



TechnoMile Heroku Magento Salesforce Feature Description

1. Configuration Module

- **Features**

- User can validate the Salesforce credential in Magento admin Configuration.
- All the Custom fields and Salesforce field will get in drop down box for particular module.eg for Product all the Product fields will get inside the drop box of Mapper(admin configuration).

2. Customer Module

2.1. Features

- **Magento To Salesforce**

- Customer creation from Magento to Salesforce through Back End (website,admin).
- Customer creation from Magento to Salesforce through Front End.
- Customer Update from Magento to Salesforce through Back End (website,admin).
- Customer Update from Magento to Salesforce through Front End.
- Magento to Salesforce Customer Update from Magento Front End .
- Customer Creation with Same Billing & Shipping Addresses from Magento Back End.
- Customer Creation with Different Billing & Shipping Addresses from Magento Back End.
- Customer Creation with Different Billing & Shipping Addresses from Magento Front End.
- Customer Creation with same Billing & Shipping Addresses from Magento Front End.

- Registered Customer will get Sync to Salesforce.
- Group types Customer will sync to Salesforce as General customer.
- Customer creation with offline sync
- Note(Billing and shipping address will get changed from front end, Only if we changed or re save Customer)
- **Salesforce To Magento**
 - Customer Creation from Salesforce to Magento.
 - Customer Update from Salesforce to Magento.
 - Customer having name with no space in Salesforce, Than same name will be last name in Magento .If it's with space than it will be divided as first name and last name.
 - Customer Billing and Shipping address will get sync to Magento.
 - Customer Billing and Shipping address update from Salesforce to Magento.
 - In case of customer having no email id in Salesforce While creating Account, a default email id is generated as per the following standard: 'Accountld@gmail.com.(Company name should be define in Magento admin configuration)
- **Below are the attributes will get sync to Salesforce and Magento.**
 - **Name:** is account name in Salesforce and customer name in Magento .
 - **Email:** Email is Account Email in in Salesforce and customer Email in Magento .
 - **Billing Street:** Billing Street is Magento Billing Street Address.
 - **Billing City:** Billing City is Magento Accounts Billing City.
 - **Billing State:** Billing State is Magento account billing state.
 - **Billing Country:** Billing Country is accounts Billing Country in Magento.
 - **ZipPostal Code:** Magento billing Postal code.
 - **Shipping Street:** Shipping Street is Magento Shipping Street Address.
 - **Shipping City:** Shipping City is Magento Customer Shipping City.
 - **Shipping State:** Shipping State is Magento Customer shipping state.
 - **Shipping Country:** Shipping Country is Customer Shipping Country in Magento.
 - **ZipPostal Code:** ZipPostal Code is Magento shipping Postal Code.
 - **Phone Number:** Salesforce Billing and shipping Addresses Phone Number in Magento.

3. Product Module

3.1. Features

- **Magento To Salesforce**
 - Product Created with Simple Type will get sync to Salesforce.

- Simple Product Update from Magento to Salesforce.
- By default Product type will be Family type in Salesforce.
- Offline Product creation
- **Salesforce to Magento**
 - Product Created in Salesforce will get sync to Magento.
 - Product Updated in Salesforce will update the Product in Magento .
 - Tax ID is configured in Magento Configuration based on client selection
Tax Id will be process for Product
 - Product Status is configured in Magento Configuration based on client selection Tax Id will be process for Product
 - By Default all the product which will sync to Magento from Salesforce will have visibility 'Catalog, Search'.
 - No weight is provided in salesforce than it will take 1 as default.
 - By default all the Product will get sync to Salesforce as a simple Product.
- **Below are the attributes will get sync to Salesforce and Magento.**
 - **Name:** is product name Magento
 - **Product Model:** Product Model is SKU in Magento.
 - **Description:** Description is Magento Description
 - **Price:** Price is Magento product price.
 - **Product Type:** Product Type is Magento product type;
 - **Active:** Active is Magento product Active or Inactive
 - **Quantity:** Quantity is Magento product Quantity.

4. Order Module

4.1. Features

- **Magento To Salesforce**
 - Order Creation from Magento to Salesforce.
 - Order Creation with Registered Customer From Magento Backend.
 - Order Creation with Registered Customer from Magento Backend with Same Billing & Shipping Addresses.
 - Order Creation with Registered Customer from Magento Backend with different Billing and Shipping Addresses.
 - Order Creation with new Customer from Magento Front End will get sync.
 - Order Creation with a Registered Customer from Magento Front End with Same Billing & Shipping Addresses.
 - Order Creation with a Registered Customer from Magento Front End with Different Billing & Shipping Addresses.
 - Order creation from back end with new customer in Magento will not sync the billing and shipping address.
 - Order Created in Salesforce will have the status closed won.

