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# FlexNet Operations Salesforce Connector

## User Guide

# Legal Information

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| **Book Name:** | FlexNet Operations Salesforce Connector User Guide |
| **Part Number:** | FNO-SFC-UG00 |
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# Contents

# 1

# FlexNet Operations Salesforce Connector User Guide

The FlexNet Operations Salesforce Connector—which is also referred to simply as *Salesforce Connector*—is an integration that connects the Salesforce CRM system and FlexNet Operations. This two-way connector syncs data—account, contact, opportunity, and opportunity line item data, or in FlexNet Operations terminology, account, user, entitlement, and entitlement line item data—between the two platforms. It enables producers to access a unified view within Salesforce, providing real-time insights in customer and end user data and product entitlements.

## Scope of Salesforce and FlexNet Operations Sync

A sync from Salesforce to FlexNet Operations occurs only when a sales order exists. In Salesforce, a sales order is represented by an opportunity that is linked to a product, resulting in the creation of an entitlement and a line item in FlexNet Operations. Data is synced when the sales order changes to the Closed Won state (or any state configured in the Salesforce Connector.)

When the sync is triggered, the following related records are transferred from Salesforce to FlexNet Operations:

- Account
- Contact
- Opportunity
- Opportunity Line Item

Objects not related to a sales order are not synced. For example, creating an account or contact in Salesforce does not trigger synchronization with FlexNet Operations. These records are included in the sync only if they are associated with a valid sales order (i.e., an opportunity with a product).

Upon successful synchronization, an entitlement is created in FlexNet Operations. The associated account and contact are also created in FlexNet Operations, if they do not already exist.

***Important*** ▪ *Products are not automatically synced between Salesforce and FlexNet Operations. Entitlements for a product will only be synced if the product exists in both Salesforce and FlexNet Operations, and if it has been selected for sync. For more information, see* *Preparing Products for Sync**.*

## Data Flow for FlexNet Operations Salesforce Connector

The following diagram visualizes the data flow between Salesforce and FlexNet Operations.

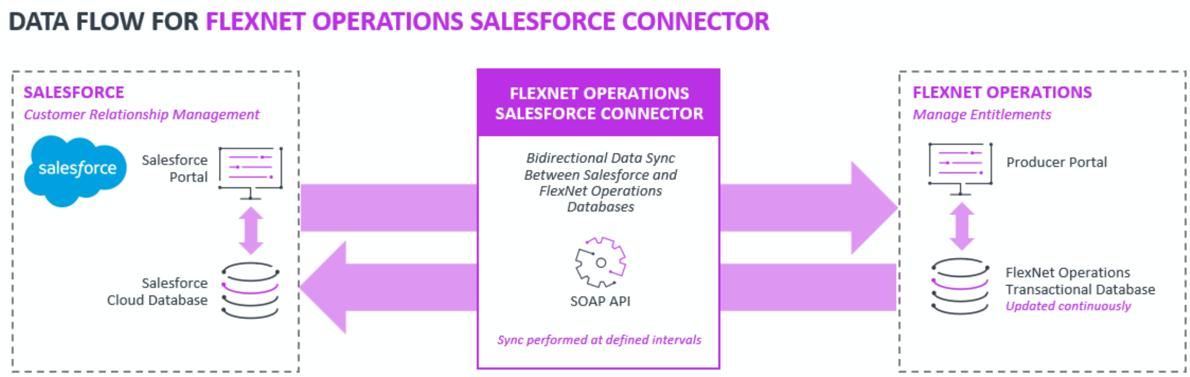


**Figure 1-1:** Bidirectional data flow between Salesforce and FlexNet Operations.

## Supported Salesforce Tools

The Salesforce Connector supports integration with Salesforce Sales Cloud as well as Salesforce CPQ (Configure, Price, Quote). This guide focuses on using the connector within Salesforce Sales Cloud, and all screenshots and instructions reflect that environment. If you are implementing the connector in Salesforce CPQ, some steps may differ and should be adjusted accordingly.

## Guide Overview

This document describes how to install, customize, and use the Salesforce Connector. It is divided into the following sections:

**Table 1-1 •** Navigation Table

| Topic | Content |
|---|---|
| **Setting Up the FlexNet Operations Salesforce Connector** | Aimed at Salesforce administrators, this section describes how to install and configure the Salesforce Connector. |
| **Common Tasks in the FlexNet Operations Salesforce Connector** | This section is designed for users involved in creating opportunities and quotes—primarily sales representatives and account executives. It provides a clear overview of how sales order data is transferred from Salesforce to FlexNet Operations. Additionally, it outlines how to monitor and manage synchronization jobs, enabling users to track the status of data transfers and quickly identify and resolve any issues that may arise during the sync process. |

# Product Support Resources

The following resources are available to assist you:

- Revenera Product Documentation
- Revenera Community
- Revenera Learning Center
- Revenera Support

## Revenera Product Documentation

You can find documentation for all Revenera products on the Revenera Product Documentation site:

https://docs.revenera.com

## Revenera Community

On the Revenera Community site, you can quickly find answers to your questions by searching content from other customers, product experts, and thought leaders. You can also post questions on discussion forums for experts to answer. For each of Revenera's product solutions, you can access forums, blog posts, and knowledge base articles.

https://community.revenera.com

## Revenera Learning Center

The Revenera Learning Center offers free, self-guided, online videos to help you quickly get the most out of your Revenera products. You can find a complete list of these training videos in the Learning Center.

https://learning.revenera.com

## Revenera Support

For customers who have purchased a maintenance contract for their product(s), you can submit a support case or check the status of an existing case by first logging into the Revenera Community, clicking **Support** on the navigation menu to open the **Support Hub** page, and then clicking the **Open New Case** or **Case Portal** button.

# Contact Us

Revenera is headquartered in Itasca, Illinois, and has offices worldwide. To contact us or to learn more about our products, visit our website at:

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2

# Setting Up the FlexNet Operations Salesforce Connector

This section is aimed at Salesforce administrators who will install the Salesforce Connector and customize it.

