ChannelOnline
Salesforce Integration
User Guide

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Document Information

History of Revisions

Revision	Date	By	Description
1.0	1/31/17	Keith Wilson	Initial document version.

Terms and Acronyms

Definitions of terms and acronyms used in this document:

Term or Acronym	Definition
SF	Salesforce
COL	ChannelOnline
CRM	Customer Relationship Management
Opportunity	The main document in Salesforce; equals a quote in ChannelOnline
Account	A SF account directly relates to a COL Customer account type
Lead	Leads are treated as a separate object in SF, but in COL Leads are the beginnings of other account types
Sync Job	Manually run or scheduled import or export job established in the integration setup section of COL

Preface

Salesforce integration is a licensed service available starting in ChannelOnline version 7.3. For pricing information, please reach out to your ChannelOnline sales rep.

Overview

ChannelOnline offers customers the ability to integrate with Salesforce. The Salesforce integration offers synchronization of leads, customer and contact information, quotes and sales orders, products and prices, when applicable from and to ChannelOnline.

The Salesforce (SF) application provides resellers with functionality related to customer relationship management (CRM), marketing, reports, support case ticketing, and business analytics. Many ChannelOnline (COL) customers are looking to leverage the quote, proposal, order, and procurement functionality of COL and the marketing, forecasting, service, and reporting elements of SF. To assist these customers, CNET Content Solutions is working to help our clients get the most out of the two applications. This effort has brought forth some effective ways to synchronize and exchange data between the platforms.

In general, resellers would like to be able to have products on a ChannelOnline quote or sales order be integrated into the Salesforce application as products on an opportunity. To facilitate this, the integration has focused on these key areas of data exchange: sales rep information, end customer company and contact information, products, quotes, and sales orders.

Key Integration Benefits

- Import/Export Customers and Contacts between Salesforce and ChannelOnline
- Export products on Quotes and Sales Orders from ChannelOnline into Salesforce opportunities to get totals and main details into SF
- Ability to schedule imports/exports and/or run them manually on an as-needed basis

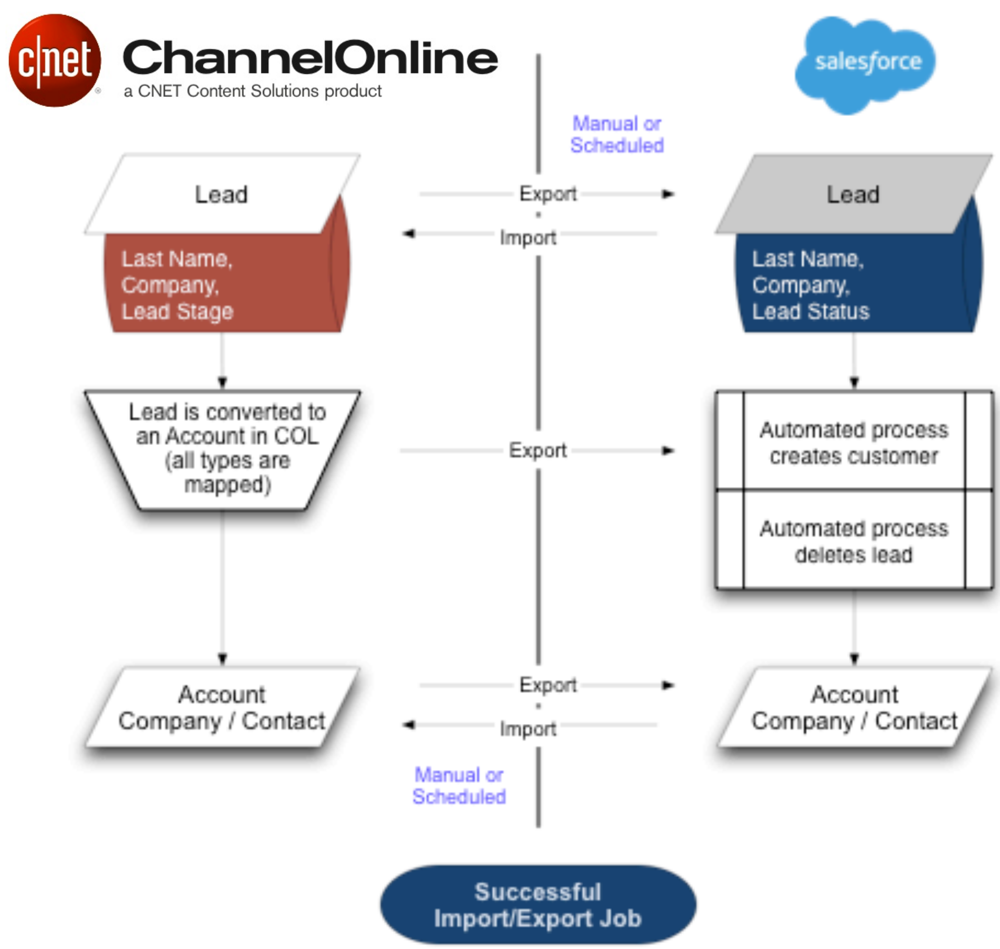
Requirements

- Salesforce integration service in ChannelOnline enabled
- Salesforce online service (Admin) access

- Salesforce user Consumer Key and Secret
- Salesforce user credentials with full rights to assign to ChannelOnline's integration

All activity points of this integration are controlled from ChannelOnline, there are no custom objects to be installed into Salesforce.

Integration Design

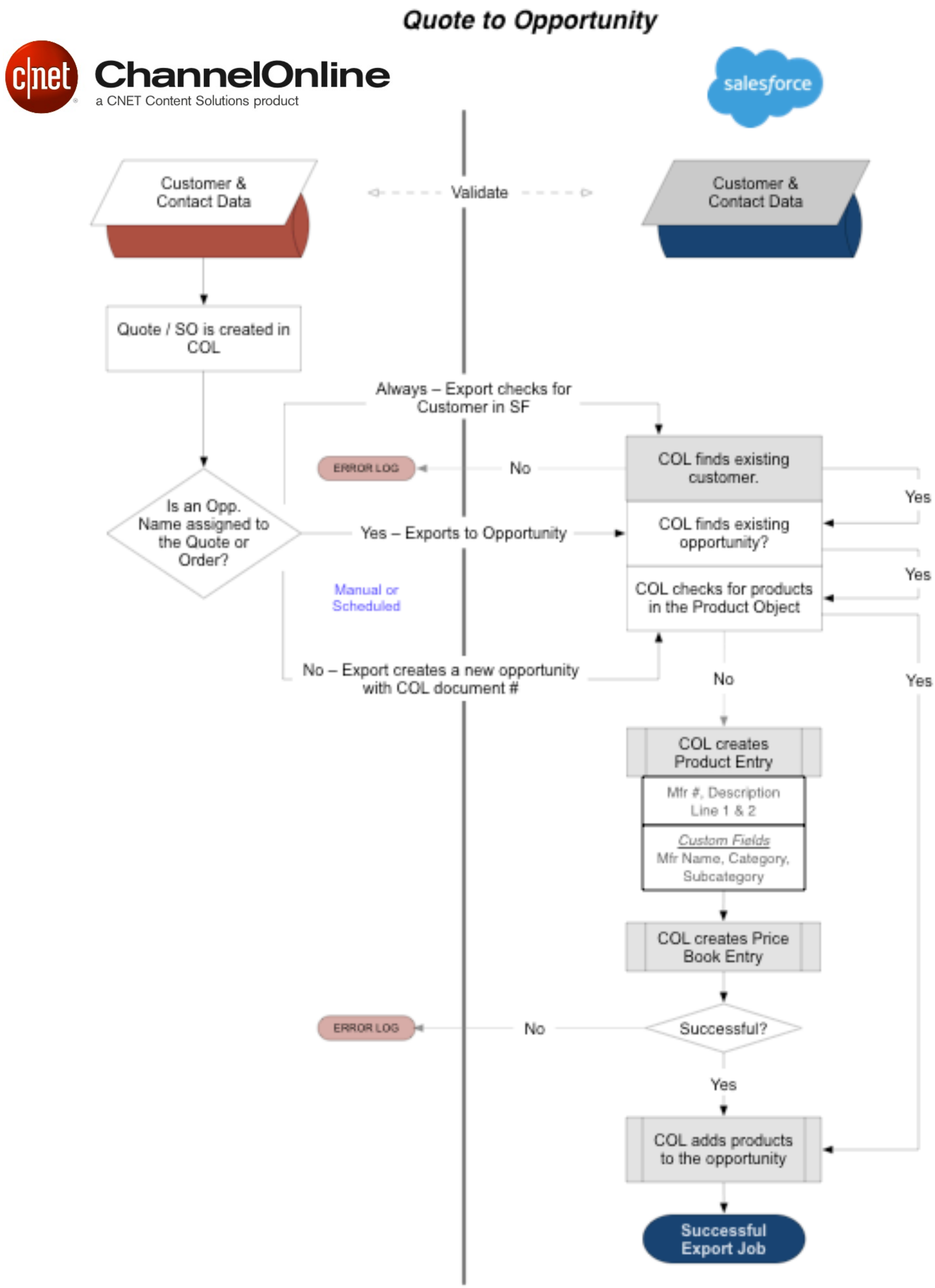


Accounts & Contacts

Account, company, and contact information differs between the two applications. We anticipate the need for the bi-directional exchange of data between the two. We have designed it for the addition and update of all contacts to take place during an account update or mapping synchronization transaction. Quotes and Sales Orders will NOT transfer if the account has not already been synchronized between the applications. This exchange needs to be facilitated in the following ways:

1) Synced between COL from SF via a scheduled sync job
2) Synced between COL by calling an Account Name manually from an import SF account link in the Accounts Tab in Admin
3) Mapped manually in the integration section of the SF Integration section of COL Admin

NOTE: In order to sync companies and contacts between these two applications, customers are required to have a COL SalesRep and SF User associated with both the company and the contact.


