

Configuring the Salesforce Exporter Plugin

The Salesforce Exporter plugin is a one-way sync of client contact information from Ubersmith to Salesforce. Every five minutes, any new or updated data in Ubersmith is exported to Salesforce. If any critical errors occur and manual intervention is required, the plugin creates an internal support ticket and records it in a log file. It is assumed you already have an existing Salesforce account. Updates made in Salesforce will not be transmitted to Ubersmith.

In order to begin exporting your data from Ubersmith to Salesforce, you need to configure Ubersmith and Salesforce. Once all the necessary pieces have been configured, any new or updated data can be exported. The configuration steps are as follows:

1. [Configure your Salesforce account.](#)
2. [Enable the Salesforce Exporter plugin.](#)
3. [Configure the Salesforce Exporter plugin.](#)
4. [Connect the Salesforce Exporter plugin to your Salesforce account.](#)
5. [Set up the data transfer.](#)
6. [Export your data.](#)
7. [Review your export using the Salesforce Exporter logs.](#)

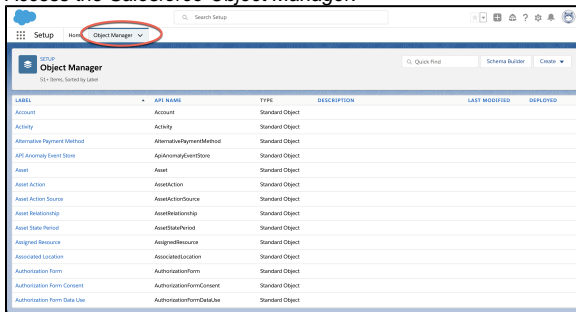
Note

These steps explain how to match Ubersmith to Salesforce, although you can choose to match Salesforce to Ubersmith.

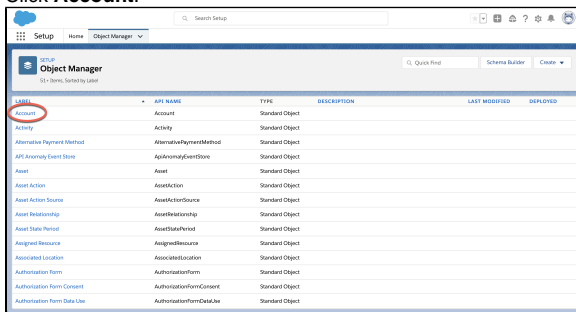
Configure Your Salesforce Account

Use the Salesforce Object Manager to add a field to each of your account and contact records, or entities, to provide a link for Ubersmith to use during the export. The field can be named anything, such as Ubersmith ID or external ID. These instructions use External ID as the field name.

1. Access the *Salesforce Object Manager*.



2. Click **Account**.



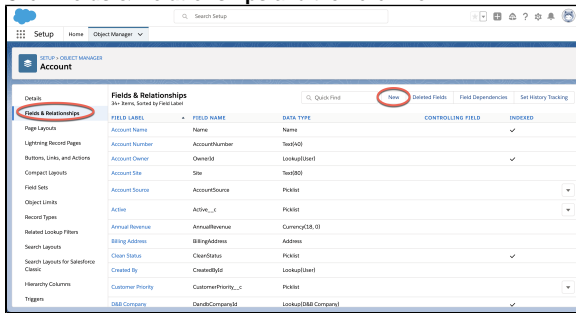
The *Account* object appears.

On this page:

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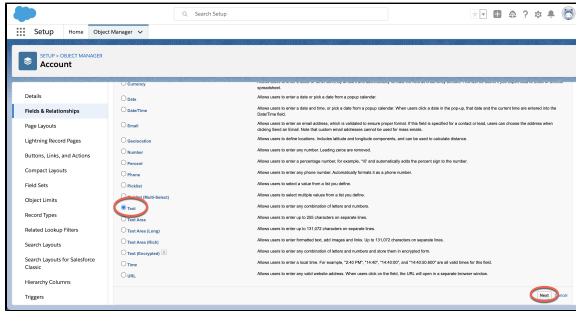
- [Configure Your Salesforce Account](#)
- [Configuring the Salesforce Exporter Plugin](#)
- [Connecting to Salesforce](#)
- [Setting Up the Data Transfer](#)
 - [Complete Step 1: Associate a Salesforce external ID](#)
 - [Complete Step 2: Configure Matching Rule](#)
 - [Complete Step 3: Set Field Mapping](#)
- [Complete the Contact Setup](#)
- [Exporting Data](#)
- [Using the Logs Tab](#)
- [Related Topics](#)

