



Salesforce/Nexternal Commerce Connector Configuration Guide


Initial Setup

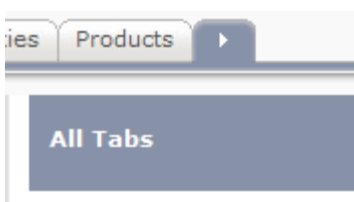
After installing the Nexternal Commerce Connector from the Salesforce AppExchange you will need to make two adjustments to your Salesforce account settings:


1. [Add the Nexternal tab](#) to your Salesforce account page.
2. [Add a Remote Site Setting](#) to enable the Commerce Connector to download information from your Nexternal storefront.

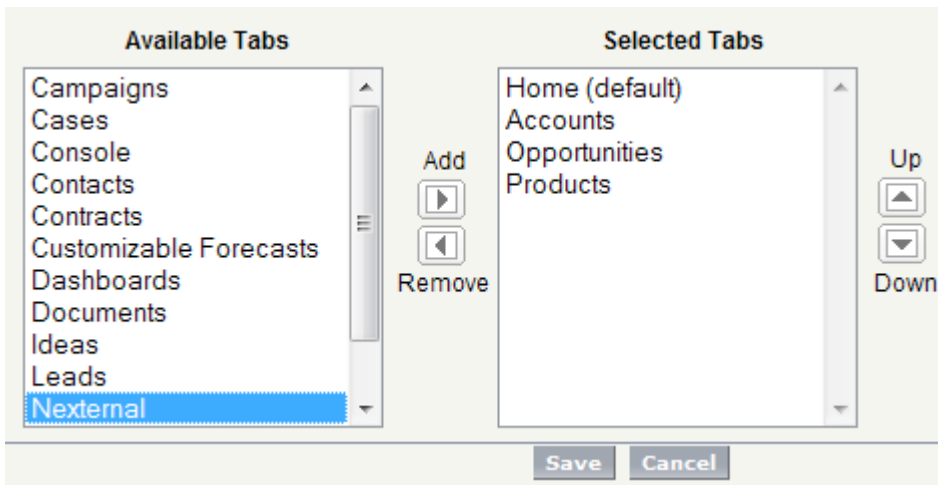
Prior to performing the initial import from you Nexternal storefront please review the [Importing Your Orders](#) section to make sure the import dates have been set (or reset, if you have been testing the addin before installing it in your production Salesforce environment), along with the [What Happens During An Import](#) section and the [Advanced Configuration](#) section below to ensure the import process won't conflict with any existing information you have entered into Salesforce.

Add the Nexternal Tab

Click on the  tab at the far right of your Salesforce account page to display the **All Tabs** configuration settings.

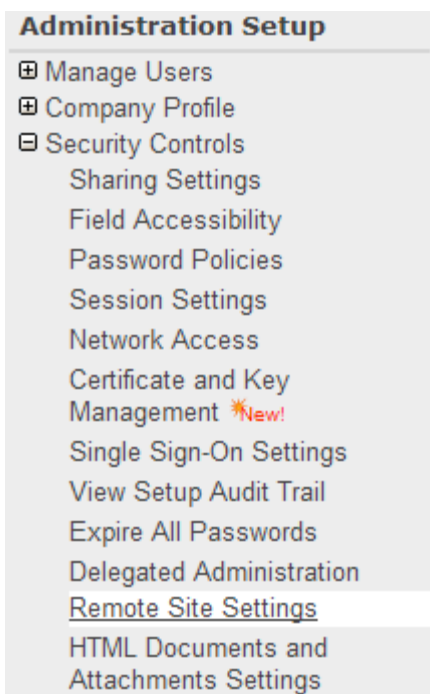


Click on the [Customize My Tabs](#) button to display the **Customize My Tabs** configuration settings. Select the **Nexternal** tab from the list of available tabs, then click the  button to add the Nexternal Commerce Connector to your list of **Selected Tabs** and [Save](#) to save your configuration.



Add a Remote Site Setting

Click on the **Setup** link at the top of your Salesforce account page, then open **Administration Setup** > **Security Controls** and click the **Remote Site Settings** link.



Click the **New Remote Site** button, and enter the following information on the **Remote Site Edit** page, and **Save** to save your configuration.


| Remote Site Edit | | Save | Save & New | Cancel |
|---------------------------|--|------|------------|--------|
| Remote Site Name | <input type="text" value="Nexternal"/> | | | |
| Remote Site URL | <input type="text" value="https://www.nexternal.com"/> | | | |
| Disable Protocol Security | <input type="checkbox"/> | | | |
| Description | <input type="text"/> | | | |

Importing Your Orders

Before you can import your storefront orders into Salesforce you will need to visit the Nexternal Order Management System and enable the Salesforce Commerce Connector under Settings > Compatible Software.

Please note that the export starting date might have to be reset by editing the date displayed in the Sync Start Date control if you have been testing the Salesforce Commerce Connector prior to installing it in your production Salesforce environment.

Information about which orders, customers, and products have already been retrieved from your storefront by the Nexternal Commerce Connector is stored on the Nexternal servers. You can reset this information by logging into your Nexternal Order Management System and changing the Sync Start Date under Settings > Compatible Software > Salesforce.

Once the Sync Start Date has been changed you can log back into Salesforce and click the  button to restart the import from the Sync Start Date you have selected.

By default the Nexternal Commerce Connector will initially set the import synchronization start date to cover the previous six months' worth of orders in your storefront. If you would like to change the start date to retrieve more (or less) orders you can do so from the Nexternal Order Management System, under Settings > Compatible Software > Salesforce.

