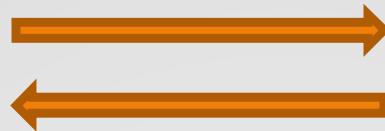


Integration



Introduction

This Tool Provides the Means to Connect a Synergy Enterprise Database to a Salesforce.com Account:

- ✓ Real Time Data Integration for Accounts, Contacts, Items & Opportunities
- ✓ Data may be Pushed or Pulled from Synergy
- ✓ Options Allow Data to be Created, Updated & Deleted
- ✓ Export & Import Filters Are Used

Introduction

- ✓ Batch Processing / Synchronization of Sales History
- ✓ Mapping is done via the Synergy Entity and the Salesforce Object
- ✓ Many Fields in Accounts, Contacts, Items & Opportunities are Pre-Mapped. Additional Fields may be Mapped.
- ✓ Integration for Other Mappings Can be Accomplished Provided there is a Salesforce Object (Such as Projects)

Integration

From Synergy Enterprise to Salesforce.com:

- ✓ Accounts
- ✓ Contacts
- ✓ Items
- ✓ Opportunities
- ✓ Sales History

Integration

From SalesForce.com to Synergy Enterprise:

- ✓ Accounts
- ✓ Contacts
- ✓ Items
- ✓ Opportunities
- ✓ Quotes (In Development)

Account Integration Info.

- ✓ Accounts can be Created in Both Products
- ✓ Changes will be Synchronized in Both Directions
- ✓ When Account is Created in Synergy, it is Sent to Salesforce.com for Creation.
- ✓ When Account has been Created in Salesforce.com, a New Section in the Synergy Account Card will be Created, Placing the Salesforce.com corresponding Account Name, Along with Hyperlink.

Account Integration Info.

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Start Page | News | Explorer | Create | Favorites | History

HRM | Customers | Financial | Workflow | Documents | System | Logistics | Projects | Configurations | Suppliers | Marketing | Import Plus | Procurement | Salesforce: Integration

Customer: 4003329, Prevue Test Inc Created: [Gijs Lamers](#) 08-10-2014 15:38 Modified: [Gijs Lamers](#) 09-10-2014 20:00

[Edit](#) [Create letter](#) [Create email](#) [Customer rates](#) [Close](#)

General

Name / Code: **Prevue Test Inc** **4003329** (4)

Address

City

Zip code

State

Country: **United States of America (US)**

Phone / Extension

Fax

E-mail

Website

Contacts [All](#) [Add](#)

L.S.

Relations

Manager

Cost center

Reseller

Parent account

Subsidiaries (0)

Marketing

Type / Since: **Customer** **08-10-2014**

Status / Since: **Active** **08-10-2014**

Security level: **10**

Source: **Internet**

Sector: **Unknown**

Classification / Rating: **Small Enterprise** **1**

Size: **Unknown**

Free fields

Auto Callback Date

Next Contact Date

Hosting Initial Date

Tax Exempt Renewal Date

Last Contact Date

Insured Employees **0.00**

 Dave **0.00**

Hosting Annual Amount **0.00**

YTD Sales **0.00**

 Acct #

Status of Prospect

 API Rep

 Dave

Frequency

 test

dave with Pic

Opportunity

 Dealer

Customer Type (Pic)

 Test by Ken

of Insurance Policies

 Item #2

 Test for Robbie

 Dealer

Status of Pipeline

 In Phone Queue No

Approved Supplier No

Monitor

[Contracts](#) [Workflow](#) [Projects](#)

[Documents](#) [Transactions](#) [Sales invoice](#)

[Opportunities](#) [Quotations](#) [Reports](#)

External References [Add](#)

Type	Link
Remarks - None	

SalesForce

SalesForce: Account: **Prevue Test Inc**

Financial

Division: **Integrated**

Customer code: **4003329** [New](#)

Account Integration Info.

- ✓ Standard Synergy Enterprise Account Search, Additional Fields are Added to the Search Criteria.
 - ✓ Linked: Account (Empty / Yes / No)
 - ✓ Account (Unique ID)
- ✓ Standard Synergy Enterprise Account Search, Additional Field is Added to the Search Results.
 - ✓ Salesforce: Account (Account ID)

Account Integration Info.

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Accounts: Search

Show | Reset | Contact | Count | Default | Close

General

Type Associate Prospect Customer Supplier Reseller Division Bank Not validated Lead Suspect
Status Active Blocked Inactive Not validated Passive Pilot Reference
Account: Type Company Person

Account

Name: TEST Code: _____
Division: 555 Integrated Zip code: _____
City: _____ Phone: _____

Contact

Last name: _____ First name: _____
Full name: _____ Contact: Phone: _____
Only main contact: Yes

View

Include: Contacts (All)
Type: Address Delivery

Advanced search

Account manager: _____ equal to: _____
Add

SalesForce

Linked: Account: _____ Linked: Contact: _____
Account: _____ Contact: _____

Columns

Account code	Account name	Contact: Last name	Contact: E-mail	Contact: Phone	Account: Customer Type (Pic)	Type	Address 1	Address 2	Address 3	City	Zip code	State: Code	State	Country	SalesForce: Account	SalesForce: Contact
--------------	--------------	--------------------	-----------------	----------------	------------------------------	------	-----------	-----------	-----------	------	----------	-------------	-------	---------	---------------------	---------------------

Contact Integration Info.

