EPICOR.

Epicor ERP

Epicor ERP Integration to

Salesforce.com, Inc.

10.2.200

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Contents

Salesforce.com Integration

Use this guide to set up the integration software between Epicor and Salesforce.com.

Important An External CRM Module license is required for the 10.1 and above versions of Epicor ERP Integration to Salesforce.com.

Salesforce.com is a cloud-based Customer Relationship Management (CRM) application that manages customer relationship, sales pipeline and quote information and analytics.

Through scheduled processes that export and import information automatically, customer, contact, part, and opportunity/quote data is exchanged between the two applications. The processes are largely invisible to the end user of both applications.

For additional information on the import and export processes, refer to the Synchronization Flow section.

Before use, you must configure your Epicor application to communicate with Salesforce.com and set up a schedule for synching the applications via System Agent Maintenance. Any Epicor records that should be synchronized with Salesforce.com must also be set up to do so.

Complete the Setup steps in this guide to set up customizations. Refer to the General Operations section for additional information specific to the import and export of data, as well as the Synchronization Message Logging.

Important In **Epicor Cloud ERP - Multi Tenant** or **Epicor Cloud ERP - Dedicated Tenancy**, this program or feature may not be available or may operate under certain restrictions.

Modules Licensing

The following modules must be licensed for 10.1 and higher versions of Epicor ERP Integration to Salesforce.com.

- Salesforce.com
- External CRM

Setup

Use the Setup topics to complete the setup tasks required to integrate Epicor with Salesforce.com.

Use the following Epicor and Salesforce programs to set up integration:

- **Company Configuration** - Setup Salesforce,com configuration and security information.
- **Customer Maintenance** - Select customers and contacts to integrate with Salesforce.com
- **Part Maintenance** - Select parts to integrate with Salesforce.com
- **Salesforce Synchronization** - Setup up the synchronization scheduled process.
- **Prepare data in Salesforce (SFDC)**. - Assign the SFDC products that should be synchronized to the Epicor Price Book.

Company Configuration

Use **Company Configuration** to set up the external CRM integration information for Salesforce.

Menu Path: System Setup > Company/Site Maintenance > Company Configuration

Navigate to the **Modules > Sales > CRM > External CRM** sheet.

Use the **External CRM** sheet to setup the integration information between ERP and Salesforce.com.

> **Important** The fields in the **External CRM** sheet are only enabled if there is an active license for External CRM Integration.

1. Select the **External CRM Integration** check box to enable the integration between Epicor ERP and an external CRM.

2. In the **External CRM System** field, select **Salesforce.com**.

3. In the External CRM URL field, enter the URL of the Salesforce.com External CRM site.

   Typically this value is **https://login.salesforce.com/services/Soap/c/30.0** but may vary for other environments that may exist for your organization.

4. In the **External CRM Master File** field, select which application to use as the primary master file holder. The options are Epicor ERP or External CRM.

5. In the **External Token** field, enter the token provided by Salesforce.com for API calls.

6. In the **External CRM Login ID** field, enter the user ID used to login to Salesforce.com.

7. In the **External CRM Password ID** field, enter the token password used to login to Salesforce.com.

   Once you enter the password value, it is encrypted.

8. In the **External CRM Time Zone ID** field, enter the time zone used by Saleforce.

   This value is used in cases where Salesforce.com is located in a different time zone than Epicor ERP. **The recommended setting is (UTC) Coordinated Universal Time.**

9. In the **Default Industry Class Type** field, enter the default industry class type used by Salesforce.com.

   > **Note** You define industry class types in **Industry Class Maintenance**.

10. Click the Test External CRM Connection button to test the connection between Epicor ERP and Salesforce.com. A message box will confirm if the test was successful.

11. Review the following fields in the **External CRM Last Sync Dates** pane. Currently these fields are blank but they display synchronization information once synchronization begins between Salesforce.com and Epicor ERP.

    > **Note** These fields are all display only and are maintained by the Salesforce Synchronization process.

    - **ERP Last Sync** - Displays the last date and time that Salesforce has been synchronized to Epicor ERP.
    - **Contacts Last Sync** - Displays the last date and time that Customer Contacts were synchronized between Epicor ERP and Salesforce.com.