**Table 2-1 ▪** Topics covered in this section

| Section | Description |
|---|---|
| **Prerequisites** | Lists requirements with regards to access rights, the role assigned to accounts synced between Salesforce and FlexNet Operations and mimimum SOAP service versions. |
| **Configuring Remote Site Settings** | Add FlexNet Operations in Salesforce as a remote site. Without this registration, any calls from Salesforce Connector to FlexNet Operations will fail. |
| **Installing the FlexNet Operations Salesforce Connector** | Describes how a Salesforce administrator can install the Salesforce Connector. |
| **Verifying the Installation** | Describes how to check whether the Salesforce Connector has been installed. |
| **Licensing the Salesforce Connector** | A short description how to enter your license key for the Salesforce Connector after installation and how to access licensing information. |
| **Setting up the Connection Between the Salesforce Connector and FlexNet Operations** | As a one-time operation, provide credentials of a Salesforce Connector user with System Administrator permissions. |
| **Selecting and Customizing Page Layouts** | Describes how to select predefined, role-based layouts that reduce the need for manual customization. |
| **Preparing Products for Sync** | Details the prerequisites that must be met in Salesforce and FlexNet Operations to ensure a successful synchronization of entitlements for products between the two systems. |

**Table 2-1 ▪** Topics covered in this section

| Section | Description |
|---|---|
| Mapping Fields for Salesforce Objects and FlexNet Operations Attributes | To sync data between Salesforce and FlexNet Operations using the Salesforce Connector, you must map Salesforce object fields to their corresponding fields for custom and default attributes in FlexNet Operations. |
| Syncing Data | Describes the sync methods:<br>• The topic Scheduling a Regular Sync provides guidance on setting up and managing regular syncs between Salesforce and FlexNet Operations, including how to configure the sync interval, modify or remove existing schedules, and manually trigger an immediate sync.<br>• The topic Triggering an Immediate Sync describes how to initiate an immediate two-way sync that transfers only data modified during a specified time period.<br>• The topic Initiating a One-Time Sync describes how to manually initiate a one-time, uni-directional sync for one particular account from Salesforce to FlexNet Operations, typically used for testing or when a scheduled sync is not required. |
| Tracking and Troubleshooting Transactions | Details how to use the **Transaction Logs** page in the Salesforce Connector to monitor whether recent transactions were processed successfully or encountered errors. |

# Prerequisites

## Salesforce Administrator Rights

The person installling the FlexNet Operations Salesforce Connector managed package must have administrator rights in Salesforce.

## Prerequisites For Accounts

Any account that has its information synced between FlexNet Operations and Salesforce must have a Portal Admin User role defined in FlexNet Operations. The Portal Admin User role is a role that is included by default in FlexNet Operations. Ensure that the role name, **Portal Admin User**, has not been changed in FlexNet Operations. If this role is not present, user creation post-sync in FlexNet Operations will fail.

# Configuring Remote Site Settings

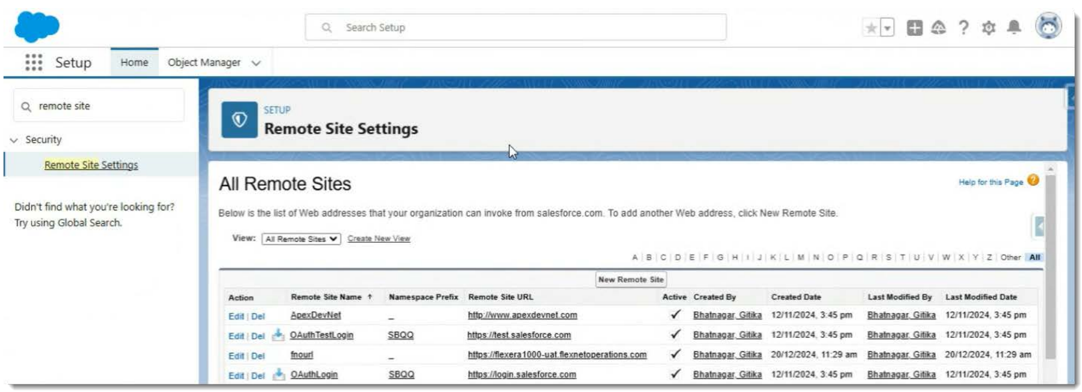
To allow Salesforce to make calls to FlexNet Operations via the Salesforce Connector, you must register FlexNet Operations in Salesforce on the **Remote Site Settings** page as a remote site. Without registering FlexNet Operations first, any calls to or from FlexNet Operations will fail.

***Note** ▪ You must have administrator rights in Salesforce to register a remote site.*

***Task*** ***To register FlexNet Operations as a remote site***

1. From **Setup**, enter `Remote Site Settings` in the **Quick Find** box, then select **Remote Site Settings**.

   The **Remote Site Settings** page displays a list of any remote sites already registered and provides additional information about each site, including remote site name and URL.

2. Click **New Remote Site**, above the list of remote sites.

3. For **Remote Site Name**, enter a descriptive term, for example, `FlexNet_Operations_UAT`.

   ***Note** ▪ A valid remote site name must meet the following criteria:*

   - *Contain only alphanumeric characters and underscores ( _ ).*
   - *Start with a letter.*
   - *Be unique.*
   - *Cannot include spaces.*
   - *Cannot end with an underscore ( _ ).*
   - *Cannot have two consecutive underscores ( __ ).*

4. Enter the URL for your FlexNet Operations UAT deployment:

   ```
   https://<siteID>-uat.flexnetoperations.com
   ```

   where <siteID> is your organization’s site ID which is supplied by Revenera. This is usually your organization's DNS name, but can also be the tenant ID that was assigned to your organization when FlexNet Operations was first implemented, and would have the format **flex*NNNN***.

