Deltek for Professional Services 1.1 Salesforce Integration

Technical Guide

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Contents

Overview

Welcome to the Deltek for Professional Services Salesforce Integration Guide. When you own both Deltek and Salesforce, you can set up integration between the two products. This allows you to share opportunity, contact, and account records from Salesforce to Deltek.

This guide is intended for a system administrator and provides the following information that supports the integration between Deltek and Salesforce:

- Configuration that must be completed before you can share opportunity, contact, and account records from Salesforce to Deltek.
- Data mapping between Salesforce objects and Deltek objects.
- Troubleshooting steps for checking issues that may occur when you configure the integration or when users run the Salesforce integration.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Access Cloud specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst

- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Use Quick Chat to submit a question to a Customer Care analyst online

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Deltek administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Using Salesforce Integration with Deltek for Professional Services

The integration between Deltek and Salesforce enables users to import existing Salesforce data into Deltek to perform key sales tasks.

The integration between Deltek and Salesforce is one-directional and allows you to import certain new or updated records from Salesforce to Deltek. The records are then “linked” between the two products. You can run the Salesforce import process either on demand or schedule it to run at a future time in the Deltek Browser’s **Utilities » Interations & Imports » Salesforce.**

The integration between Deltek and Salesforce supports only one instance of Salesforce with one Deltek database. This version of the integration does not support Multicurrency databases. In addition, the version of Salesforce must include the availability of web service APIs

Terminology Differences Between Deltek and Salesforce

The following table identifies equivalent terms in Detek and Salesforce:

Deltek	Salesforce
Firm	Account
Revenue	Amount
Source	Lead Source

Before You Begin

Before you begin the integration process, it is important to ensure both the Deltek and Salesforce applications and associated data are set up for a successful connection and information sharing.

Refer to the following steps and associated procedures in this section for additional information.

Step	Procedure	Location
1	Confirm the values in Deltek Labels and Lists match the values that you have in Salesforce.	Deltek Browser » Settings» Labels and Lists
2	Set up user-defined fields if needed.	Deltek Desktop » Settings» User Defined Components
3	Review and clean up your Salesforce Data.	Salesforce

Set Up Labels and Lists

It is necessary to review the entries in Deltek's Labels and Lists to ensure conformity with entries in Salesforce. Each Salesforce field that you want to import into Deltek must have a respective field in Deltek.

To set up Labels and Lists:

1. In the Deltek Browser Navigation pane, go to the Settings section and select **Labels and Lists**.
2. Select the Summary Tab. Use this tab to review your current labels and the number of values specified for each of the drop-down lists for fields.
3. Use the Labels & Lists Label grid to replace the default Deltek labels with those that are used in your firm (for example, replace the default "Client" with "Customer").
4. Use the Labels & Lists List grid to specify the valid values that appear in drop-down selection lists for some Deltek fields (for example, a list of the valid opportunity stages for your firm). It is necessary to pay attention to lists that map to opportunities, firms, or contacts as they will perform an exact name match.

Set Up User Defined Fields

Before beginning the import process, set up any necessary user-defined fields. User defined fields will be included in the Deltek Field list for the Data Mappings grid in Deltek.

User-defined fields are added in the Deltek Desktop at Settings » General » User Defined Components.

Review and Clean Up Your Salesforce Data

Before making your integration “Active”, it is important to review the Salesforce data that will be imported into Deltek. This is necessary because the integration process cannot distinguish between data that is acceptable and data that is corrupt.

Recommendations:

- Make sure names and records are consistently structured. For example, make sure you use the same name for accounts that are associated with contacts and opportunities.
- Pay special attention to addresses and use the same format. For example use Dr. or Drive, but not both within the data. This will help minimize duplicate records.
- The Saslesforce User used for the integration needs read permissions on **all** fields mapped (including implicit mapped).
    - See Field Accessibility in Salesforce and ensure there are no mapped fields that show “Is Private’ for the Salesforce User.

It is much easier to clean up data before completing the import process.

Duplicate Record Check

The following fields are checked for duplicate records using the logic below:

Field	Checked
Accounts/Firms	Account Number match and then exact match on name or alias.
Contacts	Contact email and then exact match on first name + last name or preferred name + last name.
Opportunities	Exact match on name.
Firm Addresses	Exact match on whole address.
Employee Roles	Match on first name and last name or email. If there is a match, add a link. If no match, no link is added.

Configuration Process for Integration

This section provides configuration instructions that you must complete before you can run the Salesforce import process.