Salesforce Commerce Connector [Free Trial](#) [Install](#)

Use Salesforce Commerce Connector

Sync Start Date:

(estimated storage use: 1.83%)

Export orders based on: ▼

Note that the percentage of **estimated storage use** is a very rough approximation of the actual amount of storage that will be used by your initial import into your Salesforce account. The calculation is based on an estimated 20MB of storage per Salesforce account; the actual amount of storage space you have will depend on the Salesforce Edition you are using. You can check the storage limit from your Salesforce account Setup page and adjust the percentages accordingly.

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- ▾ **Data Management**
 - Analytic Snapshots
 - Import Accounts/Contacts
 - [Import Leads](#)
 - Import Solutions
 - Import Custom Objects
- [Storage Usage](#)

Storage Usage

Your organization's storage usage is listed below.

| Storage Type | Limit |
|--------------|---------|
| Data Storage | 20.0 MB |
| File Storage | 20.0 MB |

Current Data Storage Usage

| Record Type |
|---------------|
| Opportunities |
| Contacts |

Remember that most Salesforce editions come with a fixed amount of storage space, and any orders you import will have to share that space with all of the other CRM-related tasks that you are performing.

Please exercise prudence (and caution!) when you chose a synchronization start date.

By default only the orders that are flagged as "Shipped" or "Sent" are exported from your storefront. If you prefer to export new ("Unshipped") orders as they come into your storefront you can change the "Export orders based on:" value to "Purchase Date".

Export orders based on: ▾

Once you have configured the Salesforce Commerce Connector settings in the Nexternal Order Management System you're ready to being your initial import from your Salesforce account. Sign on to your Salesforce account, select the Nexternal tab, and enter your Nexternal Account Name and your Nexternal login and password in the Connection Credentials fields.

Select the Salesforce User you would like to **Assign as Owner** during the import process, then click to start importing the order, customer, and product information from your storefront.

Connection Credentials

Nexternal Account Name:

User Name:

Password:

Assign as Owner: ▾

Enable automatic updates (once per hour)

Once you have completed the initial synchronization you can automate all future imports by selecting the [Enable automatic updates \(once per hour\)](#) checkbox.

Note that the Enable Automatic Updates checkbox will not be displayed until after you have completed your first successful synchronization!

What Happens During An Import

The Nexternal Commerce Connector is designed to use the standard fields in your Salesforce environment for storing the information imported from your Nexternal storefront. The import process itself is sequential (a section of imported data is read, a Salesforce record is created or updated and written back to the Salesforce database), and does not use any "event-driven" coding to complete any operations.

When data from your Nexternal storefront is imported into Salesforce the following relationships will be created.

- In general, a new Nexternal customer record will create a new Salesforce Account record and a new Salesforce Contact record that is associated with the Account. The only exceptions to this one-to-one mapping are:
 - If an existing Salesforce Account "Account Name" field matches the Nexternal customer Company name the existing Salesforce Account record will be used, and the Nexternal customer will be added to the Account record as a Salesforce Contact.
 - If an existing Salesforce Account contains a Contact record that has an email address that matches the Nexternal customer email address the existing Salesforce Contact record will be used.
- A Nexternal order record will create a new Salesforce Opportunity record.
- The order line items in the Nexternal order record will create new Salesforce OpportunityLineItem records, PricebookEntry records, and Product2 records that are associated with the Opportunity record.
- Any Nexternal customer activities will create new Salesforce Task records.

Note: If you are using the [NexternalFields.properties](#) configuration file as described in the [Nexternal Custom Field Properties](#) section the node value(s) will be written to the field(s) you have assigned in the properties file.

The Nexternal Commerce Connector is designed to always treat orders, customers, and products that are

imported from the Nexternal storefront in this manner so that a one-to-one relationship between the data in the Nexternal Order Management System and the Salesforce environment is maintained. Please see the [Issues Encountered During An Import](#) section below for more information.

The Nexternal Commerce Connector will *always* try to preserve any existing Salesforce Account and/or Contact information, even if it means a technically incorrect assignment or association is created during the import.

For example, assume there is a pre-existing Salesforce Contact record for John Doe with the email address "test@test.com". An order from Jane Smith is imported from your Nexternal storefront that has the email address "test@test.com". After the import the order (Salesforce Opportunity) will be associated with John Doe. A Salesforce Contact record for Jane Smith *will not* be created, and the customer information for Jane Smith *will not* overwrite the Salesforce Contact information for John Doe.

Note: If you are going to merge customers in your Nexternal storefront, always try to merge the records into an existing Salesforce Contact record that has already been imported by the Nexternal Commerce Connector and assigned a "Nexternal" Lead Source value.

Contact Detail Edit I

| | |
|-----------------|---|
| Contact Owner | Demo User Demo User [Cha] |
| Name | Max Martin |
| Account Name | Smart Kids Software |
| Title | |
| Department | |
| Birthdate | |
| Reports To | View Org Chart |
| Lead Source | Nexternal (1362-171) |
| Mailing Address | 14303 Shannon Ridge Houston, TX 77062 |

| | | |
|-------------------------------------|----------------------------------|---------------------------------|
| <input checked="" type="checkbox"/> | <input type="radio"/> | 165 from Allens, Inc., Ed |
| <input checked="" type="checkbox"/> | | Group #4 Select All/None |
| <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | 144 Weise, Bill and Heidi |
| <input checked="" type="checkbox"/> | <input type="radio"/> | 13 Gallagher, Mike |
| <input checked="" type="checkbox"/> | <input checked="" type="radio"/> | 171 Martin, Max |
| <input checked="" type="checkbox"/> | <input type="radio"/> | 186 Continental, Esmeralda |
| <input checked="" type="checkbox"/> | | Group #5 Select All/None |

If you have different requirements for data imported into your Salesforce environment please contact your Nexternal Account Manager. We can provide the source code for the addin to your developer or

consultant so that they can tailor the import process to meet your needs.