3. Click **Fields & Relationships** and then click **New**.



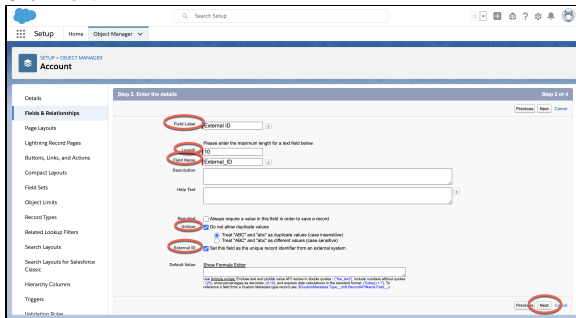
The *New Custom Field* page appears.

4. Select **Text** and click **Next**.

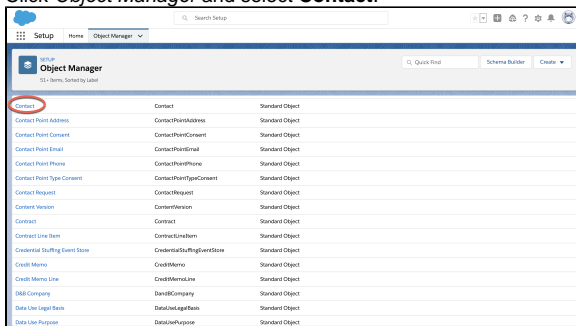


The *New Custom Field* page appears.

5. In the **Field Label** field enter **External ID**.
6. In the **Length** field, enter **10**.
7. In the **Field Name** field, ensure **External_ID** is populated.
8. Select the **Unique** field and ensure **duplicate values are case insensitive** is selected.
9. Select **External ID**.
10. Click **Next**.



11. Click **Next**.
12. Click **Save**.
13. Click **Object Manager** and select **Contact**.



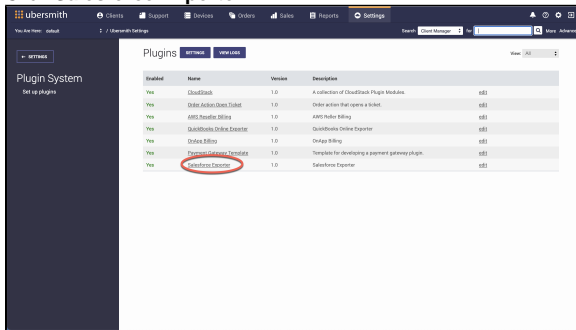
The *Contact Object Manager* appears.

14. Repeat Steps 3 through 12 for the contact object.

Configuring the Salesforce Exporter Plugin

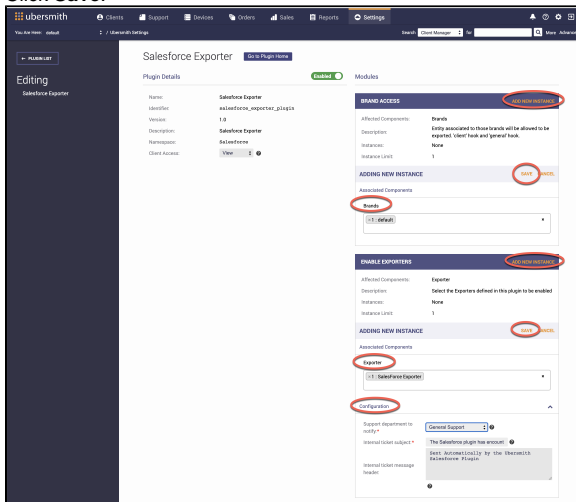
1. Access the *Plugins* page.

2. Click **Salesforce Exporter**.



The *Salesforce Exporter* page appears.

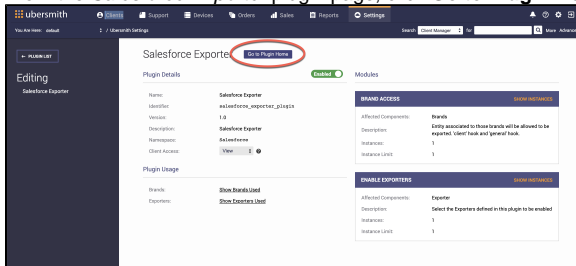
3. In the *Modules* section, click **add new instance**. The *Associated Components* section appears.
4. Click in the **Brands** field to display the brands you can export and select either **Apply to all** or one or more brands.
5. Click **Save**.
6. In the *Enable Exporters* section, click **add new instance**. The *Associated Components* section appears.
7. Click in the **Exporter** field and select **SalesForce Exporter**.
8. In the **Support department to notify** field, select the support department to send [internal tickets](#) reporting *Salesforce Exporter* plugin critical errors.
9. In the **Internal ticket subject** field, enter the internal ticket's subject.
10. In the **Internal ticket message header** field, enter a statement to be prepended to the body of the ticket.
11. Click **Save**.