Refer to the following steps and associated procedures in this section for additional information.

Step	Procedure	Where Performed
1	Enable Salesforce to communicate with Deltek.	Salesforce » Create » Apps
2	Configure Detek to connect with Salesforce.	Deltek Browser » Utilities » Integrations & Imports » Salesforce tab » Connect Your Salesforce Instance
3	Set Up Data Options and Run the Initial Import.	Deltek Browser » Utilities » Integrations & Imports » Salesforce tab . Select **new records only**.
4	Confirm Data After the Import	Review data to confirm accurate import.
5	View Error Log or Notifications.	Deltek Browser » Utilities » Integrations & Imports » Salesforce tab or Notifications pane.

Enable Salesforce to Communicate With Deltek

You must enable the Salesforce application to communication with Deltek.

To enable the Salesforce integration and configure the connection settings:

1. Open the Salesforce application, and select **Setup » Build » Create » Apps** from the Navigation Pane.
2. Complete the following fields:
   - **Connected App Name**
   - **API Name**
   - **Contact Email**
3. In the **Callback URL** field, enter the following:
   a. Copy the URL in your browser bar when you are on the Integrations page.
   b. Remove "app/#!SalesforceIntegration/view/0/0/~/presentation" and replace it with vision/salesforce/callback

i. If you get a “redirect uri mismatch” error, check that you have typed the url correctly (it is case sentitive) and that there is no ghost space at the beginning or end of the url.

4. In the **Available OAuth Scopes** field, select the **Full Access (full)** and the **Perform requests on your behalf at any time (refresh_token, offline_access)** options.
5. The **Consumer Secret** and **Consumer Key** display in their respective fields in the API Enable OAuth Settings form. Document this information for use when configuring Deltek to connect with Salesforce.
6. Before exiting Salesforce, make sure that the Oauth Settings are set to **All users may self-authorize**. To do this, navigate to **Administer** » **Manage Apps** » **Manage Connected Apps** and click on the app that you just created. Under **OAuth Policies,** confirm that **Permitted Users** is set to **All users may self-authorize**. Use the options under **Edit Policies** if you need to change this setting.

Configure Deltek to Connect with Salesforce

In Deltek Browser, you must use the Integration & Import Utility to enable theSalesforce Integration and configure the connection settings.

To enable the Salesforce integration and configure the connection settings:

1. In the Deltek Browser, go to the Utilities section and select **Integrations & Imports**.
2. Select the **Salesforce** tab.
3. Enter the **Consumer Secret** and **Consumer Key** that were documented from the previous procedure. If you see “invalid client id” error, try copying and pasting client id and secret from Salesforce.
4. Click **Connect** to connect the Salesforce instance to Deltek. After a successful connection:
   - The **Connect** button changes to **Disconnect**
   - A *Salesforce was Successfully Connected* message displays in the top banner.
   - The **Data Update Options**, **Advanced Options**, and **Data Mapping** sections are enabled.
5. Click **Disconnect** at any point to disconnect Salesforce from Deltek.
6. If the connection is not successful, *Connection was not Successful* displays. Failures are recorded in an error log table. If alerts are configured, Deltek sends a notification center alert to the users with roles impacted by the failure. See the “Verify Salesforce Connection Information” section of this guide for more information.
7. Click the **View Last Error Log** to view details from the most recent error log. See the View Error Log procedure for additional information.

Set Up Data Options

After you have established a connection with Salesforce, you can set up the Deltek data options to specify how and when Deltek records are updated with Salesforce information.

To set up data options:

1. In the Deltek Browser, go to the Utilities section and select Integrations & Imports.

2. Select the Salesforce tab.
3. In the Data Options area, specify how often data will update in the **Schedule Your Data Update Intervals** field. This is the interval for how often the data is updated with Salesforce records. For example, if you specify **8 Hours**, Deltek will run the data import every 8 hours. These processes will run in the background and not interrupt your work. See the Deltek Desktop » Utiities » Process Server help for more information.
4. Clicking **Update Now** once the process server is already queuing up the next scheduled update may result in an incorrect “Next Scheduled Update” time. It is good to note that the update will never run later than the “Next Scheduled Update” time.
5. Specify to import **new records**. This is required because there are no existing records in Deltek at this point. You may choose to import new and update existing records after the initial import.
6. If necessary, specify the **Stage** of record you want to import. For example, you can choose to import an opportunity that is in a specific stage in the pipeline to ensure your data remains clean and actionable.
7. Specify any advanced data import options as needed. If you choose to honor screen designer fields, note that you must map those fields using the data mapping section. Certain fields, such as **Name**, are always required.
8. Specify if workflow rules that are set in Salesforce should be honored upon import into Deltek.
9. Select to receive email in addition to notification center alerts if there are connection or data errors. These notifications will only be sent to the user role that is specified in the **Security Role** field. See the View Error Notifications section for more information.
10. Select the **Opportunity Mapping**, **Account Mapping**, and **Contact Mapping** options to specify the data mapping for each area. As you select each option the Salesforce fields and Deltek fields in the grid update to reflect each area. The application is set up to include default mappings. See the ”Deltek and Salesforce Data Mapping” section in this guide for additional information.
11. Select **Save**.