The Imported Data

The import comes into the Nexternal Commerce Connector as an XML document, and certain fields in the document are used by the addin to prevent duplicate records from being created in your Salesforce account. An example of the Nexternal SalesForceReply is located in your Static Resources area (Salesforce Setup > App Setup Section > Develop > Static Resources) under the name [SalesforceReply](#), and can be used as a reference for the fields described below.

<AccountID>

Nexternal storefront number combined with the Nexternal customer number (e.g. 1362-1084). The value in the AccountID node is written to the Salesforce Account.AccountId field, and is used to find existing Nexternal customers that have been created during a previous import. If this field is changed or removed a new Salesforce Account record will be created the next time the customer number is part of an import. There are two exceptions to this condition:

- (1) If the value in the <Account><Company> node matches an existing Salesforce Account.Name field and the Account.AccountId field contains a Nexternal company identifier (a "C" followed by an integer number) the matching Account record will be used, and a new Contact record will be created (or an existing record, as per exception (2) below, will be used).
- (2) If a matching Account record isn't found a secondary search will be performed for any Salesforce Contact records that have a Contact.Email field that matches the value contained in the imported <Account><Email> node. If a match is found the Salesforce Account record associated with the matching Contact record will be used instead.

A modified version of the AccountID node is also used in the Salesforce Contact.LeadSource field to identify Contact records that have been created during an import and/or associated with an existing Salesforce Contact record during an import. If the Contact.LeadSource field is changed or removed a new Salesforce Contact record will be created the next time the customer number is part of an import (or an existing record, as per exception (2) above, will be used).

<OpportunityID>

Nexternal storefront number combined with the Nexternal order number (e.g. 1362-4148). The value in the OpportunityID node is written to the Salesforce Opportunity.Name field, and is used to find existing Nexternal orders that have been created during a previous import. If this field is changed or removed a new Salesforce Opportunity record will be created the next time the order customer number is part of an import.

The OpportunityID node value is also used to associate the Salesforce Opportunity with one or more Salesforce OpportunityLineItem records (OpportunityLineItem.OpportunityId), one or more Salesforce

Task records (Task.WhatId), and with the Salesforce Contact that placed the original order in the Nexternal storefront (OpportunityContactRole.OpportunityId).

<LineltemID>

Nexternal storefront number combined with the Nexternal line item number (e.g. 1362-2174). The value in the LineltemID node is written to the Salesforce OpportunityLineltem.Description field, and is used to find existing Nexternal order line items that have been created during a previous import.

The LineltemID node value is also used to associate the Salesforce Opportunity with one or more Salesforce OpportunityLineltem records.

<ProductCode>

Nexternal storefront number combined with the Nexternal product number (e.g. 1362-32218). If the product has a product-level SKU value defined the SKU value will be used instead of the product number (e.g. 1362-ff062). If the product is a gift certificate the gift certificate code will be used (e.g. 1362-fisher2320).

Note: If the "UseSKULevelCode" key is set to "true" in the [NexternalFields.properties](#) configuration file the individual SKU-level items from your storefront orders will be used to create Product records on Salesforce. Please contact your Nexternal Account Manager for additional information about this setting, as it might not be suitable for use with your storefront.

The value in the ProductCode node is written to the Salesforce Product2.ProductCode field, and is used to find existing Nexternal products that have been created during a previous import. If this field is changed or removed a new Salesforce Product2 record will be created the next time the product number is part of an import.

The ProductCode node value is also used to associate the Salesforce OpportunityLineltem with a Salesforce Product2 record via the Salesforce PricebookEntry record.

Note: Do **not** change or alter the Pricebook information for products imported into Salesforce from your Nexternal storefront. Nexternal products need to be associated with the Salesforce Standard Pricebook.

Note that changing the ProductCode value after an import might result in reassignment of any existing Salesforce linkages between new and existing OpportunityLineltems and loss of the PricebookEntry record linkages.

The Import Process

After each batch of data is imported the information within the XML document is parsed and processed as follows. Note that each step below will use the information described in [The Imported Data](#) section to retrieve pre-existing records if possible, and the Salesforce records that are created or updated during

each step are committed to the Salesforce database before proceeding to the next step.

- (1) The <Account> node is selected, and a Salesforce Account record is retrieved or created.
- (2) All <Product> nodes within the <Account> node are selected, and Salesforce Product2 records are retrieved or created.
- (3) All <Opportunity> nodes within the <Account> node are selected, and Salesforce Opportunity records are retrieved or created. The <Product> nodes are reselected so that a relationship between the Opportunity and the Product2 records can be established via the Salesforce PricebookEntry record.
- (4) All <OpportunityLineItem> nodes within the <Account> node are selected, and Salesforce OpportunityLineItem records are retrieved or created. The <Opportunity> and <Product> nodes are reselected so that a relationship between the OpportunityLineItem and PricebookEntry records can be established.
- (5) The selected <Account> node is used to retrieve or create a Salesforce Contact record, and the Contact record is used to establish the relationship between the Account and the Contact via the Salesforce AccountContactRole record and the relationship between the Contact and the Opportunity via the Salesforce OpportunityContactRole record.
- (6) The <ActivityHistory> node is selected, and all <Activity> nodes within the <ActivityHistory> node are added as Salesforce Task records.

Issues Encountered During An Import

Each of the preceding steps performs an update on your Salesforce data, so if you have any custom triggers, rules, filters, or third-party addins in your Salesforce environment that are "listening" for change events on Salesforce objects you might encounter problems due to data fields, dependencies, or relationships that have yet to be created.

