

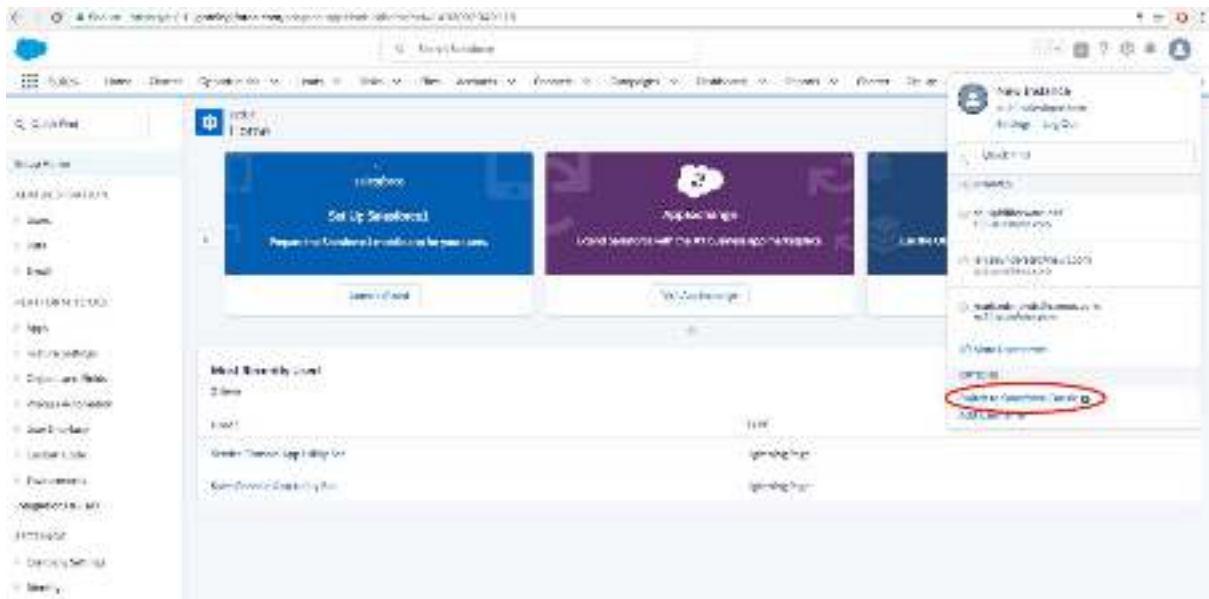
# Billforward Salesforce Integration Guide

1. Glossary
  - 1.1. SFDC - Salesforce (SalesForce Dot Com)
  - 1.2. BF - BillForward
2. Setting up Salesforce
  - 2.1. Prerequisites:
    - 2.1.1. A sandbox/production instance is available to install the BF package.
    - 2.1.2. Quote is enabled
      - 2.1.2.1. Searching for Quote in the setup menu and click “enable Quotes” in Quotes Settings.



2.1.3. Package Installation URL is provided by Billforward.

- 2.2. Install the BF Package
  - 2.2.1. Please contact Billforward for the link to the latest SF package
  - 2.2.2. To use the installation URL, replace the `login.` with the prefix for your new SFDC developer instance, and then follow the modified URL and select install for all users
- 2.3. Switch the UI to Salesforce classic this is done by clicking the user icon in the top right, then clicking “Switch to Salesforce Classic”



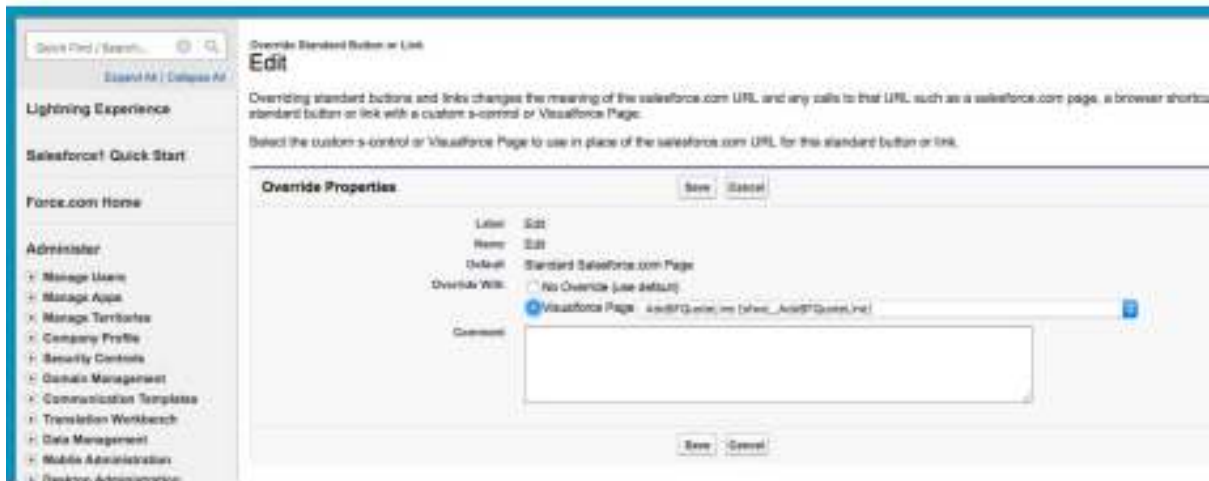
## 2.4. Make Sure the UI and Layouts Are Set-Up

2.4.1. Set up the BillForward menu bar by searching for Home Page Layout in setup and selecting Page Layout Assignment -> Edit Assignment and use the following assignment (This makes sure the user can access the BF setting UI).