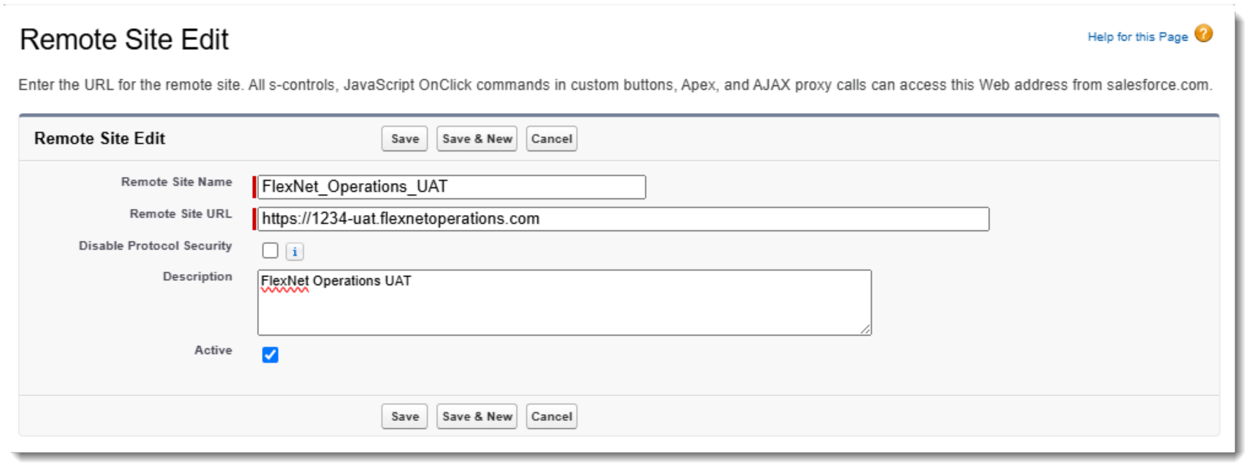



**Figure 2-1:** Example of a remote site for FlexNet Operations UAT.

***Note •*** *This step defines the URL for your UAT environment. Repeat the procedure for a production deployment, where you omit "-uat" in the URL.*

***Tip •*** *Make a note of the URL you just entered. You will need it for the next step, Setting up the Connection Between the Salesforce Connector and FlexNet Operations.*

5. Leave the **Disable Protocol Security** checkbox unselected.
6. Optionally, enter a description of the site.
7. Click **Save** to finish.

The **Remote Site Settings** page shows the details of the remote site that you set up.

# Installing the FlexNet Operations Salesforce Connector

The Salesforce Connector is provided as a managed package. A managed package is a container that includes the components of a Salesforce application. You install the managed package for the Salesforce Connector using a URL.

***Note •*** *You must have administrator rights in Salesforce to install the FlexNet Operations Salesforce Connector managed package.*

***Task*** ***To install the Salesforce Connector***

1. Open a web browser and navigate to the installation URL provided via email upon purchase of the Salesforce Connector.

   Your browser will open the Salesforce login page.

2. Enter your username and password for the Salesforce organization where you want to install the package, and then click **Log In**.

   Salesforce displays the **Install FlexNet Operations Salesforce Connector** page.

3. Select the check box to acknowledge that you're installing a non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

   ***Note ▪*** *This message is expected because the managed package isn't from the AppExchange repository. To verify the package that you intend to install, review the details below the message— such as the App Name, Publisher, Version Name, Version Number, and Description—to ensure that it is from Revenera.*

4. Select **Install for all users** and click **Install**.

Salesforce installs the Salesforce Connector.

***Note ▪*** *If the installation takes longer than expected, Salesforce will send you an email when the installation has completed.*

To verify that the installation was successful, start the Salesforce Connector, as described in the section Licensing the Salesforce Connector.

# Verifying the Installation

You can verify if the Salesforce Connector package has been installed on the **Installed Packages** page in Salesforce.

***Task*** ***To verify if the Salesforce Connector package has been installed***

1. From **Setup**, enter `Installed Packages` in the **Quick Find** box, then select **Installed Packages**.
2. On the **Installed Packages** page, review the list under **Installed Packages**. If the Salesforce Connector is installed, it will be displayed in this list, as shown in this screenshot:

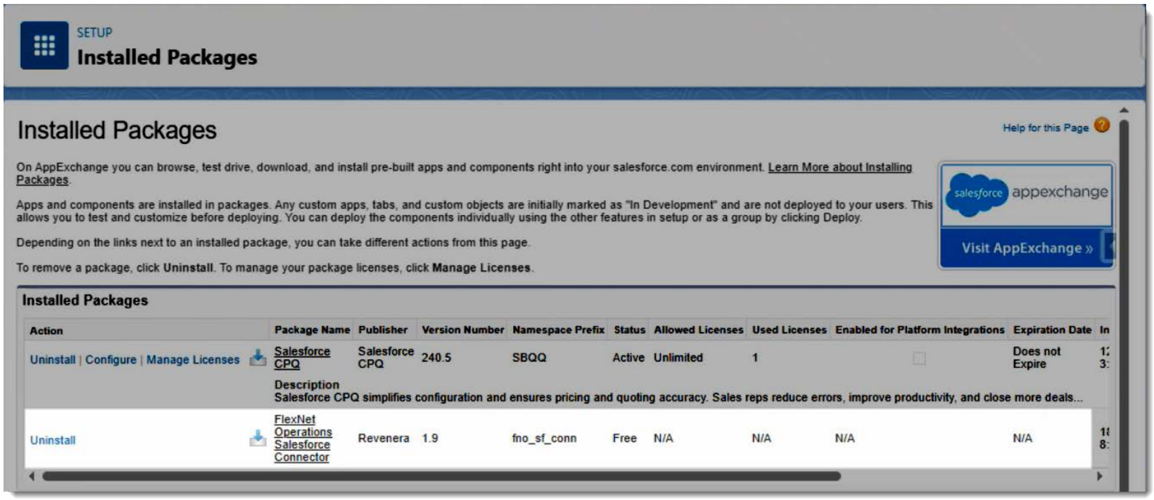


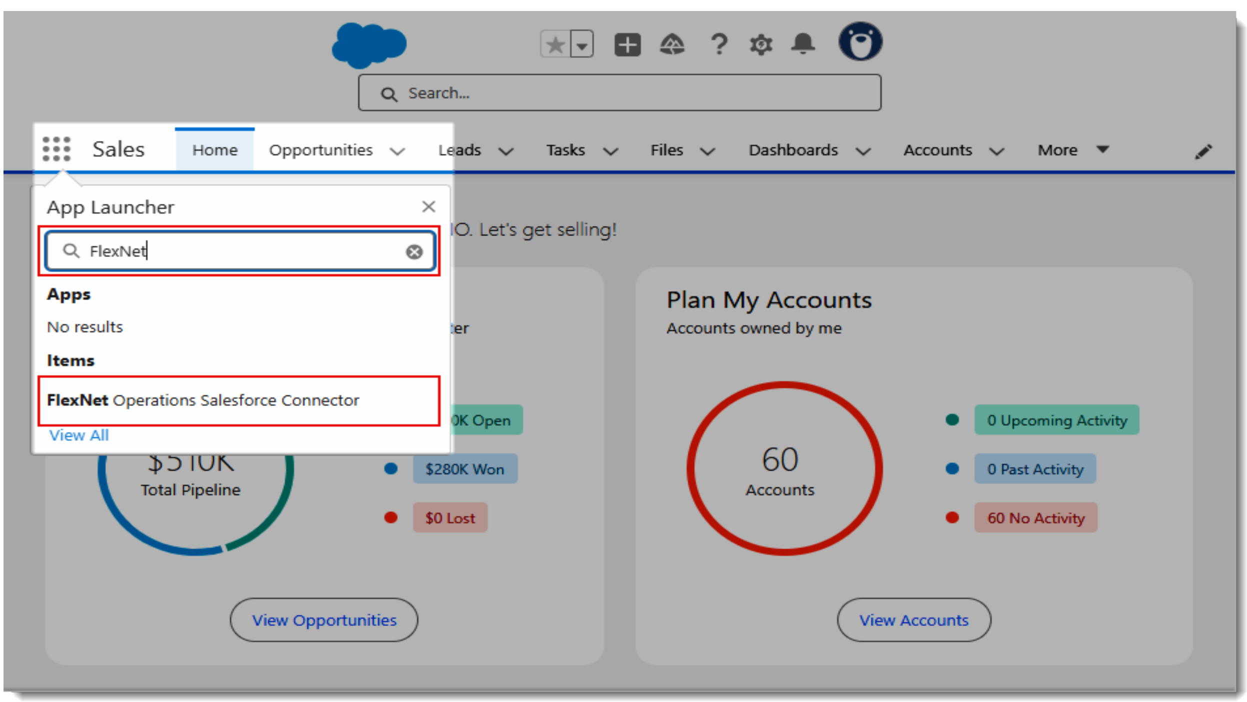

**Figure 2-2:** The **Installed Packages** page in Salesforce Setup.

# Licensing the Salesforce Connector

When you start the Salesforce Connector for the first time, you are prompted to enter your license key.

**Task** ***To start the Salesforce Connector for the first time and enter your license key***

1. In Salesforce, click the App Launcher in the top left corner and type `FlexNet Operations Salesforce Connector`, then select **FlexNet Operations Salesforce Connector** from the list of items.



Salesforce will start the Salesforce Connector.

2. The Salesforce Connector displays a dialog that prompts you to enter your license key.
3. Enter your license key and click **Submit**.

You can now use the navigation tabs on the left to access and perform various actions within the Salesforce Connector.

***Note*** ▪ *When accessing the **Admin Settings** tab in the Salesforce Connector for the first time after installation, you may experience a brief delay. This is expected behavior, as the connector initializes by creating the necessary custom attributes in Salesforce. These attributes are essential for enabling data synchronization between Salesforce and FlexNet Operations.*

## Checking Licensing Information

To ensure uninterrupted access, the Salesforce Connector provides timely reminders and visibility into your license status:

- **Renewal Notification**—A banner will appear at the top of the screen 30 days prior to license expiration, prompting you to renew.
- **Expiration Details**—You can view your license expiration date by navigating to **Admin Settings** and selecting the **Licensing Info** tab

## Renewing Your Licensing Information

If you recently renewed your license for the Salesforce Connector, you can easily update the licensing information under **Admin Settings** on the **Licensing Info** tab.

***Task*** ***To update your licensing information***

1. Under **Admin Settings**, open the **Licensing Info** tab.
2. Click **Sync Licensing Info**.

The license expiry date will be updated.

# Setting up the Connection Between the Salesforce Connector and FlexNet Operations

***Note*** ▪ *You must have administrator rights in Salesforce to make changes on the **Admin Settings** tab in the Salesforce Connector.*

Provide credentials of a FlexNet Operations user with System Administrator permissions to set up the connection between Salesforce and your FlexNet Operations tenant. This is a one-time operation. Once you have been authenticated, Salesforce will securely store your credentials.

You cannot perform any activity in the Salesforce Connector before you have successfully authenticated.

***Task*** ***To set up the connection to FlexNet Operations***

1. In Salesforce, click the App Launcher in the top left corner and type **FlexNet Operations Salesforce Connector**, then select **FlexNet Operations Salesforce Connector** from the list of items.

   Salesforce will start the Salesforce Connector, with the **Overview** tab selected.

2. In the navigation menu on the left, click **Admin Settings**.

3. Enter FlexNet Operations system administrator credentials to configure the connection to FlexNet Operations:

   - **Username**—Enter the user name.
   - **Password**—Enter the password.
   - **FlexNet Operations URL**—Enter the URL of your FlexNet Operations tenant. This is the same URL that you entered for the remote site settings (see Configuring Remote Site Settings).