Run the Initial Import

After you specify your data options, you can run the initial data import to confirm the connection and import the first round of data.

To run the initial import:

1. In the Deltek Browser, go to the Utilities section and select Integrations & Imports.
2. Select the Salesforce tab.
3. Compete one of the following:

- If you need to run the import process immediately, click **Update Now**. This will kick off the import process immediately but will then resume the import process based on the selected interval. For example, if it is 1pm and you choose **Update Now** with a 2 hour interval selected, the import process runs at 1pm and then again at 3pm and every two hours thereafter. Note that **Update Now** is only enabled when **Enable Updates** is set to **Active**. Select **Active** to run the update at the next scheduled time, which is based on the interval that is specified in the Data Update Options fields. Selecting **Active** enables the **Update Now** button. Select this button to run the update immediately.

4. Select **Save**.

Confirm Data After the Initial Import

After the infiital data import from Salesforce to Deltek, it is import to verify the accuracy of the data that was imported before

- Review your labels and lists to ensure values are correct paying special attention to list values that were appended to the list.
- If you select to update records as well, make sure your list values match your values in Salesforce to ensure you don’t have duplicate values on update.
- Review a few Opportunity, Firm (Accounts), and Contact records. Remember that information is pulled in based on Opportunities, so only accounts and contacts that are related to imported opportunities will be imported.

Deltek and Salesforce Data Mapping

Refer to the following tables for the standard field mapping between Salesforce and Deltek. You can add and remove additional fields as needed.

Standard Data Mapping for Opportunities

The following table identifies the fields that are automatically mapped from Salesforce to Deltek Opportunities. You can view these field mappings in the Deltek Browser at: **Utilities» Integrations & Imports » Salesforce tab » Opportunity Mappings.**

Note that all opportunities imported from Salesforce to Deltek are designated with **Status** set to **Active**, with the exception of those opportunities with a **Probability** of **0%**. These are marked as **Inactive.**

Salesforce Field Source	Deltek	Notes
Account Name	Firm	Auto-mapped and can not be changed so this is not displayed in the UI.
Name	Name	Name of the opportunity. Often includes the name of the client.
Amount	Revenue	How much is the end work worth if you win.
Description	Description	Additional details about the actual scope of the opportunity.
Lead Source	Source	Decsribes where you first learned of this opportunity. This might be a past colleague or a neighbor.
Owner ID	Business Development Lead	Business Development Lead is a Deltek Employee Field. If an employee record is not found in Deltek that matches the Salesforce Owner this information will not be imported and we will throw a warning.
Probability (%)	Probability	How likely you are to win the work. In Deltek, the probability and stage fields are not connected as they are in Salesforce. They must be set individually.
Stage	Stage	The opportunity stage which identifies the location in the sales process of this specific opportunity.

Salesforce Field Source	Deltek	Notes
Opportunity Type	Type	A user defined list of opportunity types typically describing the type of engagement. For example, workshop, upgrade, new customer etc.
Lead Source	Source	Where did you first learn of this lead?

Standard Data Mapping for Contacts

The following table identifies the fields that are automatically mapped from Salesforce to Deltek Contacts. You can view these field mappings in the Deltek Browser at: **Utilities » Integrations & Imports » Salesforce tab » Contact Mappings.**

Note that all contacts imported from Salesforce to Deltek are designated with **Status** set to **Qualified.**

Salesforce Field Source	Deltek	Notes
Account Name	Firm	Auto-mapped and can not be changed so this is not displayed in the UI.
Owner ID	Owner	If an employee record is not found in Deltek that matches the Salesforce Owner this information will not be imported and we will throw a warning.
Description	Memo	Additional details about the contact
Email	Email	Contact's email
Fax	Fax	Contact's fax
First Name	First Name	Contact's first name
Last Name	Last Name	Contact's last name
Phone	Phone	Contact's phone number. This will often be their office number
Lead Source	Source	Where did you first learn of this lead?
Mobile Phone	Mobile	Contact's mobile phone
Salutation	Salutation	Contact's salutation
Title	Title	Contact's title