Connecting to Salesforce

This section describes how to establish a connection between your Ubersmith instance and your Salesforce account. It is strongly recommend that you test your export by first exporting and syncing Salesforce using the Salesforce sandbox, if it is available with your Salesforce account, before exporting to production. You will then be able to correct any export issues outside of your Salesforce account.

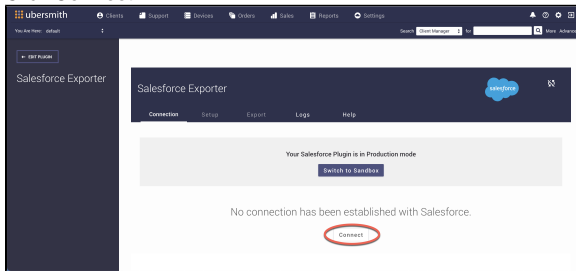
1. From the *Salesforce Exporter* plugin page, click **Go to Plugin Home**.



The *Salesforce Exporter Connection* tab appears.

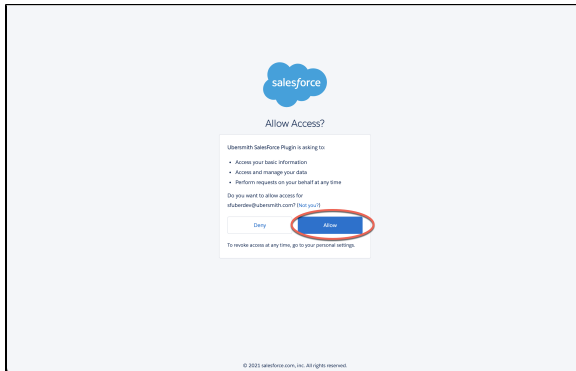
2. Ensure your desired Salesforce environment is selected by toggling between the **Sandbox** or **Production** environments. Use the **Sandbox** if you are testing the export and sync, if it's available in your Salesforce account. Use the **Production** environment to export Ubersmith client and contact data to your Salesforce account.

3. Click **Connect**.



The *Salesforce login* page appears.

4. Enter your Salesforce **username** and **password** and click **Log In**. The *Ubersmith Allow Access* page appears.
5. Click **Allow**.



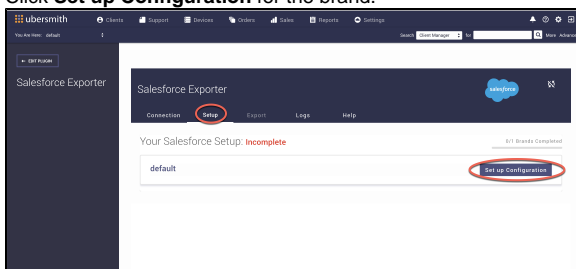
An active API connection with Salesforce message appears.

Setting Up the Data Transfer

There are three steps to ensure your Ubersmith client contact data exports successfully to Salesforce for each brand you want to export. For Step 1: Associate a Salesforce external ID, you will set the external ID fields from Salesforce to provide links for Ubersmith to use. [See Configuring Salesforce](#). For Step 2: Configure Matching Rule, you will link the Ubersmith Client Contact Information *section* to the Salesforce Account Name and Contact sections. For Step 3: Set Field Mapping you will link the individual Client Contact Information *fields* in Ubersmith to their corresponding Salesforce Account Name and Contact fields. Ensure all fields you wish to update and sync are mapped.

Complete Step 1: Associate a Salesforce external ID

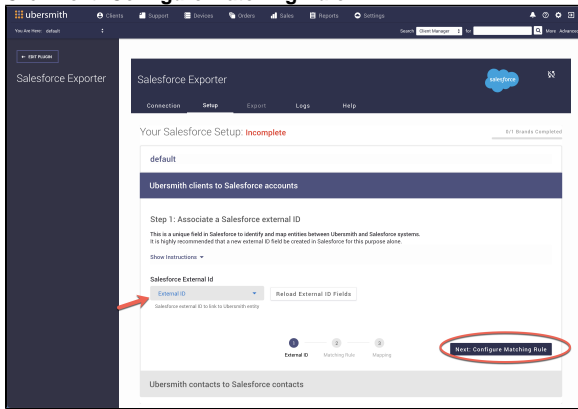
1. Click the **Setup** tab. The brands you configured to export are displayed.
2. Click **Set up Configuration** for the brand.