If this is the case we *strongly* recommend that you install the Nexternal Commerce Connector to your Salesforce environment sandbox and conduct some test-runs before installing the addin in your production environment. In some cases the issues you might encounter during your tests can be mitigated by creating custom fields in your Salesforce environment and mapping one or more Nexternal fields to these custom fields. Please see the [Advanced Configuration](#) section below for more information.

If you have any of these kinds of interaction issues with the Nexternal Commerce Connector please contact your Nexternal Account Manager. We can provide the source code for the addin to your developer or consultant so that they can tailor the import process to meet your needs.

Importing Multiple Storefronts

If desired, the Nexternal Commerce Connector can import orders from multiple storefronts into a single Salesforce environment. All of the information related to an order (e.g. Account, Contact, Opportunity, etc.) is imported with a unique storefront number, which is used to create unique records in your Salesforce environment.

The only exception to this behaviour is for Nexternal customer records that have a Company name (see the "Company Field" options in the Nexternal Order Management System > Customers > Types > Edit Customer & Activity Types (Page 2)). If the same Company name is used in more than one of your Nexternal storefronts only one Company-type Salesforce Account record will be created and used for all Customers (Salesforce Contacts) that are imported. Please see [What Happens During An Import](#) for more information about how Company Account records are created.

If you want to import multiple storefronts using the automatic update feature, each of the storefronts must be configured using a separate Salesforce Login, so that unique Salesforce CronTrigger tasks can be created to manage the information required by the addin when scheduling an import for each storefront.

In the example below, two different Salesforce Users ("First User" and "Second User") have logged into Salesforce, selected the "Nexternal" addin tab, entered the Connection Credentials for a Nexternal demonstration storefront ("fairway" and "winery"), and after successfully performing the initial synchronization they have checked the "Enable automatic updates" checkbox to create two new Scheduled Jobs within the Salesforce environment.

Administration Setup

- ▣ Manage Users
- ▣ Company Profile
- ▣ Security Controls
- ▣ Communication Templates
- ▣ Translation Workbench
- ▣ Data Management
- ▣ Monitoring
 - Imports
 - Outbound Messages
 - Time-Based Workflow
 - Automated Process Actions
 - Case Escalations
 - API Usage Notifications
 - Mass Emails
 - Debug Logs
 - Scheduled Jobs**
 - Apex Jobs
 - Bulk Data Load Jobs

All Scheduled Jobs
[Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: All Scheduled Jobs [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

| Action | Job Name | Submitted By | Submitted | Started | Next Scheduled Run | Type |
|---------------------|----------------------------|------------------------------|--------------------|--------------------|--------------------|----------------|
| Del | Nexternal Import (fairway) | User, First | 11/15/2012 3:22 PM | 11/16/2012 8:22 AM | 11/16/2012 9:22 AM | Scheduled Apex |
| Del | Nexternal Import (winery) | User, Second | 11/15/2012 3:22 PM | 11/16/2012 8:22 AM | 11/16/2012 9:22 AM | Scheduled Apex |

[Advanced Configuration \(Optional\)](#)

[Nexternal Custom Field Settings](#)

The Nexternal Commerce Connector is designed to use the standard fields in your Salesforce environment for storing the information imported from your Nexternal storefront. If you have existing CRM data entered into your Salesforce account, or if you intend to use the Nexternal Commerce Connector in conjunction with another Salesforce application or AppExchange addin, you might need to create a Nexternal Custom Fields configuration file.

The illustrations below in the [Salesforce Objects](#) section outline the Salesforce objects and standard fields used by the Nexternal Commerce Connector, and include a brief description of the storefront data that will be imported into each field. An example of the Nexternal SalesforceReply Object (XML) will be copied into your Static Resources area (Salesforce Setup > App Setup Section > Develop > Static Resources) under the name [SalesforceReply](#) during the installation of the Nexternal Commerce Connector, and can be used as a reference for the fields described below in the Nexternal Response Node columns.

The section following this one, [Nexternal Custom Field Properties](#), describes the contents of the Java "properties" file that can be used to change the Salesforce object field(s) where your Nexternal information will be stored.

Salesforce Objects

Salesforce Account Object

App Setup

- ▣ Customize
 - ▾ Tab Names and Labels
 - ▾ Home
 - ▾ Activities
 - ▾ Campaigns
 - ▾ Leads
 - ▾ Accounts
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Partner Roles
 - Contact Roles
 - Page Layouts
 - Field Sets New!
 - Search Layouts
 - Buttons and Links
 - Record Types
 - Account Teams
 - ▾ Contacts
 - ▾ Opportunities
 - ▾ Quotes
 - ▾ Forecasts
 - ▾ Cases
 - ▾ Entitlement Management
 - ▾ Self-Service
 - ▾ Call Center

Set History Tracking

Account Standard Fields

| Action | Field Label | Field Name | Data Type |
|--|-------------------------|-------------------|-----------------------|
| | <u>Account Name</u> | Name | Name |
| Edit | <u>Account Number</u> | AccountNumber | Text(40) |
| Edit | <u>Account Owner</u> | Owner | Lookup(User) |
| Edit | <u>Account Site</u> | Site | Text(80) |
| Edit | <u>Annual Revenue</u> | AnnualRevenue | Currency(18, 0) |
| | <u>Billing Address</u> | BillingAddress | Address |
| | <u>Created By</u> | CreatedBy | Lookup(User) |
| Edit | <u>Description</u> | Description | Long Text Area(32000) |
| Edit | <u>Employees</u> | NumberOfEmployees | Number(8, 0) |
| Edit | <u>Fax</u> | Fax | Fax |
| Replace Edit | <u>Industry</u> | Industry | Picklist |
| | <u>Last Modified By</u> | LastModifiedBy | Lookup(User) |
| Replace Edit | <u>Ownership</u> | Ownership | Picklist |
| Edit | <u>Parent Account</u> | Parent | Lookup(Account) |
| Edit | <u>Phone</u> | Phone | Phone |
| Replace Edit | <u>Rating</u> | Rating | Picklist |
| | <u>Shipping Address</u> | ShippingAddress | Address |
| Edit | <u>SIC Code</u> | Sic | Text(20) |
| Edit | <u>Ticker Symbol</u> | TickerSymbol | Content(20) |
| Replace Edit | <u>Type</u> | Type | Picklist |
| Edit | <u>Website</u> | Website | URL(255) |

