Connecting OneDesk to SalesForce

Pre-requirements

- [SalesForce](#) account
- [Zapier](#) account
- [OneDesk](#) account with a dedicated user for integrations with administrative rights

Description

When fully configured the SalesForce integration will keep synchronized your Opportunities, Tasks, Notes and Events from SalesForce to OneDesk. Changes to title (name), description, priority, percent complete, notes (discussion posts) will be automatically synchronized to the other system.

Optional configuration

In SalesForce

In order for the synchronization to work both ways smoothly it is important to add a custom field in your SalesForce account both for Opportunities and Activities (ex: Tasks).

To setup your custom fields:
1. Go to your "Setup" -> App Setup -> Customize -> Customize your Activities
2. Add a custom field to activities -> New -> select "Text" -> Next

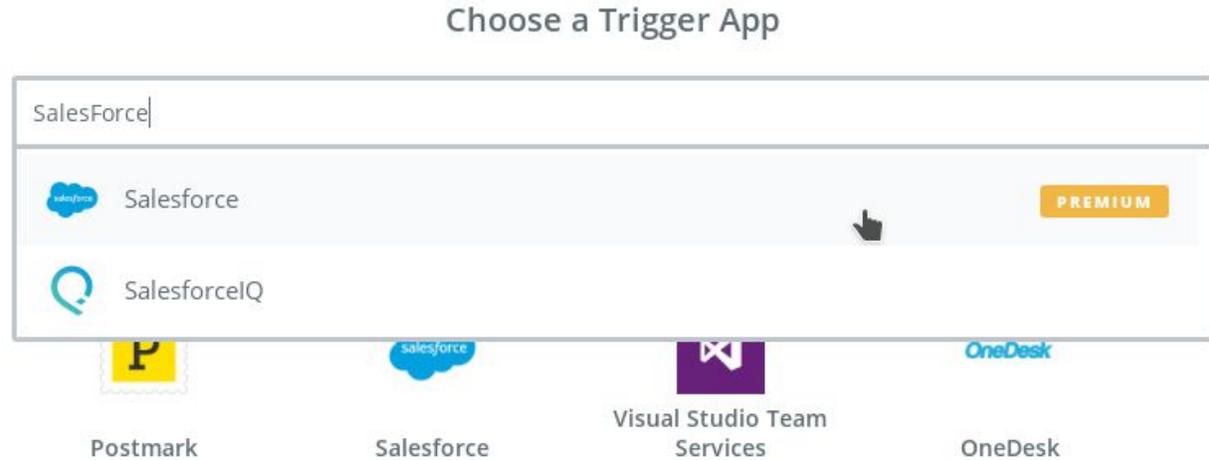3. Fill out the new custom field form like this:

4. Click Next -> Next -> Save
5. Go back to your "Setup" -> App Setup -> Customize -> Customize your Opportunities and follow again the steps 2 to 4 to add a new custom field to Opprotunities

1. ZAP1 - New opportunity in SalesForce becomes new Idea in OneDesk

The purpose of this ZAP is to bring new opportunities from SalesForce to OneDesk as ideas and create the necessary link so that updates in either system get propagate to the other.

1.1. In your Zapier account click on "Make A ZAP" button.
1.2. Type "SalesForce" in the search fields to locate the SalesForce application, or select the SalesForce application from the list of applications below the search

box:

Choose a Trigger App

SalesForce

Salesforce   PREMIUM

SalesforceIQ

Postmark   Salesforce   Visual Studio Team Services   OneDesk

1.3.   Select "New Opportunity" Trigger from the list of triggers and click Save + Continue

1.4.   Click on the Connect a New Account and fill-in the credentials for your SalesForce account.

1.5.   Go to your SalesForce account and create a new Opportunity. Come back to Zapier and click "Fetch & Continue". If the test is successful you can click "Continue".

1.6.   Click on the plus sign and add a new action, pick OneDesk from the list of "your apps", select "Create Item" from the list of actions. Click Save+Continue

1.7.   Select an existing account or click on the "Connect a New Account" button. Sign-In with the OneDesk user dedicated for integrations. Do NOT use a shared account as it is possible to miss updates in OneDesk.

1.8.   Fill-Up the configuration form for the OneDesk Item like this:

    1.8.1.   Item Type -> "idea" (feel free to choose a different type if it makes more sense to your business logic)

    1.8.2.   Item Name -> click on the "   and select "New Opportunity" -> Name

1.8.3.   Item Description -> select "New Opportunity" -> Description

Item Type (required)

Item type.

idea

Item Name (required)

Item Name

Step 1   Name

Item Description (optional)

Item description.