- **Customer Last Sync** - Displays the last date and time that the Customers have been synchronized between Epicor ERP and Salesforce.com.
- **Part Last Sync** - Displays the last date and time that parts have been synchronized between Epicor ERP and Salesforce.com.
- **Quote Last Sync** - Displays the last date and time that quotes have been synchronized between Epicor ERP and Salesforce.com.

12. Do not enter a value in the **External CRM Create SO** field. This field is used only by external CRM integration.

13. Click **Save** on the Standard toolbar and exit the program.

Data Preparation for Synchronization

When the synchronization process runs, existing Epicor customers, contacts, and parts are synchronized with Salesforce.com if the appropriate SFDC check box is selected in the data record.

Data Preparation in Epicor

This section of the guide contains the steps to prepare Epicor customers, contacts, and parts for synchronization with Salesforce.com.

To set up synchronization with Salesforce, you must enable synchronization for customers, contacts and parts.

Enable Customers and Contacts

Use **Customer Maintenance** to select customers and contacts for synchronization with Salesforce.com.

All customers and contacts selected for synchronization are synchronized with Salesforce,com, When a Salesforce Synchronization process that includes customers and contacts runs, Salesforce.com is queried for new and updated customers and contacts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for new and updated customers and contacts that synchronize with Salesforce. Any new or updated customer or contact data is used to update the records on Salesforce.com

Menu Path

Navigate to this program from the Main Menu:

Menu Path: Sales Management > Customer Relationship Management > Setup > Customer

Select Customers for Synchronization

Navigate to **Customer Maintenance**.

Menu Path: Sales Management > Customer Relationship Management > Setup > Customer

Perform the following steps for each customer to synchronize with Salesforce.com

1. In the **Customer** field, select the customer to synchronize.

2. Navigate to the **Integrations > External CRM** sheet.

3. Select the **Sync to External CRM** check box.

4. Review the **External CRM Customer ID** field. It displays the name of the customer in SFDC. This field is updated by the synchronization process and is display only. If the customer has not been synchronized, this field is blank.

5. Review the **External CRM Last Sync** field. It displays the date and time of the last synchronization with Salesforce. The field is automatically updated by the synchronization process and is display only.

6. Review the **External CRM Sync Required** check box. The check box automatically selects if a change is made to the customer that requires a synchronization to Salesforce. When the next synchronization process that includes customers runs, the check box automatically clears. This check box is display only.

7. Click **Save**.
    The customer is now enabled to synchronize with Saleforce.

Select Contacts for Synchronization

Navigate to **Customer Maintenance**.

Menu Path: Sales Management > Customer Relationship Management > Setup > Customer

Perform the following steps for each contact to synchronize with Salesforce.com

> **Important** You can integrate multiple contacts for a customer.

1. In the **Customer** field, select the customer whose contact you want to synchronize with Salesforce.com.

2. Navigate to the **Contacts > Detail** sheet.

3. In the **Person / Contact** field, select the contact you want to synchronize with Salesforce.com.

4. Navigate to the **Integrations > External CRM** sheet.

5. Select the **Sync to External CRM** check box.

6. Review the **External CRM Customer ID** field. It displays the name of the customer in SFDC. This field is updated by the synchronization process and is display only. If the customer has not been synchronized, this field is blank.

7. Review the **External CRM Contact ID** field. It displays the name of the contact in SFDC. This field is updated by the synchronization process and is display only. If the contact has not been synchronized, this field is blank.

8. Click **Save**.
    The contact is now enabled to synchronize with Saleforce.

Enable Parts

Use **Part Maintenance** to select parts for synchronization with Salesforce.com.

All parts selected for synchronization are synchronized with Salesforce,com. If selected, when the Salesforce Synchronization process runs, Salesforce.com is queried for new and updated parts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for new and updated parts that synchronize with Salesforce. Any new or updated part data is used to update the records on Salesforce.com. For each part selected to synchronize with Salesforce.com, changes to information such as the product ID, part number and description and unit price synchronize. The part synchronization process between Epicor ERP and Salesforce.com is bidirectional.

Menu Path

Navigate to this program from the Main Menu:

Menu Path: Material Management > Inventory Management > Setup > Part

Select Parts for Synchronization

Navigate to **Part Maintenance**.