     **Example:** https://<siteID>-uat.flexnetoperations.com

     where <siteID> would would have the format **flex*NNNN***. For production environments, omit “-uat”.

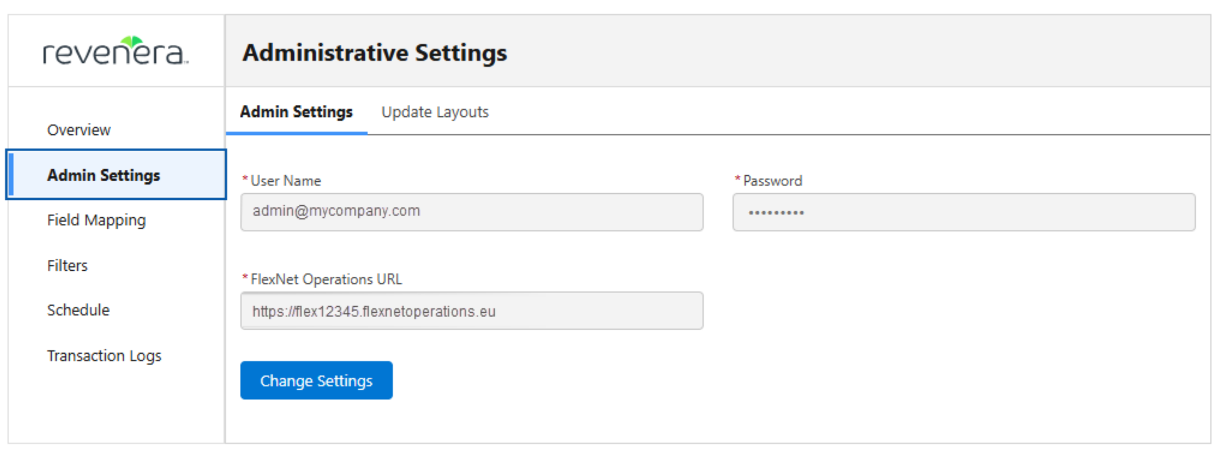



**Figure 2-3:** An example of the populated **Admin Settings** screen.

4. Click **Submit**.

   A confirmation message is displayed, indicating that user credentials have been verified and saved.

# Selecting and Customizing Page Layouts

***Note*** ▪ *You must have administrator rights in Salesforce to select page layouts in the Salesforce Connector.*

In Salesforce, layouts determine the arrangement and visibility of fields, buttons, related lists, and other elements on an object's record page, shaping the user experience. Layouts are closely tied to user profiles, ensuring that different users see only the most relevant information based on their responsibilities and permissions.

To facilitate data exchange between Salesforce and FlexNet Operations, the Salesforce Connector introduces specific custom elements—such as fields, buttons, and checkboxes—into the Salesforce environment. These elements allow users to view and modify FlexNet Operations-specific data and initiate the sync directly from Salesforce. Administrators can then choose which page layouts should include them.

For detailed information, refer to the following sections:

- Selecting a Page Layout
- Example for Custom Fields Added By the Salesforce Connector
- Custom Elements Added for FlexNet Operations

# Selecting a Page Layout

***Note** ▪ You must have administrator rights in Salesforce to select page layouts in the Salesforce Connector.*

Select the layouts that should include the custom elements specific to FlexNet Operations. By default, these elements are added to the standard layouts: Account Layout, Opportunity Layout, Product Layout, and Opportunity Product Layout.

***Task*** ***To select a page layout in the Salesforce Connector***

1. In the Salesforce Connector, in the navigation menu on the left, click **Admin Settings**.
2. On the **Administrative Settings** page, open the **Update Layouts** tab. Use the left/right arrows to select the layouts that should include custom fields for FlexNet Operations attributes.
3. Click **Save**.