Step 1   Description

1.9.   Click "Continue" -> "Create & Continue" -> "Add a step"
1.10.   Select "SalesForce" from "Your Apps" -> click on "show less common options"
         under "Create" category -> "Update Opportunity" -> Save + Continue
1.11.   Select the same SalesForce account as you selected for the "new opportunity"
1.12.   Set up the SalesForce Opportunity step like this:
         1.12.1.   "ID" -> Use a Custom Value
         1.12.2.   "Custom Value for ID ID" -> Step1 Opportunity ID
         1.12.3.   "OneDesk Integration" -> Step2 Item ID
         1.12.4.   "Continue" -> "Create & Continue"
1.13.   Click "Add a step" -> select "OneDesk" from your apps -> click "show less
         common options" -> select "Update Item" -> Continue
1.14.   Select the same OneDesk account as in "Create Item" step -> "Save + Continue"
1.15.   Setup OneDesk Item update like this:
         1.15.1.   "Item Id" -> "Use a Custom Value"
         1.15.2.   "Custom Value for Item Id ID" -> Step2 Item Id

<blockquote>
1.15.3.   In the custom fields put "INTEGRATION_CUSTOM_FIELD" and Step 1
Opportunity ID
</blockquote>

Item Id (required)

The ID of the item to be updated.

Use a Custom Value

Custom Value for Item Id ID (required)

Provide the Item Id ID, not the Fancy Name here.

Step 2   **Item ID**

Custom Field(s) (optional)

The custom fields to be updated.

INTEGRATION_CUSTOM_F   Step 1   **Opportunity ID**
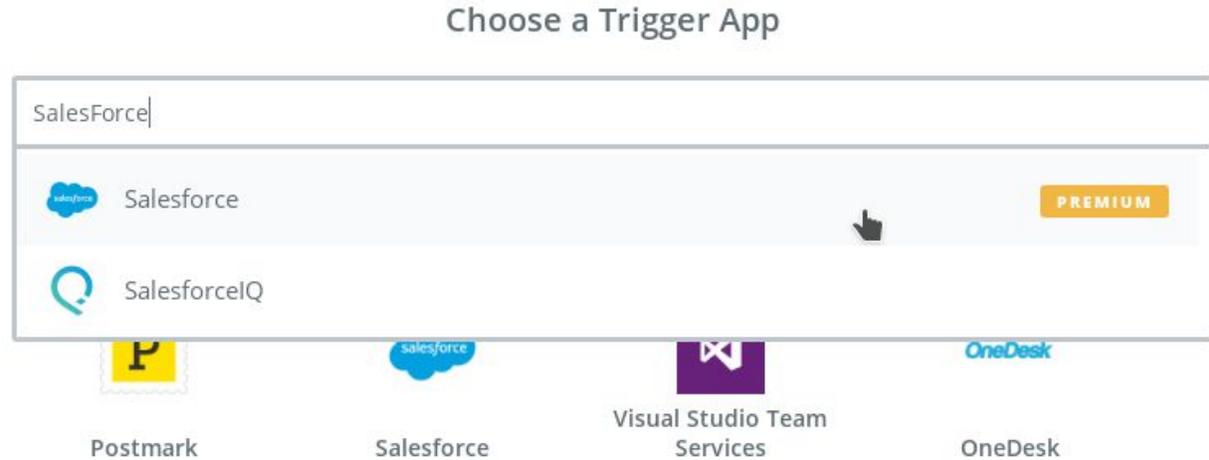
> 1.16.   Click "Continue" -> "Create & Continue" -> "Finish"
> 1.17.   Give a recognizable name to your zap and turn it ON

2.   ZAP2 - New task in SalesForce becomes new task in OneDesk

The purpose of this ZAP is to bring new tasks from SalesForce to OneDesk and create the necessary link so that updates in either system get propagate to the other.

> 2.1.   In your Zapier account click on "Make A ZAP" button.
> 2.2.   Type "SalesForce" in the search fields to locate the SalesForce application, or select the SalesForce application from the list of applications below the search

box:

Choose a Trigger App

SalesForce|

Salesforce   PREMIUM

SalesforceIQ

Postmark   Salesforce   Visual Studio Team Services   OneDesk

2.3.   Select "New Task" Trigger from the list of triggers and click Save + Continue

2.4.   Click on the Connect a New Account and fill-in the credentials for your SalesForce account.

2.5.   Go to your SalesForce account and create a new Task. Come back to Zapier and click "Fetch & Continue". If the test is successful you can click "Continue".