Standard Data Mapping for Accounts

The following table identifies the fields that are automatically mapped from Salesforce to Deltek Accounts. You can view these field mappings in the Deltek Browser at: **Utilities» Integrations & Imports » Salesforce tab » Account Mappings.**

Note that all Firms imported from Salesforce to Deltek should be marked as **Clients** (select the Client checkbox) . This is necessary because Deltek combines clients and vendors into firms.

Salesforce Field Source	Deltek	Notes
Account Name	Firm	Auto-mapped and can not be changed so this is not displayed in the UI.

Salesforce Field Source	Deltek	Notes
Annual Revenue	Annual Revenue	Firm's annual revenue
Description	Memo	Additional details about the Firm which may include historical information such as when they were founded, location, offices, or industry details.
Employees	Employees	Number of employees at the Firm
Industry	Market	The Firm's Market or Industry. For example, Healthcare, Engineering or Technology
Parent Account ID	Parent	If this firm has a parent firm, this allows you to keep track of that data.
Website	Website	Firm's website

Add Mapped Fields to the Data Mapping Grid

You can add additional fields that you want to map between Salesforce and Deltek. Use the Data Mapping grid to add mapped fields for Opportunities, Contacts, and Accounts.

To add mapped fields:

1. In the Deltek Browser, go to the Utilities section and select **Integrations & Imports**.
2. Select the **Salesforce** tab.
3. Select the **Opportunity Mapping**, **Contact Mapping**, and **Account Mapping** options to specify the data mapping for each area. The Salesforce fields and Deltek fields in the grid update to reflect each area.
4. The **Salesforce Field** column displays the standard Salesforce fields that are mapped to the standard Deltek fields as shown in the **Deltek Field** column. Click **+ Add Salesforce Field** to add a Salesforce field that you want to map to a Deltek field.
6. Specify the Deltek field that you want the Salesforce field to map to.
5. Compete one of the following:

- If you need to run the import process immediately, click **Update Now**. This will kick off the import process immediately but will then resume the import process based on the selected interval. For example, if it is 1pm and you choose **Update Now** with a 2 hour interval selected, the import process runs at 1pm and then again at 3pm and every two hours thereafter. Note that **Update Now** is only enabled when **Enable Updates** is set to **Active**.
- Select **Active** to run the update at the next scheduled time, which is based on the interval that is specified in the Data Update Options fields. Selecting **Active** enables the **Update Now** button. Select this button to run the update immediately.

6. Select **Save**.

Troubleshooting

Verify Salesforce Connection Information

When you initially configure the integration for Deltek and Salesforce, you complete all the information in the Deltek Browser on the Salesforce tab in **Utilities** » **Integrations & Imports** » **Salesforce**. This enables the Salesforce integration and gives Deltek access to the Salesforce database. You click the **Connect** button on this tab to confirm that the connection between Deltek and Salesforce is working. After a successful connection, the **Connect** button changes to **Disconnect**, a *Salesforce was Successfully Connected* message displays in the top banner, and the **Data Update Options**, **Advanced Options**, and **Data Mapping** sections are enabled. Click **Disconnect** at any point to disconnect Salesforce from Deltek.

If the connection is not successful, *Connection was not successful* displays. Failures are recorded in the error log table, which you can view using Notifications or through the Salesforce Error Log. Refer to the following sections for additional information.

Errors Sending Records from Salesforce to Deltek

When an error occurs while sending records from Salesforce to Deltek, Deltek provides multiple methods for communicating the error information to the user. Depending on the configuration, there are error notifications or email alerts that identify the following:

- Records that were rejected and the cause of the error
- Number of records received
- Number or records rejected
- Number of errors encountered

View Error Notifications

When there are connection errors or issues sending records between Salesforce and Deltek, you can choose to view an error log that provides a detailed explanation of the issues. The types of errors that are listed related to mapped fields, duplicated codes, discrepancies between data, character length issues, required fields, workflows, and authentication errors.

To view Salesforce error notifications:

1. Open the Notification Center and click **Salesforce Import/Update Error** to view the issues.
2. Failures are recorded in an error log table. If alerts are also configured, Deltek sends a notification to the users with roles impacted by the failure.

