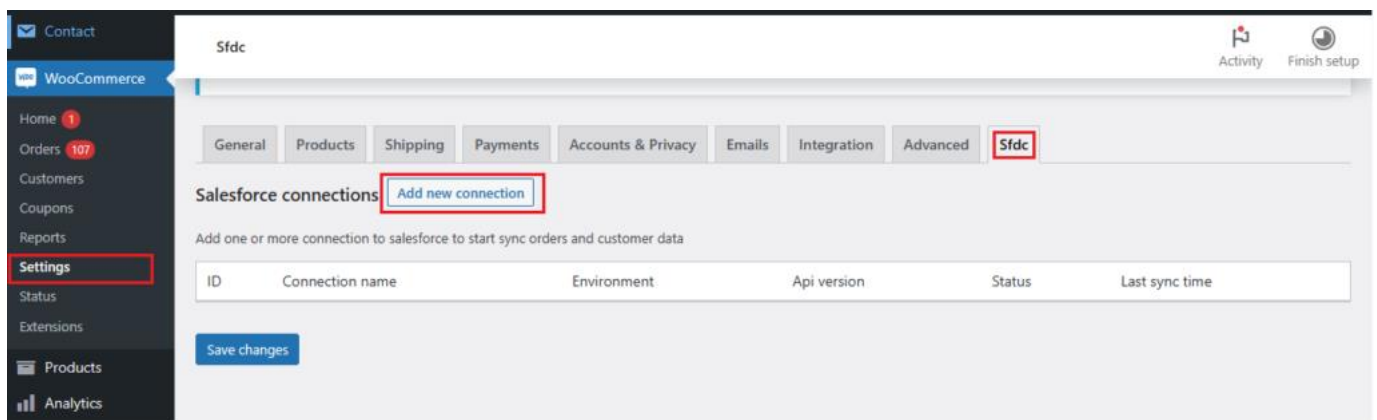


Plugin purchase and installation

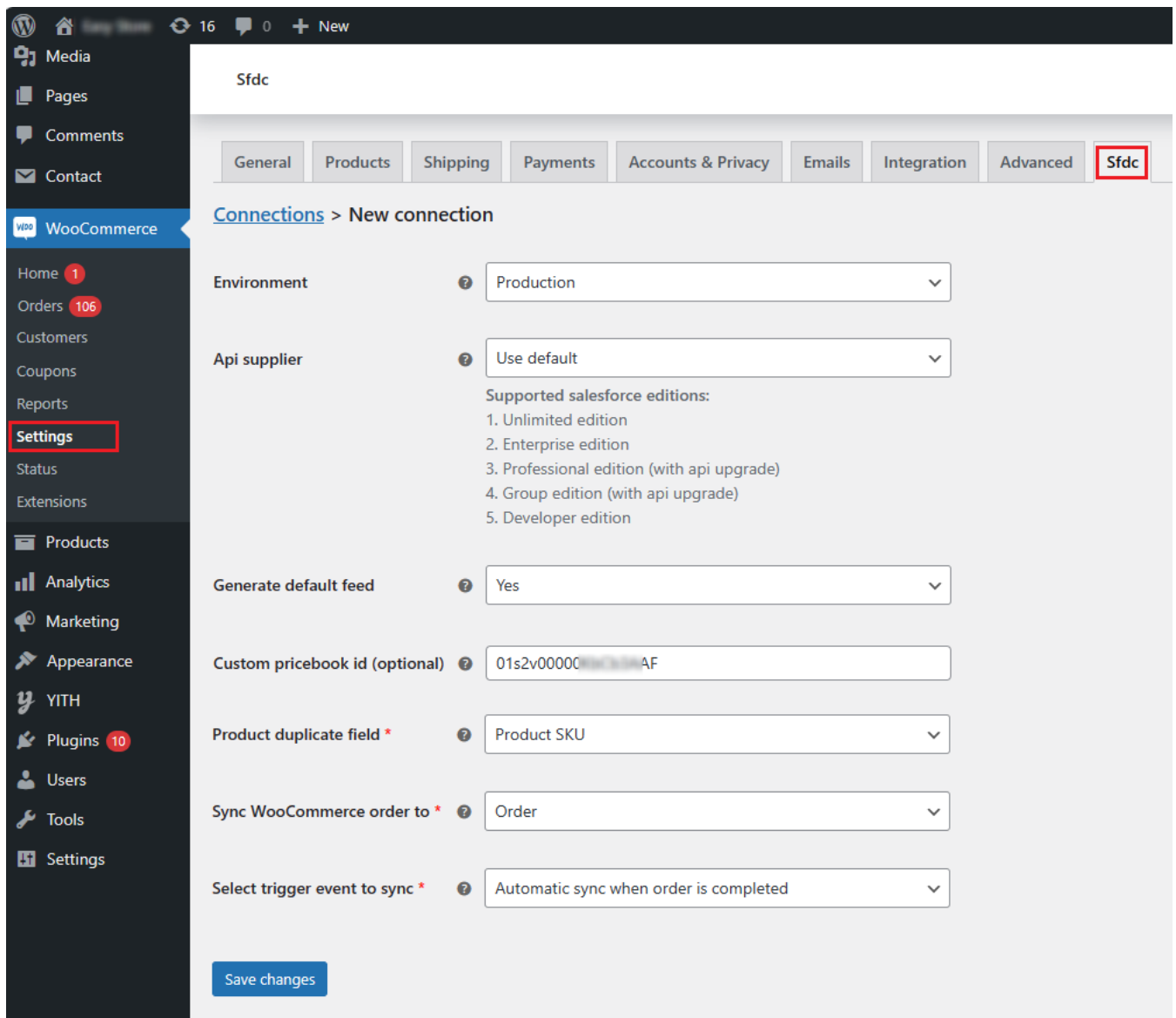
1. [Purchase](#) and download the plugin .zip file from your account or your email.
2. **Go to: WordPress Admin > Plugins > Add New and Upload Plugin** with the file you downloaded with **Choose File**.
3. **Install Now** and **Activate** the plugin.

