

用户手册

Surface for Salesforce Alibaba Cloud

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公司: enosix



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说明

什么是 enosix Surface for Salesforce Alibaba Cloud?

enosix Surface 是一个实时的、只读的集成平台，用于连接 Salesforce Alibaba Cloud 和 SAP 数据。Salesforce Alibaba Cloud 用户可以在 Salesforce Alibaba Cloud 环境中直接访问 SAP 信息及数据。

enosix Surface 可以做什么？

- 实时查看 SAP 销售数据：检索 SAP 文档，如销售订单、发票和交货详情。
- 访问关键业务信息：在 Salesforce 中展示客户、订单定价限制和物料数据。
- 无缝数据集成：使用快速集成对象（RIOs）简化 SAP 与 Salesforce 的数据检索。
- 增强客户互动：启用即时 SAP 数据访问，以简化服务和销售流程。



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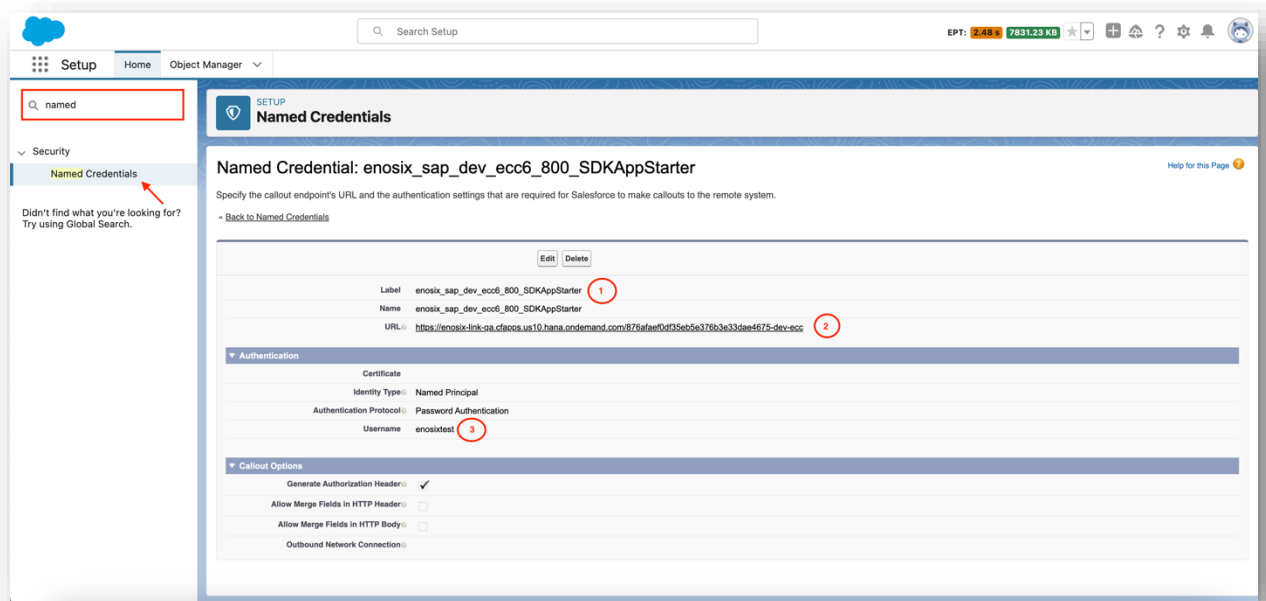
配置步骤

步骤 1: 在 Salesforce on Alibaba Cloud 中创建一个 Legacy Named Credential

1.在 Salesforce on Alibaba Cloud 中，前往设置 > Named Credentials。

2.点击新建并输入：

- 名称：选择一个描述性的名称（例如，SAPDemoConnection）。
- URL：添加您的 enosix 实例端点。
- 认证方法：使用适当的方法（例如，用户名和密码）。



获得更详细的信息：<https://docs.enosix.io/surface/post-installation-steps/creating-named-credentials>.

