

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.

Smartsheet API

The Smartsheet API provides a REST interface to Smartsheet features and data. The API enables Smartsheet customers to programmatically access and manage their data, and empowers application developers to build solutions on top of Smartsheet.

For more information about the Smartsheet API, please visit <http://www.smartsheet.com/developers> for full [API Documentation](#) and [sample applications](#).

Create Third Party App

To make use of the OAuth 2.0 flow a third party app must be registered on your Smartsheet account. The Smartsheet API documentation has a detailed section on [third-party applications](#) which takes you step by step through the Smartsheet OAuth 2.0 flow. You'll need the values from the 'App redirect URL', 'App client id',

and 'App secret' to connect the Salesforce app to Smartsheet.

Generate Access Token

The Smartsheet API documentation section on how to [generate a Smartsheet Access Token](#).

Uninstall Previous Version

If a previous version of the Opportunity Pipeline is installed in your Salesforce instance, it will need to be removed in order for this version of the application to install properly.

To uninstall the previous version, go to Setup -> Build -> Installed Packages.

Find Smartsheet Import/Export in the Installed Packages list and click Uninstall.

Installation

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

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti000000004HYn>

Click Continue -> Next -> Next -> Install

Setup

When the application is installed a Custom Settings object called Smartsheet Config is created.

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

Custom Setting

Smartsheet Config

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 and dialing 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 for a specific user is running the app, a specific profile, or just a general user.

View: All [Create New View](#)

A B C D E F G H I J K L M N O P Q															
<div>New</div>															
Name ↑															
No records to display.															

Click on New.

The several Custom Settings values should be filled out as follows:

- **Name** -- This identifies the set of custom settings. Put anything here. The only requirement is that it can not be blank.
- **API Version** -- The version of the Smartsheet API to be used. Default is the current version of 1.1.
- **Authorize URL** -- The authorization URL that will begin the OAuth2 authorization process. The default value is <https://www.smartsheet.com/b/authorize>
- **Scope** -- The default value is `READ_SHEETS,WRITE_SHEETS,CREATE_SHEETS`
- **Redirect URL** --

<https://login.salesforce.com/apex/OpportunityToSmartsheet>

- **Client Id** -- The 'App client id' from the third party application settings in Smartsheet.
- **Client Secret** -- The 'App client id' from the third party application settings in Smartsheet.
- **API Base URL** -- The base URL of the API. The default value is <https://api.smartsheet.com>

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.

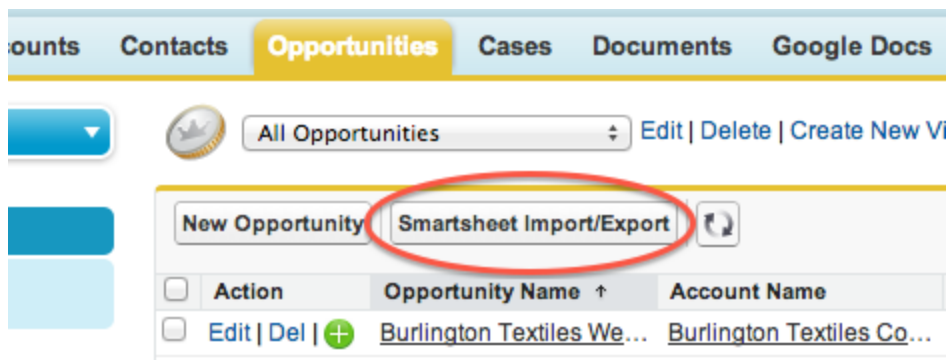
Remote Site Name: Smartsheet_API

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.

Connect to Smartsheet

Before Opportunity Pipeline can operate it will need to connect to Smartsheet. This can be done either through an OAuth 2.0 flow or with a user generated token.

OAuth 2.0

Select this option if a third-party app is registered with your Smartsheet account. To learn how to register a third-party app with Smartsheet see the Smartsheet API documentation section on creating [third-party applications](#).

User Generated Token

Select this option to use a user generated access token. To find out how to generate an access token see the Smartsheet API documentation section on how to [generate a Smartsheet Access Token](#).

Export

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

The screenshot shows the Smartsheet Import/Export interface. At the top, there's a navigation bar with 'Opportunities', 'Cases', 'Documents', 'Reports', and a plus icon. Below this, the title 'Opportunity Pipeline Report' and 'Smartsheet Import/Export' are displayed. A dropdown menu is set to 'Export'. The main section is titled '1. Run Report to get Opportunities'. It contains filters for 'Stage' (set to 'All'), 'Probability' (set to 'All'), 'From Close Date' (set to '10/15/2013'), and 'To Close Date' (set to '10/15/2013'). A 'Get Opportunities' button is at the bottom of this section.

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'.