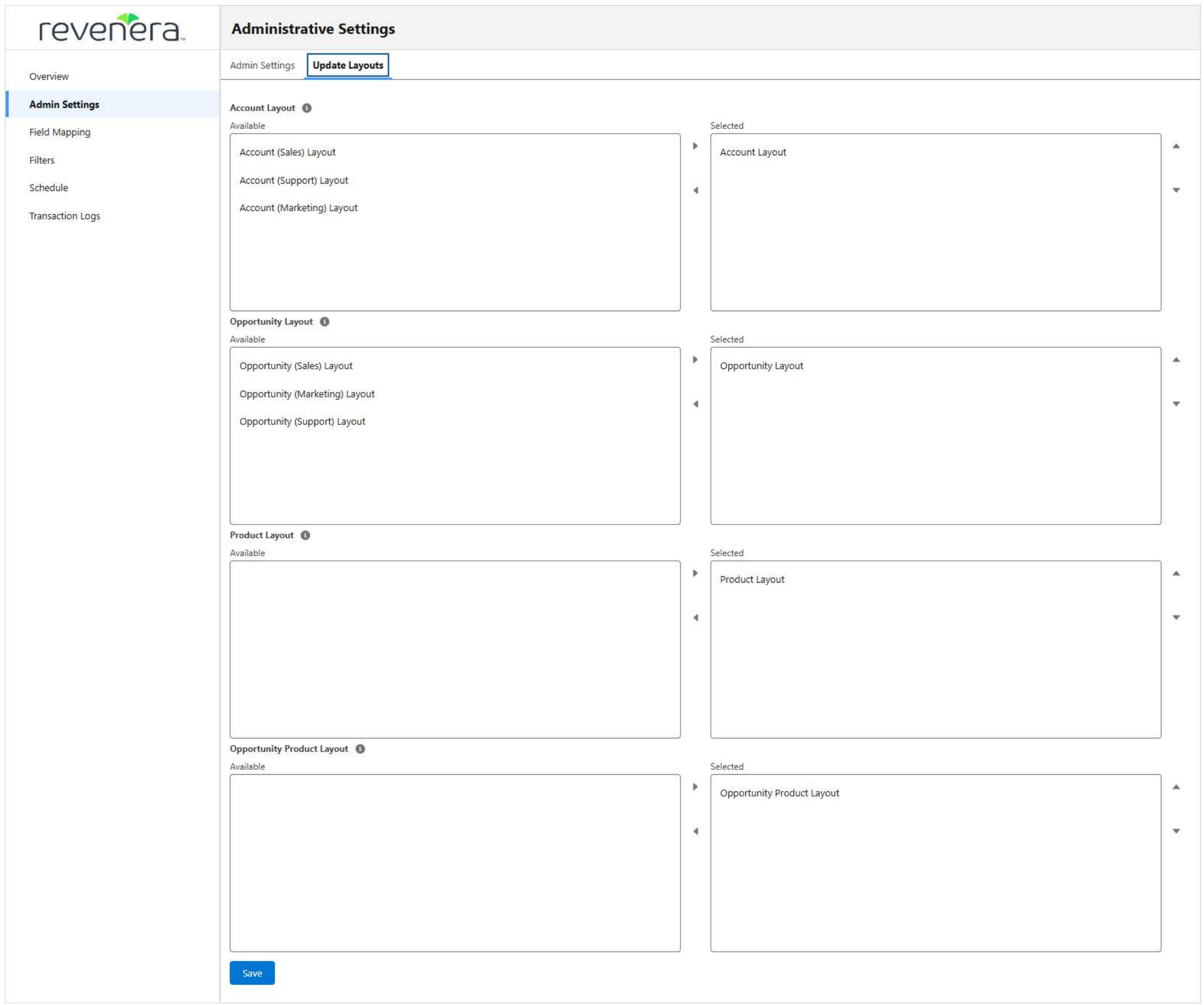



**Figure 2-4:** An example of the **Update Layouts** tab in the Salesforce Connector. The page layouts available will vary, depending on your Salesforce integration.

# Example for Custom Fields Added By the Salesforce Connector

An example for custom fields would be the **Sync with FlexNet Operations** button and **FlexNet Operations Connector Information** field on an account page, as shown in the following screenshot:

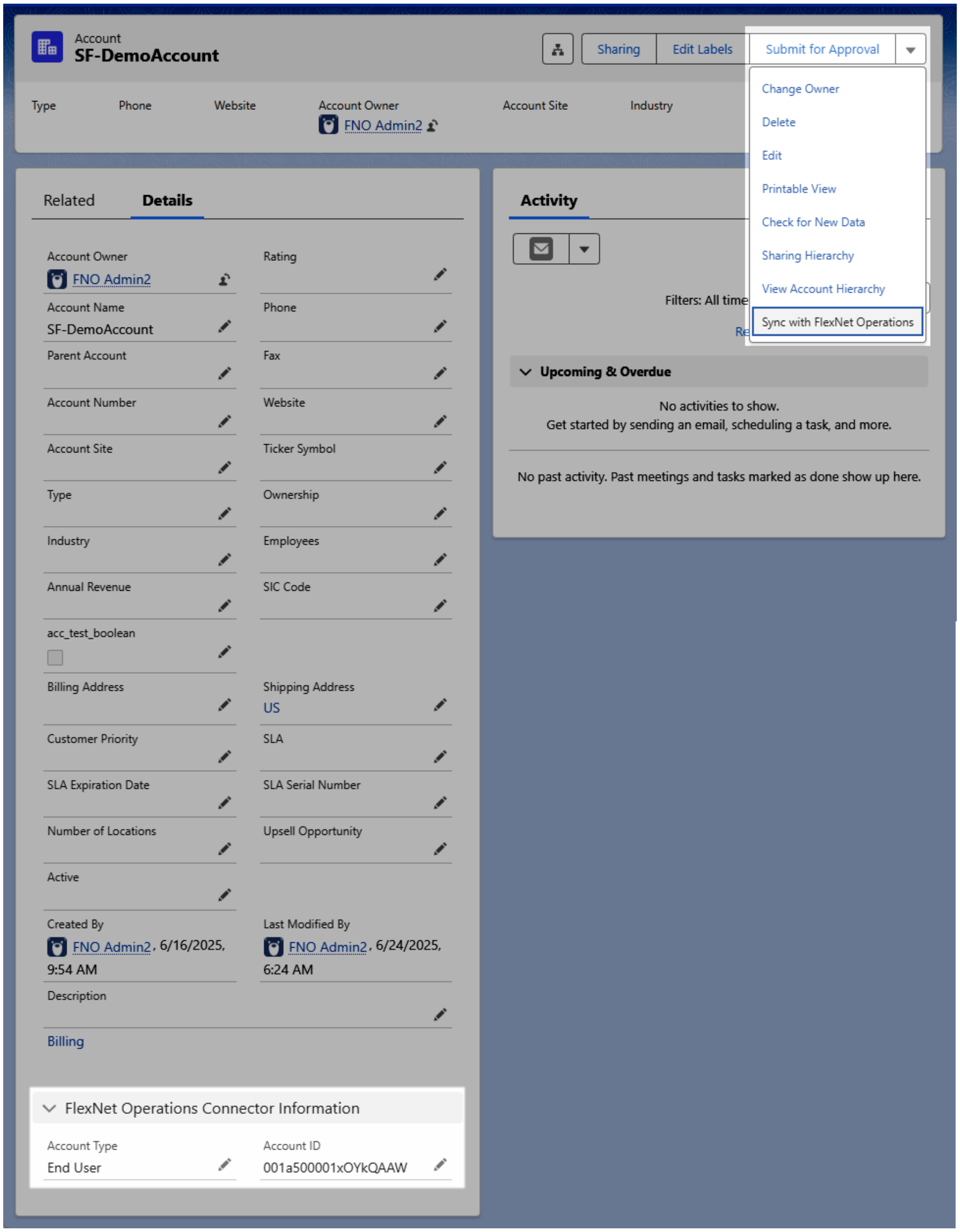



**Figure 2-5:** Example account page with custom fields added by the Salesforce Connector.

# Custom Elements Added for FlexNet Operations

The following table lists the Salesforce objects where the Salesforce Connector adds elements (like fields, buttons, and checkboxes) specific to FlexNet Operations, as well as the names of the elements that will be added.