2.4.5. Customize tabs to include whichever tabs you care about. Click on the plus on the homepage then 'Customize my tabs' to add tabs as desired.



2.4.6. Alternatively to 2.4.2 - 2.4.5 you can use the custom page layouts already defined in the BF Package by searching in setup for e.g. Quote -> Page Layouts -> Page Layout Assignment -> Edit Assignment

**Quote Page Layout**

This page allows you to create different page layouts to display Quote data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Action	Page Layout Name	Installed Package	Created By
Edit   Del	Quote Layout		Utsavale SF@salesops 21/04/2017 18:00
Edit   Del	Quote Layout	Billforward	Utsavale SF@salesops 21/04/2017 18:00

**Edit Page Layout Assignment**

**Quote**

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells. Use the drop-down.

Profiles	Page Layout To Use	Layout
Analytics Cloud Integration User	Quote Layout	Quote Layout
Analytics Cloud Security User	Quote Layout	Quote Layout
Contract Manager	Quote Layout (Installed Package: Billforward)	Quote Layout
Custom: Marketing Profile	Quote Layout	Quote Layout
Custom: Sales Profile	Quote Layout	Quote Layout
Custom: Support Profile	Quote Layout	Quote Layout
Gold Partner User	Quote Layout	Quote Layout
Marketing User	Quote Layout	Quote Layout
Partner Connecting Logic User	Quote Layout	Quote Layout
Partner Connecting User	Quote Layout	Quote Layout
Read Only	Quote Layout	Quote Layout
Solution Manager	Quote Layout	Quote Layout
Standard User	Quote Layout	Quote Layout
System Administrator	Quote Layout (Installed Package: Billforward)	Quote Layout (Installed Package: Billforward)

- 2.5. Set up BF configuration(So Salesforce can talk to Billforward)
  - 2.5.1.Go to the home page and select setup

Standard page edit Standard page view

**BF Settings** Save Cancel

▼ General

Access Token

Public Token

ApiBaseUrl

BFUIBaseUrl

▶ Advanced

Save Cancel

2.5.2. Alternatively, use [https://{domain\\_name.com}/apex/bfwd\\_UpdateBFSettings](https://{domain_name.com}/apex/bfwd_UpdateBFSettings). For example: [https://bfwd.eu11.visual.force.com/apex/bfwd\\_UpdateBFSettings](https://bfwd.eu11.visual.force.com/apex/bfwd_UpdateBFSettings)

2.5.3. Access token and public token can be obtained from the billforward account. <https://app-sandbox.billforward.net/#/setup/personal/api-keys> for sandbox <https://app.billforward.net/#/setup/personal/api-keys> for production.

2.5.4. API Base Url can be obtained from BF documentation via <https://app-sandbox.billforward.net/#/api/docs/intro>

2.5.5. Be very careful about ApiBaseUrl. It requires 'v1/' at the end to work properly

### 3. Setting up Billforward Sync (Enables BF to sync data to Salesforce)

#### 3.1. Prerequisite

3.1.1. The user has already logged in as the integration user in Salesforce. The user will be used to connect with Billforward.

3.1.2. If there is no specific integration user created, please consider creating one, as it is easier to maintain and gives more control over security (refer to <https://help.salesforce.com/articleView?id=000331470&type=1&mode=1>)

3.2. Login to Billforward app and select Salesforce under Integration on the menu bar.

The image shows two screenshots from the Billforward app. The top screenshot displays the main dashboard with a dark blue sidebar menu. The 'Integration' section is expanded, and 'Salesforce' is highlighted. The main content area shows a large blue person icon and the text 'Add a Customer' with a subtext 'Configure a new customer' and a teal button with a right arrow.

The bottom screenshot shows the 'Salesforce connect' configuration dialog. It contains three input fields: 'Salesforce Role' with the value 'Admin', 'Notification emails' which is empty, and 'Salesforce environment' with the value 'Production'. At the bottom, there are two buttons: 'Close' and 'Connect'.

3.3. Salesforce Role: Specify the integration user's profile API name. Notification email: the email address to receive synchronization status if errors occur.  
Salesforce environment:  
3.3.1.Production(production or developer org)  
3.3.2.Test(sandbox)

3.4. Click 'Allow' and when the page is redirected back to Billforward app, click on 'Start' to initiate the synchronisation.



# Allow Access?

**Billforward App** is asking to:

- Access your basic information
- Access and manage your data
- Provide access to your data via the Web
- Access and manage your Chatter data
- Provide access to custom applications
- Allow access to your unique identifier
- Access custom permissions
- Access and manage your Wave data
- Access and manage your Eclair data
- Manage hub connections
- Perform requests on your behalf at any time

Do you want to allow access for

(Not you?)

Deny

Allow

To revoke access at any time, go to your personal settings.