

Smartsheet Opportunity Pipeline

A sample application demonstrating Import/Export of data between Smartsheet and Salesforce

Purpose

The Smartsheet Opportunity Pipeline Import/Export for Salesforce is an application that allows the Import and Export of data between Smartsheet and Salesforce Opportunity objects.

With the app you can:

- Query and filter a list of opportunities in Salesforce and then export the opportunity data to a new sheet in Smartsheet.
- Select a sheet and import its data into Salesforce as opportunities.

NOTE: This is a sample app meant to help developers get a jump start on developing their own Smartsheet/Salesforce integrations. As a sample, this application does not take all possibilities of error handling, mapping, importing and exporting into account. To add these functionalities for your organization, you have full access to the classes and components, and are encouraged to make changes that meet your specific needs.

Installation

To install the unmanaged package of this application use the following URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t500000000AUwZ>

Click Continue -> Next -> Next -> Install

Setup

When the application is installed a Custom Settings object called Smartsheet Import/Export is created.

To access this new Custom Settings object go to Setup -> Develop -> Custom Settings. On the line where Smartsheet Import/Export is listed click on Manage. In the top half of the Custom Settings page there will be a New button, as seen below.

Custom Setting

Smartsheet Import/Export

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values running the app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All Create New View

A B C D E F G H I J K L M

New

Setup Owner ↑

Location

No records to display.

Click on New.

The one Custom Setting value to fill out is AccessToken, which should be filled out as follows:

AccessToken – Your Smartsheet access token. You can obtain an access token in the Smartsheet application using the following steps after logging into an existing Smartsheet account:

1. Click on the Account button in the upper left hand corner of your Smartsheet screen and select Personal Settings. This will open the Personal Settings form.
2. Click the API Access button to open the API Access form.
3. Use the API Access form to generate new or manage existing tokens.

For more information on generating an Access Token, please refer to the API Documentation:

<http://www.smartsheet.com/developers/api-documentation#h.5osh0dl59e5m>

Adding Button to Opportunity List View

To access the application, the **Pipeline_Report** button needs to be added to the Opportunity Search Layout (List View).

To install the button navigate to Setup -> Customize -> Opportunities -> Search Layouts -> Click on edit Opportunities List View and choose Smartsheet

Import/Export from the list of Available Buttons, click the arrow pointing right to add the button to the Selected Buttons list, and then click Save.

Authorize Smartsheet API Endpoint

Make sure the Smartsheet is an authorized endpoint for your Salesforce organization. To authorize the Smartsheet API as a valid endpoint in Salesforce go to Setup -> Administration Setup -> Security Controls -> Remote Site Settings.

If <https://api.smartsheet.com> is not listed as a Remote Site on this page click on the New Remote Site button.

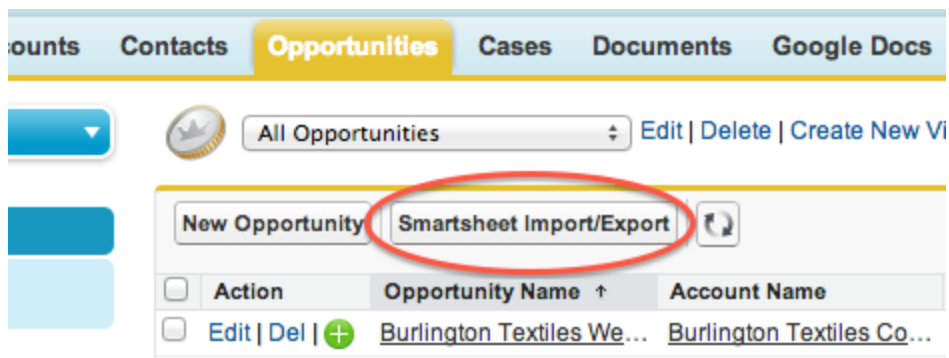
Remote Site Name: Smartsheet_API

Remote Site URL: <https://api.smartsheet.com>

Click Save.

Usage

With the **Pipeline_Report** button installed, the application can now be accessed in the Opportunities List View. The button will be above the list of Opportunities, as seen below.



Clicking this button will take you to a drop down box that will provide the option to either Import to or Export from Smartsheet.

Export

Exporting Opportunities takes two steps. First, run a report to get the Opportunities to export.

Opportunities Cases Documents Reports +

Opportunity Pipeline Report
Smartsheet Import/Export

Export

1. Run Report to get Opportunities

Stage: All Probability: All

From Close Date: [10/15/2013] To Close Date: [10/15/2013]

Get Opportunities

The filters provided are Stage, Probability, and a From and To option to select a date range for Close Date. By leaving either of the date fields blank the report will assume the value of that field is 'All'.

