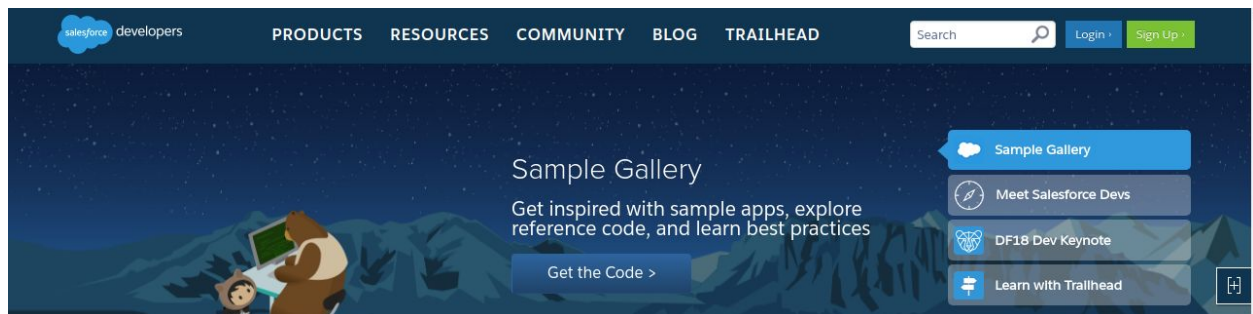


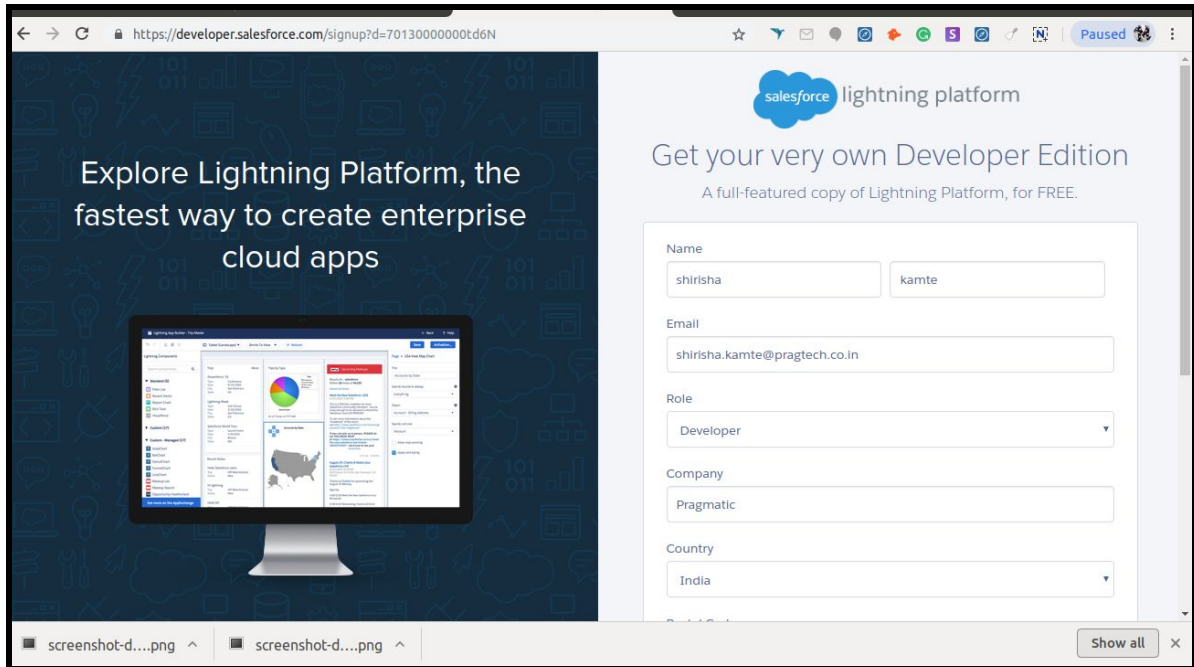
Odoo-SalesForce Online Connector User Manual



