

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.
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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.

RM7 EDI Output Codes

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.

RM7 Customer Information - 531150

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.

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

Process Edi Information

Program
Salesforce

Date
From 06/16/2015
To 06/16/2015

Cust ID
From 000002
To -00015

Route ID
To
From ZZZ

Ignore Previously Output Flag

EDI Directory C:\RMA_SERIES7\LOGS

OK Cancel

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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