Quote to Opportunity
ChannelOnline
a CNET Content Solutions product
salesforce
Customer & Contact Data
Validate
Customer & Contact Data
Quote / SO is created in COL
Always – Export checks for Customer in SF
ERROR LOG
No
COL finds existing customer.
Yes
Is an Opp. Name assigned to the Quote or Order?
Yes – Exports to Opportunity
COL finds existing opportunity?
Yes
COL checks for products in the Product Object
Manual or Scheduled
No – Export creates a new opportunity with COL document #
No
Yes
COL creates Product Entry
Mfr #, Description Line 1 & 2
Custom Fields
Mfr Name, Category, Subcategory
COL creates Price Book Entry
ERROR LOG
No
Successful?
Yes
COL adds products to the opportunity
Successful Export Job

Products, Manufacturers, and Categorization

Products and Manufacturers are migrated from COL to SF for Opportunity creation from a Quote or Sales Order. For this integration, COL is used as the master for all product information and any standardized service or labor SKUs. For ease of use, COL creates the product entry in the standard price book in SF when it sends over items from a quote or order document. To perform that creation, we also have pre-established custom fields in SF for Category, Subcategory, and Manufacturer Name. Without these fields, all products would not be categorized and would be more difficult to search for in SF. The exchange of data and any associated attributes are controlled by ChannelOnline. The following activities can be performed:

- Export product SKU from COL to SF when associated with a Quote or Sales Order document in COL
- Back-end process that creates product manufacturers, categories, and subcategories in SF from COL
- Back-end process to add items into the SF default price book

NOTE: Products in SF do not get mapped into ChannelOnline. COL is viewed for this integration as the master for all products, services, and labor items.

Quotes, Sales Orders, and Opportunities

The capability to send quotes and sales orders into SF is a primary focus of the integration and provides resellers with a large benefit of connecting the two applications. Unlike in COL however, in SF all quotes and sales order documents are tied to an Opportunity entity. As a quote, it is in one of the various SF open opportunity stages, but when it is converted into a sales order and synced to SF, the opportunity becomes Closed Won. This integration allows the user to query for an existing opportunity in order to make an addition or modification to the quote or sales order associated with it. Additionally, it is possible to create new opportunities by using only the COL document number. Once the opportunity and the COL document are linked, updates for defined fields can be sent down from COL or received from SF.

- Opportunity names can be queried, selected, and attached to a quote or sales order in COL.
- New opportunities will be created in SF by COL when no existing opportunity is attached in COL via the query.

- If an Opportunity already exists in SF, the COL quote information will be added to it in SF.
- If a synced quote tied to an existing opportunity in SF is updated in COL, it will also be updated in SF.

NOTES

- Be sure to connect the appropriate opportunity for the customer, matching both the document in ChannelOnline and the Opportunity in Salesforce.
- Only a single quote can be associated with an opportunity in SF. It is a one-to-one relationship.

Employees (Sales Reps)

For the successful export of quotes and sales orders, employees from Salesforce must be directly associated with SalesRep users in ChannelOnline. This is a one-to-one connection.

Integration Setup

In Salesforce

Resellers must perform the following setup steps in Salesforce in order to exchange data:

1. Enable the correct employee for use with the integration setup.
2. Set the user's permissions to access Admin / App settings. (If needed, go to Administer > Manage Users > Users, click Edit for the correct employee and set their profile to System Administrator.)
3. Navigate to Setup Home > Apps (under Platform Tools) > Apps Manager and click on the New Connected App button (top right of page). Users in classic view can refer here for navigation, http://help.screensteps.com/m/Salesforce/l/149550-create-a-connected-app-for-screensteps-in-Salesforce.
4. On the setup page, enter:
   - App Name: ChannelOnline
   - API Name: ChannelOnline
   - Contact Email: [SF Administrative User]
   - Enable OAuth Settings checkbox selected
   - Callback URL: https://usm.channelonline.com/

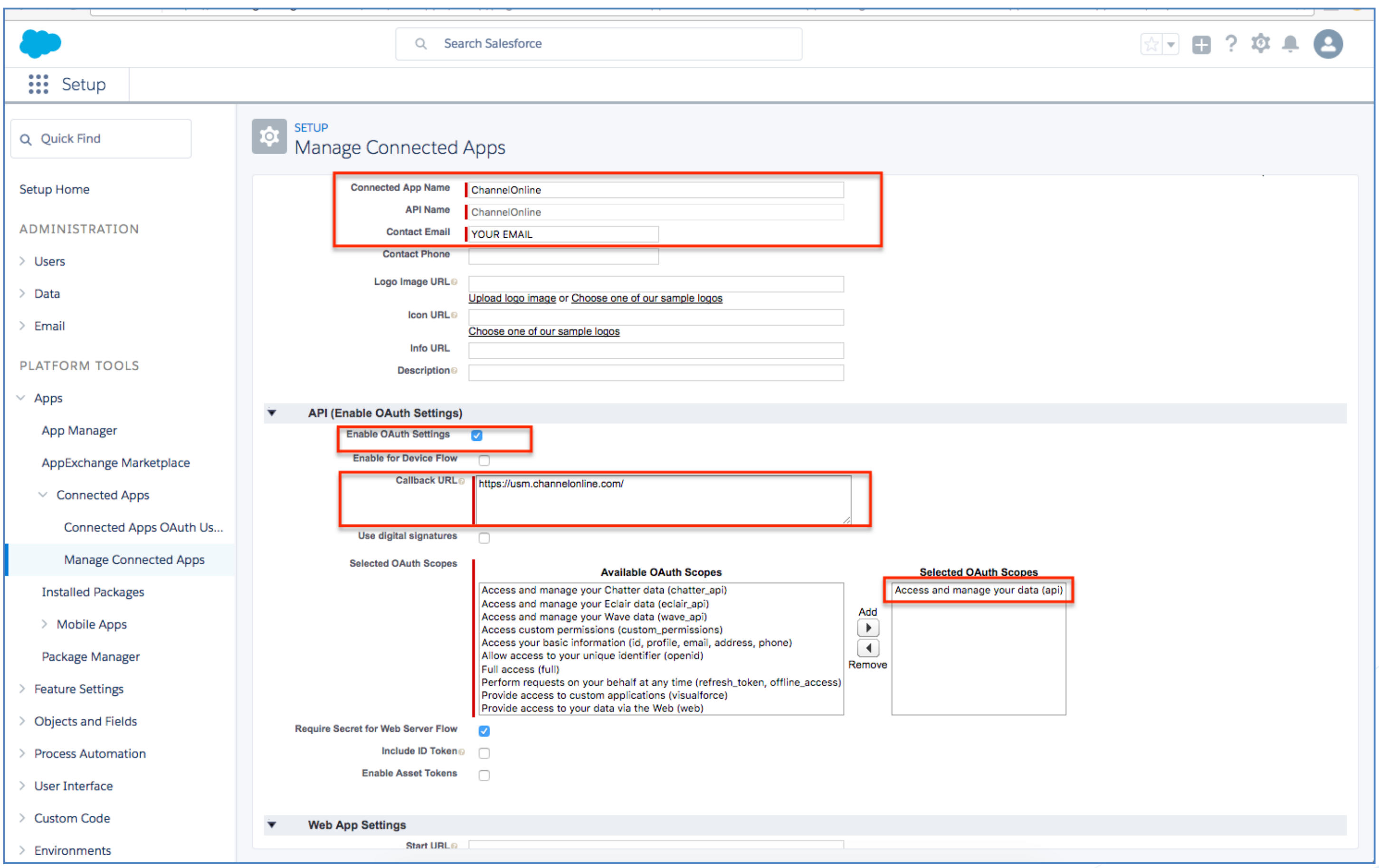
- Select from the available options box “Access and Manage your data (API)” and add to the Selected OAuth Scopes box.
- Make sure that “Require Secret for Web Server Flow” is selected.
- Click Save. (This could take up to 10 minutes to become available)

5. From Connected App View page:
   - Capture the Consumer Key and the Consumer Secret (to get secret click on Reveal).

   Consumer Key Example:
   3MVG9xOCXq4ID1uFiV1slHEkeK1i0pVDnEu7OLfQHaLSLjuw2aCEhcK.daFi8BZzMLGbphoupJEdIBGicyEe1

