OVERVIEW

The integration shares opportunity and account information between CMiC and Salesforce. Once an opportunity is created or updated in Salesforce, all relevant opportunity and account information is automatically passed to CMiC. Updates to opportunities in CMiC are automatically passed to Salesforce.

Important: Opportunities created in CMiC will NOT be passed to Salesforce. All new opportunities must be created in Salesforce.

HOW THE INTEGRATION WORKS

- Opportunities in Salesforce reaching the Proposal stage (or beyond) are synced to CMiC.
- Salesforce → CMiC sync every 10 minutes at the :01 mark.
- CMiC → Salesforce sync every 5 minutes on the :00 & :05 marks.
- Synced fields include:
  - Salesforce ID (links across both systems)
  - Organization / Business Partner Name
  - Current Sales Stage
  - Opportunity Financial Fields
  - Key Dates
  - Organizational Details (Department, Division, Office)
  - Required Opportunity Fields
  - Site Address

⚠ IMPORTANT NOTE ⚠

If an opportunity comes from Salesforce to CMiC and the customer does not exist in CMiC, the customer will appear as 'New Organization'. This means either:

1. The customer does not exist in CMiC.
2. The Salesforce Account is not linked to a CMiC customer.

Next steps:

- Search for the customer in the Organization lookup in CMiC.
- If not found, contact Sean Fleming in Accounting to set up the customer

SUPPORT CONTACTS

- Operational Finance Team – General CMiC Questions, training support, specific job needs, etc.
- Helpdesk (helpdesk@keeleycompanies.com) – access issues, system functionality issues, etc.