Step 1: Create connection from Woocommerce to Salesforce

Go to WooCommerce > Setting > Sfdc and click “Add new connection”



And fill connection detail:



–**Environment:** Select your Salesforce target sandbox or production environment.

–**Api supplier:**

- Use default (recommended): Just log in with your salesforce account and start synchronizing.
- Use your own: Choose this if you want to use your own connected app. Follow this tutorial to create your own connected app.

–**Generate default feed:**

- Yes: Create connection and generate mapping feeds from WooCommerce to Account, Contact, Opportunity, Order standard objects of Salesforce.
- No: Only create connection and doesn't generate feeds. You should choose this option if you want to create mapping manually or mapping WooCommerce to custom Salesforce objects.

–**Custom pricebook id:** If you want to use custom pricebook, please paste its id here. This is optional field, if you leave it blank, standard pricebook will be used.

–**Product duplicate field:** Select a key field to mapping product between WooCommerce and Salesforce. When a product from WooCommerce and a product from Salesforce have same key value (example SKU), we will determine that they are same product.

–Sync WooCommerce order to:

- Opportunity: WooCommerce order will be convert to Salesforce opportunity.
- Order: WooCommerce order will be convert to Salesforce order.
- Opportunity and Order: WooCommerce order will be convert to both Salesforce opportunity and order.

–Select trigger event to sync:

- Manually: Click “sync” button on order detail page to start synchronizing.
- When order is placed: Automatically sync to salesforce after the WooCommerce order is placed.
- When order is paid: Automatically sync to salesforce after the WooCommerce order status is changed to paid.
- When order is completed: Automatically sync to salesforce after the WooCommerce order status is changed to completed.

Manual sync

Navigate to “Salesforce” section of WooCommerce order detail page and click “force sync”

The screenshot shows the 'Edit Order' page in WooCommerce. The left sidebar contains a menu with 'Salesforce' at the bottom. The main content area is divided into two sections. The top section shows order details: 'Flat rate' shipping for \$0.00, 'Items Subtotal' of \$352.98, 'Shipping' of \$0.00, and 'Order Total' of \$352.98. Below this are buttons for 'Add item(s)', 'Apply coupon', 'Refund', and 'Recalculate'. The bottom section is titled 'Salesforce' and contains a 'Synced records' table with columns 'Item name', 'Object name', 'Id', and 'Sync date'. The table is currently empty, with a message: 'No sync data. Click "Syn/Re-sync" button to sync this single record.' Below the table is a 'Force sync' button, which is highlighted with a red box and a red arrow.