   Consumer Secret Example:
   9071260687183452725

Image A: Manage Connected Apps



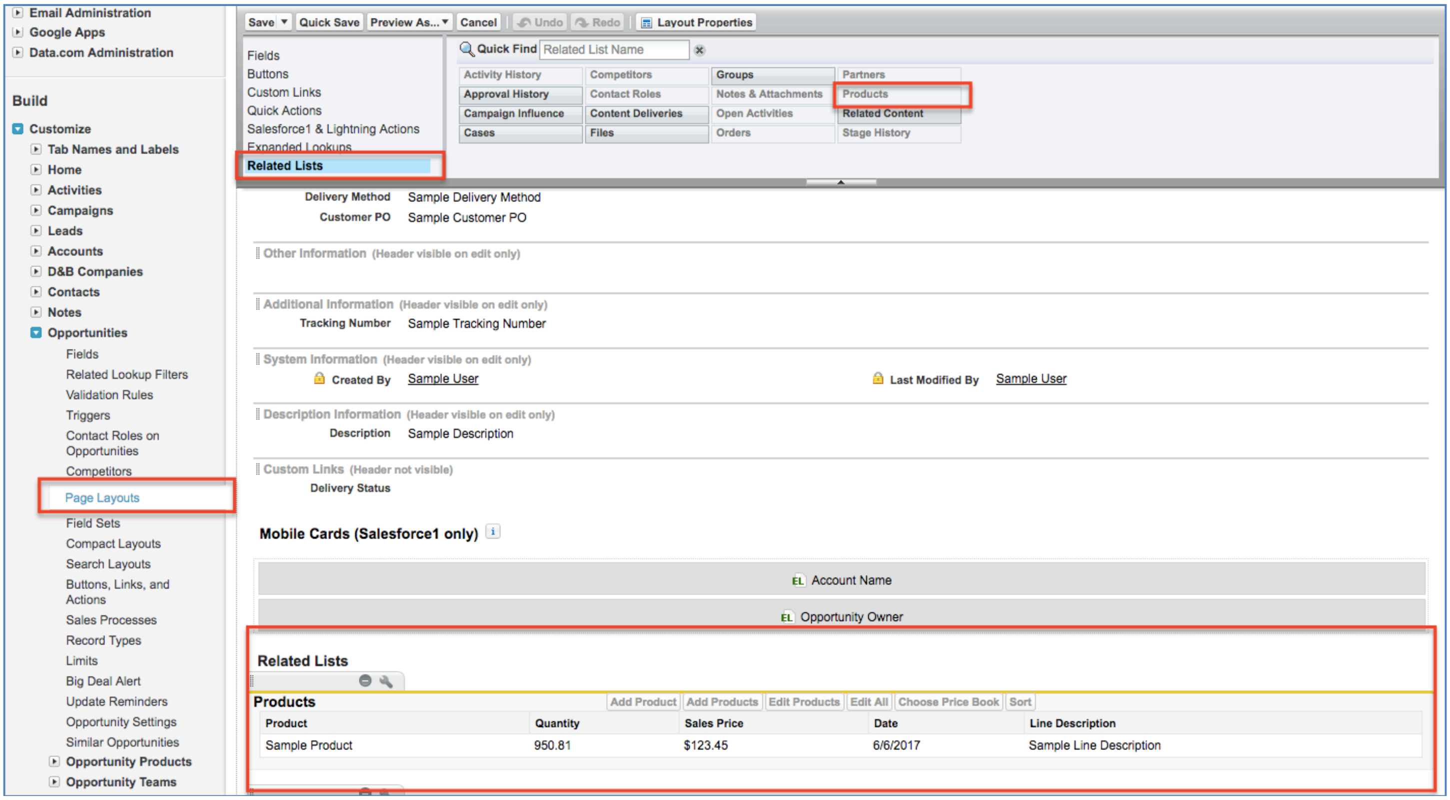
Requirements

Certain settings must be in place on the Salesforce side in order to enable transactions to occur. The Salesforce administrator needs to check on the following settings.

- Security Visibility Settings: All fields listed in the Integration mapping pages need to be made visible in order for them to be populated. A few key fields are listed here.
    - Account fields: Type, Site, and Number
    - Opportunity: Type
- Standard Price Book must be activated.
- Opportunity Layout needs to include the Product label from the Related Lists section. To activate, go to Setup -> Build -> Customize -> Opportunities -> Page Layouts -> Edit Opportunity Layout
  The page looks like (*Image B: Edit Opportunity Layout)*.

  On the top box, click Related Lists -> you should see Products. Just drag it and drop it under related list, and save the layout.

Image B: Edit Opportunity Layout



- Relax IP restrictions:
  - On Classic View:

    Go to Setup -> Apps -> Manage Apps -> Connected Apps -> edit ChannelOnline -> to make changes to IP restrictions

  - On Lightning View:

    Go to Setup -> Apps -> App Manager -> Click Manage for the ChannelOnline App -> edit policies to edit IP restrictions

  - If IP restrictions is “Relax IP restrictions”, no changes are needed;

    If IP restrictions is “Enforce IP restrictions”, ChannelOnline IPs need to be added to your trusted IP addresses

- On Classic and Lightning view

  Go to Setup -> search for Network Access -> Add trusted IP ranges and enter the following IP ranges:

  Start IP Address 216.239.0.0

  End IP Address 216.239.255.255

Image C: Trusted IP Range

Connection Troubleshooting

Sometimes admin users will need to reset their security token in order to make the connection to COL successful.

In Lightning: At the top navigation bar, go to your name > My Settings > Personal Setup > My Personal Information > Reset My Security Token.

In Classic: Go to My Settings -> Personal -> Reset My Security Token (SF will send an email)

This is how you use it. If your password is mypassword, and your security token is XXXXXXXXXX, then you must enter mypasswordXXXXXXXXXX to log in (in ChannelOnline, update password with security token appended).

In ChannelOnline

Resellers must perform the following setup steps in ChannelOnline in order to exchange data:

1. Complete the Connection settings in the Connection section under Integration > Salesforce > Settings. Select edit (on right side of title), and do the following on the edit connection page:

    a. Enter complete Integration Login ID (must be a SF user with Admin access)
    b. Enter complete Integration Password (associated with Admin user)
    c. Consumer Key (from Salesforce)
    d. Consumer Secret (from Salesforce)

    Click Save after all the fields are completed.

    Back on the Settings tab, you can click the Test Connection button to make sure that you can connect to Salesforce.

2. Make selections in the Settings section of the Settings page. In most cases, ChannelOnline will try to establish links with known defaults. However, your company may be using custom fields, which may also be available to be mapped. The following must be in place to begin sending data.
    a. SalesRep / User Mapping: Select “Map SalesReps within ChannelOnline to Salesforce Users”. Then assign the correct Salesforce employee using the dropdown selection to the right of the corresponding SalesRep in ChannelOnline.
    b. Account Type Mapping: Assign the default mappings for account types in ChannelOnline to those used in Salesforce by using the dropdown selection to the right of the corresponding type from COL.
    c. Opportunity Stage Mapping: Assign the default mappings for Quote stages in ChannelOnline to those used on the SF Opportunity by using the dropdown selection to the right of the corresponding stage from COL.
3. Preferences
    The names for these fields have been set to make it easy to recognize and support; users need only to activate them. If they get accidently deleted from the Company Settings > Global Custom Fields section, an administrator can reestablish them here.
    a. Custom Field to store Opportunity ID from Salesforce: Click the button to add the document level global custom field that will be automatically generated and placed in the custom fields header section on all quote and sales order documents.

b. Custom Field name for Close Date on Quotes: Click the button to add the document level global custom field to be used on all quote and sales order documents (in the header section) that will be synchronized with the Opportunity Close Date in SF.

4. ChannelOnline Support (not in the interface) must activate the Export to Salesforce button on the back end for it to appear in the interface. This button is used to export document information into an Opportunity in SF.