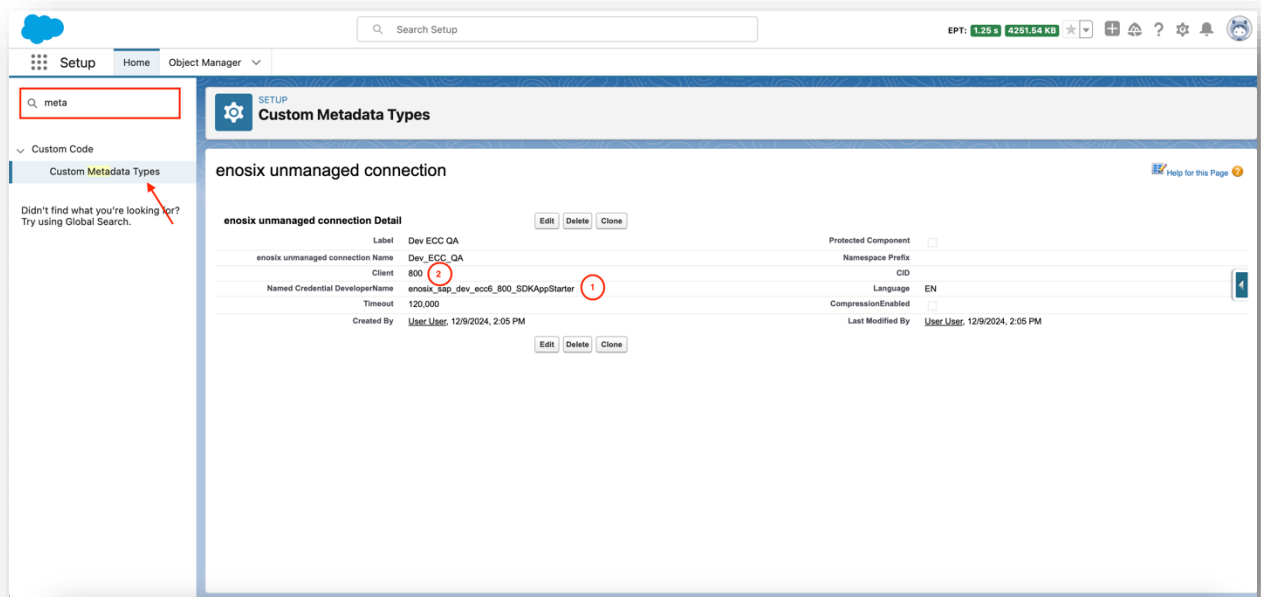


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步骤 2：配置自定义元数据

1. 在Salesforce on Alibaba Cloud中，前往“设置”>“Custom Metadata Types”。
2. 找到“enosix 未管理连接”并点击“Manage Records”。
3. 创建或编辑一条记录，包含以下信息：
 - 命名凭证开发者名称：与步骤 1 中的名称匹配。
 - SAP 客户端详情：输入 SAP 客户端 ID 及相关信息。

