Salesforce Sales Cloud Application

More Info: Technical Specs
Platforms: Legacy eCommerce, KCCP eCommerce and eCommerce+OMS

Salesforce is a world leader in cloud-based customer relationship management. Sales Cloud, by Salesforce, provides a cloud service to track customer information and interactions, complete and review purchases, manage leads, and much more.

The Salesforce Sales Cloud application links your Sales Cloud account with eCommerce so you can sync customers, products, price lists, orders, and returns between the two systems. After your initial set-up, the app continues to sync data automatically, ensuring the two systems always stay up-to-date.

Application Features

- Sync customer accounts and contacts, products, price lists, orders, and returns between eCommerce and Salesforce.
- Map multiple eCommerce catalogs to price lists in Salesforce.
- Add eCommerce fields to Sales Cloud receipts and forms to display synced data.
- Modify and map content on-the-fly between the systems for custom attributes, changes in mappings, and page content layout in your Sales Cloud forms.

TLS Support

This application supports the transport layer security (TLS) 1.0 encryption protocol. You must use TLS 1.0 in order for the application to function properly. Use of another TLS version will cause the application to no longer sync Kibo information to your Sales Cloud account.

Install the App

Contact to install the Salesforce Sales Cloud application on your tenant.
Configure the App

Review the configuration requirements to ensure you have everything you need to successfully configure the app.

Configuration Requirements

- An active Sales Cloud account.
- The Salesforce Sales Cloud Application must be installed on your tenant.
- You must have access to modify and update your store settings in Sales Cloud.

Authenticate with Salesforce

1. In Admin, go to System > Customization > Applications.
2. Double-click Mozu Salesforce Sales Cloud Application.
3. Click the Configuration link to open the configuration settings dialog.
4. On the Info tab, click Login to Sales Cloud. The Salesforce Account Login page opens.
   
   If you have previously authenticated your Sales Cloud App, a Re-Authenticate button appears in place of the login button.

   5. Enter your Salesforce credentials.
   6. If prompted, click Allow to allow the Sales Cloud App to access your Salesforce data.

   After you authenticate, new tabs for Orders and Price Lists appear. You will use these tabs in the following sections.

   7. Close the configuration settings dialog. The Initialized flag on the app details page now displays true.

Enable the App

1. In Admin, go to System > Customization > Applications.
2. Double-click Mozu Salesforce Sales Cloud Application.
3. Click Enable App.

Map Order Status

Orders in eCommerce can go through a number of order statuses: Accepted, Submitted, Completed, and so on. By default, Sales Cloud only has two order status categories: Activated and Draft. However, you can create multiple custom order values, or fields, within those standard categories. A field must exist in Sales Cloud before you can select it as a mapping option in the app, but you can create new fields at any time and come back to update your Kibo eCommerce mappings.

(Optional) Create New Order Status Fields in Sales Cloud
The number and types of order status fields you create in Sales Cloud depend on what works best for your business processes. You do not have to create new fields to start using the Sales Cloud App, and you can come back and create new or edit current fields at any time. If you do not need to create new status fields, continue to the next section.

As of Spring 2016, custom order fields are not supported in the Salesforce Lightning Experience. You must use Salesforce Classic to complete these steps. Refer to the Salesforce Help for the latest information on feature support in Salesforce Sales Cloud.

1. Log in to Sales Cloud.
2. Click **Setup**.
3. In the **Quick Find** box, enter **Orders**.
4. Under **Build > Customize > Orders**, select **Fields**.
5. In the **Order Standard Fields** list, click **Status**.
6. Under **Order Status Picklist Values**, click **New**.
7. Create your new field and assign it to a category.
8. Click **Save**. Once saved, the new status appears as a mapping option on the **Order Status** tab of the Sales Cloud App in Kibo.

### Map Order Status in Kibo eCommerce

If you do not specify a mapping for a particular eCommerce Order Status, any order that moves to that status will move to whatever you have configured as your default status in Salesforce (typically Draft).

1. Open the configuration settings dialog for the Sales Cloud app.
2. Go to the **Order Status** tab.
3. For each **Mozu Order Status**, select an available **Salesforce Order Status**. You can map multiple eCommerce statuses to the same Sales Cloud status.
Map Price Books

You must create a new price book per each eCommerce catalog. You can name these price books anything you like in Sales Cloud, though we recommend using similar names to those in eCommerce. If you already have price books for each catalog in eCommerce, make note of the names to map through the app. You can also edit the names of the price books as needed in Sales Cloud.

Create Price Books

1. Log into your Sales Cloud account.
2. Click the **Price Books** tab.
3. Click **New** to create a new price book.
4. Enter a **Price Book Name** to match to a eCommerce catalog.

5. Enable **Active**.

6. Click **Save**. The price book details page displays.

7. In the **Products** section, click **Add** to add products and prices to the price book. These products should match the products in your eCommerce catalog.

8. Repeat the steps in this section as necessary for each of your eCommerce catalogs.

**Map Price Books in Kibo eCommerce**

You can map more than one eCommerce status to the same Sales Cloud status.

