

# B2C ecommerce on Salesforce

Propel your business forward with **ForceGento**  
by TechnoMile  
the cost effective integrated B2C ecommerce solution.



Learn More

## How to install and configure ForceGento App using AppExchange

This guide will walk you through the installation of TechnoMile's ForceGento Application for your Salesforce Organization.

Note: Installation of TechnoMile's ForceGento Application is the same as any other AppExchange App. You may skip Part I of this document if you are already familiar with it. If you are not a system administrator but would like to install it anyway, you can install it into a free Developer Edition. Sign up at <http://developer.force.com>.

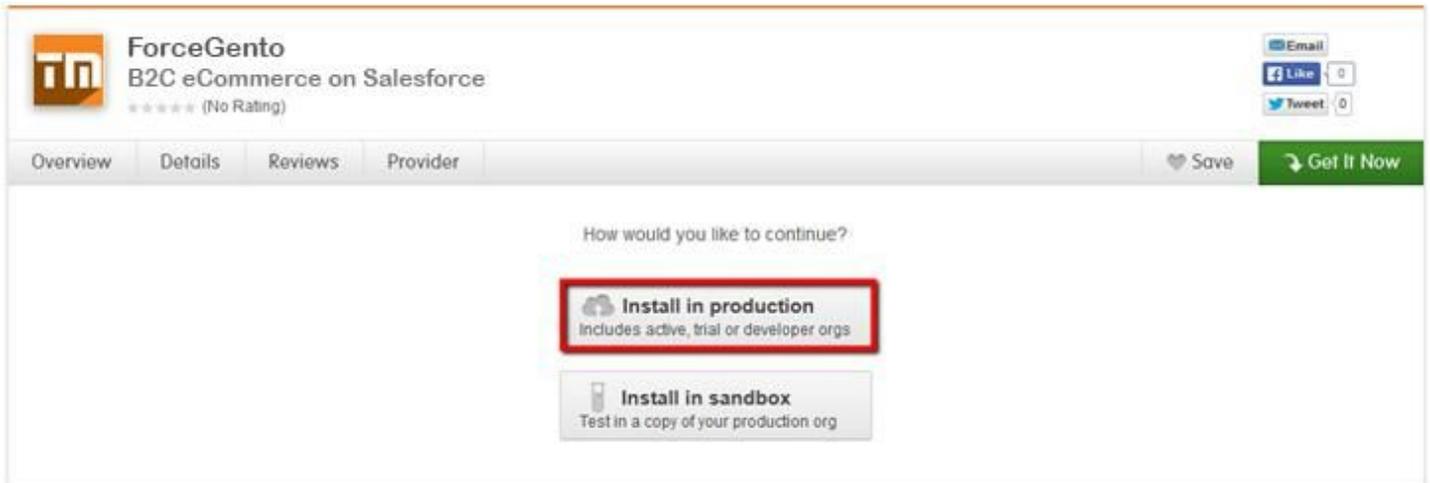
**Important: Once installation is complete, you must deploy the standard objects additional pick list values for the Account Type, Opportunity Stage & Product Family and finish your installation by following the instructions in Part II.**

### Part I

1. Enter your Salesforce credentials i.e. Username & Password.

The screenshot shows the app page for ForceGento on Salesforce AppExchange. The app is titled "ForceGento B2C eCommerce on Salesforce" and has a rating of "\*\*\*\*\* (No Rating)". The page includes navigation tabs for "Overview", "Details", "Reviews", and "Provider". There are social media sharing options for Email, Like, and Tweet. A "Save" button and a "Get It Now" button are visible. The main content area prompts the user to "To get this app, select one of the below options" and provides two buttons: "Login to the AppExchange Use your Salesforce credentials" (highlighted with a red box) and "I don't have a login Continue as a guest". A note at the bottom states: "Even if you plan to install into your sandbox, first login to the AppExchange using your production credentials."

2. Select where you would like to install the application. In this example, we will be selecting “Install in Production”; however, the instructions are the same for either option.



