

Salesforce Guide



Main features

Bidirectional synchronisation of contacts

Contacts will be fully synchronized between the two platforms in quasi real-time.

Individuals (contacts which represent real people) in SECUTIX are mapped in Salesforce as entity *PersonAccount* or *Contact* (it is a setup decision depending of the availability of PersonAccount in your Salesforce organization)

Relays in SECUTIX (individuals linked to a Structure) are mapped to Salesforce *Contact* entities.

Structures in SECUTIX (contacts which represent companies, associations...) are mapped to Salesforce *Account* entities.

1. If a Contact (Individual, Relay or Structure) is modified in SECUTIX, the changes are propagated to the relevant object in Salesforce.
2. If an *Account*, *PersonAccount* or *Contact* is modified in Salesforce, changes are propagated to SECUTIX.

Sales synchronization from SECUTIX to Salesforce

Now it is also possible to have SECUTIX sales integrated in Salesforce with the FirehoseOrder-Salesforce plugin.

This synchronization is done at operation level. The SECUTIX operation data will be mapped (see below), sent to Salesforce and associated with the corresponding contact.

The default Salesforce object to which SacuTix sales are mapped is a custom object called SECUTIXSale, but is also possible to change this and select any other available Salesforce object, custom or native. Each of these Salesforce objects will represent one SECUTIX operation.

Possible customizations: Flexible synchronisation for contacts

SECUTIX offers many custom fields for contacts : criteria, authorization, indicators...

Thanks to a specific mapping screen in SECUTIX App in Salesforce, the mapping of fields between SECUTIX and Salesforce can be customized fitting your needs.

All

Search Mapping Objects and more...

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SecuTix

Mapping Objects

SecuTix Settings

Mapping Object

OBJ-009199

Edit

Change Owner

Delete

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28.05.2020 15:57

Laurent Kioetzer

28.05.2020 16:11

Mapping Fields (35)

New

REFERENCE	SECUTIX ATTRIBUTE NAME	SALESFORCE ATTRIBUTE NAME
FLD-211044		AccountId
FLD-211045		AssistantName
FLD-211046		AssistantPhone
FLD-211047	IndividualContact/internationalPrefixFax+nationalNumberFax	Fax
FLD-211048	IndividualContact/internationalPrefixPhone1+nationalNumberPhone1	Phone
FLD-211049	IndividualContact/email	Email
FLD-211050	IndividualContact/individualFirstName	FirstName
FLD-211051	IndividualContact/internationalPrefixPhone2+nationalNumberPhone2	HomePhone
FLD-211052	IndividualContact/individualLastName	LastName
FLD-211053		LeadSource
FLD-211054	Addresses(isMain)/town	MailingCity
FLD-211055	Addresses(isMain)/countryCode	MailingCountry
FLD-211056		MailingGeocodeAccuracy
FLD-211057	Addresses(isMain)/gpsLatitude	MailingLatitude
FLD-211058	Addresses(isMain)/gpsLongitude	MailingLongitude
FLD-211059		MailingState
FLD-211060	Addresses(isMain)/line1+EOL+line2+EOL+line3	MailingStreet
FLD-211061	Addresses(isMain)/zipCode	MailingPostalCode
FLD-211062	IndividualContact/internationalPrefixCellPhone+nationalNumberCellPhone	MobilePhone
FLD-211063	IndividualContact/individualBirthdate	Birthdate
FLD-211064	Addresses(1)/town	OtherCity

Configuration detailed example

Secutix Attribute Name	Salesforce Attribute Name
IndividualContact/individualFirstName	FirstName

The SECUTIX attribute name is a path allowing to read a contact's value by browsing its representation in SECUTIX' API model.

In the example above, it means that a contact's first name will be mapped to the PersonAccount FirstName attribute in Salesforce.

Those "obvious" mappings are delivered as the default setup of SECUTIX app.

But the mechanism allows more subtle mappings like

Secutix Attribute Name	Salesforce Attribute Name
NOT(Authorizations(authorizationCode=EMAIL)/Allowed)	HasOptedOutOfEmail

Here, the system will read the authorizations, filter them by code "EMAIL" and take the inverse value of the one that has been found.

Secutix Attribute Name	Salesforce Attribute Name
Addresses(isMain)/line1+EOL+line2+EOL+line3	PersonMailingStreet

Or here, the system will read the address which is the main one, then will concatenate the 3 fields describing an address in SECUTIX with EOL (End of line) characters between them, and map them to Salesforce unique address field.

Possible customizations: Flexibility in sales synchronization

A lot of customization is possible to specify which fields are mapped from SECUTIX sales and how. This is done By a set of mappings defined directly in the plugin through the interface configuration screen. The mapping language use for this is similar to that used for the contact, but it is simpler while keeping its flexibility.

Next you can see the default set of mappings. These can be extended or modified by the operator when configuring the interface.

To the right of the '=' we can see the name of the field in Salesforce object (SECUTIXSale by default). To the left, the corresponding value from the SECUTIX operation. As can be seen for the 'Name' fields, it is possible to concatenate different fields from the origin to the destination.

Default set of mappings for sales

Name = operation.product + operation.space + order.organizationCode + operation.totalAmount + order.catalogCurrency.currencyCode

SECUTIX__SyncId__c = operation.operationId

SECUTIX__Organization__c = order.organizationCode

SECUTIX__Space__c = operation.space

SECUTIX__ContactSTXNumber__c = order.contactReference

SECUTIX__Item__c = operation.itemDisplayExternalDesignation

SECUTIX__Total_Amount__c = operation.totalAmount

SECUTIX__CatalogCurrency__c = order.catalogCurrency/currencyCode

SECUTIX__Advantage__c = operation.advantage

SECUTIX__Tariff__c = operation.audienceSubCategory

SECUTIX__Contingent__c = operation.contingent

SECUTIX__ExpirationDate__c = operation.expirationDate

SECUTIX__SECUTIXFileId__c = operation.fileId

SECUTIX__MatchRound__c = operation.match.round

SECUTIX__MatchRoundCode__c = operation.match.roundCode

SECUTIX__OrderType__c = order.orderType

SECUTIX__CreationDate__c = order.creationDateTime

SECUTIX__SECUTIXOrderId__c = order.orderId

SECUTIX__Remark__c = order.remark

SECUTIX__Description__c = operation.itemDisplayExternalDesignation

SECUTIX__Quantity__c = operation.quantity

SECUTIX__Unit_price__c = operation.unitPrice

SECUTIX__ProductFamily__c = OperationDatas(0)/productFamilyType

SECUTIX__SalesChannel__c = salesChannelCode

There are some field that must remain in any configuration because are use to keep the synchronization and the link with the relevant contact. There are 'SyncId', which matches with the operationId in SECUTIX, and 'ContactSTXNumber', which is used to find the contact in Salesforce linked to the sale via its own SyncId.

The screenshot shows the SecuTix web application interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the 'Contacts' tab is selected, showing the contact 'Ms. Edna Frank'. The interface includes a file upload section and a list of 'SecutixSales' items. The list has a 'New' button and a 'View All' link. The items in the list are:

Product Name
La Traviata, Grande Salle, NLEARN, 2000.00, EUR
Frais de réservation, NLEARN, 60.00, EUR
Les Misérables, Grande Salle, NLEARN, 2000.00, EUR
Frais de réservation, NLEARN, 60.00, EUR

In the picture can be seen an example of how we see the SECUTIXSales for Mrs. Edna Frank. The information shown here is fully configurable through the Name parameter mapping

