name** will auto-populate using the View Name.
6. Select and modify any other settings for the price book as needed. Review your Sales Cloud documentation for details on settings.

MAP PRICE BOOKS IN MOZU

1. On the Mozu Admin top bar, select **Settings>Applications**.
2. Double-click **Sales Cloud**.
3. Click the **Configuration** link to open the app.
4. Click the **Price Lists** tab.

5. For each listed Mozu catalog, select a Pricebook from the drop-down menu.
6. Click **Save**.

Map Customer Attributes

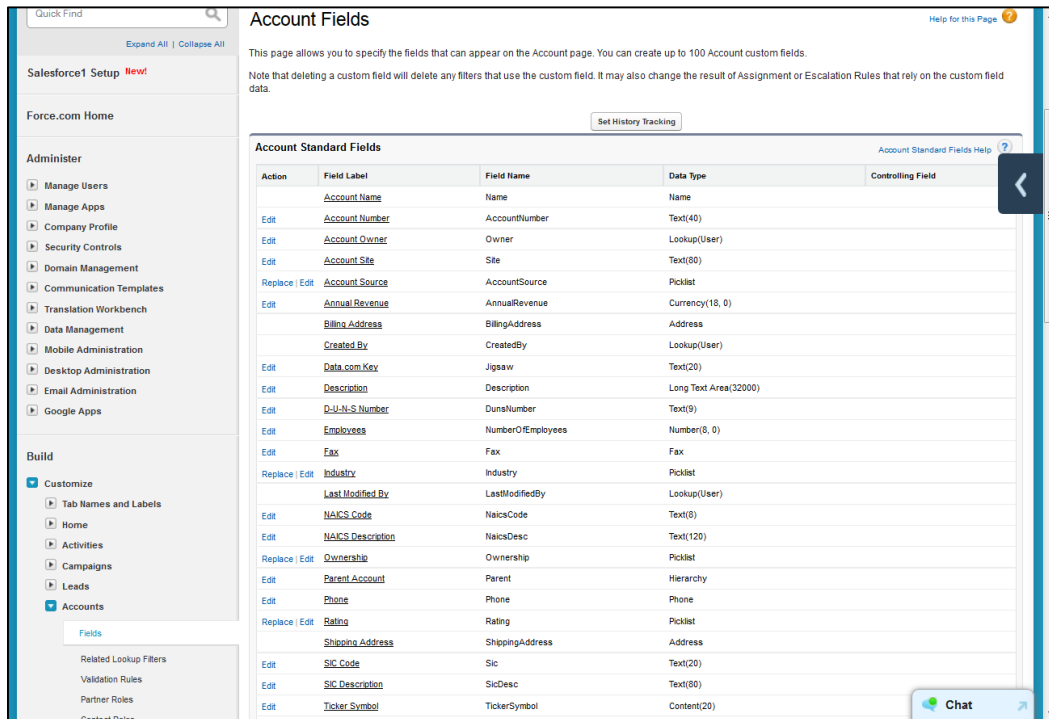
You can create and map custom attributes for a product in Mozu to attributes in Sales Cloud. As you create these attributes in Mozu for current or new customer accounts, the app provides a mapping page for associating the data into Sales Force.

We recommend performing another export into Sales Force after mapping existing attributes. If this is a new attribute without entered data, you do not need to perform an export. The mapped attribute will automatically share data as it is entered.

CREATE A NEW ATTRIBUTE IN SALESFORCE

If you do not have a matching attribute in Salesforce to map for your Mozu attributes, you need to create the attribute(s) then map. If you have existing attributes ready to map, continue to the next section.

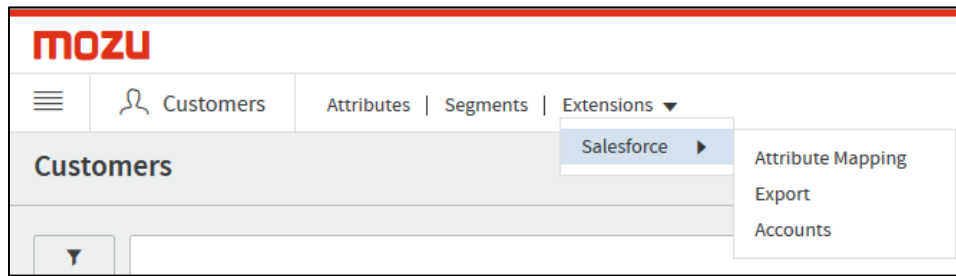
1. In your Salesforce account web portal, click **Setup**.
2. In the left-side nav options, scroll under Build to expand sections.
3. Expand Customize > Accounts and click **Fields**.