| Nexternal Response Node | Salesforce Object and Field | Description |
|--------------------------|-----------------------------|----------------------|
| Account/AccountID | Account.AccountNumber | Customer Number (1) |
| Account/Company | Account.Name | Company Name (2) |
| Account/Name | Account.Name | Customer Name |
| Account/EMail | Account.Site | Email Address |
| Account/Billing/Street | Account.BillingStreet | Billing Address |
| Account/Billing/City | Account.BillingCity | Billing City |
| Account/Billing/State | Account.BillingState | Billing State |
| Account/Billing/Zip | Account.BillingPostalCode | Billing Zip Code |
| Account/Billing/Country | Account.BillingCountry | Billing Country |
| Account/Shipping/Street | Account.ShippingStreet | Shipping Address |
| Account/Shipping/City | Account.ShippingCity | Shipping City |
| Account/Shipping/State | Account.ShippingState | Shipping State |
| Account/Shipping/Zip | Account.ShippingPostalCode | Shipping Zip Code |
| Account/Shipping/Country | Account.ShippingCountry | Shipping Country |
| Account/CustomerType | Account.Type | Customer Type (3) |
| Account/Description | Account.Description | Age Verification (4) |
| Account/Phone | Account.Phone | Phone Number |

(1) If the Salesforce Account.Type field is "Residential" the Salesforce Account.AccountNumber field

will contain the Nexternal Customer Number. If the Salesforce Account.Type is "Business" the Salesforce.AccountNumber field will contain an auto-generated (and auto-incremented) numeric value prefixed with the letter "C". This auto-generated value is used by the Nexternal Commerce Connector to query for and select "Business" accounts that can be used as the parent Account for one or more Contacts. See (2) and (3) below for more information about how Salesforce Accounts and Contacts are processed.

- (2) If the Company Name field in a Nexternal Customer record is empty (blank) the Nexternal Commerce Connector will create a Salesforce Account and a matching Salesforce Contact using the Nexternal Customer record. Both Salesforce objects will be labelled with the Customer Name.

If the Company Name field is not empty the Nexternal Commerce Connector will try to find a Salesforce Account that matches the Company Name, and, if one is found, it will create a Salesforce Contact and attach it to the existing Salesforce Company Account. If a matching Account is not found a new Salesforce Account based on the Nexternal Customer information will be created using the Company Name, and a new Salesforce Contact will be created and attached to the new Salesforce Account.

- (3) The Nexternal Customer Type is used in the Salesforce AccountContactRole.Role field. When a new Salesforce Account object is created the Account.Type field is set to either "Business" or "Residential", depending on whether or not a Company Name is involved.
- (4) If Age Verification is enabled in the storefront Order Management System the Age Verification Flag and Age Verification Notes are passed to the Salesforce Account.Description field.

See also: [What Happens During An Import](#)

Salesforce Contact Object

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts**
 - Fields**
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Page Layouts
 - Field Sets New!
 - Search Layouts
 - Buttons and Links
 - Record Types
 - Opportunities
 - Quotes
 - Forecasts
 - Cases
 - Entitlement Management
 - Self-Service
 - Call Center
 - Contracts
 - Solutions
 - Products
 - Partners
 - Salesforce to Salesforce
 - Customer Portal
 - Ideas
 - Answers
 - Assets
 - Users
 - Console
 - Salesforce CRM Content
 - Content Deliveries

Set History Tracking

Contact Standard Fields

| Action | Field Label | Field Name | Data Type |
|--|--|--------------------|-----------------------|
| Edit | <u>Account Name</u> | Account | Lookup(Account) |
| Edit | <u>Assistant</u> | AssistantName | Text(40) |
| Edit | <u>Asst. Phone</u> | AssistantPhone | Phone |
| Edit | <u>Birthdate</u> | Birthdate | Date |
| Edit | <u>Contact Owner</u> | Owner | Lookup(User) |
| | <u>Created By</u> | CreatedBy | Lookup(User) |
| Edit | <u>Department</u> | Department | Text(80) |
| Edit | <u>Description</u> | Description | Long Text Area(32000) |
| Edit | <u>Do Not Call</u> | DoNotCall | Checkbox |
| Edit | <u>Email</u> | Email | Email |
| Edit | <u>Email Opt Out</u> | HasOptedOutOfEmail | Checkbox |
| Edit | <u>Fax</u> | Fax | Fax |
| Edit | <u>Fax Opt Out</u> | HasOptedOutOfFax | Checkbox |
| Edit | <u>Home Phone</u> | HomePhone | Phone |
| | <u>Last Modified By</u> | LastModifiedBy | Lookup(User) |
| Edit | <u>Last Stay-in-Touch Request Date</u> | LastCUREquestDate | Date/Time |
| Edit | <u>Last Stay-in-Touch Save Date</u> | LastCUUpdateDate | Date/Time |
| Replace Edit | <u>Lead Source</u> | LeadSource | Picklist |
| | <u>Mailing Address</u> | MailingAddress | Address |
| Edit | <u>Mobile</u> | MobilePhone | Phone |
| | <u>Name</u> | Name | Name |
| Edit Replace | <u>Salutation</u> | Salutation | Picklist |
| | <u>First Name</u> | FirstName | Text(40) |
| | <u>Last Name</u> | LastName | Text(80) |
| | <u>Other Address</u> | OtherAddress | Address |
| Edit | <u>Other Phone</u> | OtherPhone | Phone |
| Edit | <u>Phone</u> | Phone | Phone |
| Edit | <u>Reports To</u> | ReportsTo | Lookup(Contact) |
| Edit | <u>Title</u> | Title | Text(80) |