Account:

The screenshot shows the 'Account' page for 'Taro Tanaka'. The interface includes a top navigation bar with a search bar and various icons. Below the navigation bar, there's a sub-header with the account name and several action buttons: '+ Follow', 'test comp', 'New Contact', and 'New Case'. The main content area is divided into two columns of fields, each with a pencil icon for editing. The right column contains a message: 'No past activity. Past meetings and tasks marked as done show up here.'

| | |
|---|--|
| Type | Ownership |
| Industry | Employees |
| Annual Revenue | SIC Code |
| Billing Address Addr1 Taito Tokyo 110-0012 Japan | Shipping Address Addr1 Taito Tokyo 110-0012 Japan |
| Customer Priority | SLA |
| SLA Expiration Date | SLA Serial Number |
| Number of Locations | Upsell Opportunity |
| Active | |

Contact:

The screenshot shows the 'Contact' page for 'Taro Tanaka'. The interface is similar to the Account page, with a top navigation bar and a sub-header showing the contact name and action buttons: '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'. The main content area features two columns of fields for contact information, each with an edit icon. The right column displays a message: 'Get started by sending an email, scheduling a task, and more.' followed by 'No past activity. Past meetings and tasks marked as done show up here.'

| | |
|---|---|
| Department | Fax |
| Birthdate | Email tanaka.taro@gmail.com |
| Reports To | Assistant |
| Lead Source | Asst. Phone |
| Battle Station | |
| Mailing Address Addr1 Taito Tokyo 110-0012 Japan | Other Address Taro Tanaka Taito Tokyo 110-0012 Japan |
| Languages | Level |

Opportunity

Sales

Home

Opportunities

Quotes

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More

Search...

★

+

🔔

?

⚙️

13

👤

Opportunity

1762

+ Follow

New Case

New Note

Change Record Type

Account Name

Taro Tanaka

Close Date

2023/09/11

Amount

\$352.98

Opportunity Owner

binh thanh

>

Prospecting

Proposal/Price Quote

Negotiation/Review

Closed

Mark Stage as Complete

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

Related

Products (2)

Sample product 1

Quantity: 2.00

Sales Price: \$32.23

Date:

Sample product 2

Quantity: 4.00

Sales Price: \$72.13

Order:

Sales

Home

Opportunities

Quotes

Leads

Tasks

Files

Accounts

Contacts

Campaigns

00000205 | Order

More

Search...

★

+

🔔

?

⚙️

13

👤

Order

00000205

New Contact

New Case

New Lead

Account Name

Taro Tanaka

Contract Number

2023/09/11

Status

Draft

Order Amount

\$352.98

Draft

Activated

Mark as Current Status

Related

Details

Order Products (2)

Add Products

Edit Products

| Product | Product Code | Quantity | Unit Price |
|------------------|--------------|----------|------------|
| Sample product 1 | 111111 | 2.00 | \$32.23 |
| Sample product 2 | 222222 | 4.00 | \$72.13 |

View All

Activity

Calendar

Tasks

Log a Call

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

[illegible]