The *Ubersmith client to Salesforce account* section appears.

3. From the **Salesforce External ID** field, select **External ID**. If External ID is not displayed, click **Reload External ID Fields**.

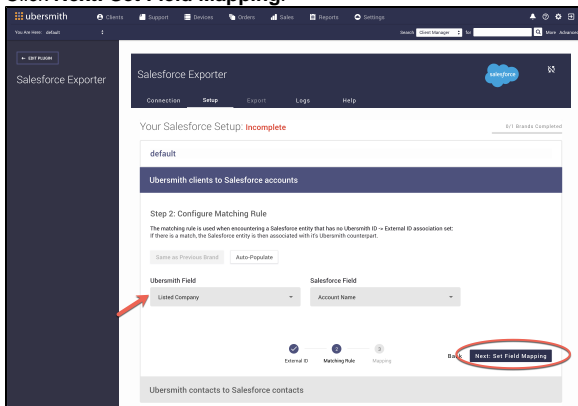
4. Click **Next: Configure Matching Rule**.



Step 2: *Configure Matching Rule* appears.

Complete Step 2: Configure Matching Rule

1. Click **Previous Brand** for the plugin to use the same selections from the previous brand. This field is disabled if this is the first brand to be configured.
2. Click **Auto-Populate** for the plugin to suggest the common link to be made.
3. In the **Ubersmith Field**, select **Listed Company**.
4. In the **Salesforce Field** select **Account Name**.
5. Click **Next: Set Field Mapping**.

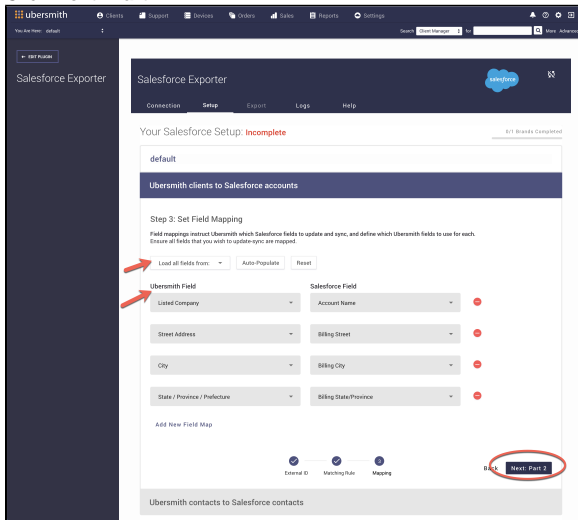


Step 3: *Set Field Mapping* appears.

Complete Step 3: Set Field Mapping

1. In the **Load all fields from** field, select either **Previous Brand** for the plugin to use the same selections from the previous brand, **Ubersmith** to load all the Ubersmith client or contact fields first, or **Salesforce** to load all the Salesforce account or contact fields first. For this guide, Ubersmith was chosen.
2. Click **Auto-Populate** for the plugin to suggest the common links to be made. A confirmation message appears. Click **Proceed**.
3. Select **Reset** to clear the mapping fields, if necessary.
4. The **Ubersmith Field** section is populated with Ubersmith fields to be matched to your Salesforce fields.
5. In the listed **Salesforce Field** section, select the appropriate matching option to guide Ubersmith to use for the update and sync.
6. Click **Add New Field Map** to add a single mapping field.

7. Click Next: Part 2.

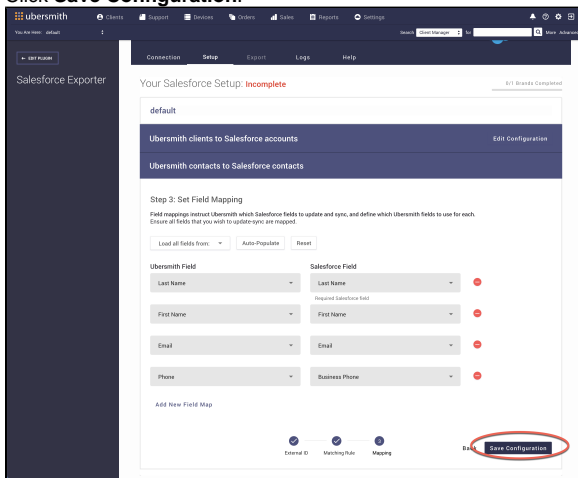


The *Ubersmith Contacts to Salesforce Contacts* section appears.