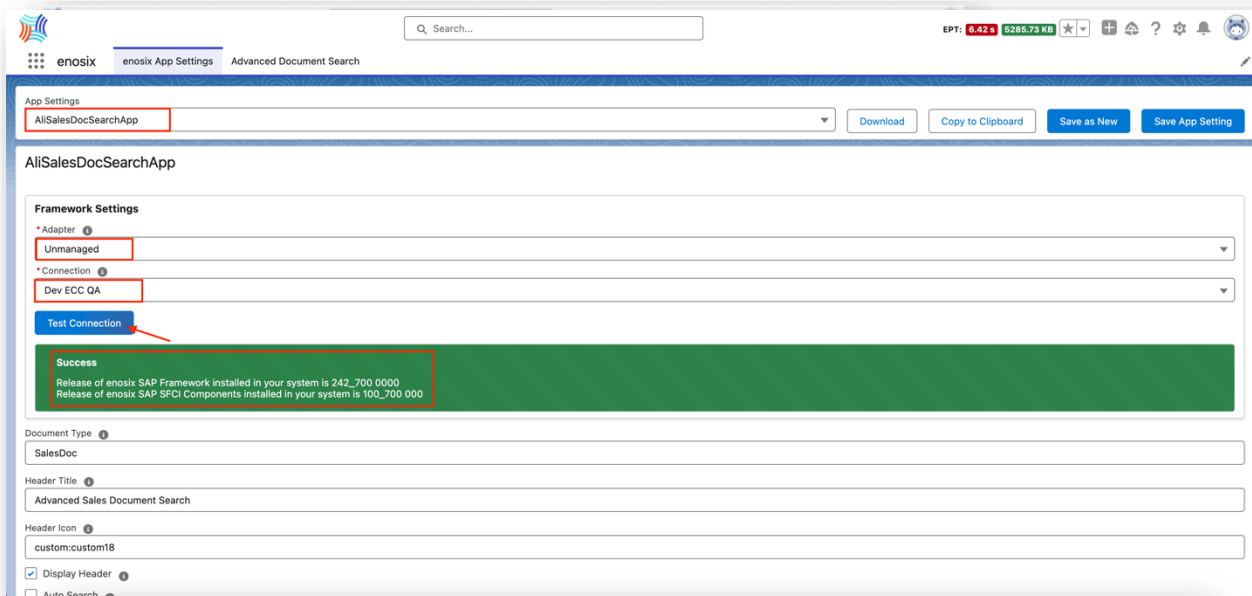


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步骤 3：在 Salesforce on Alibaba Cloud 中配置 enosix APP

1. 打开应用启动器，选择enosix应用。
2. 转到应用设置 > AliSalesDocSearchApp。
3. 选择“未管理的适配器”并选择已配置的连接。
4. 点击“测试连接”以验证对SAP的访问权限。



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步骤 4：集成搜索组件

1. 在Salesforce on Alibaba Cloud中，导航到Lightning APP Builder。
2. 设置Lightning页面。
3. 多次拖放 SAP Document Search 搜索组件。
4. 检查 APP 设置名称中的每个组件及其相关字段。

ADVANCED SALES DOCUMENT SEARCH

The screenshot shows the 'Advanced Sales Document Search' app interface. The main search area is titled 'Advanced Sales Document Search' and contains various input fields for document search criteria. A red box highlights the 'App Settings Name' field in the right sidebar, which is set to 'ensxtx_SR_enosixAllSalesDocSearchAppSett'.

ADVANCED DELIVERY SEARCH

The screenshot shows the 'Advanced Delivery Search' app interface. The main search area is titled 'Advanced Delivery Search' and contains various input fields for delivery search criteria. A red box highlights the 'App Settings Name' field in the right sidebar, which is set to 'ensxtx_SR_enosixAllDeliverySearchAppSettir'.



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ADVANCED INVOICE SEARCH

Delivery Date From

Delivery Date To

Delivery From

Delivery To

Sold To

Ship To

Shipping Point

Shipping Conditions

Delivery Priority

Bill of Lading

PGI Date From

PGI Date To

Delivery Status

☐ Open

☐ Picked

☐ Packed

☐ PGIed

Search

Advanced Invoice Search

From Document Number

To Document Number

Sales Organization

Sold To

Payer

Created By

Billing Date From

Billing Date To

From Created Date

To Created Date

Search

☐ Is Flow?

RecordId Id

Customer Number

* App Settings Name

ensxtx_SR_enosixAllInvoiceSearchAppSetting

SAP Document Id (Output)

SAP Document Flow Type (Output)

Set Component Visibility

Filters

+ Add Filter

5.激活页面，选择要添加应用的平台，并指定标签的名称。

Activation: Advanced Document Search

PAGE SETTINGS **LIGHTNING EXPERIENCE** MOBILE NAVIGATION

Add this app page to Lightning Experience apps. You can manage Lightning apps in Setup.

Add to Lightning Apps

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Remove page

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LightningBolt

Sales

Salesforce CMS

enosix App Settings

Advanced Document Search



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步骤 5: Sales APP 落地

1. 打开APP Launcher, 选择Sales App。
2. 导航到选项卡。
3. 使用 Advanced Document Search 功能实时检索SAP数据。

The screenshot displays the SAP Advanced Document Search interface. The top navigation bar includes tabs for Sales, Home, Advanced Document Search, Accounts, Contacts, Leads, Opportunities, Tasks, Calendar, Groups, Reports, Dashboards, Forecasts, Files, and List Emails. The main content area is titled 'Advanced Document Search' and contains a sub-section 'Advanced Sales Document Search'. This section includes various input fields for search criteria: 'From Document Number' (17521), 'To Document Number', 'Sold To', 'Ship To', 'PO Number', 'Material Number', 'Transaction Group' (a dropdown menu), 'Document Status' (checkboxes for Open, Completed, Delivery Block, Billing Block, Credit Block), 'From Created Date', and 'To Created Date'. A 'Search' button is located below these fields. Below the search section, the 'SAP Sales Document Results' table is shown, displaying one record with the following details:

SALES DOCUMENT	PO NUMBER	CREATED DATE	DOCUMENT TYPE	SOLD-TO NAME	SHIP-TO NAME	NET VALUE	TAX AMOUNT	ORDER STATUS	
Sales Document Details	17521	ww355666	Sep 25, 2024	OR - Standard Order	Msc Chemicals	Msc Chemicals	399.00 USD	19.95 USD	Completed

At the bottom of the results table, there are pagination controls showing '1 of 1 Page(s)' and 'Records: 1'.



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应用程序设置场景

2

*Name ①
ToSalesDocumentNumber

*Label ①
To Document Number

☒ Display ①

*Input Type ①
text

- Name = Field name

场景 1：更改标签字段

定制化确保统一命名规则，减少混淆并提升用户体验：

- 更改界面中字段名称的显示方式可以根据业务需求进行更改，减少混淆并提升用户体验。
- 例如，将标签“PO Number”更改为“Order Number”。

5

*Name ①
CustomerPONumber

*Label ①
Order Number

☒ Display ①

*Input Type ①
text

- 查看在高级销售单据搜索屏幕上显示的变化。

Advanced Sales Document Search

From Document Number

Sold To

Order Number

Transaction Group
Select an Option

From Created Date

To Document Number

Ship To

Material Number

Document Status
☐ Open
☐ Completed
☐ Delivery Block
☐ Billing Block
☐ Credit Block

To Created Date

Search



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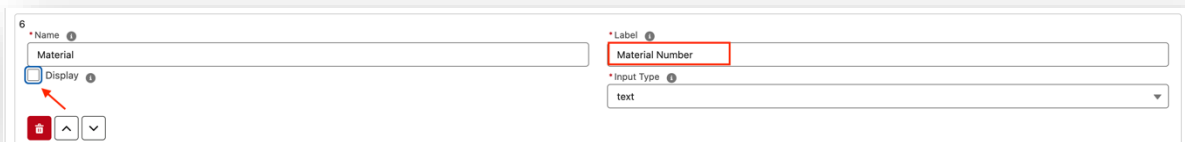
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场景 2：启用或禁用字段

（有助于保持界面更加简洁和专注，将集中注意力在关键信息上。）

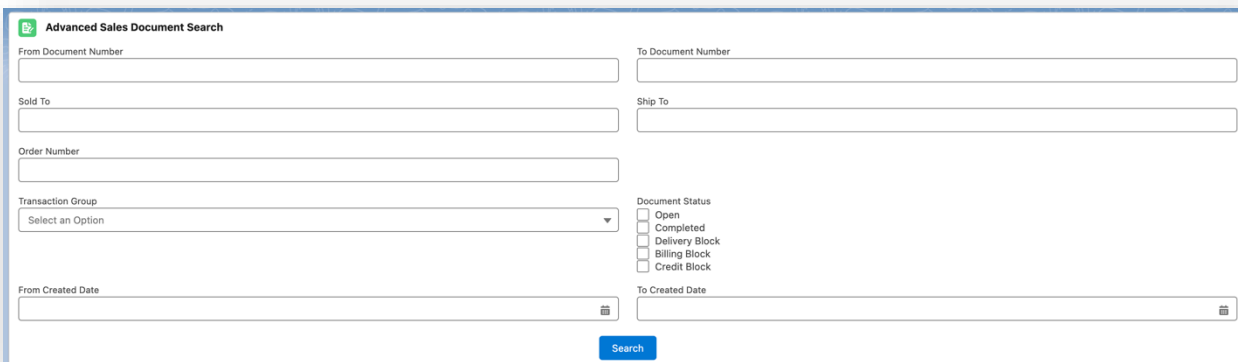
通过勾选或取消勾选“显示”复选框来控制用户界面中哪些字段是可见的。

- 例如，取消勾选显示框来禁用 Material Number 字段。



A screenshot of a configuration interface for a field. On the left, under a 'Name' label, there is a 'Material' field and a 'Display' checkbox. A red arrow points to the 'Display' checkbox, which is currently checked. To the right, under a 'Label' label, there is a 'Material Number' field. Below the 'Material Number' field, there is an 'Input Type' dropdown menu set to 'text'.