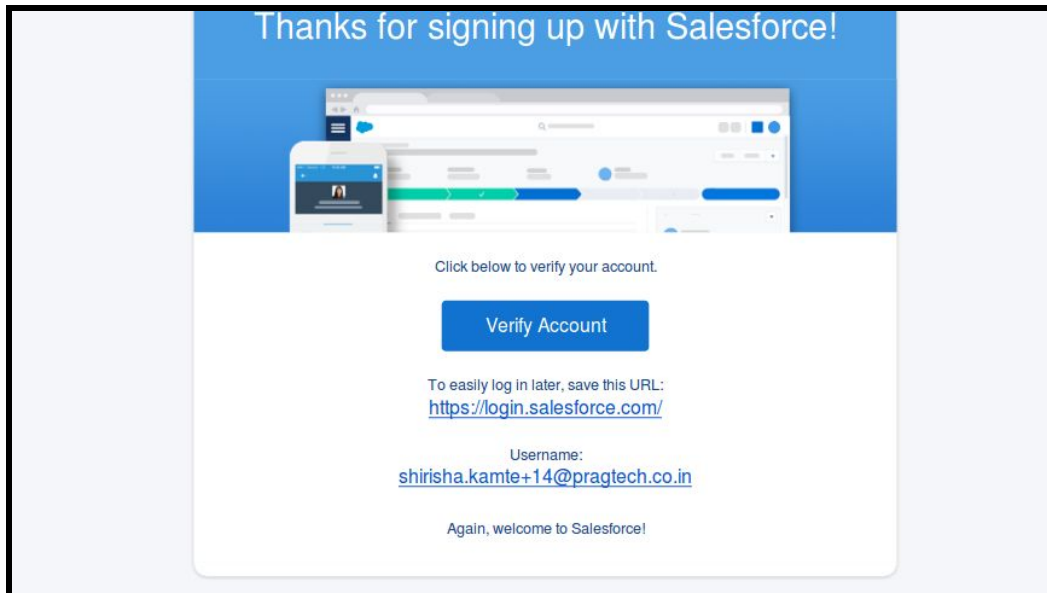
- **Salesforce Interface:-**

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.

A screenshot of the "Change Your Password" form in Salesforce. The title "Change Your Password" is at the top. Below it, the text "Enter a new password for shirisha.kamte+14@pragtech.co.in. Your password must have at least:" is followed by three green checkmarks and their requirements: "8 characters", "1 letter", and "1 number". There are two password input fields: "New Password" and "Confirm New Password". The "New Password" field has a "Good" status indicator, and the "Confirm New Password" field has a "Match" status indicator. Below these is a "Security Question" dropdown menu with the text "In what city were you born?". Below the dropdown is an "Answer" input field with the text "Pune". At the bottom of the form is a blue "Change Password" button.

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains the navigation menu with 'Setup' selected. Under 'PLATFORM TOOLS', 'Apps' is expanded, and 'App Manager' is highlighted. The main content area displays a table of installed apps. At the top right of the main area, there are buttons for 'New Lightning App' and 'New Connected App', with the latter being highlighted by a red box. The table lists 14 items, sorted by App Name, filtered by all appmenuitems - TabSet Type. The table columns are APP NAME, DEVELOPER NAME, DESCRIPTION, LAST MODIFIED, APP TYPE, and VISIBILITY. The table contains 10 rows of data.

	APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
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 automat...	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

The screenshot shows the 'New Connected App' form in the Salesforce Lightning Experience App Manager. The left sidebar is the same as the previous screenshot. The main content area is titled 'New Connected App' and has a 'Help for this Page' link. Below the title are 'Save' and 'Cancel' buttons. The form is divided into sections, with 'Basic Information' being the first. It contains several input fields: 'Connected App Name' (required), 'API Name', 'Contact Email', 'Contact Phone', 'Logo Image URL' (with a link to 'Upload logo image or Choose one of our sample logos'), 'Icon URL' (with a link to 'Choose one of our sample logos'), 'Info URL', and 'Description'. A red vertical bar on the right side of the form indicates required information.