The screenshot shows the '2. Preview and Export Data' section. It includes a text input for 'Enter the Sheet Name:' with the value 'Opportunity Pipeline 2013-11-07 16:38:03' and an 'Export to Smartsheet' button. Below this is a table with the following data:

Opportunity ID	Opportunity Name	Stage	Type	Probability (%)	Amount
006i000000BZUY7	Dickenson Mobile Devices	Needs Analysis	Existing Customer - Upgrade	100%	\$9,999,999.00
006i000000BZUY8	United Oil Office Portable Generators	Negotiation/Review	Existing Customer - Upgrade	90%	\$125,000.00
006i000000BZUY9	Express Logistics Standby Generator	Closed Won	New Customer	100%	\$220,000.00
006i000000BZUYA	GenePoint Standby Generator	Closed Won	New Customer	100%	\$85,000.00
006i000000BZUYB	Grand Hotels Kitchen Generator	Id. Decision Makers	Existing Customer - Upgrade	60%	\$15,000.00

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	Opportunity ID
Name	Name
Stage	Stage
Opportunity Type	Opportunity Type
Probability (%)	Probability (%)

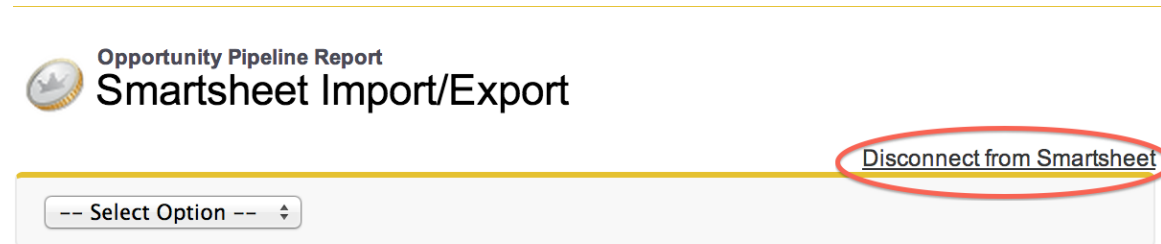
Import to Opportunity

Once the columns are mapped, click Import to Opportunity.

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Disconnect from Smartsheet

To disconnect from Smartsheet, or remove the access token, follow the Disconnect from Smartsheet link in the upper right corner of the page.



The next page will provide a button to Remove Token. Click that button to disconnect from Smartsheet.

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!](#)

Don't have an organization yet? Sign up for a free Developer Edition organization.

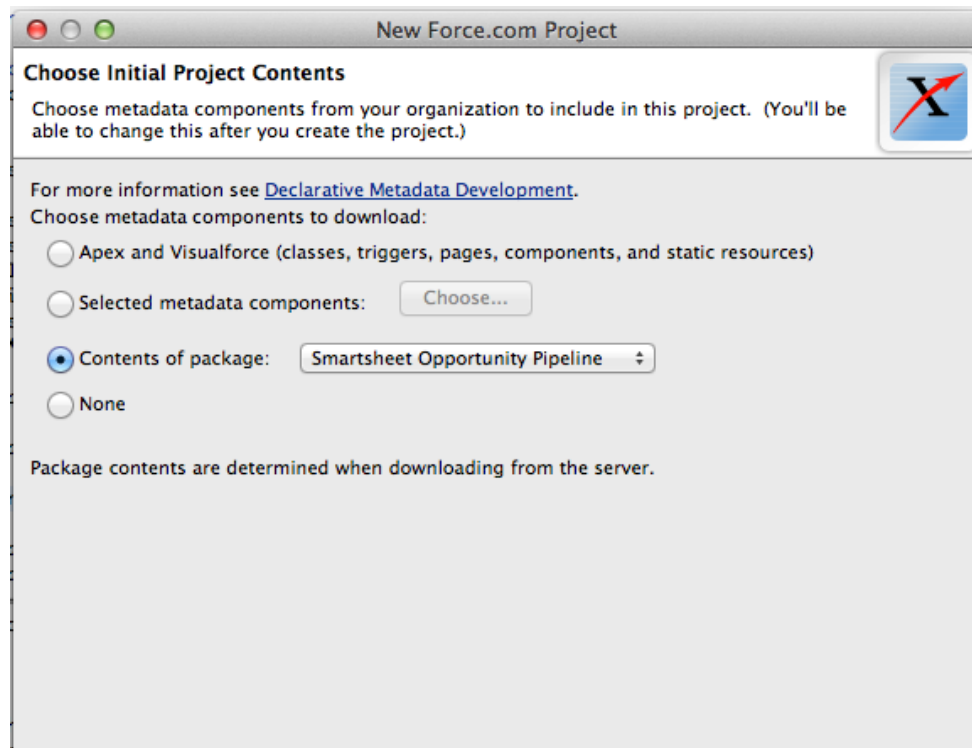
Connection Settings

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, the Opportunity Pipeline application, the toolkit, or about the Smartsheet API in general please contact us at api@smartsheet.com. Development questions can also be posted to [Stackoverflow](https://stackoverflow.com) with the tag [smartsheet-api](https://stackoverflow.com/questions/tagged/smartsheet-api).

The Smartsheet Platform team