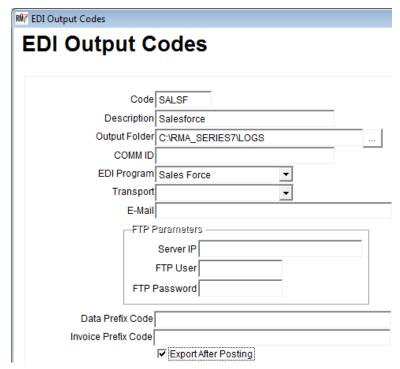# Chapter 4.44: RMA Salesforce Integration

An optional feature that RMA is to pass sales data to Salesforce. This integration in RMA is through EDI Export. Presently, the only support we do is to pass sales transactions to Salesforce.

Requirements:

- Login information to Salesforce API.
- Salesforce ID should be entered in the Extra field in RMA.
- RMA Account Number should be entered in Salesforce. This is done so we can import them into RMA and update the Extra field for the first time and also for cross-referencing.

Creating a new EDI Code:

1. Under Lists->Product Codes-> EDI Output Codes add a new code and select Salesforce from the EDI Program drop down.
2. Enter the Salesforce user name and password in the FTP User/Password boxes.
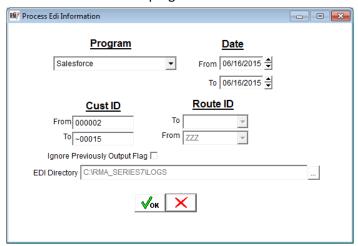3. Assign the EDI code to each customer.

EDI Output Codes

Code	SALSF
Description	Salesforce
Output Folder	C:\RMA_SERIES7\LOGS
COMM ID	
EDI Program	Sales Force
Transport	
E-Mail	

FTP Parameters

Server IP	
FTP User	
FTP Password	

Data Prefix Code	
Invoice Prefix Code	

☑ Export After Posting

Then, you will need to go to each customer and put this cod on this screen.

Customer Information

A 531150 Bailey's Ice

Info | $ | Invoices | Credit | Payment Info | Contacts | Route | Route

Status/Contract | Credit Terms | Billing/Statement | C

Pricing and Promotion

Price Level	Default
Open Invoice	☑
Promotional Price Group	
Refund Check Code	
Period Discount Code	
EDI Code	SALSF Salesforce

Transactions are uploaded to Salesforce by one of the following methods.

1. Automatic - During posting if "Export After Posting" is checked for the Salesforce EDI code.

2. Manual - Transactions->Payments->Process EDI Transactions and select the Salesforce from the program.

Here is the format for the Salesforce EDI file that is uploaded to Salesforce:

SalesforceID, customer ID, invoice number, invoice date, charge code, quantity, price, product description

Once an invoice is successfully uploaded, a confirmation number is obtained from Salesforce which will be stored on the invoice. The uploaded invoice will not be transferred again.

Summary

At this time, there is limited support for Salesforce integration. This feature may be expanded in the future.

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Warning

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