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Full access (full)**
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to custom applications (visualforce)

Add

Remove

Selected OAuth Scopes

-None-

← → ↻ 🏠 🔒 https://ap4.lightning.force.com/lightning/setup/NavigationMe... 🔍 Search

Welcome to Pragmati... 📁 Guides 📁 Do before go 📁 Gmail 📁 Building a Module — ... 📁 Please explain how t...

SETUP
App Manager

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Add

Remove

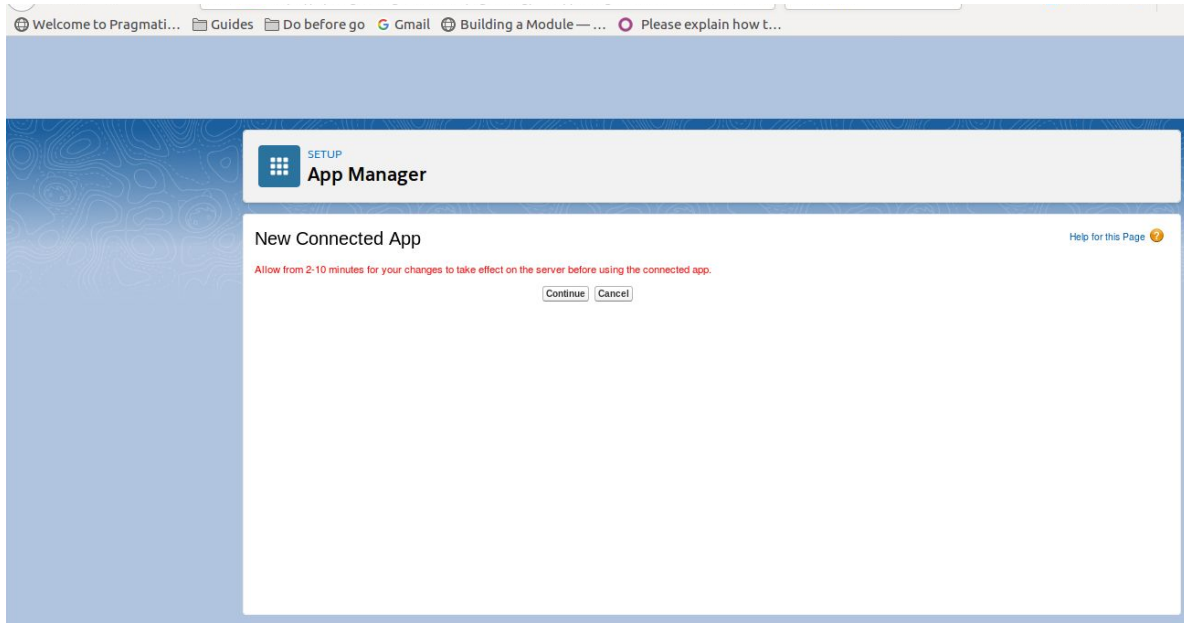
Selected OAuth Scopes

Full access (full)