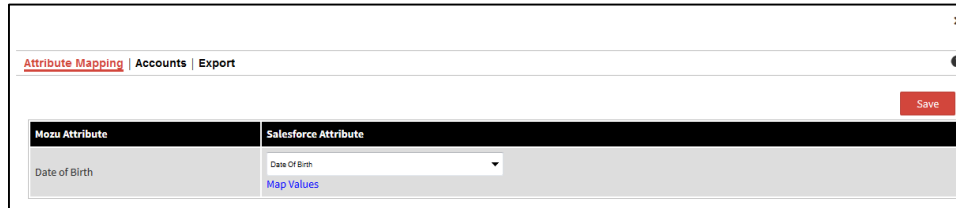
4. Scroll to the bottom of the page to the Account Custom Fields & Relationships table. Click **New** to create a new attribute.
5. In Step 1, select the field type. These include checkboxes, text fields, selectable options, dates, and more. We recommend the attribute content type matching the Mozu attribute. Click **Next**.
6. In Step 2, enter all data for the attribute. Depending on the type of field you selected in step 1, you may need to enter the length of a text field (max characters), date formats, options for customers to select from, and so on. The options do not have to match the full descriptions or names, as the mapping from Mozu to Salesforce will provide that data. You can map down to the attribute content level. We recommend you consider matching this content between the systems.
7. Click **Next**.
8. Depending on the attribute content and location, you may need to edit the Page Layout for Accounts in Salesforce to display the new mapped attribute.

MAP ATTRIBUTES IN MOZU

1. Log into the Mozu Admin.
2. Click **Customers**.
3. As needed, create your custom attribute(s) in Mozu for your customers. For example, you may want to add a Date of Birth or Gender attribute.
4. Along the menu bar, select **Extensions > Salesforce**. From the options, select **Attribute Mapping**.



5. A list of existing customer Mozu Attributes displays with Salesforce Attributes to map.



6. For each Mozu Attribute, select a Salesforce Attribute from the drop-down list.
7. Click the **Map Values** link. Depending on the type of attribute, you may need to link the Mozu options for the attribute with the available options in Salesforce. For example, Gender attributes would have Male or Female selectable values. In Mozu, this value may be Male with a Salesforce value of M. You can map these specific values, regardless of label, on this screen.



8. Click **Save**.

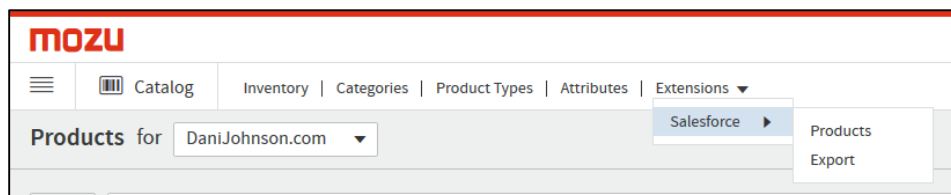
Export Data to Sales Cloud

After the initial authentication with Sales Cloud, any existing data in Mozu should be exported to Sales Cloud. You can perform these exports through the products, customers, and orders pages in the Mozu Admin. The app adds extended pages to export one or all of your products, product attributes (with mappings), customers, and orders. After the data is exported, you can click the provided links to directly open Sales Cloud to that record through the Salesforce portal.

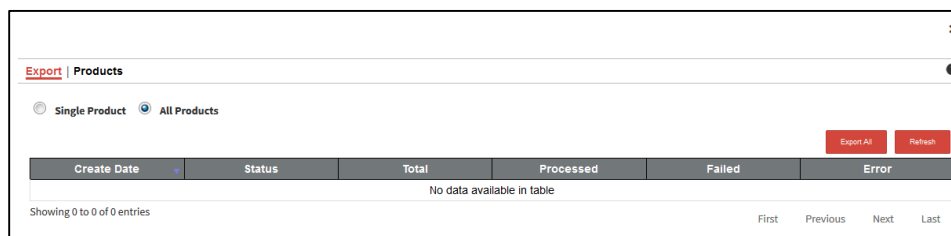
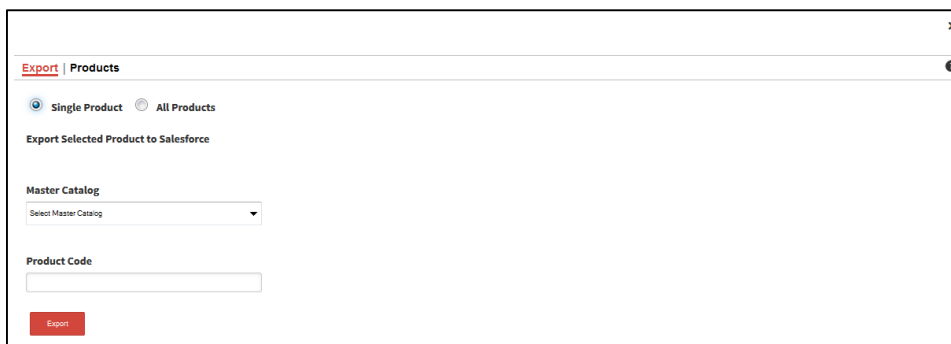
EXPORT SINGLE OR ALL PRODUCTS

You have a choice of exporting one or all products.

