

Q: Synchronization works from BF to SF but not the other way around.

A: This is usually caused by error in credentials:



The screenshot shows the 'BF Settings' configuration page. At the top, there are links for 'Standard page edit' and 'Standard page view'. Below the title 'BF Settings', there are 'Save' and 'Cancel' buttons. The 'General' section is expanded, showing four input fields: 'Access Token' (masked with dots), 'Public Token' (masked with dots), 'ApiBaseUrl' (containing 'https://api-sandbox.billforward.net/v1/'), and 'BFUIBaseUrl' (containing 'https://app-sandbox.billforward.net/'). The 'Advanced' section is collapsed. At the bottom, there are 'Save' and 'Cancel' buttons.

Please make sure ApiBaseUrl and BFUIBaseUrl look exactly as above. If this doesn't help please reset the access token in BF and copy it to the right box.

Q: Everything seems to synchronize correctly but there are no products/rate plans to add to Quote or to Subscription.

A: This happens when there are no Pricebook Entries created for Products. You can add these manually or BF can do it for you. If you would like to have them created automatically please make sure that setting SyncToStandardPricebook is on. It will create Pricebook Entries in your Standard Pricebook and 'BillForward All' Pricebook when new Rate Plans are synchronized



The screenshot shows a system configuration page with a sidebar on the left containing a tree view of settings. The main content area is titled 'BF Settings' and has a 'Save' button. Below this, there are several sections with various settings. A red arrow points to a checkbox labeled 'SyncToStandardPricebook' which is currently checked. Other settings include 'SyncToSubscriptionPricebook' (checked), 'SyncToQuotePricebook' (checked), and 'SyncToBillingPricebook' (checked).

Currency:

Q: All currency fields show up with \$ sign even though my Rate Plans are in different currency.

A: In single currency SF orgs all currency fields are styled according to currency set in Company Info Tab in Setup. If you would like to change the currency, go to Setup -> Company Profile -> Company Info. If you would like to use more than one currency, consider enabling 'multiple currencies' in your SF org. Refer to https://help.salesforce.com/articleView?id=admin_enable_multicurrency_implications.htm&type=5.



Q: Can we use multiple currencies in Salesforce?

A: Yes, it is possible to use many currencies. There are just few things to keep in mind:

- All currencies that the user is planning to use must be made available in SF setup -> manage currencies -> manage currencies button.
- Some currencies that are available in BF are not available in SF. When a Rate Plan that uses unsupported currency synchronizes with SF, it defaults to corporate currency.
- When a user creates records manually he is prompted to choose currency iso code. If these codes don't match between records of Standard Objects that are related (f.e. Opportunity and PriceBook Entry) it will result in an error. Users must be careful then to create records carefully.

Miscellaneous

Q: I'm trying to add Payment Method using button on BF Account but I'm getting an error.

A: Please make sure that you have configured payment gateway in your BF organization. You can't create a Payment Method before.

Advanced BF Settings:



- Subscription Provisioning Behaviour
 - 'Automatically Created When Opportunity is Closed & Won'
 - Subscription will be created automatically when opportunity is closed successfully.
 - 'Created Only By Clicking Provision Subscription Button'
 - Subscription will be created manually when Provision Subscription button on Opportunity record is clicked and Opportunity is 'Closed - Won'
 - 'Created with button and advanced options'
 - As above, but gives more control over Subscription being created
- CreateRatePlanTriggerOn
 - When on, SF Product is created along BF RatePlan
- CreateSFAccountTriggerOn
 - When on, SF Account and Contact are created along BF Account
- CreateSFContactTriggerOn
 - (Works only if CreateSFAccountTriggerOn is off) When on, Contact is created along BF Account
- SyncToStandardPricebook
 - When on, two Pricebook Entries are created and associated with Standard Pricebook and 'Billforward All' Pricebook along BF RatePlan
- UseContractsAndRenewal
 - **It sets 'store Quotes' to true**
- PopulateOpportunityIdOnBfSubscription
 - When on, creates a lookup connecting subscription with opportunity from which it was created. (under development)