**Table 2-2 •**

| Object | Elements added by the Salesforce Connector |
|---|---|
| **Account** | Fields:<br>• Account Type<br>• Account ID<br>Buttons:<br>• Sync with FlexNet Operations |
| **Opportunity** | Fields:<br>• Entitlement State<br>• Entitlement ID |
| **Product** | Checkbox:<br>• Include in Flexnet Operations Sync |
| **Opportunity Product** | Fields:<br>• Start Date Option<br>• Start Date<br>• Expiration Date Option<br>• Expiration Date<br>• Expiration Term<br>• Expiration Term option<br>• Remaining Quantity<br>• Activation ID |

# Preparing Products for Sync

To ensure a successful synchronization of entitlements for a certain product between Salesforce and FlexNet Operations, specific prerequisites must be met in both systems.

### Requirements in FlexNet Operations

- **Product exists**—The product must already be created in FlexNet Operations.
- **Part number**—The product must be assigned a part number.

- **Deployed status**—The product must be in a deployed state to be eligible for synchronization.

### Requirements in Salesforce

- **Product selected for sync**—Products must be explicitly marked for synchronization.

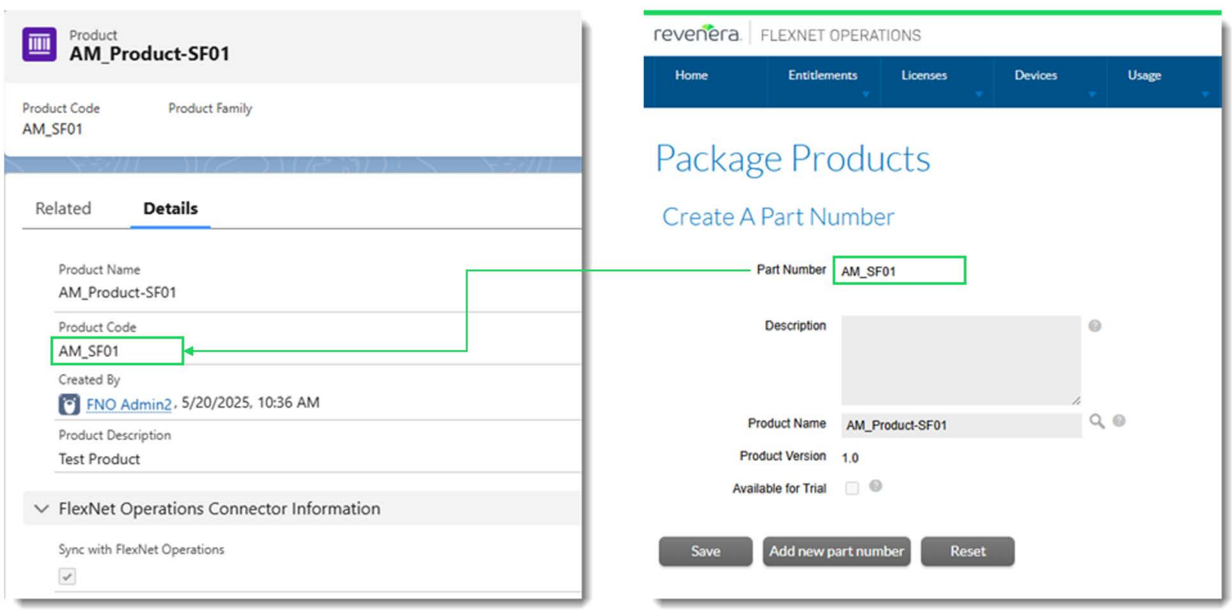
  For more information, see Selecting Products for Sync in Salesforce.

- **“Active” product status**—The product must have a status of Active in Salesforce.

### Naming Requirements in Salesforce and FlexNet Operations

To ensure successful synchronization, each product in FlexNet Operations must be uniquely mapped to its corresponding product in Salesforce. This requires the product code in Salesforce to exactly match the part number in FlexNet Operations.

If these values do not align precisely, the synchronization process will fail.




For step-by-step instruction of creating a product in FlexNet Operations and an equivalent product in Salesforce, see Creating a Test Product.

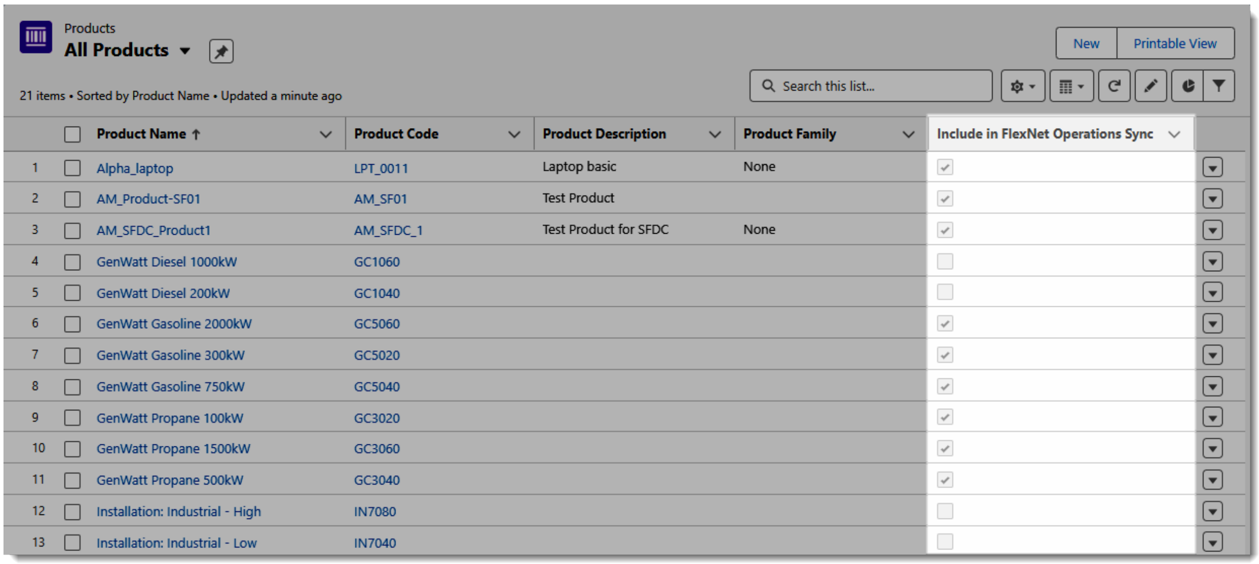
## Selecting Products for Sync in Salesforce