Menu Path: Material Management > Inventory Management > Setup > Part

Perform the following steps for each part to synchronize with Salesforce.com

1. In the **Part** field, select the part to synchronize.

2. Navigate to the **Integrations > External CRM** sheet.

3. Select the **Sync to External CRM** check box.

4. Review the **External CRM Part ID** field. It displays the name of the part in SFDC. This field is updated by the synchronization process and is display only. If the part has not been synchronized, this field is blank.

5. Review the **External CRM Last Sync** field. It displays the date and time of the last synchronization with Salesforce. The field is automatically updated by the synchronization process and is display only.

6. Review the **External CRM Sync Required** check box. The check box automatically selects if a change is made to the part that requires a synchronization to Salesforce. When the next synchronization process that includes parts runs, the check box automatically clears. This check box is display only.

7. Click **Save**.
    The part is now enabled to synchronize with Saleforce.

Set Up Salesforce Synchronization Process

Use **Salesforce Synchronization** to set up a schedule for the SFDC synchronization process. The Epicor system clock will launch the schedule at the specified time, and all synchronization tasks selected for the schedule will run as well.

You can select the **Customers/Contacts**, **Quotes**, and **Parts** check boxes to specify which records to synchronize at a given time. Use the Processing Type field to select a net change or regenerative synchronization. Use the **Schedule** drop-down list to set the time on which the synchronization process should run. If you want synchronization to occur more than once, select the **Recurring** check box.

Menu Path: Sales Management > Customer Relationship Management > General Operations > Salesforce Synchronization

Selection Fields
Salesforce Synchronization

Fields for the current sheet are listed on this topic.

Some fields on the interface have a context menu, which is indicated by a triangle in the upper right corner of the field. To open the context menu, right-click on the field.

Customers/Contacts

If selected, when the Salesforce Synchronization process runs, customer and contact data synchronizes between Epicor ERP and Salesforce.com based on the selected processing type:

- If the Processing Type is **Net Change**, Salesforce.com is queried for new and updated customers and contacts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for new and updated customers and contacts that synchronize with Salesforce. Any new or updated customer or contact data is used to update the records on Salesforce.com.

- If the Processing Type is **Net Change and Regenerative**, Salesforce.com is queried for customers and contacts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for customers and contacts that synchronize with Salesforce. All customers or contact data set to integrate with Salesforce.com is used to update the records on Salesforce.com.

The customer and contact synchronization process between Epicor ERP and Salesforce.com is bidirectional.

> **Note** For a customer to synchronize with Salesforce.com, the **Sync to External CRM** check box must be selected for that customer in the **Customer Maintenance > Integrations > External CRM** sheet. If the check box is clear, the customer is excluded from the synchronization process.

> **Note** For a contact to synchronize with Salesforce.com, the **Sync to External CRM** check box for that contact must be selected in the **Customer Maintenance > Contacts > Integrations > External CRM** sheet. If the check box is clear, the contact is excluded from the synchronization process.

Parts

If selected, when the Salesforce Synchronization process runs, part data synchronizes between Epicor ERP and Salesforce.com based on the selected processing type:

- If the Processing Type is **Net Change**, Salesforce.com is queried for new and updated parts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for new and updated parts that synchronize with Salesforce. Any new or updated part data is used to update the records on Salesforce.com. The part synchronization process between Epicor ERP and Salesforce.com is bidirectional. For each part selected to synchronize with Salesforce.com, changes to information such as the product ID, part number and description and unit price synchronize.

- If the Processing Type is **Net Change and Regenerative**, Salesforce.com is queried for parts and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for parts that synchronize with Salesforce. All part data set to integrate with Salesforce.com is used to update the records on Salesforce.com. For each part selected to synchronize with Salesforce.com, information such as the product ID, part number and description and unit price synchronizes.

The part synchronization process between Epicor ERP and Salesforce.com is bidirectional.

> **Note** For a part to synchronize with Salesforce.com, the **Sync to External CRM** check box for that part must be selected in the **Part Maintenance > Integrations > External CMS** sheet. If the check box is clear, the part is excluded from the synchronization process.