2. Preview and Export Data

Enter the Sheet Name: Opp Pipeline Sheet Export to Smartsheet

Opportunity ID	Opportunity Name	Stage	Type	Probability (%)
006i0000009EpH	OppOne Revised Again	Value Proposition	New Customer	90%
006i0000009Uhys	Express Logistics Portable Truck Generators	Value Proposition	Existing Customer - Upgrade	50%
006i0000009Uhyo	Grand Hotels Guest Portable Generators	Value Proposition	Existing Customer - Upgrade	50%
3 opportunities returned				

Once the report runs the results will display in a table, and a field will be given to name the sheet created by the export process.

Import

To import data from Smartsheet back into Salesforce select Import on the Select Option drop down. Next, select a sheet in the Select Sheet: drop down. When a sheet is selected the application will attempt to map the sheet's columns with its matching Opportunity column. The match is done by the name of the columns, so if any of the column names in the sheet differ from the available Opportunity columns the mapping will need to be done by hand.

Opportunity Pipeline Report Smartsheet Import/Export

Import

Import to Opportunity

Select Sheet:

OppPipe-Import

Smartsheet Column	Opportunity Column
Opportunity ID	<div>Opportunity ID</div>
Name	<div>Name</div>
Stage	<div>Stage</div>
Opportunity Type	<div>Opportunity Type</div>
Probability (%)	<div>Probability (%)</div>

Import to Opportunity

Once the columns are mapped, click Import to Opportunity.

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Force.com IDE Setup

The cleanest way to begin local development of this application is to download the contents of the package through the Force.com IDE.


The Force.com IDE can be found here:

[http://wiki.developerforce.com/page/Force.com IDE](http://wiki.developerforce.com/page/Force.com+IDE)

With the IDE installed on your local machine, and with the Smartsheet Opportunity Pipeline application installed in your Salesforce org, open the IDE and go to File -> New... -> Force.com project.

Create a Force.com Project

Choose a name for your project and configure the connection settings for your organization.



Fields marked with an asterisk (*) are required.

*Project name:

Organization Settings

*Username:

*Password:

Security Token:

*Environment: [Sign Up Now!](#)

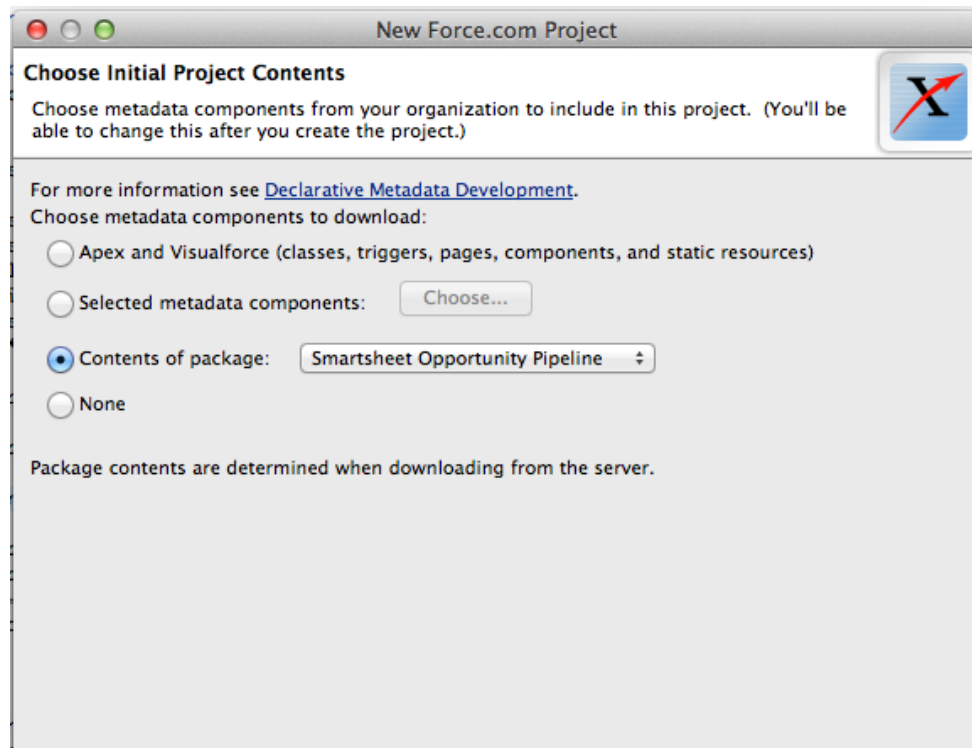
Connection Settings

Timeout (sec): (max 600)

See [Proxy Settings](#) for connecting through a proxy server

Connect the project to your Salesforce account with your Salesforce credentials, and click Next.

On the Choose Initial Project Contents select Contents of Package, and then choose Smartsheet Opportunity Pipeline from the dropdown.



The package contents will then be loaded into Force.com IDE project.

If you have any questions or suggestions about this document or about the Smartsheet API in general please contact us at api@smartsheet.com, or post your question to www.stackoverflow.com with the tag 'smartsheet-api'.

The Smartsheet Platform team