iConnect 180269 Design Approach for Salesforce Integration

Project Overview

Implement Salesforce CRM functionality that will allow data to be pulled from Salesforce into FireLight using a custom action button on a form. The Salesforce authorization credentials will be stored either in the individual user's CRM preferences or in the Organization Third Party Service Config within the Admin tool.

Features/Requirements

- Allow the user to specify Salesforce in their user preferences for CRM
- Allow the user to save the necessary credentials for Salesforce authentication- username, password, client ID, and client secret
- If the users has credentials saved in the app portal's preferences, these credentials will be used in place of the organization's Third Party Service Config credentials
- Web service call out to Salesforce will return the list of contact records for lookup information within a Contacts dialog box when the CRM button is clicked
- Clicking on an individual contact will return detailed information from Salesforce- only the out of the box Salesforce data will currently be available for integration with FireLight
- Clicking on a letter in the alphabet header will filter the returned contacts by beginning letter of the last name
- Entering the first or last name in the search field will return the requested contact if available within Salesforce
- Clicking the Select button in the Contacts dialog will pre-fill the mapped fields on the FireLight form

Use Cases / Workflow Changes

A CRM button would be placed on the form in the form designer and set to map data to a particular data group- i.e. the owner. During the application process, the user would click the CRM button to call out to Salesforce for their Salesforce contact information. The user can either select the contact from the list of contacts, use the alphabetical filtering to find the contact, or type the first or last name in the search box. The detailed information for the contact would then appear in the detailed information window. The user would then click the Select button below the contact detail and the detailed information would pre-fill the mapped fields for the owner.

Admin Changes

- Option added to CRM button for selecting Salesforce

App Changes

- Option added to CRM preference drop-down for selecting Salesforce
- Text fields added for client ID and client secret- these fields are only visible when Salesforce has been selected
- CRM dialog for Salesforce contacts
- Back-end integration for querying Salesforce for filtered list of contacts and first name or last name search
- Back-end mapping for Salesforce to FireLight fields for the following Salesforce properties:

  - First Name
  - Last Name
  - Birthdate
  - Phone
  - Mailing City
  - Mailing State
  - Mailing Postal Code
  - Mailing Country
  - Mailing Street

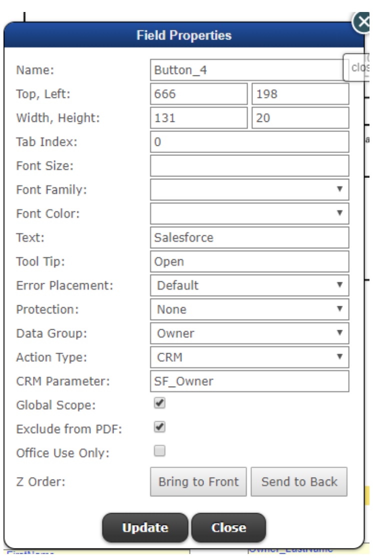
Integration Changes

N/A

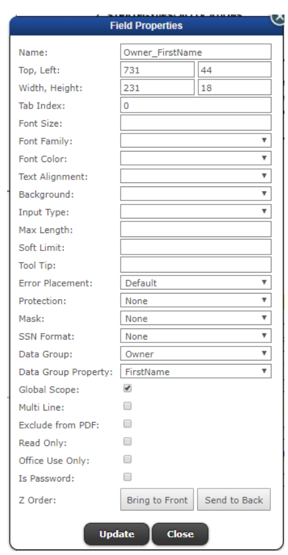
UI Mock Ups

Admin

Salesforce CRM button property settings.



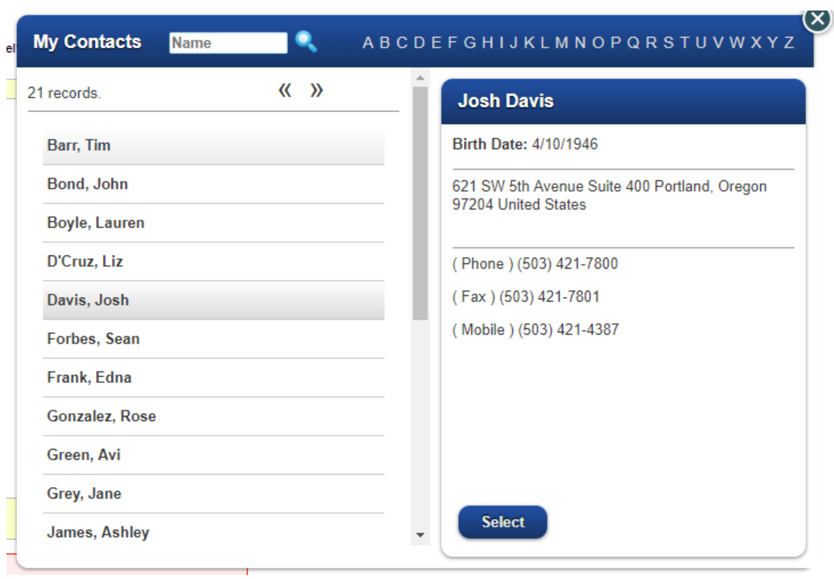
Text field property settings for owner first name



App Portal

Preference CRM setting

CRM Dialog



How to Enable and Use This Feature

- To save the Salesforce provided credentials for an organization, open the Third Party Service Config dialog in the Organization tab in the Admin tool. Click add and select Salesforce in the Service Type drop-down. Add the following credentials using the Config Name and Config Value text fields:
  - Username
  - Password
  - ClientID
  - ClientSecret
- In the form or wizard designer, add a button. In the button field properties, select the data group and then add the CRM Parameter. The parameter should have a prefix of SF_ followed by the value of the data group. For example, a CRM button for the owner would have Owner selected in the Data Group drop-down and the CRM Parameter would be SF_Owner.
- In each of the fields that you would like to pre-fill with Salesforce values, add the Data Group in the Field Properties dialog. Then choose the Data Group Property. For example, the owner first name field would have Owner selected in the Data Group and FirstName selected in the Data Group Property.

- In the Mappings tab of the Admin tool, verify the field mappings. In order to pre-fill from Salesforce, the form's field names in the Form Data Item ID column must be mapped to the System Data Item ID value.
- If individual Salesforce credentials will be used, add the credentials in the Preferences tab in the App Portal. Select Salesforce as the preferred CRM and then add the credentials in the text fields. After saving, only the User Name will remain visible. . *In order to view the CRM preferences in the Preferences tab, the group option for Enable CRM Preferences must be turned on in the Admin Tool's Group tab. This is found in the App Only group options listing*

Areas Impacted

System Area	Yes	Comment
Admin Tool		
- **Form Library**		Salesforce added to CRM button in form and wizard designer
- **Design Forms**		
- **Profile Administration**		
- **Reports**		
- **Deployment**		
FireLight App		
- **New Application**		
- **Edit Application**		Added functionality to call Salesforce for contact info and field data mapping
- **Signature Process**		
- **Review Queue**		
- **Manual Review**		
- **User Preferences**		Added Salesforce to CRM preferences and text fields for client id and client secret
- **Inbound Integration**		
- **Outbound Integration**		
- **PDF Generation**		
- **Email System**		

FireLight Console		
- **Windows**		
- **iOS**		
Other Systems		
- **DTCC Integration**		
- **Commission Netting**		
- **Activity Reporting**		