- ✓ Contact can be Created in Both Products
- ✓ Changes will be Synchronized in Both Directions
- ✓ When Contact is Created in Synergy, it is Sent to SalesForce.com for Creation.
- ✓ When Contact has been Created in SalesForce.com, a New Section in the Synergy Contact Card will be Created, Placing the SalesForce.com corresponding Contact Name, Along with Hyperlink.

Contact Integration Info.

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HRM | Customers | Financial | Workflow | Documents | System | Logistics | Projects | Configurations | Suppliers | Marketing | Import Plus | Procurement | Salesforce: Integration

Contact: Gijs Lamers Modified: Gijs Lamers 13-10-2014 16:35

Customer: [Prevue Test Inc](#) Status: **Active** Rating: **1**
 Created: [Gijs Lamers](#) 08-10-2014 15:38

[Edit](#) [New](#) [Create letter](#) [Create email](#) [New Request](#) [Validation](#) [vCard](#) [Close](#)

Contacts

Name: L.S. Gijs Lamers
 Initials:
 Status: **Active**
 Job description: --
 Job title:
 Gender: Unknown
 Phone:
 E-mail: gijs@qlmsystems.com
 Valid email address: Yes
 Email permission: Yes
 Financial contact person: No
 MSN ID: Portal access: Required
 Skype ID: Portal access: Required
 Language: American English

Marketing

Account manager
 Job title (Account manager)
 Manager (Contact)
 Job title (Contact: Manager)
 Portal access: No
 Last: Login: None

Free fields

Next Follow-Up Date
 Qty of Calendars: 0.00
 Group Category: Marketing
 Industry
 Reports To:
 Reporting Level: Level 1 - President
 e-mail #2
 In Phone Queue?
 Send Calendar
 E-Mail Weekly Newsletter?
 ContactNumber1: 0

Links

Type	Account	Job description	Phone	Mobile	E-mail

Picture

Remarks

Start date
 End date

Employment

Monitor

[Marketing: History](#) [Workflow](#) [Documents](#)

SalesForce

SalesForce: Contact: [Gijs Lamers](#)

Addresses: Postal

Address [Map \(4\)](#)
 Zip code / City
 County
 State
 Country: United States of America
 Phone
 Fax

External References [Add](#)

Type	Link

Contact Integration Info.

- ✓ Standard Synergy Enterprise Account Search, Additional Fields are Added to the Search Criteria.
 - ✓ Linked: Contact (Empty / Yes / No)
 - ✓ Contact (Unique ID)
- ✓ Standard Synergy Enterprise Account Search, Additional Field is Added to the Search Results.
 - ✓ Salesforce: Contact (Contact ID)

Contact Integration Info.

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Start Page | News | Explorer | Create | Favorites | History

Gijs Lamers | Preferences | About

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- My work
- Create
- Search
- People
- Accounts
- Requests
- Documents

Accounts: Search

Show | Reset | Contact | Count | Default | Close

Templates
Private
Save

General

Type Associate Prospect Customer Supplier Reseller Division Bank Not validated Lead Suspect
Status Active Blocked Inactive Not validated Passive Pilot Reference
Account: Type Company Person

Account

Name Code
Division Integrated Zip code
City Phone

Contact

Last name First name
Full name Contact: Phone
Only main contact Yes

View

Include: Contacts (All)
Type: Address

Advanced search

Account manager equal to
Add

SalesForce

Linked: Account Linked: Contact
Account Contact

Columns

Account code | Account name | Contact: Last name | Contact: E-mail | Contact: Phone | Account: Customer Type (Pic) | Type | Address 1 | Address 2 | Address 3 | City | Zip code | State: Code | State | Country | Salesforce: Account | Salesforce: Contact

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Sales History Integration Info.

- ✓ Sales History will be Transferred from Synergy to Salesforce.com
- ✓ A SQL Stored Procedure (Using a SQL Server Agent Job) will Extract Sales History from the Macola Back-Office Software and Place it into a Temporary Table.
- ✓ Two New Repository Components in Synergy are Created. (MacolaOrderHistory & MacolaOrderHistoryLine) These are Used for the Mapping to the Salesforce Objects (Creation of These Object is Required)

Reporting

- ✓ **SalesForce: Log**
Used to Log any errors, warnings and other Data
- ✓ **SalesForce: Pending**
Stores Records which have Failed to Synchronize. This is used to Assist in Error Corrections or Required Fields Not Being Used.