> **Note** When a part synchronizes between ERP and Salesforce.com, the ERP on hand quantity for the part is summed up and sent to Salesforce.com. In Salesforce.com, an **Epicor 10 Quantity On Hand = XXXX** note related to the product is created (where XXXX is the on hand quantity). If there is an existing note, it is overwritten by the new note. If the processing type is **Net Change**, only new or changed on hand quantities are sent to Salesforce.com.

Processing Type

Determines the processing type to use when the synchronization process runs. You can select **Net Change** or **Net Change and Regenerative**.

- **Net Change** - Customer/contact, part and quote records that are new or have changed since the last synchronization date are included in the synchronization process.

- **Net Change and Regenerative** - All customer/contact, part and quote records set to synchronize with Salesforce.com are included in the synchronization process. The last sync date is ignored.

> **Note** A part, customer or contact must have the **Sync to External CRM** check box selected to be included in the synchronization process with Salesforce.com.

Quotes

If selected, when the Salesforce Synchronization process runs, quote data synchronizes between Epicor ERP and Salesforce.com based on the selected processing type:

- If the **Processing Type** is **Net Change**, Salesforce.com is queried for new and updated quotes (opportunities) and quote lines and those records are retrieved from Salesforce.com. New quotes (opportunities) and quote lines created in Salesforce.com import into Epicor ERP with a link to the quotes (opportunities) and quote lines in Salesforce.com. Updated quote (opportunities) and quote line data in Salesforce.com update the linked quotes and quote lines in Epicor ERP. ERP is queried for updates to quotes and quote lines that synchronize with Salesforce. Any updated quote data is used to update the opportunity records on Salesforce.com. The quote synchronization process between Epicor ERP and Salesforce.com is bidirectional.

- If the Processing Type is **Net Change and Regenerative**, Salesforce.com is queried for quotes (opportunities) and quote lines and those records are retrieved from Salesforce.com and updated in Epicor ERP. ERP is queried for updates to quotes and quote lines that synchronize with Salesforce. Any updated quote data is used to update the opportunity records on Salesforce.com.

> **Note** When a quote imports into Epicor ERP, the stage/status is not updated in Epicor ERP. You will need to set the status manually.

> **Note** When a quote imports into ERP and the quote line part has a type of **Sales Kit**, component lines for the quote line part are also created based on the quote line order quantity and the bill of materials defined for the active part revision in **Engineering Workbench**.
>
> When a quote line for a sales kit is imported, the sales kit pricing is based on the **Price Type** assigned to the sales kit in **Part Maintenance > Part > Sites > Sales Kits**:
>
> - If the **Price Type** is **Parent Pricing**, the price imported from Salesforce.com is used as the unit price.
> - If the **Price Type** is **Component Pricing**, the unit price is based on prices defined for the kit component parts in ERP.

Recurring

Select the **Recurring** check box to indicate that the process should be run on a repeating basis. This check box is available only if a schedule other than **Now** is selected.

Schedule

From this list, select the schedule option during which you would like the process to run. Options include Now, Startup Task Schedule, and any other user-defined schedules created for your company.

To learn more about creating schedules, review the **System Agent Maintenance - Schedules Details** topic.

Use the Salesforce Synchronization Program

Navigate to Salesforce Synchronization.

Menu Path: Sales Management > Customer Relationship Management > General Operations > Salesforce Synchronization

1. In the **Processing Type** field, select the processing type to use to synchronize the data between ERP and Salesforce.com.

2. Select which data to include in the synchronization process.

3. In the **Schedule** field, select the Salesforce Synchronization process schedule to use.

   You can run the synchronization process immediately (Now), schedule it for each time you start your startup task (Startup Task Schedule) or select any user defined schedule created for your company.

4. Select the **Recurring** check box if the synchronization process should be run on a repeating basis.

   Note If the **Schedule** value is **Now**, this check box is disabled.

5. To submit this process, click the **Submit** button.

Create a Schedule

Use **System Agent Maintenance** if you want to create a new schedule for your Salesforce synchronization process. You can create as many schedules as you need. These schedules display as options on reports, processes, and other tasks.

Navigate to **System Agent Maintenance**.

