

ChannelAdvisor & Salesforce Bidirectional Integration

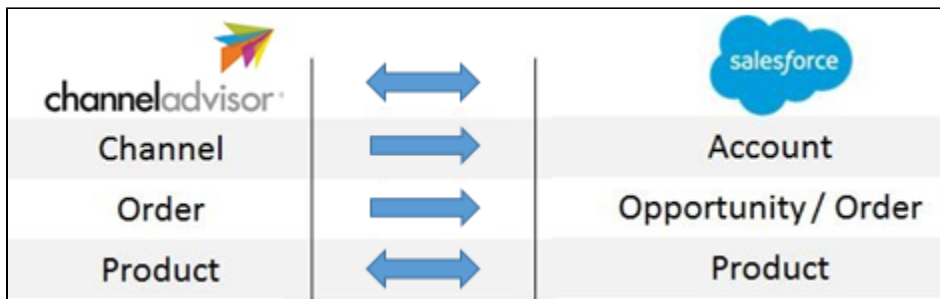
- Overview
- Data Flow
- Process Map
- ChannelAdvisor to Salesforce - Field Mapping
- Prerequisites For Integration
- Getting Started With DBSync
- Running The Integrations

Overview

DBSync for ChannelAdvisor & Salesforce integration template is an easy to use integration solution. It seamlessly integrates ChannelAdvisor Channel, Order and Product with Salesforce Accounts, Order, Opportunity, Product and vice-versa. DBSync provides bi-directional sync between Salesforce and ChannelAdvisor with the pre-built field-to-field mappings along with flexibility for more complex and dynamic mapping capabilities. DBSync's automatic online updates enable customers to enjoy all the product updates, and features, effortlessly with every new release.

