

BUILDING A TWO WAY INTEGRATION PLATFORM OF  
**WORDPRESS TO SALESFORCE  
AND VICE VERSA**



salesforce



## Our Customer, Montessori St. Nicholas

of London exists to encourage and promote education in every way, in particular the education of children in accordance with the philosophy and methods of the late Dr Maria Montessori, by making awards to support the development of Montessori education, including the provision of relevant training, and by funding research into the value and effectiveness of Montessori education.

## What bothered them

- ✓ The client was using an IT system on the WordPress end which had the scattered data all over in the Schools, Woo Commerce, and User Sections.
- ✓ The data was needed to be stored according to the Proper Memberships and Orders, which would likely to help in finding and Managing the data at any given time.
- ✓ Again, another critical requirement is Managing the MSA Registrations data of the Users and Schools as there was no any common section at the WordPress end to show the entire data at the glance.
- ✓ There was no any unique identifier of the user for their Members.

# What we did

- ✓ During the entire design and development process, Aress focus was to build a robust solution, that is simple to operate by resources with low IT exposure, and has fast maneuverability with minimum clicks. We developed a simple interface with minimal need of inputs.
- ✓ Identifying the each and every record is done much simplified by assigning/ generating unique "email Id" with the creation of the Account according to the different record types viz. Individuals/Organizations. ✨
- ✓ Proper display of the inventory and sales of products in the tabular format with accurate data and figures and also showing the having its 2-Way integrations with the WordPress End.
- ✓ Provided the entire of the school, the description of the Order and the user's information in one section named as "MSA Registrations". This helps in the managing the school data, Track of the active membership of the User/School.
- ✓ The entire implementation process was conducted in an Iterative and Agile execution method. There were intermediate checkpoints through a show and tell session, to capture user feedback.
- ✓ For the WordPress Section, an add-on functionality was provided to the Client, regarding the Changing the Role of the user i.e. "Free User" to "Individual" or "Small School" to "Large School". This Functionality was not available in the Standard WordPress Plugin.
- ✓ For the Phase-2 of the Montessori, the client requested an additional two fields to be mapped in the Individual Membership paid by Employer.
- ✓ We also enabled the working of the "Free User" same as that of the "Individual Account" for its Method of Shopping, only the Free User has no MSA Registration.

## The Value we offered

- ✓ The simple interface made for all different types of users who could use the system more efficiently. This resulted in faster operation, a lesser challenge in staffing by leveraging cross staffing and deploying semi-skilled staffs.
- ✓ 2-Way integration of almost all the fields so as to maintain the consistency of the Data on WordPress and Salesforce End.
- ✓ Proper mapping and Updating of the records in the respective sections of the User, Schools, Order to its corresponding MSA Registration, Account and Orders in the Salesforce.
- ✓ Products with their Standard Price List are mapped to the Order for identifying its inventory and Stocks. ✨ ✨ ✨



Some of the Screen  
shots for the Points  
Mentioned Above -

School Section  
on the  
WordPress End

# TestingSchool15112017

Permalink: <http://montessori-dev.sntweb.co.uk/school/testingschool15112017/> [Edit](#)

## Yoast SEO

[Help centre](#) [Go Premium](#)

Readability

Enter your focus key...

Snippet preview

### TestingSchool15112017 - Montessori

montessori-dev.sntweb.co.uk/testingschool15112017/

Please provide a meta description by editing the snippet below.

[Edit snippet](#)

Focus keyword

Analysis

- No focus keyword was set for this page. If you do not set a focus keyword, no score can be calculated.
- The text contains 0 words. This is far below the recommended minimum of 300 words. Add more content that is relevant for the topic.
- No meta description has been specified. Search engines will display copy from the page instead.
- The page title is too short. Use the space to add keyword variations or create compelling call-to-action copy.

## Publish

[Preview Changes](#)

Status: Published [Edit](#)

Visibility: Public [Edit](#)

Revisions: 3 [Browse](#)

Published on: 15 Nov 2017 @ 11:52 [Edit](#)

Readability: Needs improvement

SEO: Not available

[Move to Bin](#) [Update](#)

## Geolocation

lat

55.8637318

lng

-4.259866


area

☒ UK

☐ International

for\_postcode

fake

  
Technology that Impacts Business



|                            |   |                             |
|----------------------------|---|-----------------------------|
| Username                   | <input type="text" value="TestSchoolHead"/>                         | Username cannot be changed. |
| Role                       | <input type="text" value="Childminders &amp; Small Schools (MSA)"/> |                             |
| First Name                 | <input type="text" value="TestSchoolUserFirst15112017"/>            |                             |
| Last Name                  | <input type="text" value="TestSchoolUserLast15112017"/>             |                             |
| Nickname <i>(required)</i> | <input type="text" value="TestSchoolHead"/>                         |                             |
| Display name publicly as   | <input type="text" value="TestSchoolUserFirst15112017"/>            |                             |
| <b>Contact Info</b>        |   |                             |
| Email <i>(required)</i>    | <input type="text" value="TestSchoolHeadUser@gmail.com"/>           |                             |
| Website                    | <input type="text" value="http://TestingSchool15112017.com"/>       |                             |

User Section  
at the  
WordPress end

## Order #11012 details

Payment via PayPal. Customer IP: 203.193.165.227

### General Details

Order date:

2017-11-15 @ 0 : 0

Order status:

Completed

Customer:

[View other orders](#)

TestSchoolUserFirst15112017 T... ✕

### Billing Details

Address:

TestSchoolUserFirst15112017

TestSchoolUserLast15112017

fake

fake

fake - 422010

Maharashtra, India

Email:

[testschoolheaduser@gmail.com](mailto:testschoolheaduser@gmail.com)

Phone:

2323232323

### Shipping Details

Address:

TestSchoolUserFirst15112017

TestSchoolUserLast15112017

fake

fake

fake - 422010

Maharashtra, India

### Order Actions

Actions

Move to Bin

Save Order

### Order Notes

Order status changed from On Hold to Completed.

added on 15th November 2017 at 11:51 am by Dimitra Chaloglou [Delete note](#)


Awaiting BACS payment Order status changed from Pending Payment to On Hold.

added on 15th November 2017 at 11:50 am [Delete note](#)

Add note

Private note

Add

| Product  | Cost   | Qty | Total  |
|--|--------|-----|--------|
|  <a href="#">MSA Childminder &amp; Small Schools Membership</a> | £45.00 | × 1 | £45.00 |
|  |        |     |        |
| Discount:  |        |     | £0.00  |
| Shipping:  |        |     | £0.00  |
| Order Total:   |        |     | £45.00 |
| Refunded:  |        |     | -£0.00 |
|  |        |     |        |
| Refund   |        |     |        |

This order is no longer editable.

Order Section  
at the  
WordPress End

▼ Account Information

|                   |   |                     |               |
|-------------------|---|---------------------|---------------|
| Account Owner     |  Aress Software <a href="#">[Change]</a> | Account Number      |               |
| Account Name      | Testchool24112017 <a href="#">[View Hierarchy]</a>  | Account Record Type | Organisations |
| Parent Account    |   | Annual Revenue      |               |
| Account Source    |   | Description         |               |
| Method of Payment | Direct Bank Transfer  |                     |               |

▼ Additional Info


|                 |  |                    |  |
|-----------------|--|--------------------|--|
| SIC Description |  | Fax                |  |
| Type            |  | Phone              | 74569841230  |
| Industry        |  | Other Phone Number | 987456250  |
| Employees       |  | Email              | <a href="mailto:testchool24112017@gmail.com">testchool24112017@gmail.com</a> |
|                 |  | Website            |  |
|                 |  | Rating             |  |

Account section at the Salesforce end where “email” is the unique identifier.

### ▼ Registration Details

|                                   |                          |                 |                                    |
|-----------------------------------|--------------------------|-----------------|------------------------------------|
| MSA Registrations Number          | Test1389                 | Region          | The North                          |
| User approved                     | Yes                      | Membership role | Childminders & Small School (MEAB) |
| Registered On                     | 24/11/2017               | User/School     | <a href="#">Testschool24112017</a> |
| Name of Current Employer (School) |                          |                 |                                    |
| School Paying                     | <input type="checkbox"/> |                 |                                    |

### ▼ Membership Order and Subscription Details

|                             |                          |                             |  |
|-----------------------------|--------------------------|-----------------------------|--|
| Order                       | <a href="#">00000535</a> | Order#                      | 11,060   |
| Order Status                | Completed                | Order On                    | 24/11/2017   |
| Subscription#               | 11,061                   | Subscription Billing Period | Year  |
| Subscription Status         | Active                   | Subscription Started On     | 24/11/2017   |
| Subscription Payment Method | Direct Bank Transfer     | End Date                    |  |
|                             |                          | Subscription Total          | £35  |

### ▼ School Details

|                                 |  |
|---------------------------------|--|
| School Head Title               | Mr   |
| Head First name                 | TestUserschool24112017HL   |
| Head Surname                    | TestUserschool24112017HL   |
| School Email                    | <a href="mailto:testschool24112017@gmail.com">testschool24112017@gmail.com</a> |
| School Phone Number             | 745632210  |
| Correspondence Country          | United Kingdom (UK)  |
| School Website                  |  |
| Correspondence Address          |  |
| Correspondence Town             |  |
| Correspondence Postcode         |  |
| Correspondence County           |  |
| Correspondence Address 2        |  |
| Date of last ofsted inspection  | 07/11/2017   |
| Grade of last ofsted inspection | ok   |

MSA  
Registration at  
the Salesforce  
end where we  
get a glance of  
all the data i.e.  
Membership,  
order and  
School  
information.



Product section at the Salesforce end mapped with unique Product code to find its inventory.

| Product Name                        | Product Code          | Product Description                              | Last Modified Date | Amount Remaining |
|-------------------------------------|-----------------------|--|--------------------|------------------|
| <a href="#">newProduct</a>          | <a href="#">10986</a> |  | 02/11/2017         | 10               |
| <a href="#">testProduct3</a>        | <a href="#">10982</a> |  | 02/11/2017         | 5                |
| <a href="#">testProduct2</a>        | <a href="#">10981</a> | Testing from the WP to SF                        | 02/11/2017         | 10               |
| <a href="#">test from SF to WP2</a> | <a href="#">10978</a> | Testing Twice                                    | 02/11/2017         | 0                |
| <a href="#">test from SF to WP</a>  | <a href="#">10977</a> | testing syncing of the product from the SF to WP | 02/11/2017         | 0                |

Product section at the WordPress end.

Product Data — Simple product  Virtual: ☐ Downloadable: ☐ Ticket: ☐

General

Inventory

Shipping

Linked Products

Attributes

Advanced

Regular price (£)

25

Sale price (£)

Schedule

Tax status

Taxable

Tax class

Standard

Subscription Type

Link the subscription to the package (renew

Resume posting limit

Inlimited

Resume listing duration

Feature Listings?

☐ Feature this resume - it will be styled differently and sticky.