Menu Path: System Setup > System Maintenance > System Agent

Important This program is not available in Epicor Web Access.

1. In the **Agent ID** field, select the System Task Agent for which you want to create the schedule.

   Note If you only use one system agent, this field is disabled.

2. Click the **Down Arrow** next to the **New** button and select **New Schedule**.
   The **Schedules > Detail** sheet displays.

3. The **Schedule Number** defines each schedule as you add it to the system agent. This number is automatically assigned.

4. Enter a **Description** for the schedule.

5. Select the **Enabled** check box to activate the schedule.

6. Click the **Next Run** drop-down list to define the first date on which this schedule should run. You can also enter the date and time directly.

7. Select a **Schedule Type**. You can select **Once**, **Hourly**, **Interval** (hours/minutes/seconds), **Daily**, **Weekly**, or **Monthly** schedule types. For this example, select the Once type.

8. Click **Save** on the **Standard** toolbar.
   Your new schedule is now available throughout the application.

Data Preparation in SFDC

This section of the guide contains the steps to prepare existing SFDC (Saleforce) products for synchronization with Epicor ERP.

By default, all SFDC customers and contacts import into Epicor with the customer records created as suspects. The Epicor Price Book is created in SFDC when at least one Epicor ERP part is synchronized.

1. Synchronize at least one Epicor part to SFDC.
   The Epicor Price Book is created in SFDC.

2. Assign the SFDC products that should be synchronized to the Epicor Price Book.

General Operations

Use the General Operations section to run the integration server process to import and export data between the Epicor application and Salesforce.com.

Epicor Salesforce.com Synchronization Flow

This section describes the processes that synchronize the data in the Epicor application with the data on Salesforce.com.

Import Process

One part of the integration between the Epicor application and Salesforce.com is the import procedure.

At a specified interval, a scheduled synchronization process within Epicor queries Salesforce.com. The information retrieved during the import process is based on the synchronization processing type:

• **Net Change** - Salesforce.com is queried for new and updated customer, contacts, parts and quotes since the last synchronization date.
• **Net Change and Regenerative** - Salesforce.com is queried for ALL customer, contacts, parts and quotes. The last synchronization date is ignored.

The records are retrieved from Salesforce.com and the Epicor data is updated. If an error occurs, it is logged into the System Monitor. You can view a log of Salesforce synchronization process events and errors in **Process Review**.Customer records created in Salesforce are brought into Epicor as suspects. These suspects will require the usual process within the Epicor application to promote them to prospects/customers.

Opportunities created in Salesforce are brought into Epicor and created as quotes. The status on the quote is not updated. That must be done manually in Opportunity / Quote Entry.

When a quote is created through the Salesforce.com import process and the quote line part has a type of **Sales Kit**, component lines for the quote line part are also created based on the quote line order quantity and the bill of materials defined for the active part revision in **Engineering Workbench**. Kit component lines for a quote line appear in **Opportunity / Quote Entry** in the **Line > Kit Details > List sheet**.

When a quote line for a sales kit is created during the import process, the sales kit pricing is based on the **Price Type** assigned to the sales kit in **Part Maintenance > Part > Sites > Sales Kits**:

- If the **Price Type** is **Parent Pricing**, the price imported from Salesforce.com is used as the unit price.
- If the **Price Type** is **Component Pricing**, the unit price is based on prices defined for the kit component parts in ERP.

Map New and Updated Data

The following tables show how data from the Salesforce.com account is mapped to the Epicor application.

Customers

This table displays how customer data imported from Salesforce.com is mapped to the Epicor ERP application.

SFDC Customer	Epicor Customer
Id	Customer.ExternalCRMCustomerID
Name	Customer.Name
Type	Customer.ExternalCRMCustomerType
BillingStreet	Customer.Address1
BillingState	Customer.State
BillingPostalCode	Customer.Zip
BillingCountry	Customer.Country
ShippingStreet	Shipto.Address1
ShippingState	Shipto.State
ShippingPostalCode	Shipto.zip
ShippingCountry	Shipto.Country
Phone	Shipto.Phone
AccountNumber	Customer.CustID
Website	Customer.url
Industry	Customer.Industry
AnnualRevenue	Customer.AnnualRevenue
NumberOfEmployees	Customer.NumberOfEmployees
Ownership	Customer.Ownership
TickerSymbol	Customer.TickerSymbol
Description	Customer.Comment
Rating	Customer.Rating

Contacts

This table displays how contact data imported from Salesforce.com is mapped to the Epicor ERP application.