Reporting

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SalesForce: Log Refresh Reset Close

Criteria

Division

Created date <Range> - -

Type Error Warning Message Confirmation

Subject

Source Import Export

Created	Division	Subject	Source	Key	Reason	Type
13-10-2014 16:35	555	Contact	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 14:40	555	Account	Import		Created: 0, Updated: 0, Rejected: 7, Deleted: 1	
13-10-2014 14:36	555	Account	Import	0019000000GutNZAAZ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:36	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:36	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:36	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:36	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:36	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:34	555	Account	Export	4003101	entity is deleted	
13-10-2014 14:33	555	Account	Import		Created: 0, Updated: 0, Rejected: 7, Deleted: 0	
13-10-2014 14:33	555	Account	Import	0019000000GutNZAAZ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:33	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 14:27	888	Account	Export		Created: 0, Updated: 0, Rejected: 1, Deleted: 0	
13-10-2014 14:27	888	Account	Export	497	No such column 'BillingCountryCode' on subject of type Account	
13-10-2014 14:03	555	Contact	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 13:59	555	Contact	Export	{f319ac0-7c17-4427-bb29-d5800ae3219c}	entity is deleted	
13-10-2014 13:57	555	Contact	Export		Created: 0, Updated: 1, Rejected: 0, Deleted: 0	
13-10-2014 13:53	555	Contact	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 13:49	555	Contact	Export		Created: 1, Updated: 0, Rejected: 1, Deleted: 0	
13-10-2014 13:49	555	Contact	Export		Created: 1, Updated: 0, Rejected: 1, Deleted: 0	
13-10-2014 13:49	555	Contact	Export	{f319ac0-7c17-4427-bb29-d5800ae3219c}	Query timeout. Timeout = -1. Query = INSERT INTO SCPUsers(ContactPersonID) VALUES (N '{f319ac0-7c17-4427-bb29-d5800ae3219c}')	
13-10-2014 13:49	555	Contact	Export	{f319ac0-7c17-4427-bb29-d5800ae3219c}	HTTP Method 'DELETE' not allowed. Allowed are HEAD,GET,POST	
13-10-2014 13:47	555	Contact	Export		Created: 0, Updated: 1, Rejected: 0, Deleted: 0	
13-10-2014 13:46	555	Contact	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 13:45	555	Contact	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 13:44	555	Account	Export		Created: 0, Updated: 1, Rejected: 0, Deleted: 0	
13-10-2014 13:43	555	Account	Export		Created: 1, Updated: 0, Rejected: 0, Deleted: 0	
13-10-2014 13:12	555	Account	Import		Created: 0, Updated: 0, Rejected: 7, Deleted: 0	
13-10-2014 13:12	555	Account	Import	00190000015a0s8AAE	Account: Can't delete - Used in: WfSearch.aspx?SCAction=1&CustomerID=%7b7706ff98-4316-40ef-9628-c05644a462c9%7d'>Requests	
13-10-2014 13:11	555	Account	Import	0019000000GutNZAAZ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 13:11	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	
13-10-2014 13:11	555	Account	Import	0019000000GutNAAA	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	

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SalesForce: Pending Refresh | Reset | Delete | Close

Criteria

Division: Created date: Subject:

Division	SObject	Key	Reason	Created	Modified	Direction
<input type="checkbox"/> 888	Account	497	No such column 'BillingCountryCode' on subject of type Account	Monday, October 13, 2014 2:27 PM	Monday, October 13, 2014 2:27 PM	Export
<input type="checkbox"/> 555	Contact	{1f319ac0-7c17-4427-bb29-d5800ae3219c}	Query timeout. Timeout = -1. Query = INSERT INTO SCPUsers(ContactPersonID) VALUES (N'{1f319ac0-7c17-4427-bb29-d5800ae3219c}')	Monday, October 13, 2014 1:49 PM	Monday, October 13, 2014 1:49 PM	Export
<input type="checkbox"/> 555	Account	4003093	entity is deleted	Thursday, October 09, 2014 7:48 PM	Thursday, October 09, 2014 7:48 PM	Export
<input type="checkbox"/> 555	Account	0019000000GutNhAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNaAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNFAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNIAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNBAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNaAAJ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	0019000000GutNZAAZ	Mandatory: Country (Delivery) Mandatory: Country (Invoice)	Thursday, October 09, 2014 7:32 PM	Thursday, October 09, 2014 7:32 PM	Import
<input type="checkbox"/> 555	Account	4003370	The BillingStateCode field contains LB, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:21 PM	Thursday, October 09, 2014 7:21 PM	Export
<input type="checkbox"/> 555	Account	4003346	The BillingStateCode field contains NB, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:20 PM	Thursday, October 09, 2014 7:20 PM	Export
<input type="checkbox"/> 555	Account	4003345	The BillingStateCode field contains ZH, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:20 PM	Thursday, October 09, 2014 7:20 PM	Export
<input type="checkbox"/> 555	Account	4003203	The BillingStateCode field contains ZH, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:16 PM	Thursday, October 09, 2014 7:16 PM	Export
<input type="checkbox"/> 555	Account	4003186	The BillingStateCode field contains NB, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:15 PM	Thursday, October 09, 2014 7:15 PM	Export
<input type="checkbox"/> 555	Account	4003135	The BillingStateCode field contains LB, which isn't an available state. Your administrator can add it for you.	Thursday, October 09, 2014 7:11 PM	Thursday, October 09, 2014 7:11 PM	Export

Page size: Show

More Information

Please contact us to schedule a demo or
receive additional information on our tools

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