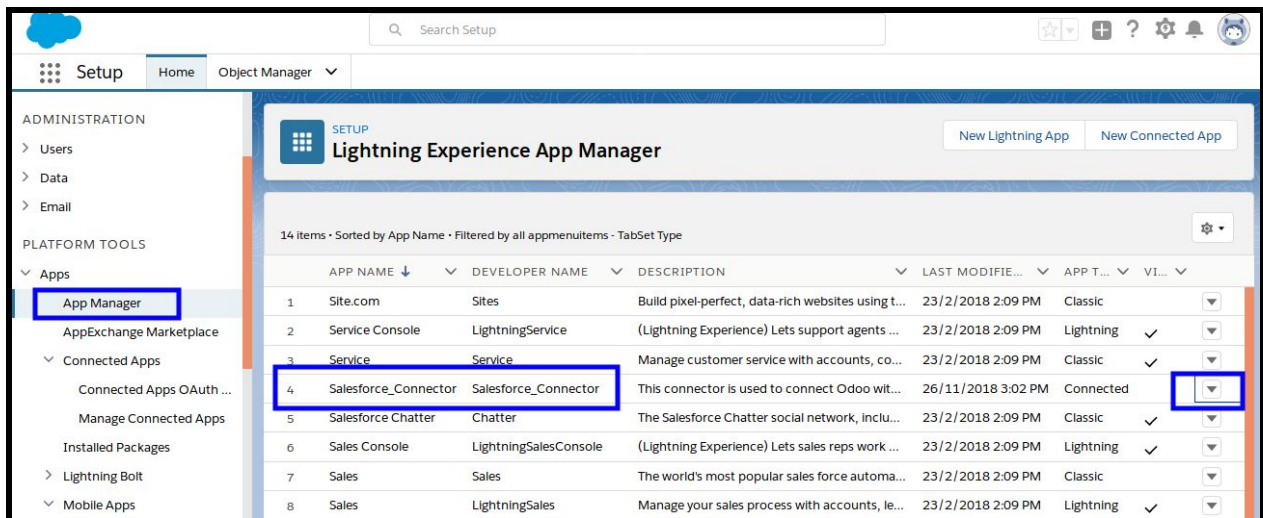
Require Secret for Web Server Flow ☒

Configure ID Token ☐


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 app created and click on view.
 It will enter in the detail view of the created app.



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

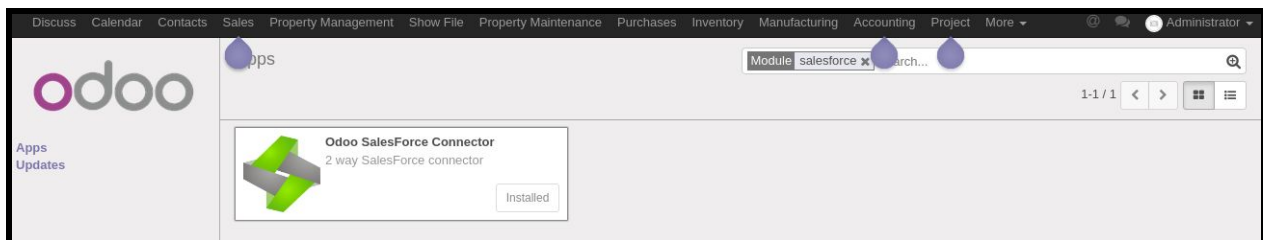
		By: Himesh Haswani Contact Email: himesh.haswani@pragtech.co.in Contact Phone: Last Modified Date: 26/11/2018 3:02 PM By: Himesh Haswani Description: This connector is used to connect Odoo with Salesforce and is used to sync data between two platforms. All the process to sync data is handled at Odoo. Info URL:
▼ API (Enable OAuth Settings)		
Consumer Key 3MVG9d8..z.hDcPLZeuNcyjz69.IYBrITVDQabvHfwZ7gFriHYpmNg7P3MchyfM.kpuo1n4KhZgOg8MKBovGd	Consumer Secret 5602188594401864071	Callback URL http://localhost:8009/get_auth_code
Selected OAuth Scopes Full access (all)		
Enable for Device Flow <input type="checkbox"/>	Require Secret for Web Server Flow <input checked="" type="checkbox"/>	
Token Valid for 0 Hour(s)	Include Custom Attributes <input type="checkbox"/>	
Include Custom Permissions <input type="checkbox"/>		
Enable Single Logout Single Logout disabled		