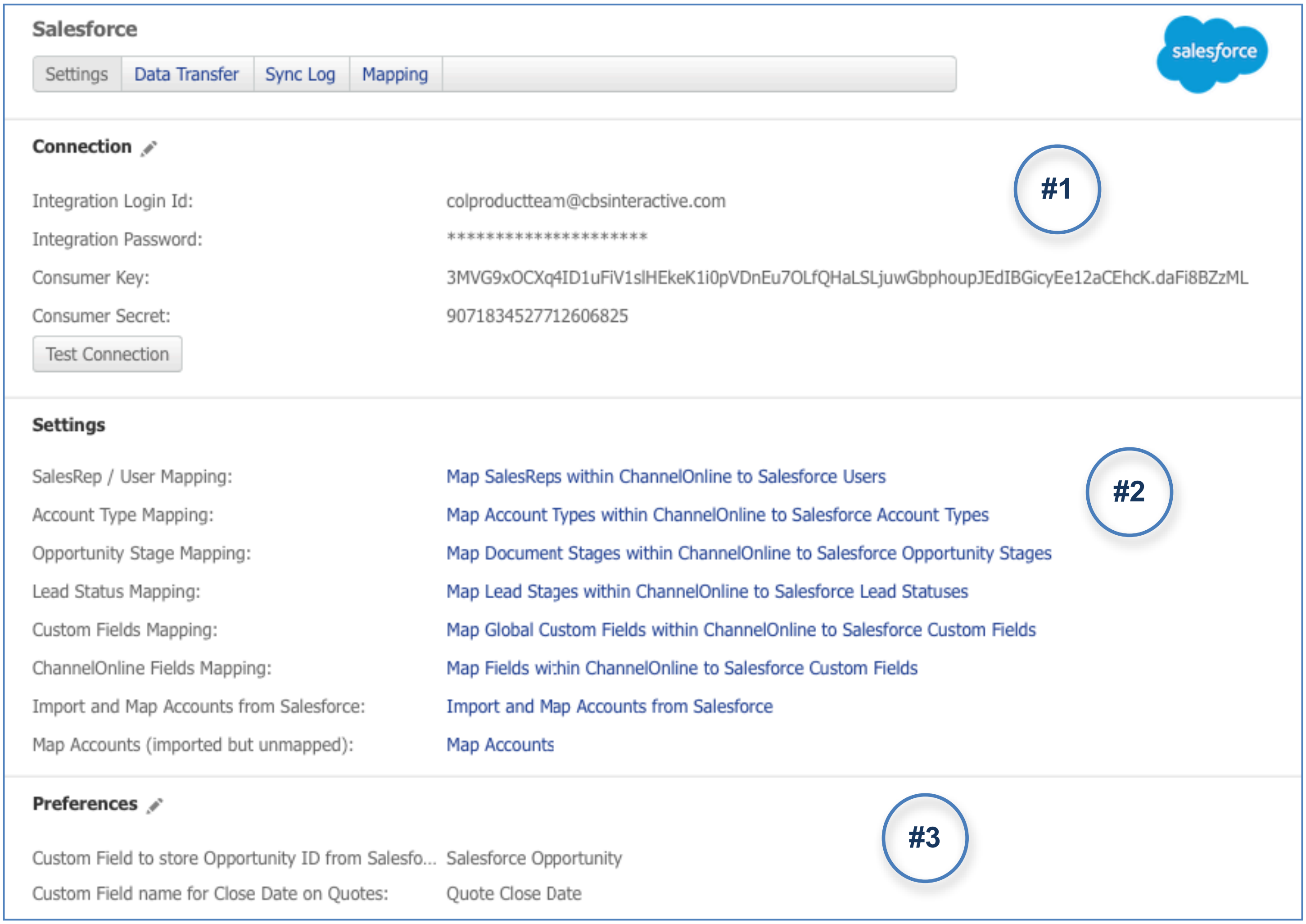
Functionality Overview

Within the administration portion of COL, in the “Integrations” section, users are able to set up and review information about the connection between the two applications. When Salesforce is activated, there will be a link present on the Integrations Page to take users to the Salesforce integration pages. All activity points of this integration are controlled from ChannelOnline. There are no custom objects to be installed into Salesforce.

Integration Settings

Details for communicating with Salesforce via their open API are captured on the Settings Page (*Image 1:: Settings Page*) through its various setup functionality.

Image 1: Settings Page



Connection Section (Image 1: Item #1)

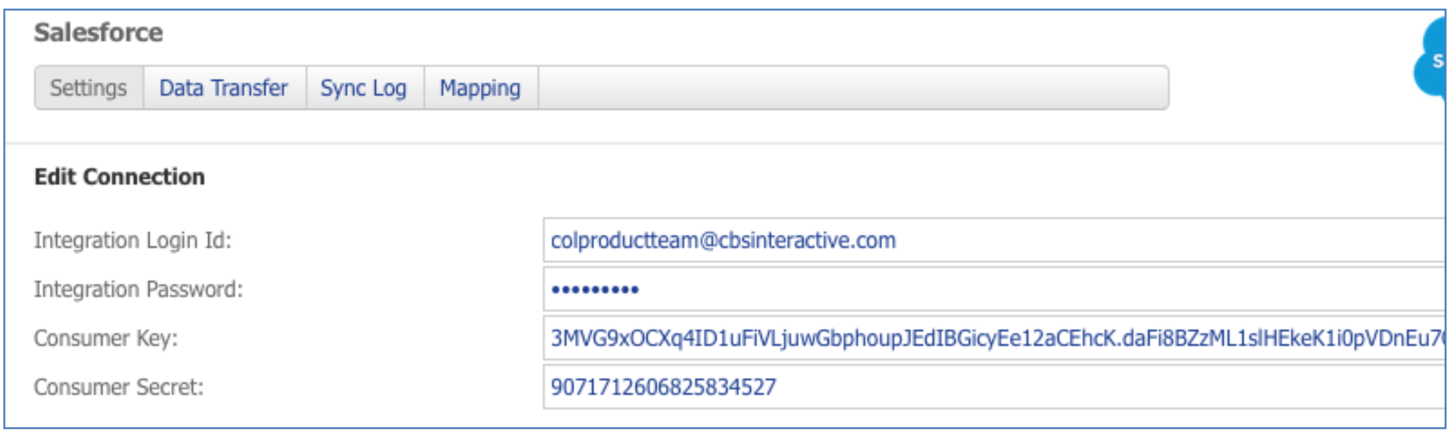
To get the integration up and running, four key pieces of information from Salesforce must be entered into ChannelOnline. Connection Edit Options (*Image 2: Edit Connection Information*):

1. Integration Login ID & Password – Provide a login ID and password for a user that has full administration rights in Salesforce to be used for the Integration Login ID and Password. These credentials are used by ChannelOnline to connect to the Salesforce service and transmit data to your hosted Salesforce account.

2. Consumer Key – Provided by Salesforce in the Apps Managers section and is a unique key provided for the connection with an outside application. To locate this key in SF, see the Integration Setup section above.
3. Consumer Secret – Provided by Salesforce in the Apps Managers section and is a unique string that must be provided with the key for the connection with an outside application. To locate the secret in SF, see the Integration Setup section above.

NOTE: Export and Import connections can be initiated from within the Integration Data Transfer page through manual or scheduled jobs, or on the fly on a document or customer edit page. All jobs will terminate after the jobs are completed, and statuses will appear on the Sync Log Page.

Image 2: Edit Connection Information



Settings Section (Image 1: Item #2)

This section contains all the settings required to make transactions run smoothly between the applications. The links contained here enable the mapping of Salesforce employees to ChannelOnline SalesReps and several account, lead, document, and product details. In most cases, the system will try to establish links with known defaults. However, your company may be using custom fields. These custom fields may also be available to be mapped. All mapping is one-to-one; no one-to-many relationship mapping can be done in this process.

1. SalesRep / User Mapping: Select “Map SalesReps within ChannelOnline to Salesforce Users”. Then assign the correct Salesforce employee by using the dropdown selection to the right of the corresponding SalesRep in ChannelOnline. To map, select the Salesforce employee from the search dropdown queried from SF that matches up with employee in COL, then save the page (*Image 3: SalesRep / User Mapping*).
2. Account Type Mapping: Assign the default mappings for account types in ChannelOnline to those used in Salesforce by using the dropdown selection to the right of the corresponding account type from COL. To map, select the Salesforce account type from the search dropdown queried from SF (includes custom fields) that matches up with the desired one in COL, then save the page.
3. Opportunity Stage Mapping: Assign the default mappings for Quote stages in ChannelOnline to those used on the Salesforce Opportunity by using the dropdown selection to the right of the corresponding stage from COL. To map, select the Salesforce account type from the search dropdown queried from SF (includes custom fields) that matches up with the desired one in COL. Save the page.
   NOTE: Quotes converted in ChannelOnline to sales orders will update the Opportunity in Salesforce to Closed Won upon syncing (export).
4. Lead Status Mapping: Assign the default mappings for Lead stages in ChannelOnline to those used as statuses on a Salesforce Lead by using the dropdown selection to the right of the corresponding stage from COL. To map, select the Salesforce stage from the search dropdown queried from SF (includes custom fields) that matches up with the desired one in COL. Save the page.
5. Custom Fields Mapping: This section will query Salesforce for custom fields pertaining to the Account and Opportunity objects and allow you to map them to either account and/or document header global custom fields in ChannelOnline. To map, select the Salesforce custom field from the search dropdown queried from SF that matches up with the desired one in COL. Save the page.

6. ChannelOnline Fields Mapping: This section contains a list of fields that we have identified in COL from accounts and documents that are NOT global custom fields but may map to your Salesforce custom fields. ChannelOnline will use its internal product types, category, and subcategory names for ALL products. (*Image 4: ChannelOnline Fields Mapping*).
7. Import and Map Accounts from Salesforce: Selecting this link will prompt ChannelOnline to query a list of customer accounts that are in Salesforce that have not yet been mapped to customers in ChannelOnline. To map, begin typing the corresponding name to the right of the Salesforce account record listed on the left. As you type, COL will prompt you with account suggestions to help you narrow your search. Once the account name you are looking for appears, select it and it will be placed in the field. Do this for as many unmapped accounts as needed, and then Save the selections.
8. Map Accounts (imported but unmapped): Selecting this link will not query a list of customer accounts that are in Salesforce but will display a list of previously queried accounts that have not yet been mapped to customers in ChannelOnline.