- Material Number 在用户界面中被隐藏了。



A screenshot of the 'Advanced Sales Document Search' form. The form contains several input fields and a search button. The fields are organized into two columns. The left column includes 'From Document Number', 'Sold To', 'Order Number', 'Transaction Group' (a dropdown menu), and 'From Created Date'. The right column includes 'To Document Number', 'Ship To', and 'To Created Date'. Below the 'Transaction Group' dropdown, there is a 'Document Status' section with four checkboxes: 'Open', 'Completed', 'Delivery Block', and 'Billing Block'. A 'Search' button is located at the bottom center of the form.



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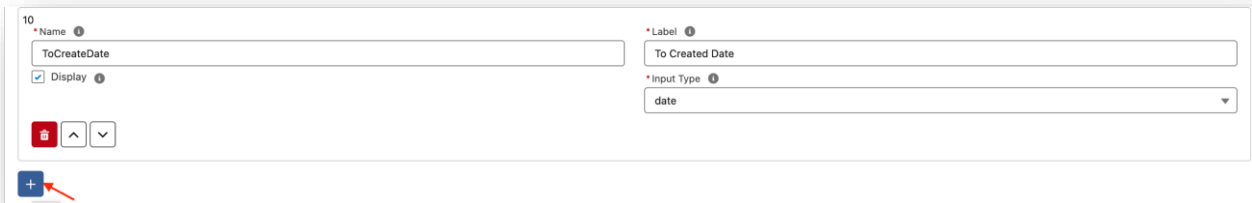
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场景3：在SAP销售文档结果中显示报价文档类型

（确保相关文档类型出现在搜索结果中，提高管理销售文档的可见和高效。）

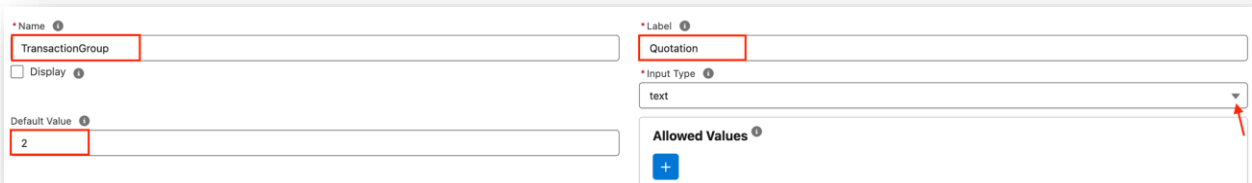
在SAP销售文档结果中添加并显示报价文档类型，请按照以下步骤操作：

- 点击“添加”以在应用设置中创建一个新的字段。



The screenshot shows a configuration form for a new field. On the left, the 'Name' field is set to 'ToCreateDate', the 'Display' checkbox is checked, and there are up/down arrows and a delete icon. On the right, the 'Label' field is 'To Created Date' and the 'Input Type' is 'date'. A blue '+' button at the bottom left is highlighted with a red arrow.

- 名称：在这个示例中，添加来自交易组的引用。
- 标签：输入将在文档类型中显示的报价。
- 默认值：选择2，与交易组中允许值列表中匹配的值。
- 输入类型：根据数据格式选择文本。
- 保存：选择保存应用设置按钮。



The screenshot shows the completed configuration. The 'Name' field is 'TransactionGroup', 'Display' is unchecked, and 'Default Value' is '2'. The 'Label' field is 'Quotation' and the 'Input Type' is 'text'. A red arrow points to the 'Allowed Values' section, which contains a blue '+' button.