- Order created in Salesforce Closing date will have today's date with +10.
- Offline Order creation
- **Salesforce to Magento**
 - Order creation from Salesforce to Magento.
 - Order will get sync to Salesforce with number of product and price.
 - Currency is configured in Magento Configuration based on client selection
Currency will be process for Order.
 - No shipping Method will get sync to Magento
 - Payment Method will be Purchase Order
 - No Order will get Sync to Magento , If Particular customer and Product doesn't exist in Magento
 - Order created in Magento by default it will have status as processing
- **Below are the attributes will get sync to Salesforce and Magento.**
 - **Name:** Order Name
 - **Status:** Order status.
 - **Total Qty:** NO of product
 - **Probability:** by default will be 100 %
 - **Web:** Source from where order is place
 - **Close date:** Order Close Date
 - **Order Number:** Magento order Id

5. Leads

5.1. Features:

- Magento contact us information will get sync to Salesforce as a Lead.
- Leads will get sync to Magento to Salesforce only

Below are the attributes will get sync to Salesforce and Magento.

- **Name:** is account name in Magento contact us
- **Email:** is contact us Email in Magento
- **Telephone:** Telephone is Magento contact us Telephone;
- **Comment:** Comment is Magento contact us Comment,
- **Website:** Website is the name of the website from which url the lead is getting generate
- **Company:** company name will be current store name.

6. Cron

All the reverse sync will be based on cron job.

Only the Data(Customer,Product,Order) which are Created after the installation of Salesforce connector will get sync to Magento.

7. Limitations

7.1. General Limitations

- Only mapped fields will be synced.
- Any data already existing with your current system i.e. Customers/Orders/Products/Customer Group/Tier Prices, etc. are not synced with TechnoMile Salesforce Connect by default. Synchronization of old data is an additional effort.
- TechnoMile will not be responsible for any conflicts between a third party module/extension and TechnoMile Salesforce Connect. We assume there are no modifications in Magento core files. In case of such modifications which are affecting the module functionality it will be considered as an additional effort.
- TechnoMile Salesforce Connect will not fix or is not responsible for any of Magento related bugs or custom code related bugs.
- In the default set-up, the TechnoMile Magento Salesforce Connect supports localization for USA only. In other words the localization factors are not supported by default in the connector.
- TechnoMile Salesforce Connect will not support the operations made using “Professionals Tools” like item modifier, item combiner, etc in Salesforce and Shipworks, StoreManager, Shipstation, Shipmanager etc in Magento.

7.2. Customer limitations

- Only the customer billing address will get sync from Salesforce to Magento and shipping address will have billing address of Salesforce.
- Guest Customer Will not get sync to Salesforce
- Customer Address from front end ,back end will not get sync to Salesforce.
- Customer Region will get sync from Salesforce to Magento based on state and county provided in Salesforce to get the region Id.
- Only a Customer’s ‘First Name’, ‘Last Name’ and ‘Email Address’ are considered for creating a customer in the Magento to Salesforce sync process.
- Customer Billing and Shipping Addresses deletion is not synced. In other words, if you delete a ‘Customer Billing and Shipping Address’ from Magento, you will have to manually delete it from Salesforce and vice-versa.
- Customer billing and shipping addresses will get updated to Salesforce only if customer is resaved or updated.
- Customer delete will not delete the Salesforce customer and vice versa
- The current scheduler is not scheduled to work with huge updates for products, customers, customer classes, orders, etc, in such cases this will take a longer time than expected.
- A customer with NO email address in Salesforce will be created with a dummy email address in Magento, in the following format:Accountld@gmail.com
- Duplicate Customers with the same email address will not be updated in Magento because only one customer can be created per email in Magento.

- Customer configuration should be set globally and not per website.
- Phone number will not get Sync from Magento to Salesforce

7.3. Product limitations

- No other Product will get Sync except simple Product.
- Tier Price will not get sync to Salesforce.
- Only the Mapped Product Data will get sync to Salesforce and Vice versa.
- Product Image will not get sync to Salesforce.
- Only the Mapped data will get sync to Salesforce and vice versa
- 'Product' deletion is not synced. In other words, if you delete a 'Product' from Magento, you will have to manually delete it from Salesforce and Vice-versa.
- Products imported (using Profilers or any tools) to Magento cannot be synced to Salesforce. Products created/updated by any means will not be synced automatically if the product creation & updating dates are not updated suitably in Salesforce.
- Products created from Salesforce to Magento will be assigned to default Attribute set in Magento
- Product group prices are not supported.
- Renaming product SKU(Product code) in Salesforce will create a new product in Magento.
- Duplication of product in Magento and Salesforce cannot be synced either ways.

7.4. Order limitations

- No Shipping Method will get sync to Magento.
- No Payment Method will get sync to Magento.
- Order created in Magento with new customer, than no billing and shipping address will get sync.
- Order will get sync to Magento if no product selected in Salesforce
- No invoice and shipment will get sync.
- TechnoMile Salesforce Connect does not support 'Credit Memo/Refunds'. Refunding at both Salesforce and Magento should be done manually.
- Order Hold, Order Void and Order Cancellation in Magento are not synced to Salesforce Vice versa.
- Editing of Orders is not supported at both ends as editing an order in Magento will cancel the existing order and create a new order.
- Deleting an order in Salesforce will not remove the order from Magento and Vice-versa. It has to be done manually from both the systems.