Image 3: SalesRep / User Mapping

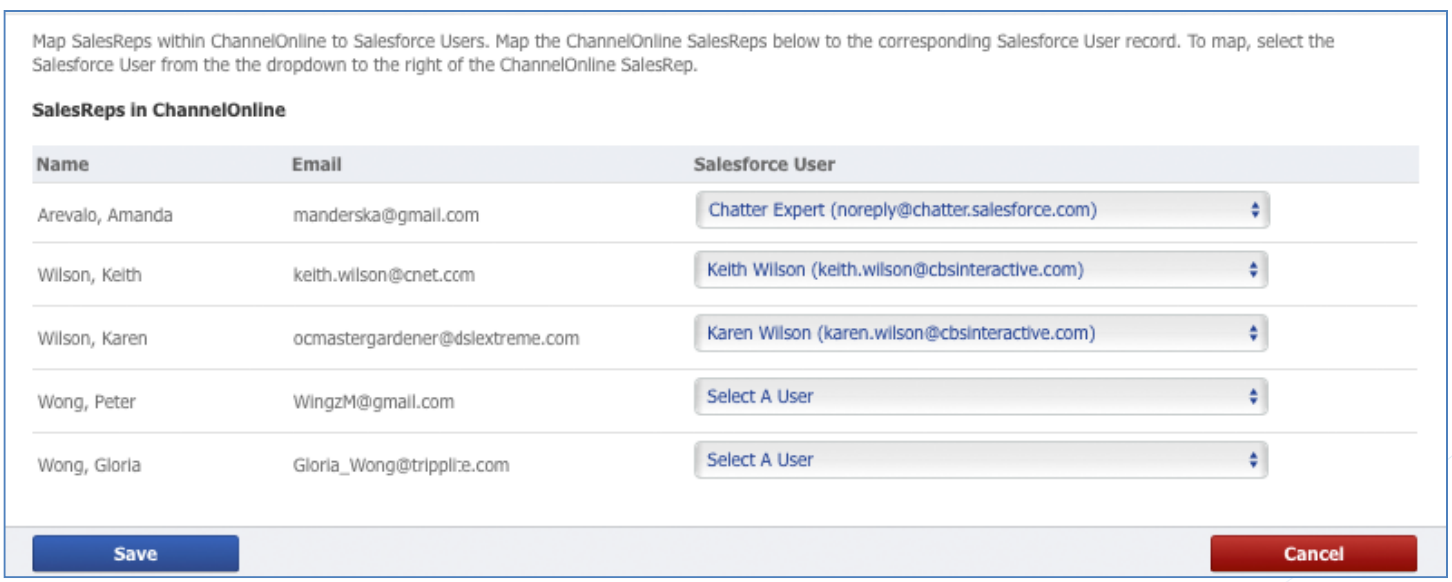
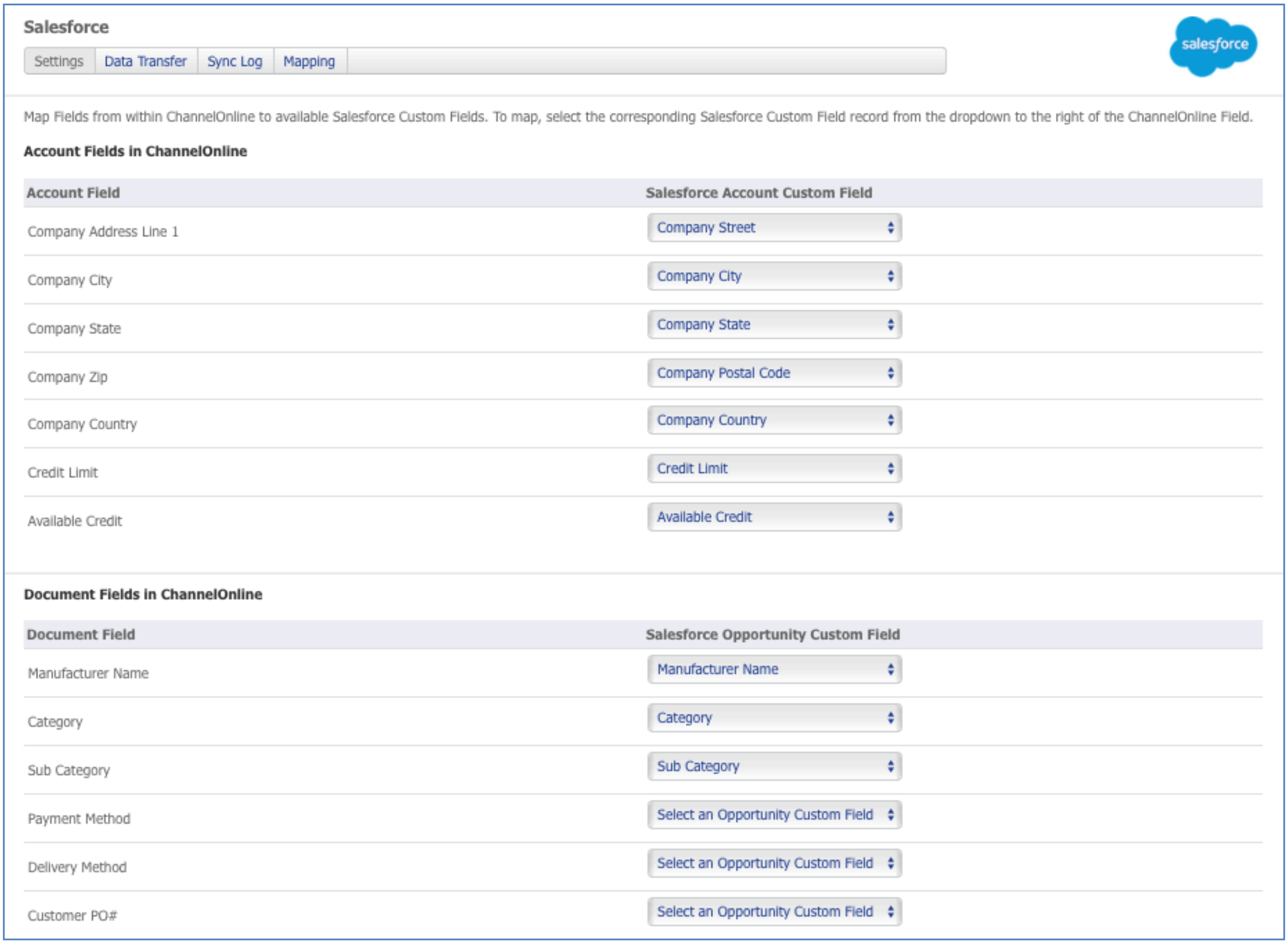


Image 4: ChannelOnline Fields Mapping



Salesforce

Settings | Data Transfer | Sync Log | Mapping

Map Fields from within ChannelOnline to available Salesforce Custom Fields. To map, select the corresponding Salesforce Custom Field record from the dropdown to the right of the ChannelOnline Field.

Account Fields in ChannelOnline

Account Field	Salesforce Account Custom Field
Company Address Line 1	Company Street
Company City	Company City
Company State	Company State
Company Zip	Company Postal Code
Company Country	Company Country
Credit Limit	Credit Limit
Available Credit	Available Credit

Document Fields in ChannelOnline

Document Field	Salesforce Opportunity Custom Field
Manufacturer Name	Manufacturer Name
Category	Category
Sub Category	Sub Category
Payment Method	Select an Opportunity Custom Field
Delivery Method	Select an Opportunity Custom Field
Customer PO#	Select an Opportunity Custom Field

Preferences Section (Image 1: Item #3)

These few setting are needed to make sure that required information can be passed from a Quote to Opportunity while working within the document on ChannelOnline.

1. Custom Field to store Opportunity ID from Salesforce - Click the button to add the document level global custom field that will be automatically generated and placed in the custom fields header section

on all quote and sales order documents. Select this option if you want to export quotes and orders into opportunities that already exist in SF.

2. Custom Field name for Close Date on Quotes – Click the button to add the document level global custom field to be used on all quote and sales order documents (in the header section) that will be synchronized with the Opportunity Close Date in SF. Closed Date is a required field in SF and needs to be completed in order to sync a quote to an opportunity. ChannelOnline sales orders will use the ordered date as Opportunity Close Date in SF.