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- 转到进阶销售单据搜索。
- 点击搜索。
- 根据配置显示报价单据类型。

 **SAP Sales Document Results**

	SALES DOCUMENT	PO NUMBER	CREATED DATE	DOCUMENT TYPE	SOLD-TO NAME	SHIP-TO NAME	NET VALUE	TAX AMOUNT	ORDER STATUS
Sales Document Details	20000983	testst	Dec 11, 2024	QT - Quotation	enosix test	enosix test	76.00 USD	0.00 USD	Open
Sales Document Details	20000982	testst	Nov 15, 2024	QT - Quotation	enosix test	enosix test	76.00 USD	0.00 USD	Open
Sales Document Details	20000978	Test	Nov 6, 2024	QT - Quotation	enosix test	enosix test	1000.00 USD	0.00 USD	Open
Sales Document Details	20000979	Test	Nov 6, 2024	QT - Quotation	enosix test	enosix test	1000.00 USD	0.00 USD	Open
Sales Document Details	20000980	Test	Nov 6, 2024	QT - Quotation	enosix test	enosix test	1000.00 USD	0.00 USD	Open
Sales Document Details	20000981	Test	Nov 6, 2024	QT - Quotation	enosix test	enosix test	1000.00 USD	0.00 USD	Open
Sales Document Details	20000975	Test Demo OR Change	Oct 22, 2024	QT - Quotation	enosix test	enosix test	5092.39 USD	0.00 USD	Open
Sales Document Details	20000976	new1	Oct 22, 2024	QT - Quotation	enosix test	enosix test	0.00 USD	0.00 USD	Open
Sales Document Details	20000977	new1	Oct 22, 2024	QT - Quotation	enosix test	enosix test	8.75 USD	0.00 USD	Open
Sales Document Details	20000974	Test Demo OR Change	Oct 11, 2024	QT - Quotation	enosix test	enosix test	5092.39 USD	0.00 USD	Open

10

<<

< Previous

1 of 97 Page(s)

Next >

>>

Records: 963

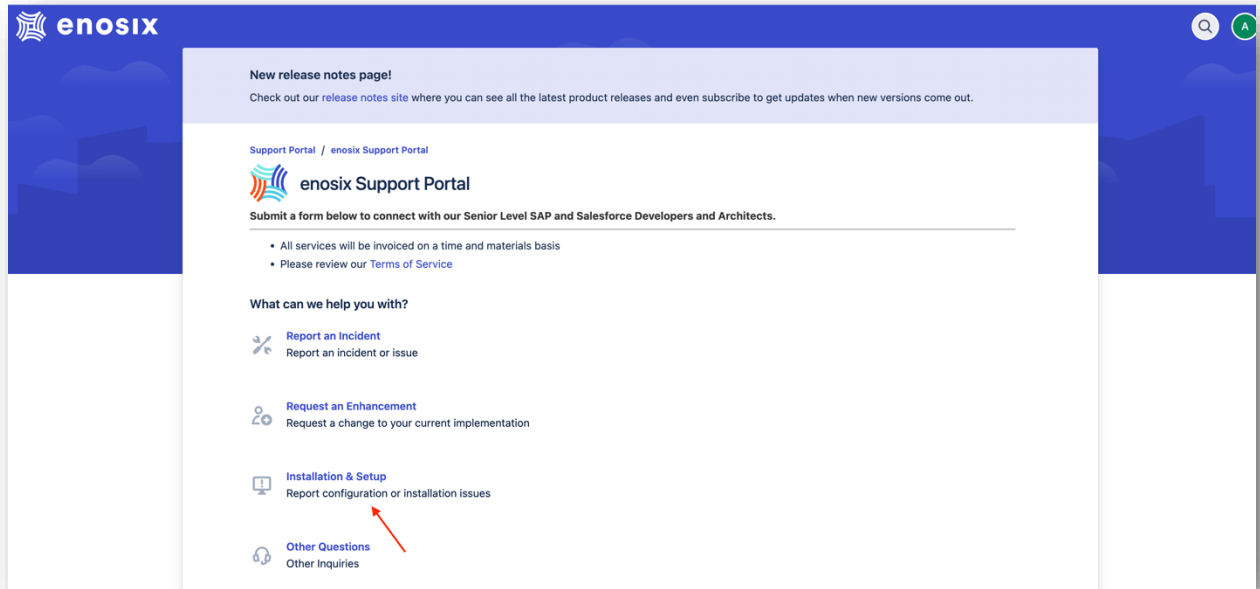


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从支持门户请求安装

1. 登录到enosix支持门户：<https://go.enosix.com/support>
2. 提交安装与设置的支持请求。



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联系我们

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