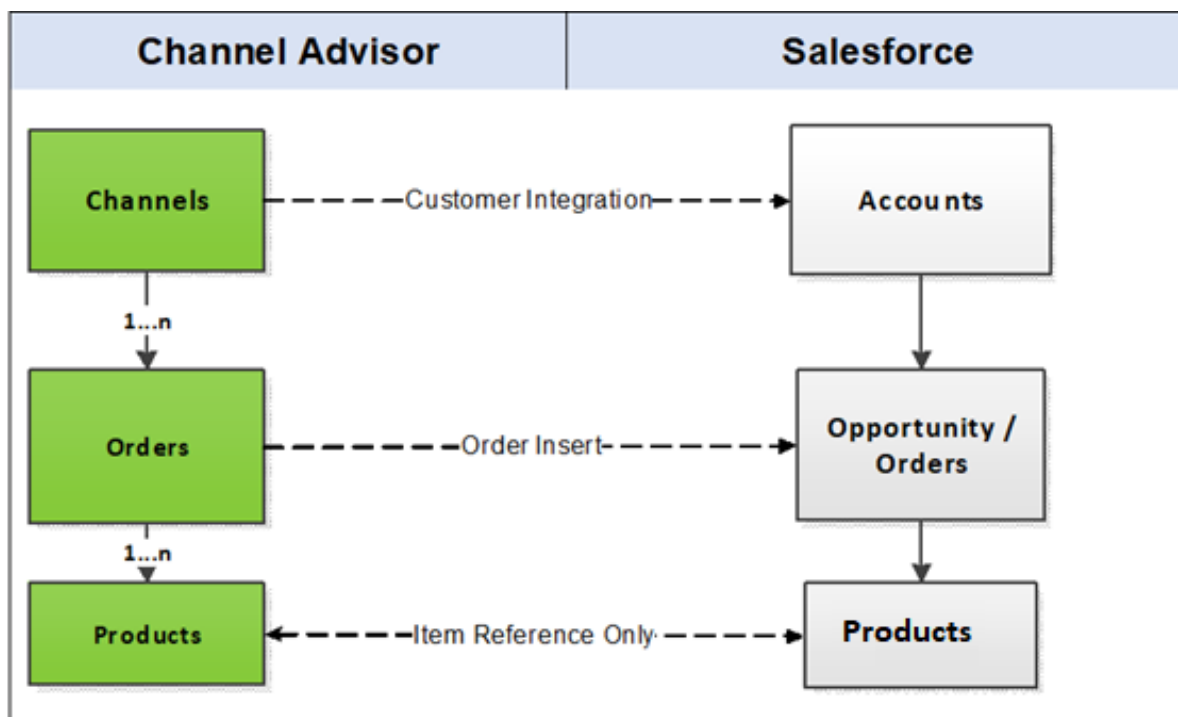
Data Flow

The data flow of bidirectional integration between ChannelAdvisor & Salesforce is shown in the table below.



Process Map

The process map of bidirectional integration between ChannelAdvisor & Salesforce is as shown in the image below.



The template of ChannelAdvisor and Salesforce comes as one project. However, for a better explanation, the data flow is broken down into two

sections:

1. **Data flow from Salesforce to ChannelAdvisor:** This section explains the data flow from Salesforce to ChannelAdvisor platform. The information is segmented based on readers' persona. This will reduce clutter and help readers better understand the integration requirements. As a result, readers should be able to configure templates without any help from the DBSync support team.
 - a. **Product Integration:** The product integration data flow constitutes retrieving data from the Product object of the Salesforce and integrating it with ChannelAdvisor as Products.
2. **Data flow from ChannelAdvisor to Salesforce:** This section explains the data flow from ChannelAdvisor platform to Salesforce. The information is segmented based on readers' persona. This will reduce clutter and help readers better understand the integration requirements. As a result, readers should be able to configure templates without any help from the DBSync support team.
 - a. **Channel Integration:** The Channel integration data flow constitutes retrieving data from the Channel object of ChannelAdvisor and integrating with it Salesforce as Accounts.
 - b. **Order Integration:** The Order integration data flow constitutes retrieving data from the Order object of ChannelAdvisor and integrating it with Salesforce as Opportunity/Order.
 - c. **Product Integration:** The item integration data flow constitutes retrieving data from the Item object of ChannelAdvisor and integrating it with Salesforce as Products.

ChannelAdvisor to Salesforce - Field Mapping

Prerequisites For Integration

To facilitate the data flow between Salesforce and ChannelAdvisor, a user has to do the following:

- Have a valid license to DBSync ChannelAdvisor and Salesforce connector.
- Have a valid username, password, Account ID and application ID to access ChannelAdvisor web service.
- Have a valid username, password of the Salesforce production instance.
- The connections must be rightly configured to the respective applications via the connector page of this standard template provided by DBSync.

Getting Started With DBSync

1. Go to www.mydbsync.com & register for Free Trial. Ensure that Source & Target Adapters are Salesforce & ChannelAdvisor respectively. Populate user registration form to complete registration.
2. An email will trigger from dbsync-notification@mydbsync.com to the registered Email ID. Click on the activation link to activate your DBSync account
3. Login to your DBSync account. Click on the template library and import the ChannelAdvisor and Salesforce - Bidirectional Integration template to your workspace.
4. Clicking on "Launch Development studio" will redirect the user to the connectors landing page. Configure Salesforce and ChannelAdvisor connectors respectively by following the steps as listed in the link [ChannelAdvisor Connector](#).
5. Now, run the integration by following the steps listed in the following section "Running The Integration".

Running The Integrations

DBSync integration of Salesforce & ChannelAdvisor can be triggered by:

1. Clicking on the "Run Now" button from the process listing page of DBSync.
2. Using "DBSync scheduler".

Clicking on "Run Now" button from DBSync platform

The user has to login to DBSync with his/her valid credentials and hit the "Run Now" button from the process listing page or from the workflow listing page.

Using DBSync Scheduler

- Scheduler available in DBSync account can be used to schedule the integrations. Details pertaining to usage of DBSync scheduler is available from <http://help.mydbsync.com/docs/display/dbsync/Scheduler>, link.