SFDC Contact	Epicor Customer Contact
Id	CustCnt.ExternalCRMContactID
AccountId	CustCnt.ExternalCustomerID
LastName	CustCnt.LastName
FirstName	CustCnt.FirstName
Name	CustCnt.Name
MailingStreet	CustCnt.Address1
MailingCity	CustCnt.City
MailingState	CustCnt.State
MailingPostalCode	CustCnt.zipcode
MailingCountry	CustCnt.Country
Phone	CustCnt.HomePhone
Fax	CustCnt.FaxNum
MobilePhone	CustCnt.CellPhoneNum
Email	CustCnt.EmailAddress
Title	CustCnt.ContactTitle
Description	CustCnt.Comment
LastModifiedDate	CustCnt.ChangeDate

Leads (Quotes)

This table displays how quotes imported from Salesforce.com are mapped to the Epicor ERP application.

SFDC Opportunity	Epicor Quote
Id	QuoteHed.ExternalCRMQuoteID
AccountId	QuoteHed.CustNum where Customer.ExternalCRMCustomerID = 'AccountId'
OrderID	QuoteHed.ExternalCRMOrderID
BillingState	Customer.State
BillingPostalCode	Customer.Zip
BillingCountry	Customer.Country
ShippingStreet	Shipto.Address1
ShippingState	Shipto.State
ShippingPostalCode	Shipto.zip
ShippingCountry	Shipto.Country
Phone	Shipto.Phone
PriceBookstentry.ProductCode where PricebookId = QuoteLineIte.PriceBookId	QuoteDtl.PartNum

SFDC Opportunity	Epicor Quote
PriceBookstentry.UnitPrice where PricebookId = QuoteLineIte.PriceBookId	QuoteDtl.UnitPrice
QuoteLineItem.Quantity	QuoteDtl.SellingExpectedQty

Export Process

The other part of the integration between the Epicor application and Salesforce.com is the export procedure.

At a specified interval, a scheduled synchronization process polls Salesforce integrated customer, contact, part and quote data. The information sent during the export process is based on the synchronization processing type:

- **Net Change** - Epicor is queried for new and updated customer, contacts, parts and quotes since the last synchronization date. Updated part on hand data for synchronized parts is summed up.

- **Net Change and Regenerative** - Epicor is queried for ALL Salesforce integrated customer, contacts, parts and quotes. Part on hand data for all integrated parts is summed up. The last synchronization date is ignored.

The results are then used to update records on Salesforce.com. If an error occurs, it is logged into the System Monitor. You can view a log of Salesforce synchronization process events and errors in **Process Review**.

When a part is synchronized between ERP and Salesforce.com, the ERP on hand quantity for the part is summed up and sent to Salesforce.com. In Salesforce.com, an **Epicor 10 Quantity On Hand = XXXX** note related to the product is created (where XXXX is the on hand quantity). If there is an existing note, it is overwritten by the new note. If the processing type is **Net Change**, only new or changed on hand quantities are sent to Salesforce.com.

Map New and Updated Data

The following table shows how newly created or updated SFDC parts that exist in Epicor are mapped to Salesforce.com.

Parts

This table displays how new and changed part data exported from the Epicor ERP application is mapped to Salesforce.com.

SFDC Products	Epicor Part
Product.ProductId	Part.SfdcProductId
Product.ProductCode	Part.PartNum
Product.Description	Part.Description
Pricebookstentry.UnitPrice	Part.UnitPrice
Product.ExtID	Part.SFDCExtID

The System Monitor

Use the **System Monitor** to verify the synchronization processes and review errors that occurred during the Epicor ERP and Salesforce synchronization process.

The System Monitor automatically activates when you start the Epicor ERP application. You can click this program's icon on the system tray on the Windows toolbar to display it. You can also launch this program within the Epicor ERP application.

> **Note** To launch the System Monitor, your user account must have **Allow Session Impersonation** rights; you can then review the tasks for the companies assigned to your user account.