**ForceGento**  
B2C eCommerce on Salesforce  
\*\*\*\*\* (No Rating)

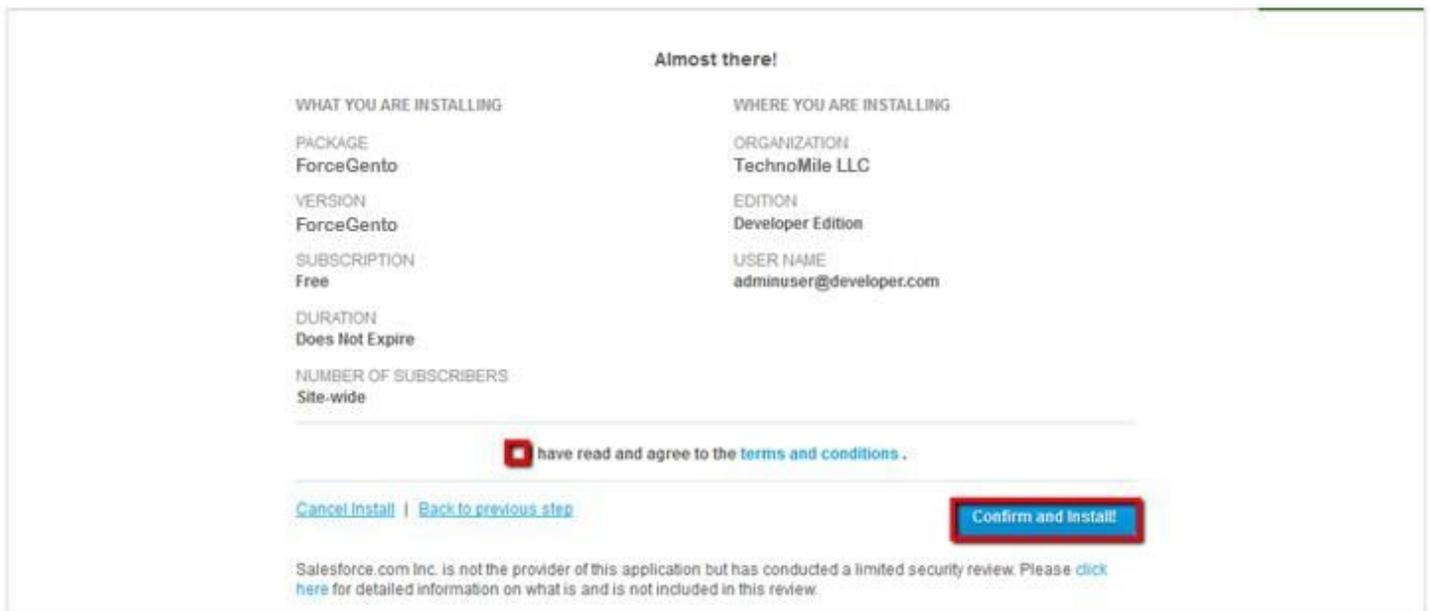
Overview Details Reviews Provider Save Get It Now

How would you like to continue?

**Install in production**  
Includes active, trial or developer orgs

**Install in sandbox**  
Test in a copy of your production org

3. Check the “I have read and agree to the terms and conditions” checkbox. Then, click “Confirm and Install!”.



**Almost there!**

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE ForceGento	ORGANIZATION TechnoMile LLC
VERSION ForceGento	EDITION Developer Edition
SUBSCRIPTION Free	USER NAME adminuser@developer.com
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#) **Confirm and Install!**

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

4. Click "Continue".

### Package Installation Details

Help for this Page

Package Name: ForceGento  
 Version Name: ForceGento  
 Version Number: 1.2  
 Publisher: TechnoMile LLC  
 Description: B2C eCommerce app provides high performance, scalable eCommerce solution for businesses. TechnoMile has built a B2C eCommerce app with Salesforce that is an online store which is compatible with web/mobile app. This app provides online merchants with a flexible shopping cart system, as well as control over the look, content and functionality of their online store. Users can register, select products for shopping and place orders. This application is integrated with Magento Community Edition and Salesforce CRM

**Continue** Cancel

#### Package Components

▼ Tabs (10)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Expense		Tab	This is a brand new component.
Create	Getting Started		Tab	This is a brand new component.
Create	Project		Tab	This is a brand new component.
Create	Milestone		Tab	This is a brand new component.
Create	Summary		Tab	This is a brand new component.
Create	Log		Tab	This is a brand new component.
Create	Task		Tab	This is a brand new component.
Create	Import Template		Tab	This is a brand new component.
Create	Calendar		Tab	This is a brand new component.
Create	Time		Tab	This is a brand new component.