| Nexternal Response Node | Salesforce Object and Field | Description |
|---------------------------|-----------------------------|---------------------------------|
| Contact/Name/LastName (1) | Contact.LastName | Customer Last Name |
| Contact/Name/FirstName | Contact.FirstName | Customer First Name |
| Contact/Mailing/Street | Contact.MailingStreet | Billing Address |
| Contact/Mailing/City | Contact.MailingCity | Billing City |
| Contact/Mailing/State | Contact.MailingState | Billing State |
| Contact/Mailing/Zip | Contact.MailingPostalCode | Billing Zip Code |
| Contact/Mailing/Country | Contact.MailingCountry | Billing Country |
| Contact/Phone | Contact.Phone | Phone Number |
| Contact/Email | Contact.Email | Email Address (2) |
| Contact/LeadSource | Contact.LeadSource | Nexternal (Customer Number) (3) |

(1) Note that in this instance the Nexternal Response Node column is a mapping placeholder for Contact-level information that actually comes from the "Account/*" nodes. See the notes for [Salesforce Account Object](#) for more information.

- (2) When a Nexternal Customer record is initially imported into a Salesforce account the Nexternal Commerce Connector will use the Contact/Email node to try and find a matching (pre-existing) Salesforce Contact. If the same email address is used for more than one Contact (or more than one Nexternal Customer) only the first match found will result in a binding between that specific Nexternal Customer and that specific Salesforce Contact; all subsequent Nexternal Customers sharing that email address will create new Salesforce Contact objects.
- (3) The Salesforce Contact.Leadsource is used to store the source of the lead (your Nexternal storefront) and the Nexternal Customer Number.

See also: [What Happens During An Import](#)

Salesforce Opportunity Object

App Setup

- Customize
 - ▾ Tab Names and Labels
 - ▾ Home
 - ▾ Activities
 - ▾ Campaigns
 - ▾ Leads
 - ▾ Accounts
 - ▾ Contacts
 - Opportunities
 - Fields**
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Field Sets New!
 - Search Layouts
 - Buttons and Links
 - Sales Processes
 - Record Types
 - Big Deal Alert
 - Opportunity Team Selling
 - Update Reminders

Set History Tracking

Opportunity Standard Fields

| Action | Field Label | Field Name | Data Type |
|--|---|--------------------------|-----------------------|
| Edit | Account Name | Account | Lookup(Account) |
| Edit | Amount | Amount | Currency(16, 2) |
| Edit | Close Date | CloseDate | Date |
| | Created By | CreatedBy | Lookup(User) |
| Edit | Description | Description | Long Text Area(32000) |
| Edit | Expected Revenue | ExpectedRevenue | Currency(16, 2) |
| Edit | Forecast Category | ForecastCategoryName | Picklist |
| | Last Modified By | LastModifiedBy | Lookup(User) |
| Replace Edit | Lead Source | LeadSource | Picklist |
| Edit | Next Step | NextStep | Text(255) |
| Edit | Opportunity Name | Name | Text(120) |
| Edit | Opportunity Owner | Owner | Lookup(User) |
| Edit | Primary Campaign Source | Campaign | Lookup(Campaign) |
| Edit | Private | IsPrivate | Checkbox |
| Edit | Probability (%) | Probability | Percent(3, 0) |
| Edit | Quantity | TotalOpportunityQuantity | Number(16, 2) |
| Replace Edit | Stage | StageName | Picklist |
| Replace Edit | Type | Type | Picklist |

| Nexternal Response Node | Salesforce Object and Field | Description |
|---------------------------|-----------------------------|----------------------------------|
| Opportunity/OpportunityID | Opportunity.Name | Order Number |
| Opportunity/CloseDate | Opportunity.CloseDate | Ship Date |
| Opportunity/NextStep | Opportunity.NextStep | Payment Method and P.O. Number |
| Opportunity/StageName | Opportunity.StageName | Status (always "Closed Won") |
| Opportunity/Type | Opportunity.Type | Placed By |
| Opportunity/LeadSource | Opportunity.LeadSource | Lead Source (always "Nexternal") |
| Opportunity/OrderDate | Opportunity.Description(1) | Creation Date |
| Opportunity/OrderNet | Opportunity.Description | Net Price |
| Opportunity/Coupon | Opportunity.Description | Coupon Discount(s) |
| Opportunity/Discount | Opportunity.Description | Other Discount(s) |
| Opportunity/Tax | Opportunity.Description | Tax |
| Opportunity/Shipping | Opportunity.Description | Shipping |
| Opportunity/Amount | Opportunity.Description | Total Price |
| Opportunity/Comments | Opportunity.Description | Customer Comments |

- (1) Note that the last eight fields are concatenated and stored in the Opportunity.Description field by default. See [Nexternal Custom Field Properties](#) for more information.