2.6.   Click on the plus sign and add a new action, pick OneDesk from the list of "your apps", select "Create Item" from the list of actions. Click Save+Continue

2.7.   Select an existing account or click on the "Connect a New Account" button. Sign-In with the OneDesk user dedicated for integrations. Do NOT use a shared account as it is possible to miss updates in OneDesk.

2.8.   Fill-Up the configuration form for the OneDesk Item like this:

     2.8.1.   Item Type -> "task" (feel free to choose a different type if it makes more sense to your business logic)

     2.8.2.   Item Name -> click on the "   and select "New Task" -> Subject

2.8.3.   Item Description -> select "New Opportunity" -> Description

Item Type (required)

Item type.

task

Item Name (required)

Item Name

Step 1 Subject

Item Description (optional)

Item description.

Step 1 Description

2.9.   Click "Continue" -> "Create & Continue" -> "Add a step"
2.10.   Select "SalesForce" from "Your Apps" -> click on "show less common options"
           under "Create" category -> "Update Custom Object" -> Save + Continue
2.11.   Select the same SalesForce account as you selected for the "new task"
2.12.   Set up the SalesForce Opportunity step like this:
        2.12.1.   "Object Type" -> Task
        2.12.2.   "Object" -> "Use a Custom Value"
        2.12.3.   "Custom Value for Object ID" -> Step1 Activity ID
        2.12.4.   "OneDesk Integration" -> Step2 Item ID
        2.12.5.   "Continue" -> "Create & Continue"
2.13.   Click "Add a step" -> select "OneDesk" from your apps -> click "show less
           common options" -> select "Update Item" -> Continue
2.14.   Select the same OneDesk account as in "Create Item" step -> "Save + Continue"
2.15.   Setup OneDesk Item update like this:
        2.15.1.   "Item Id" -> "Use a Custom Value"
        2.15.2.   "Custom Value for Item Id ID" -> Step2 Item Id

2.15.3. In the custom fields put "INTEGRATION_CUSTOM_FIELD" and Step 1 Opportunity ID

Item Id (required)

The ID of the item to be updated.

Use a Custom Value

Custom Value for Item Id ID (required)

Provide the Item Id ID, not the Fancy Name here.

Step 2 | Item ID

Custom Field(s) (optional)

The custom fields to be updated.

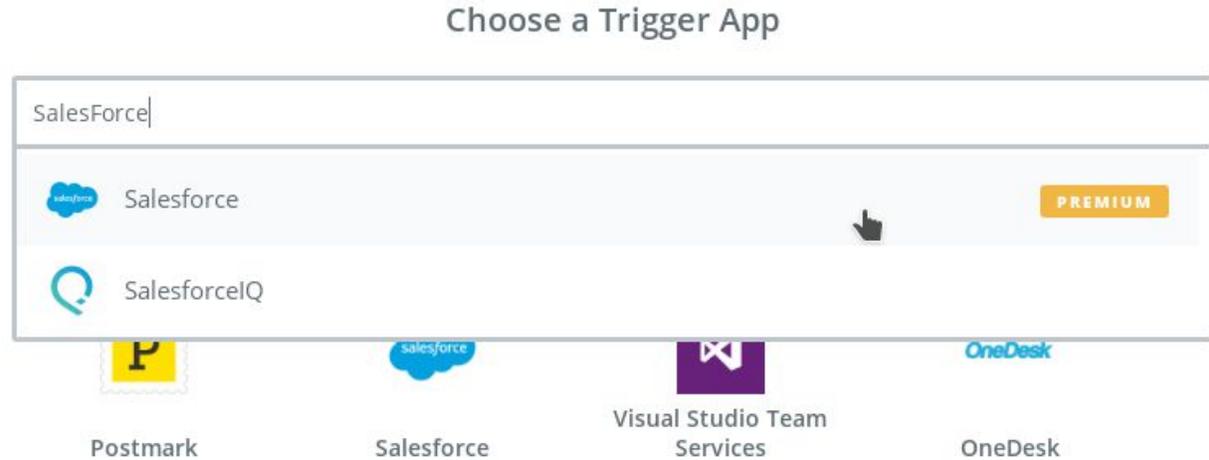INTEGRATION_CUSTOM_F | Step 1 Opportunity ID

2.16. Click "Continue" -> "Create & Continue" -> "Finish"
2.17. Give a recognizable name to your zap and turn it ON

3. ZAP3 - New Note in SalesForce creates comment on linked item in OneDesk

The purpose of this ZAP is to bring new notes from SalesForce to OneDesk as discussion posts.