1. Log into the Mozu Admin.
2. Click **Catalog**.
3. Along the menu bar, select **Extensions > Salesforce**. You have the choice of Export (opens the export options) or Product (displays successful exported data with links).



4. Select **Export**.



5. Select Single Product or All Products.
6. If Single Product, select the **Master Catalog** and enter a **Product Code**. Click **Export**.
7. If All Products, click **Export All**. A table displays the full list of exports with results.
8. Products will export to Sales Cloud. Completed exports provide links on the Product page into Sales Cloud.

Export | Products

Show: 10 entries Search:

Product Code	Salesforce Id
133187	01p0000000d03sAAM
133951D	01p0000000d03sCAA2
133951D-1	01p0000000d03sDAA2
133951D-2	01p0000000d03sEAA2
134215	01p0000000d03sFAAA
137845	01p0000000d03sKAAA

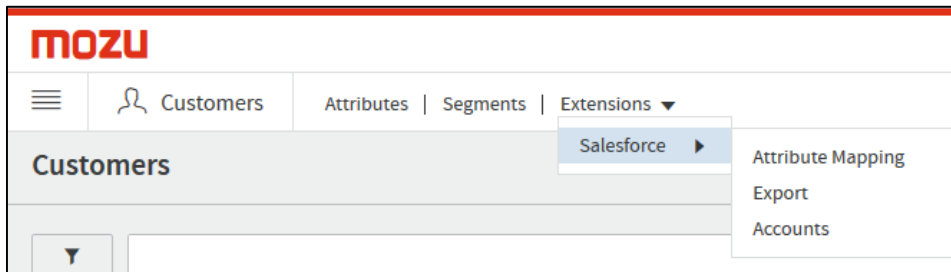
Showing 1 to 6 of 6 entries

First Previous 1 Next Last

EXPORT SINGLE OR ALL CUSTOMERS

You have a choice of exporting one or all customer accounts.

1. Log into the Mozu Admin.
2. Click **Customers**.
3. Along the menu bar, select **Extensions > Salesforce**. You have the choice of Export (opens the export options) or Accounts (displays successful exported data with links).



4. Select **Export**.

Attribute Mapping | Accounts | Export

☒ Single Account ☐ All Accounts

Export Selected account to Salesforce

Account Id

Attribute Mapping | Accounts | Export

☐ Single Account ☒ All Accounts

Create Date	Status	Total	Processed	Failed	Error
2015-01-16 22:15:33	Completed	3	3	0	

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

5. Select Single Account or All Accounts.
6. If Single Account, enter an **Account Id** or scroll through the list of customer accounts. Click **Export**.

- If All Accounts, click **Export All**. A table displays the full list of exports with results.
- Customer accounts will export to Sales Cloud. Completed exports provide links on the Accounts page into Sales Cloud.

Attribute Mapping | Accounts | Export

Search:

Id	First Name	Last Name	Email	Salesforce Id
1001	Frank	Carson	facarson@bookstore.com	001j000000E6Jf-eAAJ
1002	Daniel	Nelson	dnelson@mail.com	001j000000E6JfYAAZ
1003	Marie	Bentley	mariebentley@mymail.com	001j000000E6JfYAAJ

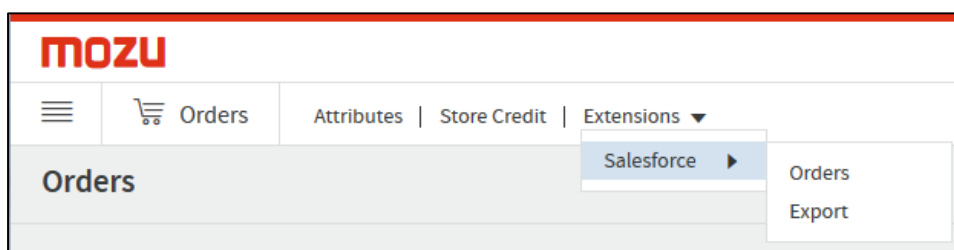
Showing 1 to 3 of 3 entries

First Previous **1** Next Last

EXPORT SINGLE OR ALL ORDERS

You have a choice of exporting one or all orders.

- Log into the Mozu Admin.
- Click **Orders**.
- Along the menu bar, select **Extensions > Salesforce**. You have the choice of Export (opens the export options) or Orders (displays successful exported data with links).