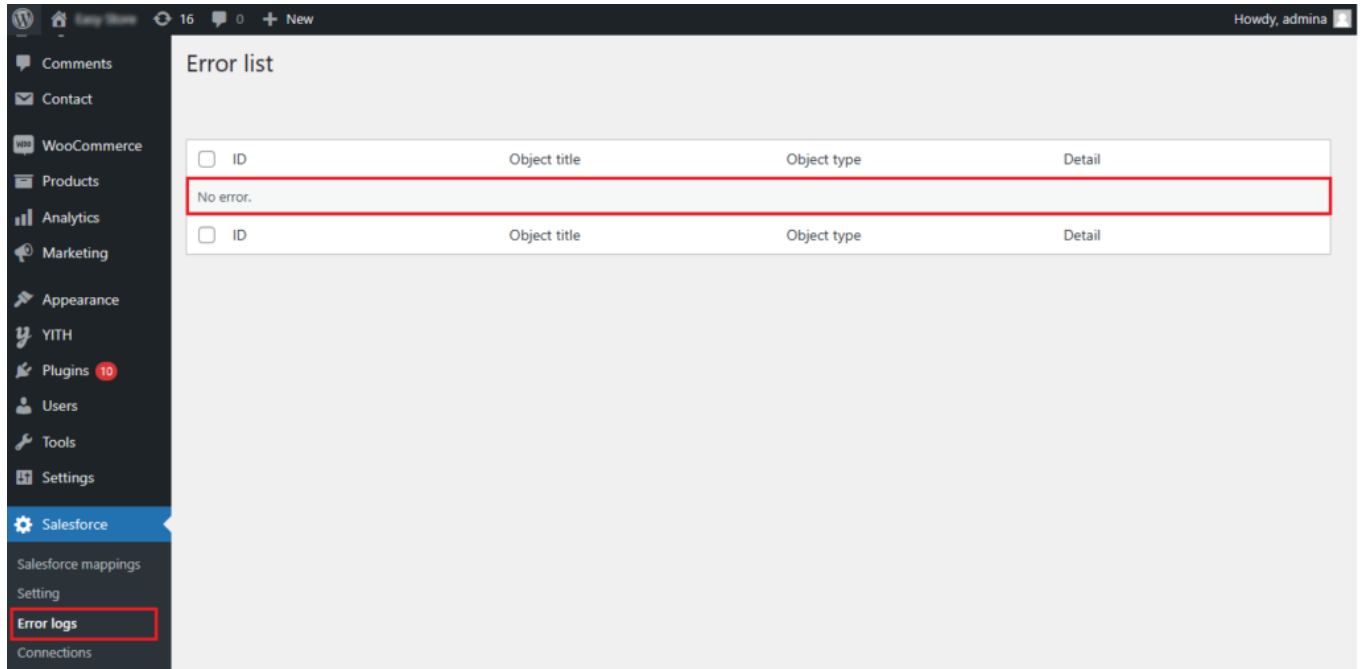
Order filter by sync status

The screenshot shows the Magento 2 'Orders' page. A dropdown menu for 'Sf all status' is open, showing options: 'Sf all status', 'Synced', and 'Not synced'. The table below lists orders with columns: Order, Date, Status, Salesforce, and Total. The 'Salesforce' column indicates the sync status of each order.

| Order | Date | Status | Salesforce | Total |
|-------------------------|--------------|-----------------|------------|----------|
| #1811 Taro Tanaka | 55 mins ago | Processing | Not synced | \$296.72 |
| #1810 Taro Tanaka | 20 hours ago | Processing | Synced | \$90.00 |
| #1762 Taro Tanaka | Sep 11, 2023 | On hold | Synced | \$252.99 |
| #1761 Taro Tanaka | Sep 11, 2023 | Processing | Not synced | \$252.99 |
| #1676 Ishi Long Floride | Sep 1, 2023 | On hold | Not synced | \$229.29 |
| #1675 Ishi Long my | Sep 1, 2023 | Pending payment | Not synced | \$252.99 |
| #1671 Ishi Long that it | Sep 1, 2023 | Processing | Not synced | \$196.59 |

Error log

Any exception error will be display here:



The screenshot shows the WordPress admin interface. On the left sidebar, the 'Salesforce' menu item is expanded, and 'Error logs' is highlighted. The main content area displays the 'Error list' page. It features a table with the following structure:

| <input type="checkbox"/> | ID | Object title | Object type | Detail |
|--------------------------|----|--------------|-------------|--------|
| No error. | | | | |
| <input type="checkbox"/> | ID | Object title | Object type | Detail |

Help and support

We support customers who have valid licence through the ticket system or email.

By ticket: <https://codekiwi.net/my-account/customer-support-ticket/>

By email: contact@codekiwi.net