Salesforce OpportunityLineItem Object

- Opportunities
- Fields
- Validation Rules
- Triggers
- Contact Roles
- Competitors
- Page Layouts
- Field Sets New!
- Search Layouts
- Buttons and Links
- Sales Processes
- Record Types
- Big Deal Alert
- Opportunity Team Selling
- Update Reminders
- Settings
- Similar Opportunities New!
- Opportunity Products
- Fields

| Opportunity Product Standard Fields | | | |
|-------------------------------------|-------------------------|----------------|---------------------|
| Action | Field Label | Field Name | Data Type |
| | <u>Created By</u> | CreatedBy | Lookup(User) |
| Edit | <u>Date</u> | ServiceDate | Date |
| Edit | <u>Discount</u> | Discount | Percent(3, 2) |
| | <u>Last Modified By</u> | LastModifiedBy | Lookup(User) |
| Edit | <u>Line Description</u> | Description | Text(255) |
| Edit | <u>List Price</u> | ListPrice | Currency(16, 2) |
| Edit | <u>Opportunity</u> | Opportunity | Lookup(Opportunity) |
| Edit | <u>Product</u> | Product2 | Lookup(Product) |
| Edit | <u>Product Code</u> | ProductCode | Text(255) |
| Edit | <u>Quantity</u> | Quantity | Number(10, 2) |
| Edit | <u>Sales Price</u> | UnitPrice | Currency(16, 2) |
| Edit | <u>Subtotal</u> | Subtotal | Currency(16, 2) |
| Edit | <u>Total Price</u> | TotalPrice | Currency(16, 2) |

| Nexternal Response Node | Salesforce Object and Field | Description |
|---------------------------------|------------------------------------|---------------------------|
| OpportunityLineItem/Quantity | OpportunityLineItem.Quantity | Line Item Quantity |
| OpportunityLineItem/ServiceDate | OpportunityLineItem.ServiceDate | Line Item Ship Date |
| OpportunityLineItem/UnitPrice | OpportunityLineItem.UnitPrice | Line Item Unit Price |
| OpportunityLineItem/LineItemID | OpportunityLineItem.Description(1) | Line Item Number |
| OpportunityLineItem/ShipTo | OpportunityLineItem.Description | Line Item ShipTo Address |
| OpportunityLineItem/TrackingNo | OpportunityLineItem.Description | Line Item Tracking Number |

- (1) Note that the last three fields are concatenated and stored in the OpportunityLineItem. Description field by default. See [Nexternal Custom Field Properties](#) for more information.

Salesforce Product2 Object

| Product Standard Fields | | | |
|--|-------------------------------------|----------------|-----------------|
| Action | Field Label | Field Name | Data Type |
| Edit | Active | IsActive | Checkbox |
| | Created By | CreatedBy | Lookup(User) |
| | Last Modified By | LastModifiedBy | Lookup(User) |
| Edit | Product Code | ProductCode | Text(255) |
| Edit | Product Description | Description | Text Area(4000) |
| Replace Edit | Product Family | Family | Picklist |
| Edit | Product Name | Name | Text(255) |

| Nexternal Response Node | Salesforce Object and Field | Description |
|-------------------------|-----------------------------|-----------------------------------|
| Product2/ProductName | Product2.Name | Product Name |
| Product2/ProductCode | Product2.ProductCode (1) | Product Number |
| Product2/Family | Product2.Family | Product Category |
| Product2/Vendor | Product2.Description (2) | Product Vendor |
| Product2/Description | Product2.Description | Product Description (abbreviated) |

- (1) See <Product Code> in [The Imported Data](#) for more information about alternative field values.
- (2) Note that the last two fields are concatenated and stored in the Product2.Description field by default. See [Nexternal Custom Field Properties](#) for more information.

Nexternal Custom Field Properties

If you are using the Nexternal Commerce Connector with a brand new Salesforce account, and your Salesforce account will never be used for anything except importing order, customer, and product information from your Nexternal storefront into the Salesforce CRM, then

You DO NOT need to have a NexternalFields.properties file!

Please do not proceed beyond this point, and please do not follow any of the steps or procedures outlined below!

The information in this section is intended for any combination of the following:

- (1) Companies and users that have an existing Salesforce account, and that Salesforce account already contains CRM data.
- (2) Companies and users that are signing up with Salesforce and intend to use additional addins from the Salesforce AppExchange in combination with the Nexternal Commerce Connector addin.
- (3) Companies and users that already are using or will be using any kind of programming service(s) to modify their Salesforce data and / or views (e.g. triggers, rules, etc.).

The content of the next section should be copied in its entirety and pasted into a plain-ASCII text file named [NexternalFields.properties](#). This is the configuration file you will modify and upload to the Static Resources area (Salesforce Setup > App Setup Section > Develop > Static Resources) as [NexternalFields](#) if you want to create your own Custom Fields and use them for storing Nexternal data.

The properties file itself serves as the documentation for what kind of changes can be made. Remember that you must create your Salesforce Custom field(s) **first**, and then transfer the Custom Fields API Name(s) to the Salesforce object field(s) **to the right of the period**.

Information about creating Salesforce Custom Fields can be found in the [Force.Com Workbook](#) (PDF) and [How do I create a custom field?](#) (video).

NexternalFields.properties

START OF PROPERTIES

#

In general, the keys below represent nodes in the Nexternal XML response and
the values represent Salesforce objects and fields. The value will be 'read'
from the XML node as a String, converted to the appropriate Salesforce data
type, and stored into the Salesforce object.

#

(1) Values on the left-hand side of the equal sign (the 'key') cannot be

changed in any way. These are the nodes in the XML response, and are used
by the Nexternal addin to locate and retrieve data.

(2) Values on the right-hand side of the equal sign (the 'value') represent
the Salesforce object and field where data from the XML node will be
stored.