- Select **Export**.

Export | Orders

☒ Single Order ☐ All Orders

Export a single Order to salesforce

Type
Select Type

Order/Return Number

Export

Export | Orders

☐ Single Order ☒ All Orders

Export All Refresh

Create Date	Status	Total	Processed	Failed	Error
No data available in table					

Showing 0 to 0 of 0 entries

First Previous Next Last

5. Select Single Order or All Order.
6. If Single Order, select an order **Type** as **Order** or **Return**. Enter the **Order/Return Number**. Click **Export**.
7. If All Orders, click **Export All**. A table displays the full list of exports with results.
8. Orders will export to Sales Cloud. Completed exports provide links on the Orders page into Sales Cloud.

The screenshot shows a window titled 'Export | Orders'. It contains a table with the following data:

Order Number	Type	Salesforce Id
1	Order	801p00000008tmUAAQ
4	Order	801p00000008usLAAQ
5	Order	801p00000008usQAAQ

Below the table, it says 'Showing 1 to 3 of 3 entries'. At the bottom right, there are navigation buttons: 'First', 'Previous', '1' (selected), 'Next', and 'Last'.

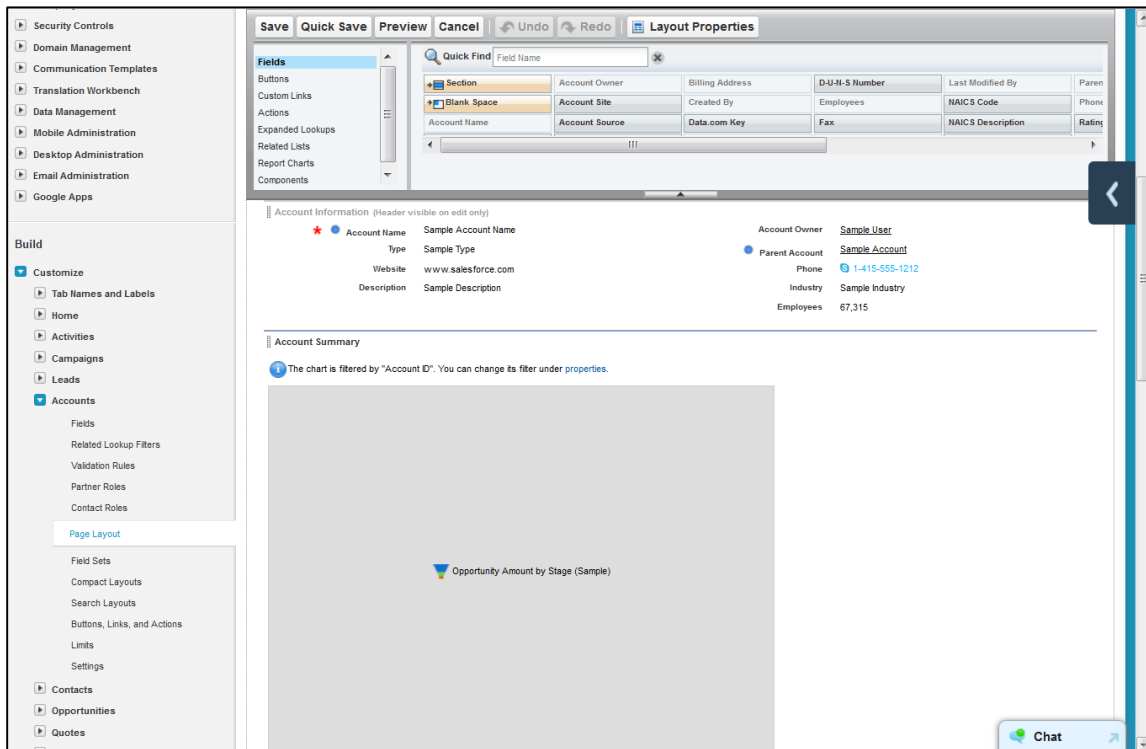
Customize Sales Cloud Page Layouts

You can add Mozu fields to display additional Mozu data in your Account Details and Order Details. For each page layout display, a floating section of Fields displays across the top including all Mozu fields. You can drag and drop these fields into the page layouts. This section details how to add these fields to account and order details pages, but you can add them to other pages as you need.

1. Log into your Sales Cloud account in a web browser.
2. Click **Setup**.



3. In the left-side nav options, scroll under Build to expand sections.
4. Expand Customize > Accounts and click **Page Layout**. Drag and drop the new Mozu fields into the page. You can rearrange the details as needed.



- Expand **Customize > Orders** and click **Page Layout**. Drag and drop the new Mozu fields into the page. You can rearrange the details as needed on the page.