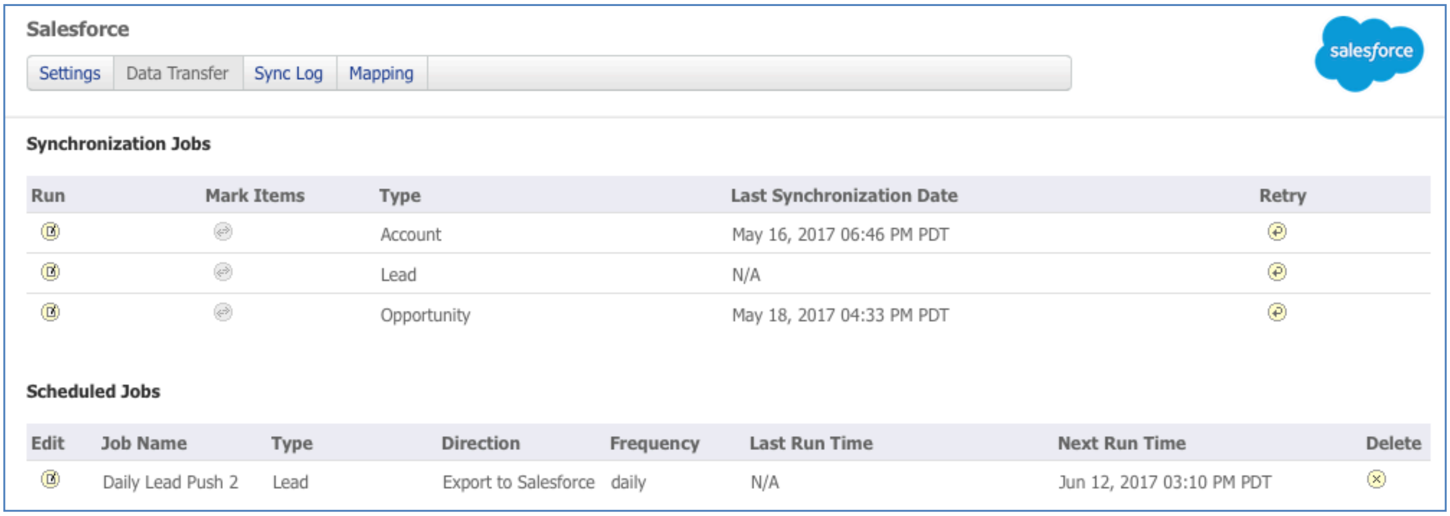
Data Transfer Settings

The transfer of multiple documents at one time can be run manually or at scheduled intervals. The Data Transfer section contains three transactions that can be manually run or scheduled: Account, Lead, or Opportunity (Quote or Sales Order) *(Image 5: Data Transfer Page)*. Customer data transfer can be selected to flow from ChannelOnline to Salesforce, or from Salesforce to ChannelOnline. Quotes and Orders can only flow from ChannelOnline to Salesforce.

Types of updates:

- Account /contact info = Account
- Leads = Lead
- Quotes/Orders = Opportunities

Image 5: Data Transfer Page



From the Run page of a specific transfer type *(see Image 6: Run Opportunity Job Page)*, date and time ranges can be set, or the job can be scheduled to run at regular intervals. The job history can be found on the Sync Log page. Setting options include:

<u>Manual Jobs</u>

- Direction: master source for data
- By ID (document, lead or account number)
- Period defined by:
  - Document status: Report Date, Created Date, Last Modified Date, or Follow-up Date.
  - Period:
    - Today
    - Last 7 days, Last 30 days, Last 60 days, Last 90 days
    - This Week, This Month, This Quarter, This Year
    - Last Week, Last Month, Last Quarter, Last Year
    - Custom

<u>Scheduled Jobs</u>

- Job Name
- Start time (12:00 AM = default)
- Frequency: Daily, Weekly or Monthly

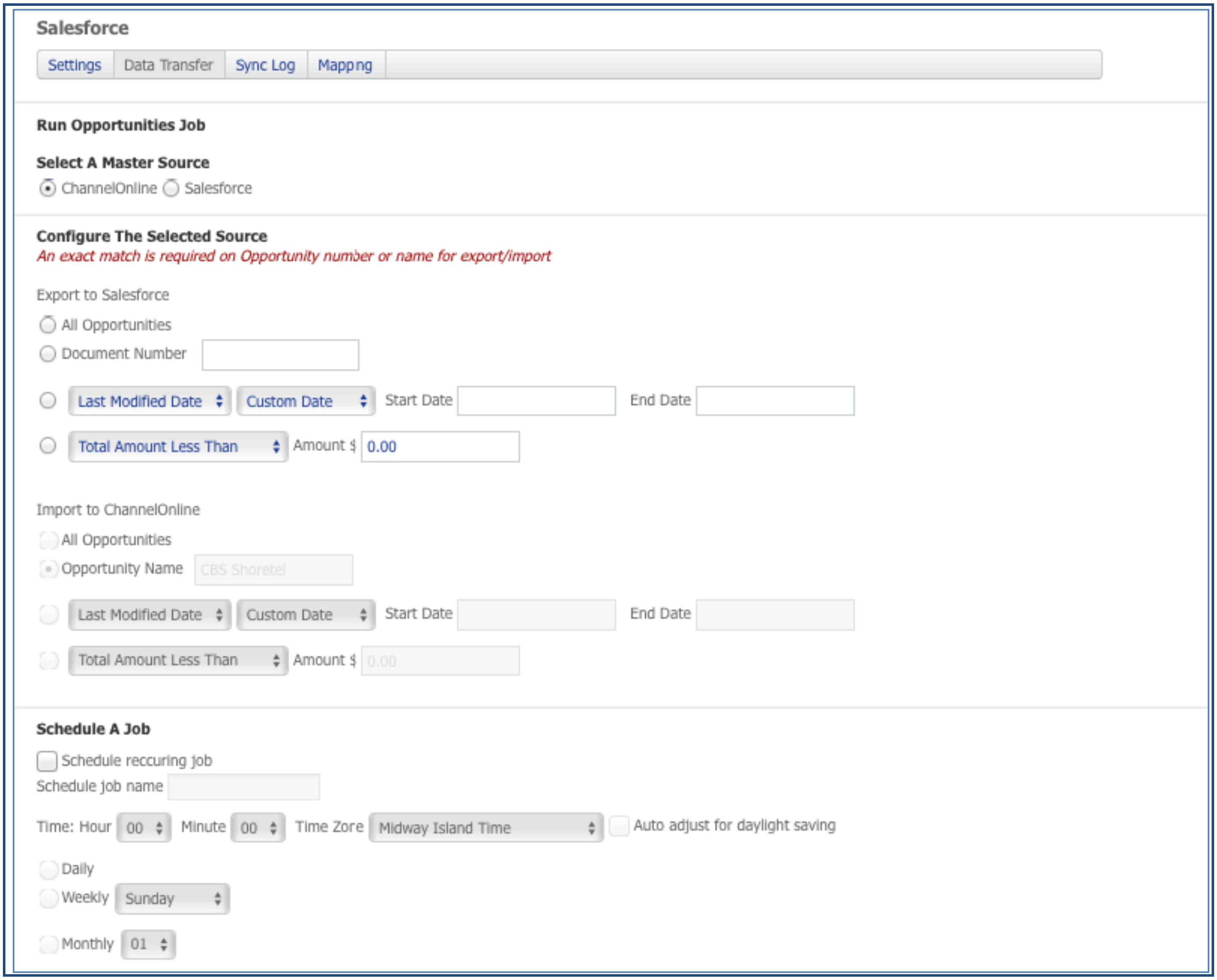
Jobs are logged for historical reporting. Logs show job statuses and any errors that may have occurred (see Sync Logs section).

JOB SYNC PROCESS

This integration uses the Open API available by Salesforce and thereby relies on a user to initiate all synchronizations from within ChannelOnline.

1. Log in to COL
2. Navigate to Admin > Integration > Salesforce > Data Transfer page
    a. Select job you want to run, and select the Run icon
    b. Select which direction to sync (to or from COL)
    c. Select time period for the sync
    d. Schedule job for a day and time (optional)
    e. Click “Run” button to initiate the job

Image 6: Run Opportunity Job Page



Complete Reset Link

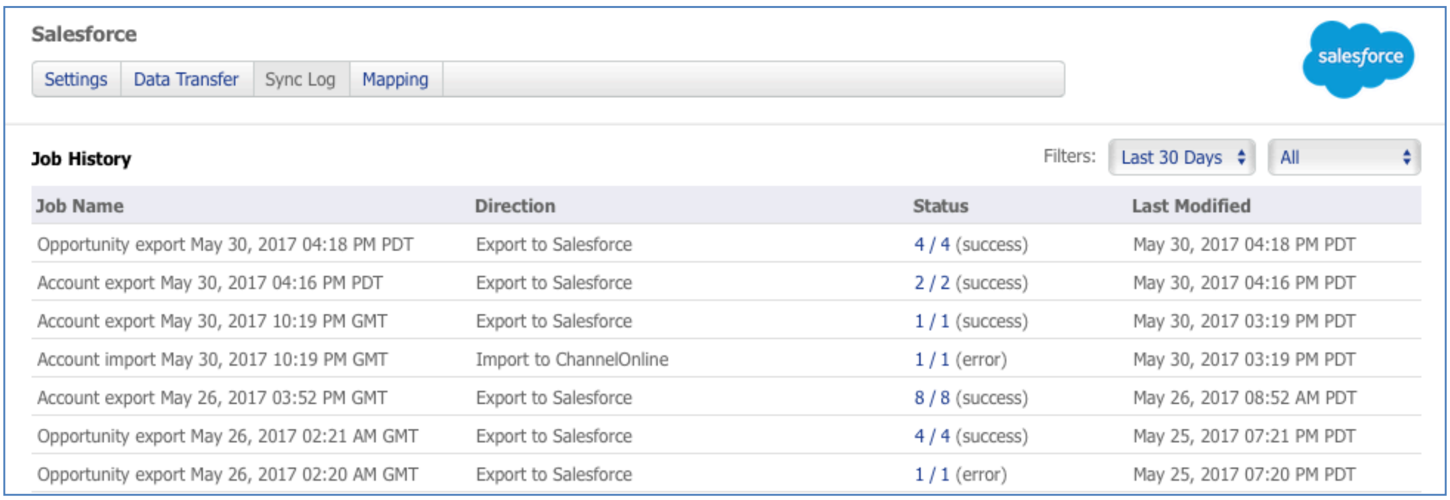
The reset link allows you to reset ALL of your Salesforce connector history and settings within ChannelOnline. This removes any known links between customer, contact, quote, and sales order information. After performing this action, you will be required to repeat the entire setup process.