5. Click "Next".

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

#### Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

#### Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Goals	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Goal Collaborators	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Goal Links	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Coaching	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Performance Cycles	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	Products	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓					

#### General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

#### Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

**Next** Cancel

6. **Note: If you would like all users to be able to add ForceGento Application, select the “Grant Access to all users” radio button. If you would like specific users to be able to add ForceGento Application, select the “Select Security settings” radio button. If you would like only the admin users to be able to add ForceGento Application, select the “Grant Access to admins only” radio button. Click “Next” again.**

Package Installer  
ForceGento

Help for this Page

Step 2. Choose security level Step 2 of 3

Select security settings:

- Grant access to admins only Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

Previous **Next** Cancel

7. Click “Install”.

Package Installer  
ForceGento

Help for this Page

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click install to continue.

Previous **Install** Cancel

8. It will take several minutes for the install to complete; you will be notified via an email.

## Processing

Your request is in progress. You will be notified by email when it completes.

Help for this Page

9. To view the installed Profile Image Application click on Setup > Build > View Installed Packages.

## Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as “In Development” and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Help for this Page



Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	
Uninstall	ForceGento	TechnoMile LLC	1.2	ForceGento	7/28/2015 11:24 PM	✓	1	3	3	

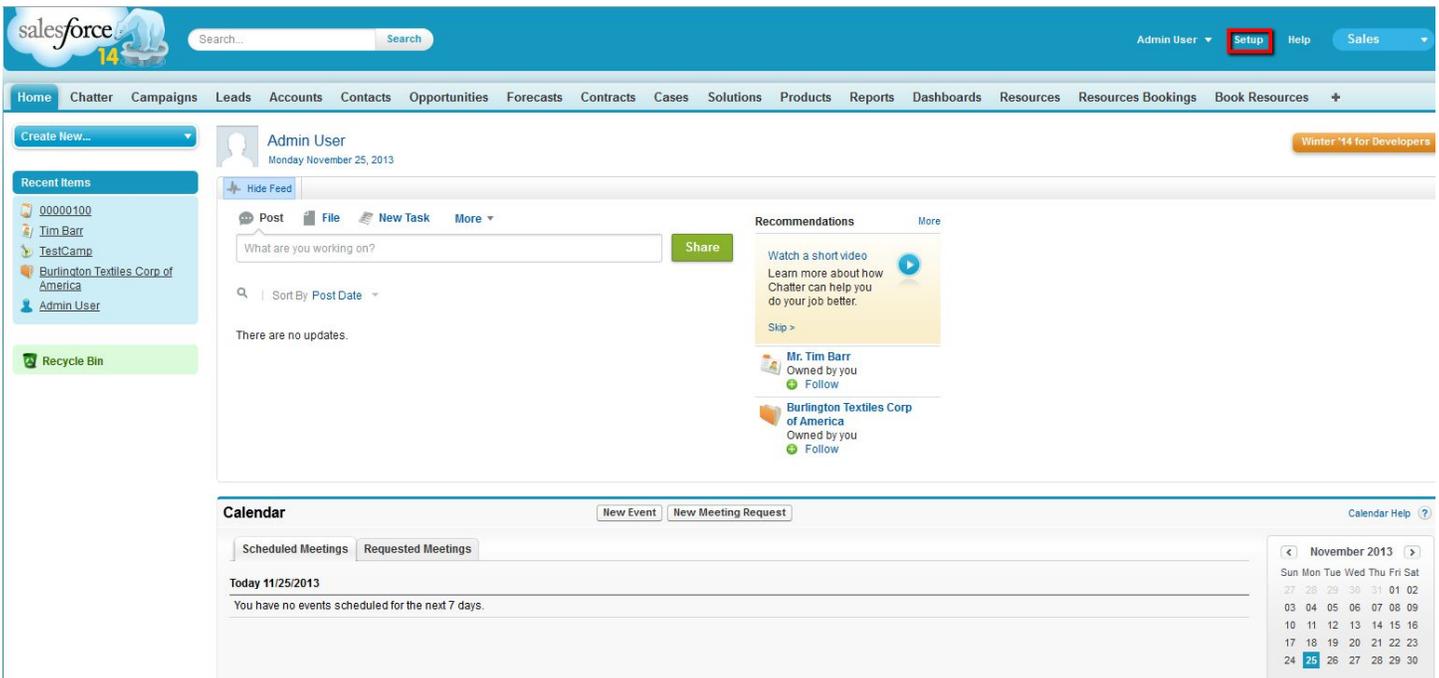
  

Uninstalled Packages
No uninstalled package data archives

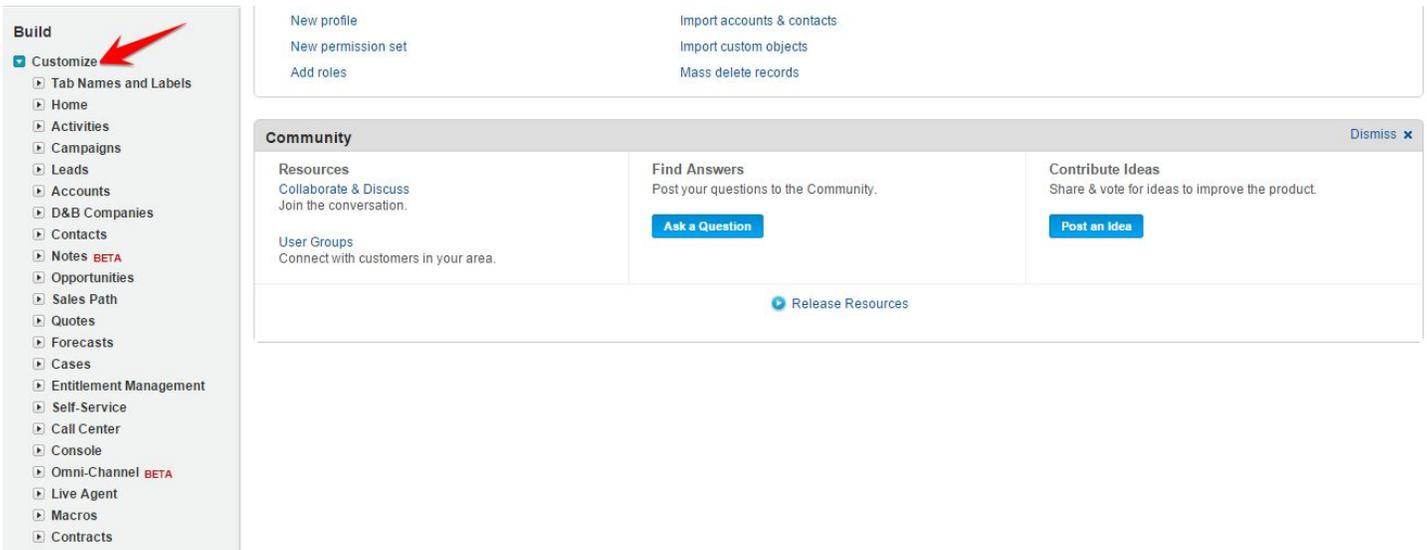
## Part II

Please complete the following steps to finish the configuration of the application.

1. Click on “Setup” in the upper right-hand corner of your browser.



2. Click on the down arrow next to “Customize”.



- Click on the down arrow next to "Account" to expose the "Fields" menu then click on "Type" field for adding additional pick list values.