(a) The Salesforce object on the left-hand side of the period (e.g.
'Account.') CANNOT be changed.
(b) The Salesforce object field on the right-hand side of the period
(e.g. 'AccountNumber') CAN be changed to a custom field that you have
created within your Salesforce object, but it is YOUR RESPONSIBILITY
to ensure the custom field is of the SAME SALESFORCE DATA TYPE as the
field it will replace. The following Salesforce DisplayTypes are
currently supported in the Nexternal addin: Currency, Date, Double,
Integer, String, and PickList.

(3) The values stored in the following nodes cannot be altered in any way:

Account/AccountID
Contact/LeadSource
Opportunity/OpportunityID
OpportunityLineItem/LineItemID
Product2/ProductCode

The information in these fields is used to identify Nexternal information
imported into Salesforce so that changes to a customer, order, or product
in your Nexternal Order Management System will be accurately reflected in
your Salesforce account.

All of the above identification values (except for OpportunityLineItem/
LineItemID) must be mapped to a Salesforce field that contains ONLY the
Nexternal record value, so that SOQL queries can be used to retrieve
Salesforce records that match the records imported from your Nexternal
Order Management System.

(4) Almost all Salesforce objects have required fields. For example, the Account
object requires an entry for the Account.Name field, so if you change the
Account/Name node to point to a Salesforce field other than Account.Name the
Nexternal addin will write the value of Account/Name to your custom field
AS WELL AS the Account.Name field to fulfill the Salesforce requirement for
that field.

Note that the above condition will only be applied to NEW Salesforce objects
that are created by the Nexternal addin during an import.

Account/AccountID=Account.AccountNumber
Account/Company=Account.Name
Account/Name=Account.Name

Account/EMail=Account.Site
Account/Billing/Street=Account.BillingStreet
Account/Billing/City=Account.BillingCity
Account/Billing/State=Account.BillingState
Account/Billing/Zip=Account.BillingPostalCode
Account/Billing/Country=Account.BillingCountry
Account/Shipping/Street=Account.ShippingStreet
Account/Shipping/City=Account.ShippingCity
Account/Shipping/State=Account.ShippingState
Account/Shipping/Zip=Account.ShippingPostalCode
Account/Shipping/Country=Account.ShippingCountry
Account/CustomerType=Account.Type
Account/Description=Account.Description
Account/Phone=Account.Phone

Salesforce Contact records are created using the child nodes of the Account
container node from the Nexternal XML response.

Contact/Name/LastName=Contact.LastName
Contact/Name/FirstName=Contact.FirstName
Contact/Mailing/Street=Contact.MailingStreet
Contact/Mailing/City=Contact.MailingCity
Contact/Mailing/State=Contact.MailingState
Contact/Mailing/Zip=Contact.MailingPostalCode
Contact/Mailing/Country=Contact.MailingCountry
Contact/Phone=Contact.Phone
Contact/EMail=Contact.Email
Contact/LeadSource=Contact.LeadSource

Opportunity/OpportunityID=Opportunity.Name
Opportunity/CloseDate=Opportunity.CloseDate
Opportunity/NextStep=Opportunity.NextStep
Opportunity/StageName=Opportunity.StageName
Opportunity/Type=Opportunity.Type
Opportunity/LeadSource=Opportunity.LeadSource

The directions below apply to the following section ONLY.

The values for the next 8 nodes are normally combined into one String as
'key: value' pairs separated by linefeeds and stored in the Opportunity.
Description field on Salesforce. You can change any (or all) of the values
below to store the XML node value in a different (or custom) Salesforce
field within the Opportunity object, and any remaining nodes mapped to
Opportunity.Description will be combined into the String and stored.

Opportunity/OrderDate=Opportunity.Description
Opportunity/OrderNet=Opportunity.Description
Opportunity/Coupon=Opportunity.Description
Opportunity/Discount=Opportunity.Description

```
Opportunity/Tax=Opportunity.Description
Opportunity/Shipping=Opportunity.Description
Opportunity/Amount=Opportunity.Description
Opportunity/Comments=Opportunity.Description
#
OpportunityLineItem/Quantity=OpportunityLineItem.Quantity
OpportunityLineItem/ServiceDate=OpportunityLineItem.ServiceDate
OpportunityLineItem/UnitPrice=OpportunityLineItem.UnitPrice
#
# The directions below apply to the following section ONLY.
#
# The values for the next 3 nodes are normally combined into one String as
# 'key: value' pairs separated by linefeeds and stored in the OpportunityLineItem.
# Description field on Salesforce. You can change any (or all) of the values
# below to store the XML node value in a different (or custom) Salesforce
# field within the OpportunityLineItem object, and any remaining nodes mapped to
# OpportunityLineItem.Description will be combined into the String and stored.
#
OpportunityLineItem/LineItemID=OpportunityLineItem.Description
OpportunityLineItem/ShipTo=OpportunityLineItem.Description
OpportunityLineItem/TrackingNo=OpportunityLineItem.Description
#
Product2/ProductName=Product2.Name
Product2/ProductCode=Product2.ProductCode
Product2/Family=Product2.Family
#
# The directions below apply to the following section ONLY.
#
# The values for the next 2 nodes are normally combined into one String as
# 'key: value' pairs separated by linefeeds and stored in the Product2.
# Description field on Salesforce. You can change any (or all) of the values
# below to store the XML node value in a different (or custom) Salesforce
# field within the Product2 object, and any remaining nodes mapped to
# Product2.Description will be combined into the String and stored.
#
Product2/Vendor=Product2.Description
Product2/Description=Product2.Description
#
# Additional Configuration Settings: Contact your Nexternal Account Manager before
# enabling any of the following configuration values.
#
# UseSKULevelCode=true
#
# END OF PROPERTIES
```