Sync Logs

The Sync Logs section shows you the history of all the data transactions you have performed for a specified time period. The history defaults to a period of the last seven days but can be set to show the last 30 or 90 days via the dropdown on the right side. The report table on the page provides the name of the job that ran, when it ran, and what the result of it was (*Image 8: Sync Log Page*).

Notice that the status column provides the number of successful transactions with the total number attempted. These numbers link to the actual results and errors associated with that job, providing information on what needs to be fixed to make it transfer successfully.

Image 8: Sync Log Page



Salesforce

Settings | Data Transfer | Sync Log | Mapping

Job History

Filters: Last 30 Days | All

Job Name	Direction	Status	Last Modified
Opportunity export May 30, 2017 04:18 PM PDT	Export to Salesforce	4 / 4 (success)	May 30, 2017 04:18 PM PDT
Account export May 30, 2017 04:16 PM PDT	Export to Salesforce	2 / 2 (success)	May 30, 2017 04:16 PM PDT
Account export May 30, 2017 10:19 PM GMT	Export to Salesforce	1 / 1 (success)	May 30, 2017 03:19 PM PDT
Account import May 30, 2017 10:19 PM GMT	Import to ChannelOnline	1 / 1 (error)	May 30, 2017 03:19 PM PDT
Account export May 26, 2017 03:52 PM GMT	Export to Salesforce	8 / 8 (success)	May 26, 2017 08:52 AM PDT
Opportunity export May 26, 2017 02:21 AM GMT	Export to Salesforce	4 / 4 (success)	May 25, 2017 07:21 PM PDT
Opportunity export May 26, 2017 02:20 AM GMT	Export to Salesforce	1 / 1 (error)	May 25, 2017 07:20 PM PDT

Mapping Page

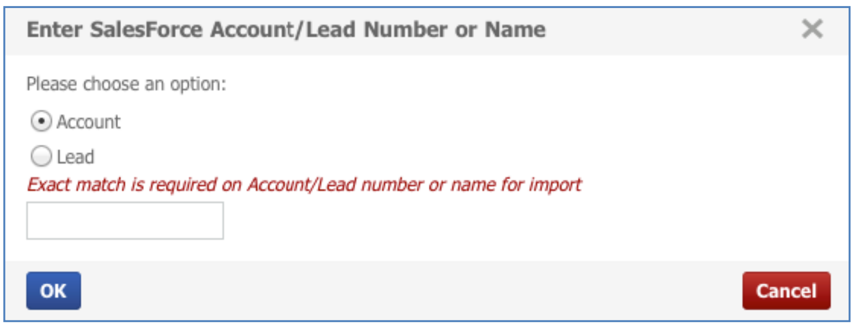
Mapping Reference tables provide a guide to the information and fields that are being updated during data transactions. There are tables available for Accounts, Contacts, Leads, and Quotes/Sales Orders (Opportunities). Linked fields have been defined by CNET ChannelOnline based on all available and applicable Salesforce integration points, except where choices have been presented to the reseller during setup.

NOTE: For field mapping details, see Appendix A.

Import/Export Accounts and Leads from Account View in COL

Import: Aside from needing to go to the Integration Data Transfer section, Accounts and Leads can be brought in manually by a user. From the Accounts tab, on All Accounts sub-tab, click the “Import from Salesforce” button. You will be provided a pop-up box to enter the company name or account number used in Salesforce to import the customer or lead that you want added.

Image 9: Import Salesforce Account/Lead Pop-up

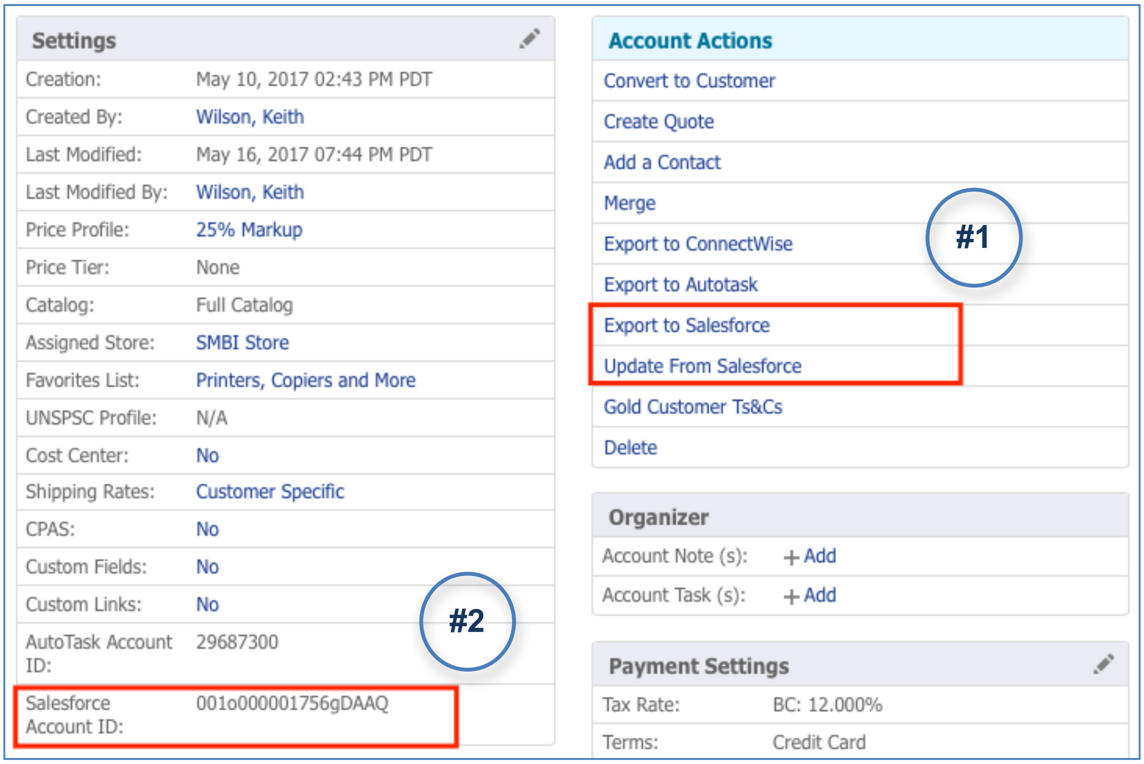


Export: To export or send an update for a customer to Salesforce, click on the “Export to Salesforce” link provided in the Account Actions component on the account view page. (*Image 10, bullet #1: Export/Update Account with Salesforce*)

Update: To Update account and lead information from Salesforce (when SF is used as the master source), click on the “Update from Salesforce” link provided in the Account Actions component on the account view page.