View the Salesforce Integration Error Log

The Salesforce Integration Error Log displays a list of the completed and failed Salesforce import jobs. For each job, you can view the number of records sent and received, information about updated fields, any error messages, and so on.

To view the Salesforce Integration error log:

1. From the Deltek Browser, click **Utilities » Integrations & Imports** and select the **Salesforce** tab.
2. Click the **View Last Error Log** to view details from the most recent error log.

Check Errors in the Process Queue Manager

The Process Queue Manager in Deltek Desktop monitors all data integrations between Deltek and other systems. You can use this to view the status of importing (receiving) opportunities, contacts, and accounts from Salesforce.

The Process Queue Manager screen displays the following information for every integration instance:

- Status of the process
- Description of the process
- Date/Time when the process will be run in the future (Start After)
- Date/Time when the process started (Started)
- Date/Time when the process finished (Finished)
- User who ran the process (Submitter)

To check whether there were errors receiving data from Salesforce in the Process Queue Manager:

1. From the Deltek Desktop, click **Utilities » Process Server » Queue Manager**.
2. In the **Queue Filter** section, select the **Failed** check box, and click the **Refresh Queue List** button.
3. In the Queue Process grid, select a failed process row, and click **Detail** on the toolbar.
4. In the Process Queue Detail dialog box, select the failed process, and click **Status Log** on the toolbar to view details about the error.

Appendix A: Inline Errors

Inline Missing Required Field

A required field in a record in Deltek is not mapped on the screen when the user is doing the initial mapping or making a change to the mapping. Note that for Opportunities, Contacts and Accounts, only the "Name" is required by default. Also, since the user can choose to honor screen designer or workflow required fields these affected should be treated the same on the mapping screen and does not map a required field.
INLINE ERROR: *Please map this required field*

Inline Truncation Warning

A warning for the Opportunity field when the Salesforce values are longer than 30 characters and they will be truncated in Deltek.
INLINE ERROR: *Values will be truncated if longer than 30 characters*

Appendix B: Import Errors

All import errors follow the same pattern of identifying the record with the error or warning and then listing out the issues. For example, Opportunity Mobile App. Market Analysis (00641000008HoinAAC) Could not find owner Susie Strongbow (deltek@gmail.com),Column:EstStartDate does not exist.

Missing Mapped Field

The Salesforce Import failed because there is an invalid column. In the Deltek Browser, be sure to update **Utilities » Imports & Integrations » Salesforce Integration » Mapping** by deleting this mapping if you've deleted the Salesforce or Deltek field in order to avoid getting this error again.

Duplicate Code

Record was not imported because it created a duplicate code. In the Deltek Browser, select **Settings » Labels and Lists** to add the field and create a unique code manually. Be sure to update this issue in Salesforce as well if you have selected to update records.

State and Country Discrepancy

State and Country were not imported due to a discrepancy in the state and country. In the Deltek Browser, go to the record to fix the issue. Be sure to update this issue in Salesforce as well if you have selected to update records to avoid recurring errors.

Salesforce field has too many characters

Log: {0}: the value {1} is greater than {2} in length. Value trimmed."
Record has been truncated to fit within the character limit of the field requirements. In the Deltek Browser, go to to **Settings » Labels and Lists** to adjust the record.

Min and Max Errors

This value cannot be greater than {0}" and "This value cannot be less than {0}
Records was not imported because it did not fit within the value limit of the field requirements. In the Deltek Browser, go to **Settings » Labels and Lists** to adjust the record.

Missing Required Field

Log: Please provide a {0}
Record was not imported because it was missing a required field.To adjust it, go to the Deltek Browser and select **Settings » Labels and Lists**. This applies to required fields and fields that have been made required in the screen designer as well.

Workflow Error

There was an error with workflow upon import.

Authentication Error

The Salesforce authentication has failed or is disconnected. Please check the connection on the Salesforce tab found in the Deltek Browser at **Utilities » Imports & Integrations » Salesforce Integration**.

Could not find Owner

Count not find owner {first} {last} ({email}) Could not find an existing employee record. Owner was not imported.

Audit Trail

Information pulled in from Salesforce should be added to the audit trail and we should honor the audit trail import rules.

Deltek is the leading global provider of enterprise software and information solutions for professional services firms, government contractors, and government agencies. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. Over 14,000 organizations and 1.8 million users in approximately 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resource, streamline operations, and deliver more profitable projects. Deltek – Know more. Do more.®

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