CRM Salesforce Integration

TaraByte Solutions & Fishbowl Gurus, LLC

Data Flow

Leads and opportunities are managed in Sales Force

Once the opportunity is finalized, the opportunity is flagged and the integration downloads the opportunity as an order in Fishbowl

The related customer data will also be downloaded/updated at this time

After the order is fulfilled (shipped) in Fishbowl the integration will write back to Sales Force the following; Shipment tracking information and Sales Order/Opportunity Fulfillment status

The integration will also update the Quantities available for sale in Sales Force

Requirements

Compatible Sales Force Editions – Enterprise, Ultimate, Developer or Professional Edition + Purchase of the API for the Professional Edition

Data Mapping:

- Client needs to map the Fishbowl and SalesForce data fields. We have a standard template to make that easier

Sales Force Flag:

- We need a flag in Sales Force to denote that at opportunity and its related customer information is ready to download to Fishbowl

Limitation:

- The Fishbowl API does not allow us to download product or kits with variable or optional components

Data Set-up

Products in Sales Force must match Fishbowl file

Discount codes from cart must match Fishbowl file

(Note: Discount codes usually work best when set up as non-inventory items in Fishbowl rather than Discount Items)

Product Units of Measure from Sales Force must match Fishbowl

Shipping Carriers from Sales Force must match Fishbowl file

We will also need your Sales Force Security token and a copy of the Fishbowl database for testing

Sales tax codes in Sales Force must match the Fishbowl file

Shipping method from Sales Force must match the Fishbowl

Lastly your Fishbowl Data File Built and ready to use

Work with us early to identify unusual set-ups and limitations

Contact Information:

Jeanne Tarazevits

(949) 645-1019

Jeanne@tarabyte.com

www.tarabyte.com