**Connecting the Quote Tool with Salesforce**

This training material instructs developers to connect the Salesforce database with the Quote Tool on the company site. Connecting the two allows coding development on local devices.

Establish local access to the Management Portal and Quoting Tool.

* Run Yarn API
* Run Yarn Portal
* Run Yarn Quoting

This enables Management Portal and Quoting Tool websites on localhost:4200 and localhost:4204 respectively.

Check sites are running, then import data from Salesforce.

* Navigate to in the Management Portal
* Click on the Salesforce Import
* Click on each menu item and import all available data
* For Accounts:
  + Go to 01/2018 to receive “Burger King”

Once all pertinent data is available, go to PSQL Marketplace. In Marketplace:

* Check the “Test Agent” partner is in your local database:
  + select \* from partners where name = 'Test Agent';
* Pull the information needed from your user account:
  + select id, name from sf\_users where name like (your name);
* Use the id field from your name to update the “admin” user with your SalesForce id:
  + update users set salesforce\_id=(your salesforce id) where id=1;
* Find the parent\_id of Burger King:
  + select name, parent\_id from sf\_accounts where name = 'Burger King';
* Verify the parent of Burger King is Test Agent:
  + select name, parent\_id from sf\_accounts where id = (Burger King’s parent\_id);