1. In Admin, go to **System > Customization > Applications**.
2. Click **Salesforce Application**.
3. Click the **Configuration** link to open the app.
4. Click the **Price Lists** tab.
5. For each listed eCommerce catalog, select a price book from the drop-down menu.

Kibo only displays the custom price books that you created in Sales Cloud. Kibo does not display any standard price books provided by default by Sales Cloud.

6. Click Save.

Map Customer Attributes

You can create and map custom attributes for a product in eCommerce to attributes in Sales Cloud. As you create these attributes in eCommerce for current or new customer accounts, the app provides a mapping page for associating the data into Salesforce.

We recommend performing another export into Salesforce after mapping existing attributes. If this is a new attribute without entered data, you do not need to perform an export. The mapped attribute will automatically share data as it is entered.
Create a New Attribute in Salesforce

If you do not have a matching attribute in Salesforce to map for your eCommerce attributes, you need to create the attribute(s) then map. If you have existing attributes ready to map, continue to the next section.

1. Log into your Sales Cloud account in a web browser.
2. In the left-side nav options, scroll under Build to expand sections.
3. Expand Customize > Accounts and click Fields.

4. Scroll to the bottom of the page to the Account Custom Fields & Relationships table. Click New to create a new attribute.
5. In Step 1, select the field type. These include checkboxes, text fields, selectable options, dates, and more. We recommend the attribute content type matching the eCommerce attribute. Click Next.
6. In step 2, enter all data for the attribute. Depending on the type of field you selected in step 1, you may need to enter the length of a text field (max characters), date formats, options for customers to select from, and so on. The options do not have to match the full descriptions or names, as the mapping from Kibo to Salesforce will provide that data. You can map down to the attribute content level. We recommend you consider matching this content between the systems.
7. Click Next.
8. Depending on the attribute content and location, you may need to edit the Page Layout for Accounts in Salesforce to display the new mapped attribute.
Map Attributes in Kibo eCommerce

1. In Admin, go to **Main > Customers > Salesforce**.
2. Select **Attribute Mapping**.
3. A list of existing customer eCommerce Attributes displays with Salesforce Attributes to map.

4. For each Kibo eCommerce Attribute, select a Salesforce Attribute from the drop-down list.
5. Click the **Map Values** link. Depending on the type of attribute, you may need to link the eCommerce options for the attribute with the available options in Salesforce. For example, Gender attributes would have Male or Female selectable values. In eCommerce, this value may be Male with a Salesforce value of M. You can map these specific values, regardless of label, on this screen.

6. Click **Save**.

Export Data to Sales Cloud

After the initial authentication with Sales Cloud, any existing data in eCommerce should be exported to Sales Cloud. You can perform these exports through the products, customers, and orders pages in the Kibo Admin. The app adds extended pages to export one or all of your products, product attributes (with mappings), customers, and orders. After the data is exported, you can click the provided links to directly open Sales Cloud to that record through the Salesforce portal.

Export Single or All Products

You have a choice of exporting one or all products.

1. In Admin, go to **Main > Catalog > Salesforce**. You have the choice of Export (opens the export options) or Product (displays successful exported data with links).
2. Select Export.

3. Select Single Product or All Products.

4. If Single Product, select the Master Catalog and enter a Product Code. Click Export.

5. If All Products, click Export All. A table displays the full list of exports with results.

6. Products will export to Sales Cloud. Completed exports provide links on the Product page into Sales Cloud.

Export Single or All Accounts

You have a choice of exporting one or all customer accounts.

1. In Admin, go to Main > Customers > Salesforce. You have the choice of Export (opens the export options) or Accounts (displays successful exported data with links)

2. Select Export.
3. Select **Single Account** or **All Accounts**.

4. If Single Account, enter an **Account Id** or scroll through the list of customer accounts. Click **Export**.

5. If All Accounts, click **Export All**. A table displays the full list of exports with results.

6. Customer accounts will export to Sales Cloud. Completed exports provide links on the Accounts page into Sales Cloud.

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**Export Single or All Orders**

You have a choice of exporting one or all orders.

1. In Admin, go to **Main > Orders > Salesforce**. You have the choice of Export (opens the export options) or Orders (displays successful exported data with links).

2. Select **Export**.
3. Select Single Order or All Orders.
4. If Single Order, select an order Type as Order or Return. Enter the Order/Return Number. Click Export.
5. If All Orders, click Export All. A table displays the full list of exports with results.
6. Orders accounts will export to Sales Cloud. Completed exports provide links on the Orders page into Sales Cloud.

Customize Sales Cloud Page Layouts

You can add eCommerce fields to display additional data in your Account Details and Order Details. For each page layout display, a floating section of Fields displays across the top including all eCommerce fields. You can drag and drop these fields into the page layouts. This section details how to add these fields to account and order details pages, but you can add them to other pages as you need.

1. Log into your Sales Cloud account in a web browser.
2. Click Setup.
3. In the left-side nav options, scroll under Build to expand sections.
4. Expand **Customize > Accounts** and click **Page Layout**. Drag and drop the new eCommerce fields into the page. You can rearrange the details as needed.

5. Expand **Customize > Orders** and click **Page Layout**. Drag and drop the new eCommerce fields into the page. You can rearrange the details as needed on the page.