### Step 1

Action	Field Name	Field Type	Field Format
Edit	Fax	Fax	Fax
Replace   Edit	Industry	Industry	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Edit	NAICS Code	NaicsCode	Text(8)
Edit	NAICS Description	NaicsDesc	Text(120)
Replace   Edit	Ownership	Ownership	Picklist
Edit	Parent Account	Parent	Hierarchy
Edit	Phone	Phone	Phone
Replace   Edit	Rating	Rating	Picklist
	Shipping Address	ShippingAddress	Address
Edit	SIC Code	Sic	Text(20)
Edit	SIC Description	SicDesc	Text(80)
Edit	Ticker Symbol	TickerSymbol	Content(20)
Edit	Tradestyle	Tradestyle	Text(255)
Replace   Edit	Type	Type	Picklist
Edit	Website	Website	URL(255)
Edit	Year Started	YearStarted	Text(4)

**Account Custom Fields & Relationships** New Field Dependencies

### Step 2

Account Type Picklist Values				
Action	Values	Default	Chart Colors	Modified By
Edit   Del	Prospect	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Customer - Direct	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Customer - Channel	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Channel Partner / Reseller	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Installation Partner	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Technology Partner	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM
Edit   Del	Other	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM

### Step 3

#### Add Picklist Values Account Type

Add one or more picklist values below. Each value should be on its own line.

Registered - Ecommerce  
Customer - Ecommerce

Save Cancel

- Click on the down arrow next to "Opportunity" to expose the "Fields" menu then click on "Stage" field for adding additional pick list value 'Wishlist'.

## Step 1

Opportunity Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Current Generator(s)	CurrentGenerators__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del   Replace	Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist			Admin User, 8/13/2015 11:36 PM
Edit   Del	Main Competitor(s)	MainCompetitors__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Order Number	OrderNumber__c	Text(8)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Tracking Number	TrackingNumber__c	Text(12)			Admin User, 8/13/2015 11:36 PM

## Step 2

Opportunity Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Current Generator(s)	CurrentGenerators__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del   Replace	Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist			Admin User, 8/13/2015 11:36 PM
Edit   Del	Main Competitor(s)	MainCompetitors__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Order Number	OrderNumber__c	Text(8)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Tracking Number	TrackingNumber__c	Text(12)			Admin User, 8/13/2015 11:36 PM

## Step 3

### Opportunity Stages

[Help for this Page](#)

Modify or Add the stage to fit your sales process. Note that the Type and Forecast Category values affect each other. The Forecast Category automatically determines how opportunities are tracked in a forecast, but these values can be revised when users update their forecasts.

**!** Changing the Type or Forecast Category will update all opportunities that have this stage value.

Stage Name	<input type="text" value="Wishlist"/>	Probability	<input type="text" value="10%"/>
Type	<input type="text" value="Open"/>	Forecast Category	<input type="text" value="Pipeline"/>
Description	<input type="text" value="Wishlist products from Shopping Cart."/>		
	Chart Color	Assigned dynamically	

- Click on the down arrow next to "Product" to expose the "Fields" menu then click on "Family" field for adding additional pick list value 'simple'.

## Step 1

### Product Fields

[Help for this Page](#)

This page allows you to specify the fields that can appear on the Product page. You can create up to 500 Product custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
<a href="#">Edit</a>	<a href="#">Active</a>	IsActive	Checkbox			<input type="checkbox"/>
	<a href="#">Created By</a>	CreatedBy	Lookup(User)			<input type="checkbox"/>
	<a href="#">Last Modified By</a>		Lookup(User)			<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Code</a>		Text(255)		✓	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Description</a>		Text Area(4000)			<input type="checkbox"/>
<a href="#">Replace</a>   <a href="#">Edit</a>	<a href="#">Product Family</a>		Picklist			<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Name</a>	Name	Text(255)		✓	<input type="checkbox"/>

**Please click on Product Family for adding additional picklist value 'simple'**

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#### Product Custom Fields & Relationships

[New](#) [Field Dependencies](#)

No custom fields defined

## Step 2

Product Field

### Product Family

[Back to Product Fields](#)

[Help for this Page](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

#### Field Information

Field Label	Product Family	Field Name	Family
Data Type	Picklist		
Help Text			

#### Field Dependencies

[New](#)

[Field Dependencies Help](#)

No dependencies defined.

#### Validation Rules

[New](#)

[Validation Rules Help](#)

No validation rules defined.

#### Product Family Picklist Values

[New](#)

[Product Family Picklist Values Help](#)

Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>	None	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 8/13/2015 11:36 PM