When an account in ChannelOnline has been linked to an account in Salesforce, the SF ID will be displayed in the Settings Component on the COL account view page. (*Image 10, bullet #2: Export/Update Account with Salesforce)*

Image 10: Export/Update Account with Salesforce



Preparing a ChannelOnline Document for Export to Salesforce

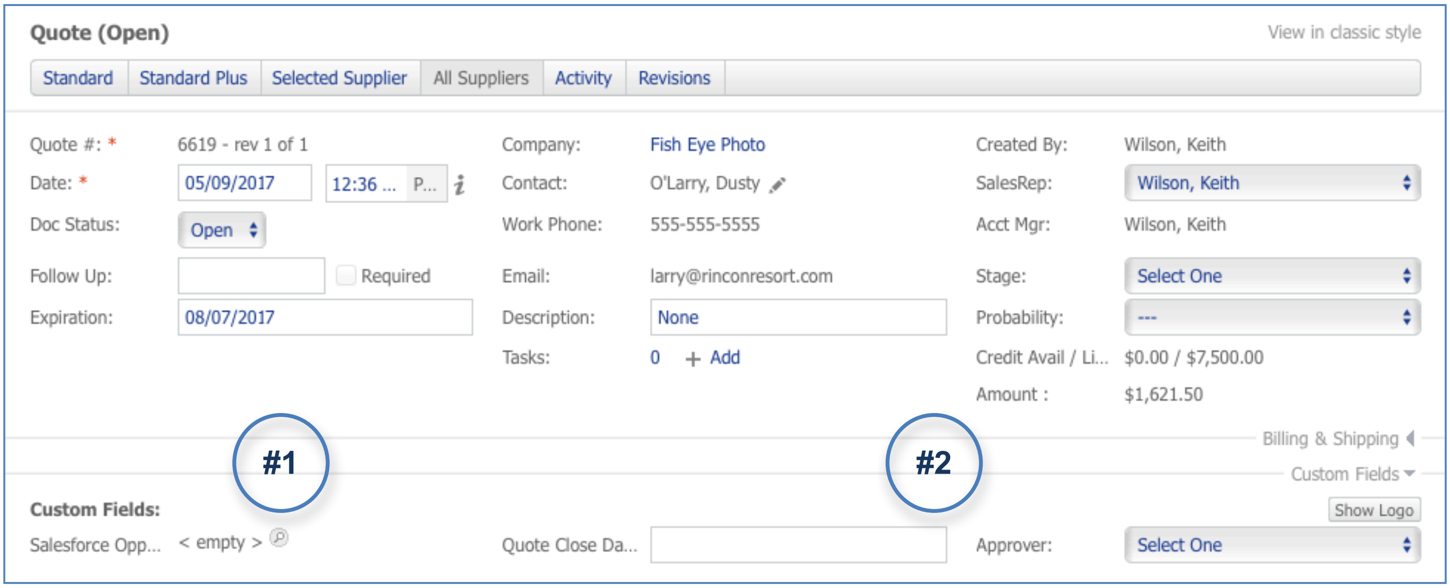
From the quote or sales order document, you can perform the following actions:

1. Assign it to an existing opportunity in Salesforce.
2. Use the quote/order to create a new opportunity in Salesforce, if one does not already exist (the document number will become the opportunity number in Salesforce).
3. Export the document to Salesforce.

Assigning an Opportunity to a Document

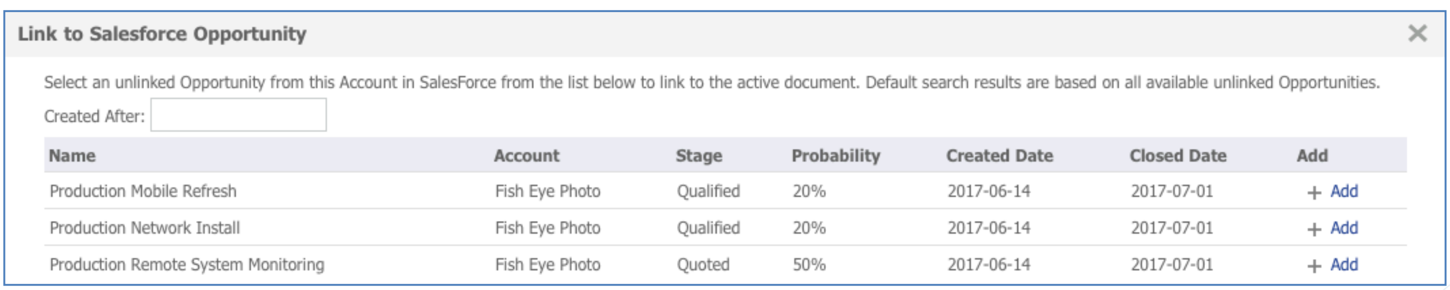
To assign a quote to an Salesforce opportunity, click on the search icon next to the custom field that was created during setup called “Salesforce Opportunity” (*Image 11, bullet #1: Assgining a Salesforce Opportunity*).

Image 11: Assigning a Salesforce Opportunity



After selecting the search icon, you will receive a popup window titled "Link to Salesforce Opportunity" that enables you to select the appropriate opportunity to attach the active document. Note that only unlinked Opportunities from that active Account in Salesforce will be delivered to the results list.

Image #12: Selecting an Opportunity to tie to a Quote


Link to Salesforce Opportunity

Select an unlinked Opportunity from this Account in SalesForce from the list below to link to the active document. Default search results are based on all available unlinked Opportunities.

Created After:

Name	Account	Stage	Probability	Created Date	Closed Date	Add
Production Mobile Refresh	Fish Eye Photo	Qualified	20%	2017-06-14	2017-07-01	+ Add
Production Network Install	Fish Eye Photo	Qualified	20%	2017-06-14	2017-07-01	+ Add
Production Remote System Monitoring	Fish Eye Photo	Quoted	50%	2017-06-14	2017-07-01	+ Add

Export to Salesforce Button on Quotes and Orders

In order to send any documents from ChannelOnline, Salesforce requires two pieces of information. First is the entry of an opportunity close date which we capture in COL as the Quote Close Date. To add a date, simply click on the text field next to the custom field name that was created during setup called “Quote Close Date” (*Image 11, bullet #2: Assgining a Salesforce Opportunity*) and select a date from the calendar. Second, be sure to assign a stage value from the Stage dropdown in the header to the Quote (this is for quotes only, orders go as closed won). Stage values are mapped in the Integrations > Salesforce > Settings section called “Opportunity Stage Mapping”.

The last step in sending the document to Salesforce is to select the ”Export to Salesforce” button at the bottom center of the document page.

APPENDIX A – Field Data Mapping

ACCOUNTS

Account company information from COL linked to Salesforce Account

ChannelOnline Fields		Salesforce Fields
Name	------>	Account Name*
Active	------>	Active
Customer Number	------>	Account Number
Type	------>	Type*
Billing Address Line 1	------>	Billing Street
Billing City	------>	Billing City
Billing State	------>	Billing State
Billing Zip	------>	Billing Postal Code
Billing Country	------>	Billing Country
Shipping Address Line 1	------>	Shipping Street
Shipping City	------>	Shipping City
Shipping State	------>	Shipping State
Shipping Zip	------>	Shipping Postal Code
Shipping Country	------>	Shipping Country
Company Address Line 1	------>	Company Street (Custom)
Company City	------>	Company City (Custom)
Company State	------>	Company State (Custom)
Company Zip	------>	Company Postal Code (Custom)
Country	------>	Company Country (Custom)
Website	------>	Website
Company Phone	------>	Phone
Company Fax	------>	Fax
Account Manager	------>	Account Owner*
Created By	------>	Created By
Last Modified By	------>	Last Modified By
Location Code	------>	Account Site

Presence of * after field name refers to a required field.

CONTACTS

Account company contact information from COL linked to Salesforce Contacts

ChannelOnline Fields		Salesforce Fields
Account Name	------>	Account Name*
First Name	------>	First Name
Last Name	------>	Last Name*
Title	------>	Title
Account Manager	------>	Contact Owner*
Email	------>	Email
Phone	------>	Phone
Fax	------>	Fax
Home Phone	------>	Home Phone
Mobile	------>	Mobile Phone
Fax	------>	Fax
Address Line 1	------>	Mailing Street
City	------>	Mailing City
State	------>	Mailing State
Country	------>	Mailing Country
Zip	------>	Mailing Postal Code

Presence of * after field name refers to a required field.

LEADS

Account Lead information from COL linked to Salesforce Contacts

ChannelOnline Fields		Salesforce Fields
Name	------>	Company*
Company Address Line 1	------>	Street
Company City	------>	City
Company State	------>	State
Company Zip	------>	Postal Code
Company Country	------>	Country
Company Phone	------>	Phone
Company Fax	------>	Fax
Description	------>	Description
Contact First Name	------>	First Name
Contact Last Name	------>	Last Name*
Contact Title	------>	Title

Created By	------>	Created By
Last Modified By	------>	Last Modified By
Last Modified Date	------>	Last Transfer Date
Lead Manager	------>	Lead Owner*
Lead Source	------>	Lead Source
Stage	------>	Lead Status*
Priority	------>	Rating

Presence of * after field name refers to a required field.

OPPORTUNITIES (Quote / Sales Order)

Quote / Sales Order and product information from COL linked to Salesforce Opportunity and Products

ChannelOnline Fields		Salesforce Fields
Account Name	------>	Account Name*
Amount	------>	Amount
Quote Close Date (custom)	------>	Close Date*
SO Creation Date	------>	Close Date
Description	------>	Description
Created By	------>	Created By
Last Modified By	------>	Last Modified By
Internal Document Notes	------>	Next Step
Document Number	------>	Opportunity Name*
Account Manager	------>	Opportunity Owner*
Probability	------>	Probability
Stage	------>	Stage*
Account Type	------>	Type
Product Manufacturer Part Number	------>	Product Code
Product Manufacturer Name	------>	Product Manufacturer Name (custom)
Product Category	------>	Product Category (custom)
Product Sub Category	------>	Product Sub Category (custom)
Product Description	------>	Product Description
Product Name	------>	Product Name
MSRP	------>	List Price
Item Quantity	------>	Quantity
Customer Price	------>	Sales Price
Line Total	------>	Total Price

Presence of * after field name refers to a required field.