Complete the Contact Setup

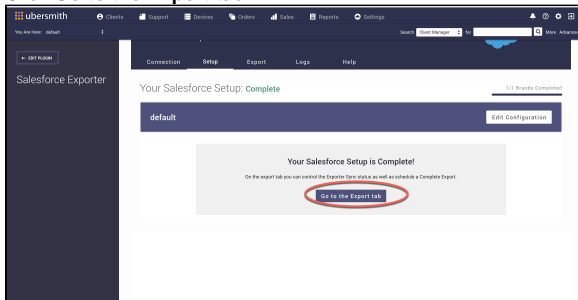
This section repeats Steps 1 through 3 above to configure the Salesforce Contact object. It is also for any other additional brands you want to export.

1. Repeat Steps 1 through 3 to link data for contacts and any other additional brands.
2. Click **Save Configuration**.



A message stating your setup is complete appears.

3. Click **Go to the Export tab**.



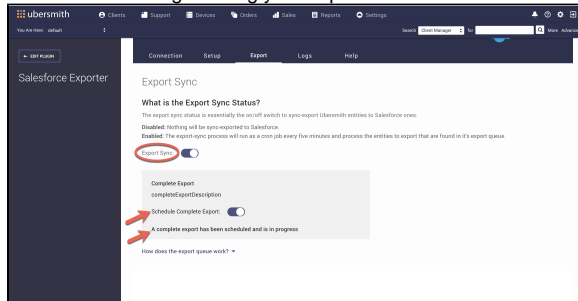
A warning message appears.

4. Click **Proceed** to continue to the tab. The *Export* tab appears with the export-sync in process. If you click **Cancel**, the *Export* tab appears without starting the export-sync.

Exporting Data

When Ubersmith is connected to Salesforce, and the company and contact fields are linked for all the brands you configured, the *Export* tab becomes available. You can set the plugin to continuously export and export all your data on an as-needed basis. The initial export detailed in this section consists of a complete export, while ongoing updates are made every five minutes as a cron job.

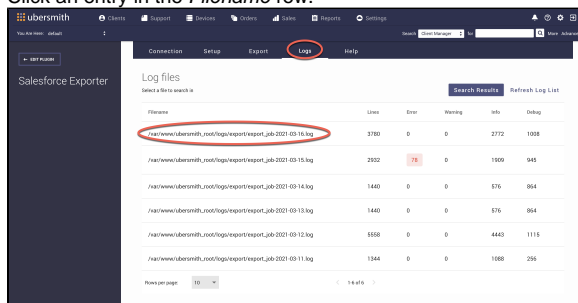
1. Click the *Export* tab.
2. Ensure the **Export Sync status** is enabled.
3. Click **Proceed**. A success confirmation message appears.
4. Click **Ok**. A success message appears.
5. Click **Schedule Complete Export**. A confirmation message appears.
6. Click **Proceed**. A success message appears.
7. Click **Ok**. A message stating your export has been scheduled and is in progress also displays.



Using the Logs Tab

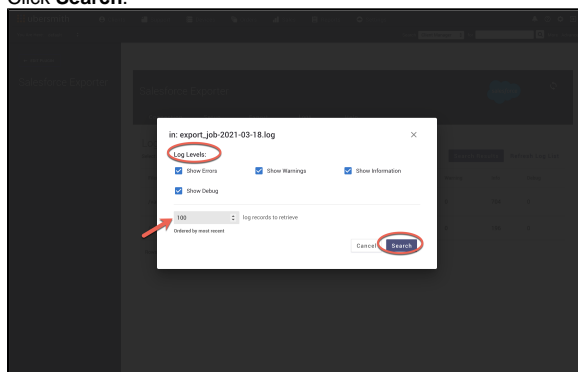
All activity for the Salesforce Export plugin is recorded in the Logs tab. The Logs tab combines log records from two log channels, the *Plugin Export Job* and the Salesforce Export plugin. You can select multiple types of information to search for, show or hide the log information from the Plugin Export Job channel, and copy JSON code relating to the exported data. If an export problem happens, knowing which channel the issue is located and the JSON code is key to solving it.

1. Click an entry in the *Filename* row.



A search dialog appears.

2. In the *Log Levels* section, select one or more type of log information you want to see. When a search is performed, new records are added to the end of the file (EOF).
3. In the **log records to retrieve** field, adjust the number of lines you want to return in the search.
4. Click **Search**.



The *Search Results* page appears with all filters first applied, then the number of lines you want, starting from the EOF.

5. Enable **Include Job Channel** to see the logging information from the *Plugin Export Job channel*.
6. Click the **down arrow** in the *JSON* column to display the code. The JSON code displays.

- [illegible]

Configuring the Plugin Export Job Page

Using Plugins