- **Odoo Interface:-**

Step 5:- Login in Odoo:Admin Account

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

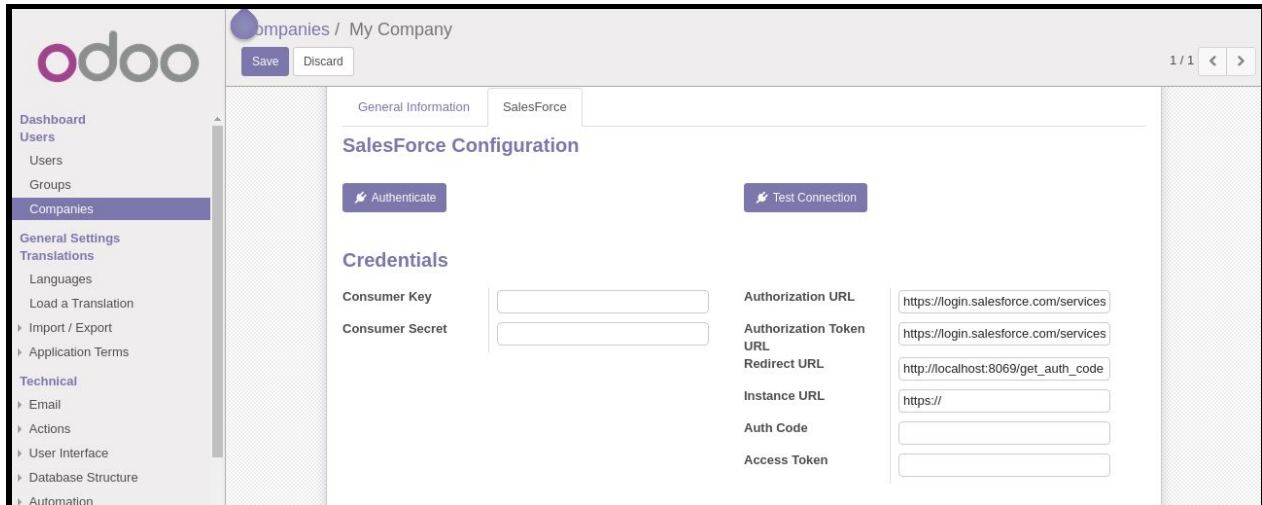
Click to Install Pragmatic Salesforce Connector Odoo App. It is available for odoo version 10.0 and 11.0



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

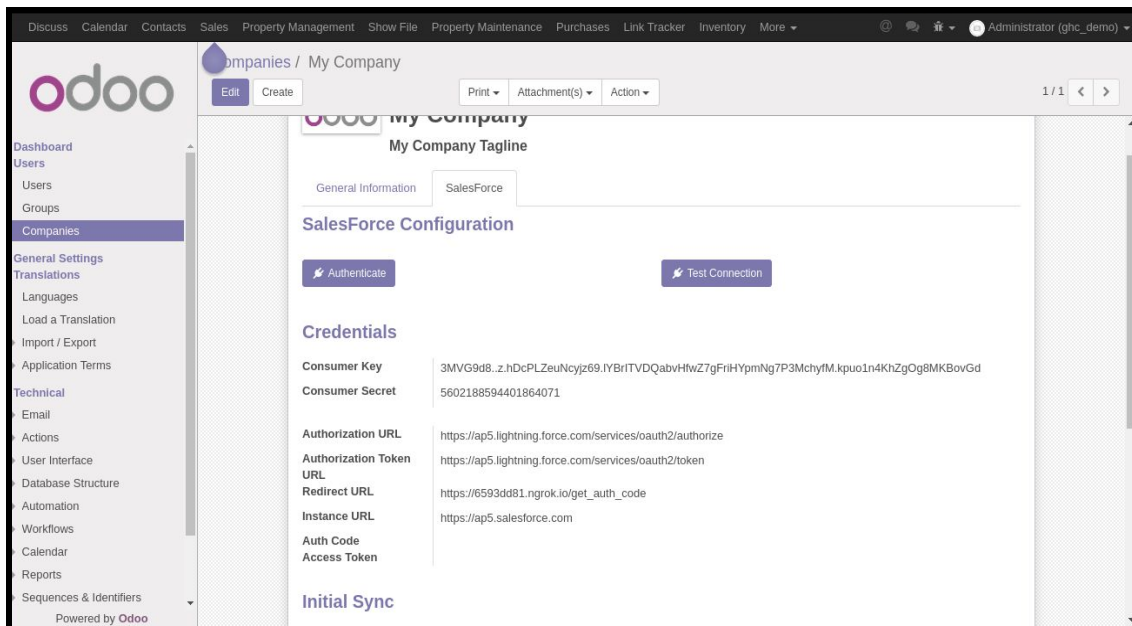
Pragmatic Salesforce Connector is a Odoo App which allows following operations:

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



The screenshot shows the Odoo interface for configuring Salesforce. The left sidebar contains navigation links: Dashboard, Users, Groups, Companies (selected), General Settings, Translations, Languages, Load a Translation, Import / Export, Application Terms, Technical, Email, Actions, User Interface, Database Structure, and Automation. The main content area is titled 'Companies / My Company' and has tabs for 'General Information' and 'SalesForce'. The 'SalesForce Configuration' section includes an 'Authenticate' button and a 'Test Connection' button. Below these are the 'Credentials' fields: Consumer Key, Consumer Secret, Authorization URL, Authorization Token URL, Redirect URL, Instance URL, Auth Code, and Access Token. The form is currently empty, with only the 'Authorization URL' field containing the text 'https://login.salesforce.com/services'.

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

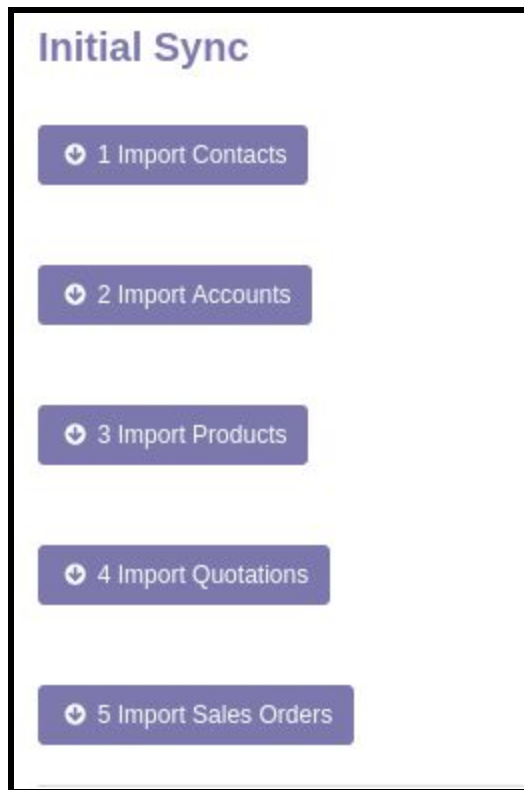


This screenshot shows the same Odoo interface, but the 'SalesForce Configuration' form is now filled with data. The 'Authenticate' button is still present. The 'Credentials' section contains the following values: Consumer Key (3MVG9d8...z.hDcPLZeuNcyz69.IYB1TVDQabvHtwZ7gFriHYpmNg7P3MchyfM.kpuo1n4KhZgOg8MKBovGd), Consumer Secret (5602188594401864071), Authorization URL (https://ap5.lightning.force.com/services/oauth2/authorize), Authorization Token URL (https://ap5.lightning.force.com/services/oauth2/token), Redirect URL (https://6593dd81.ngrok.io/get_auth_code), Instance URL (https://ap5.salesforce.com), Auth Code, and Access Token. Below the credentials section is an 'Initial Sync' button. The top of the interface shows a navigation bar with links like Discuss, Calendar, Contacts, Sales, Property Management, Show File, Property Maintenance, Purchases, Link Tracker, Inventory, and More. The user is logged in as 'Administrator (ghc_demo)'.

If Authentication is successful then below message will come



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



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