Menu Path

Navigate to this program from the Main Menu:

- System Setup > System Maintenance > System Monitor

> **Important** This program is not available in Epicor Web Access.

Using the System Monitor

Navigate to **System Monitor**.

Menu Path: System Setup > System Maintenance > System Monitor

> **Important** This program is not available in Epicor Web Access.

1. Click the **Active Tasks** sheet to review Salesforce synchronization process tasks that are currently active. Information for each task displays in the list.

   a. To view details for an active synchronization task, select the task in the list and click the **Details** sheet.

   b. To view logs for an active task, select the task in the list and click the **Logs** sheet. Logs include any synchronization processing errors. Click on an error log to display the error message in the **Message** pane.

2. Click the **History Tasks** sheet to review a list of completed Salesforce synchronization process tasks. Information for each task appears in the list. To view details for a process task, select the task in the list and click the **Details** sheet.

3. Click the **Scheduled Tasks** sheet to review Salesforce synchronization process tasks that are on the schedule but have not started.

4. Click **Exit** to exit the System Monitor.

Process Review

Use **Process Review** to retrieve and review a log of the synchronization process tasks between ERP and Salesforce.com.

You can view task detail information and log entries for a selected task, including any errors that occurred during the synchronization process.

> **Note** You can only review process task logs for your current company.

Menu Path

Navigate to this program from the Main Menu:

- System Setup > System Maintenance > Process Review

Process Review - Summary

Use this sheet to review a summary of tasks for the Salesforce synchronization process that occurred within the selected date range.

You can also select to retrieve only the last process.

For each task, information such as the task name and description, the task start and end times, the user who created the task and the task status display.

Fields
Process Review

Fields for the current sheet are listed on this topic.

Some fields on the interface have a context menu, which is indicated by a triangle in the upper right corner of the field. To open the context menu, right-click on the field.

Process Type

Specifies the process type for which you want to see the runs and errors for each process run.

Summary Fields
Process Review

Fields for the current sheet are listed on this topic.

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By User

Displays the name of the user who submitted the task. The **Name** value from the user account record appears in this field.

Company

Displays the name of the company from which this task originated. One of the companies set up in your Epicor application displays in this field.

Description

Displays a brief explanation of the task. This value is typically the name of the process added to the current schedule.

Ended On

Displays the date and time the process ended.

Last Process Only

Indicates that you only want to retrieve the last process for a task.

Retrieve

Click this button to search for existing records. This search program retrieves the record type displayed on the button label.

Started On

Displays the date and time the process started.

Status

Displays the status of the task.

A task can have one of the following statuses:

- Active
- Complete
- Cancelled
- Error

Task

Displays the number assigned to the task when it was attached to the current schedule. This value helps identify the task on the schedule.

Task Type

Defines the category of the task. Available options:

- Report - Generates a report like the Stock Status report, Job Traveler, and so on.
- Process - Updates data through processes like Synchronization, Global Scheduling, and so on.

Retrieve Process Tasks

1. In the **Process Type** field, select **Salesforce Synch**.

2. Use the selection fields to filter the data to display tasks that match the selected criteria.

   Note For more details about the selection criteria fields, refer to the Summary - Fields sheet.

3. Click **Retrieve**.

Process Monitor - Detail

Use this sheet to view task log details for a selected task.

Detail Fields
Process Review

Fields for the current sheet are listed on this topic.

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Entry

Displays the entry number for the system task log entry.

Error

Indicates whether this log entry recorded an error. Either **Yes** or **No** displays in this field.

Message

Displays a brief explanation for the log entry. If this log entry records an error, the cause of this error appears in this field.

Message

Displays a brief explanation for the log entry. If this log entry records an error, the cause of this error appears in this field.

Message Type

Displays the message type for the task log message.

View Process Task Log

1. In the **Process Type** field, select **Salesforce Synch**.

2. Select the criteria to filter the retrieved task list.

   Note For more details about the selection criteria, refer to the Summary - Fields sheet.

3. Click **Retrieve**.

4. Select a process task in the tree and navigate to the **Detail** sheet.
   A log of all entries for the selected task display in the task log.

5. Select a task to view message details for the task.

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