3.1. In your Zapier account click on "Make A ZAP" button.
3.2. Type "SalesForce" in the search fields to locate the SalesForce application, or select the SalesForce application from the list of applications below the search

box:

Choose a Trigger App

SalesForce

Salesforce   PREMIUM

SalesforceIQ

Postmark   Salesforce   Visual Studio Team   OneDesk
                                        Services

3.3.   Select "New Note" Trigger from the list of triggers and click Save + Continue
3.4.   Click on the Connect a New Account and fill-in the credentials for your
        SalesForce account.
3.5.   Go to your SalesForce account and create a new Note. Come back to Zapier and
        click "Fetch & Continue". If the test is successful you can click "Continue".
3.6.   Click on the plus sign and add a new action, pick OneDesk from the list of "your
        apps", select "Find WorkItem" from the list of actions. Click Save+Continue
3.7.   Select an existing account or click on the "Connect a New Account" button.
        Sign-In with the OneDesk user dedicated for integrations. Do NOT use a shared
        account as it is possible to miss updates in OneDesk.
3.8.   Fill-Up the configuration form for the OneDesk Find WorkItem like this:
        3.8.1.   Search By -> "OneDesk's default custom field for integrations"
        3.8.2.   Search Operation -> "Is"

3.8.3.   Search Criteria -> "click on the "   and select "New Note" ->
          ParentId Raw

Search By (required)

Search items by author, container or custom field

OneDesk's default custom field for integrations

Search Operation (required)

Search operation (is / is not / is not empty).

Is

Search Criteria (optional)

Search criteria(s) joined by OR.

Step 1   ParentId Raw

3.9.   Click "Continue" -> "Create & Continue" -> "Add a step"
3.10.   Select "OneDesk" from your apps -> "Create Comment" Continue
3.11.   Select the same OneDesk account as in "Find WorkItem" step -> "Save +
          Continue"
3.12.   Setup OneDesk Comment update like this:
          3.12.1.   "Item Id" -> "Use a Custom Value"
          3.12.2.   "Custom Value for Item Id ID" -> Step2 Id
          3.12.3.   "Post Type" -> "DISSCUSION POST"

3.12.4.   "Comment" -> Step1 Title and Step1 Body

Item ID (required) 1 2 3

ID of the work item to post a comment on

> Use a Custom Value

Custom Value for Item ID ID (required)

Provide the Item ID ID, not the Fancy Name here.

> Step 2 **Id**

Post Type (required)

Comment type

> DISCUSSION POST

Comment (required)

Comment content

> Note Title ◉ Step 1 **Title** Note Body: ◉ Step 1 **Body**

3.13.   Click "Continue" -> "Create & Continue" -> "Finish"
3.14.   Give a recognizable name to your zap and turn it ON

4.   ZAP4 - Item Updates in OneDesk updates the linked item in SalesForce

The purpose of this ZAP is to bring updates on name (title), description, priority made in OneDesk to their corresponding item in SalesForce.

4.1.   In your Zapier account click on "Make A ZAP" button.
4.2.   Select "OneDesk" from your apps -> "Item Updates" Continue
4.3.   Click on the Connect a New Account and fill-in the credentials for your OneDesk account.
4.4.   Setup the OneDesk Item Update by adding the following fields to the "Updates On", you can use the + sign to add all the needed lines
4.4.1.   Name
4.4.2.   Priority
4.4.3.   Description

4.4.4. Percent Complete

4.5. Click "Continue"
4.6. Go to your OneDesk account and update the title on one of the items that are linked to a SalesForce item (created by ZAP1 or ZAP2 for example)
4.7. Come back to Zapier and click "Fetch & Continue" -> If the test is successful add a new action to your ZAP
4.8. Pick SalesForce from the list of "your apps", click "show less common options" and select "Update Custom Object" from the list of actions. Click Save+Continue
4.9. Select an existing account or click on the "Connect a New Account" button.
4.10. Setup the configuration form for the SalesForce Custom Object like this:
    4.10.1. Object Type-> "Task"
    4.10.2. Click "Add a Search Step" -> the "Ok Add It":
        4.10.2.1. Custom Object Type -> Task
        4.10.2.2. Field to Search By -> "OneDesk Integration ID"
        4.10.2.3. Search Value -> Step1 Item Id
        4.10.2.4. Click Continue -> Search & Continue -> after the search is successful go back to "Set Up Template" in Step 3 (Update Custom Object)
    4.10.3. Description -> Step 1 Description New Value
    4.10.4. Priority -> "Use a Custom Value"
    4.10.5. Custom Value for Priority -> Step1 Priority New Value
    4.10.6. Subject -> "Use a Custom Value"
    4.10.7. Custom Value for Subject -> Step1 Name New Value
4.11. Click "Continue" -> "Create & Continue" -> "Finish"
4.12. Give a recognizable name to your zap and turn it ON