In your business, you likely manage a wide range of products and sales orders in Salesforce. However, it’s likely that not all of these need to be synced to FlexNet Operations. To ensure efficiency and relevance, the Salesforce Connector lets you select the products that you want to sync with FlexNet Operations.

The products you select will be synced between Salesforce and FlexNet Operations when a scheduled sync is performed. You configure this sync on the **Schedule** tab in the Salesforce Connector. For more information, see Scheduling a Regular Sync.

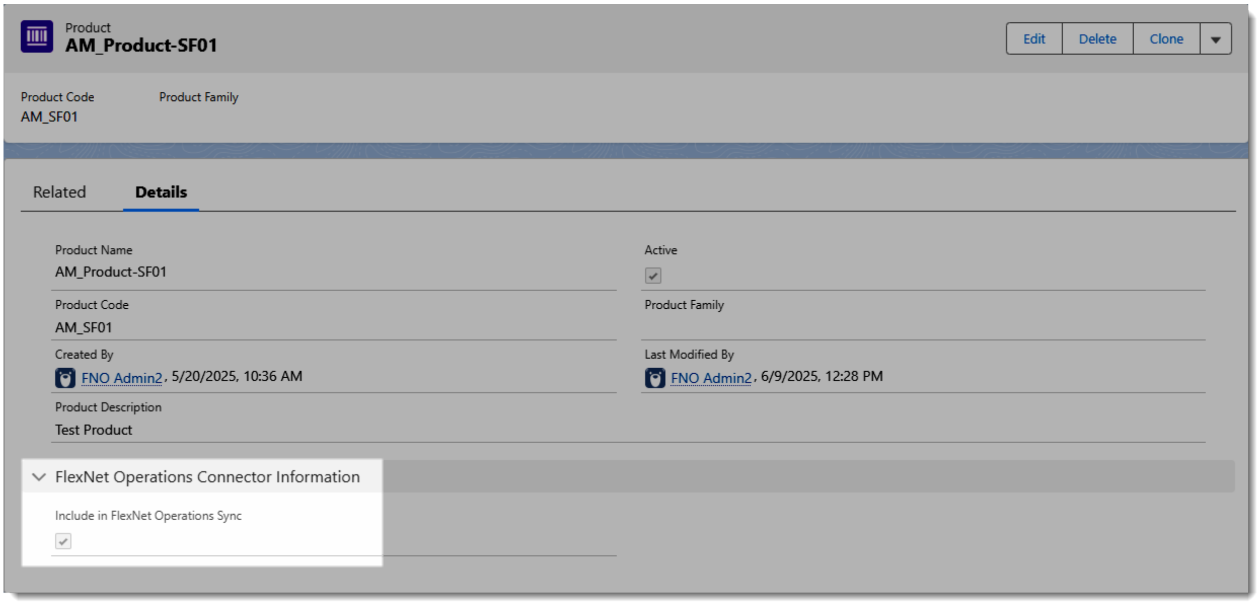
***Task*** ***To select the products to be synced***

1. Navigate to the **All Products** page.
2. On the **All Products** page, in the **Include in FlexNet Operations Sync** column, select the products that should be synced with FlexNet Operations.




***Note*** ▪ *If the **Include in FlexNet Operations Sync** column is not displayed, click the button with the gear icon (**List View Controls**) and click **Select Fields to Display**. Using the arrow buttons, move **Include FlexNet Operations Sync** to the **Visible Fields** area. Click **Save**.*

3. Alternatively, you can navigate to a product page and select the **Include in FlexNet Operations Sync** check box in the **FlexNet Operations Connector Information** section:




# Mapping Fields for Salesforce Objects and FlexNet Operations Attributes

For the Salesforce Connector to sync data between Salesforce and FlexNet Operations, any Salesforce object fields must be mapped to their corresponding fields in FlexNet Operations.

Field mappings must be defined for any data that needs to be synced between Salesforce and FlexNet Operations. This applies to default FlexNet Operations fields—that is, fields that appear in FlexNet Operations by default—and to custom attribute fields that are specific for your implementation of FlexNet Operations.

This section describes how to manage field mappings for FlexNet Operations attributes and FlexNet Operations custom attributes:

- Mapping Fields for FlexNet Operations Default Attributes
- Mapping Fields for FlexNet Operations Custom Attributes
- Viewing Field Mappings for Salesforce Objects
- Editing or Deleting Field Mappings

## Mapping Fields for FlexNet Operations Default Attributes

***Note*** ▪ *This topic focuses on default FlexNet Operations. For information about creating and mapping fields for FlexNet Operations custom attributes, see Mapping Fields for FlexNet Operations Custom Attributes.*

When you install the Salesforce Connector, it automatically creates certain custom fields in Salesforce. These fields are available for the Account, Contact, Opportunity, and OpportunityLineItem objects in Salesforce. The fields are required for the smooth flow of the sales order between FlexNet Operations and Salesforce.

The Salesforce Connector maps these custom Salesforce fields to their corresponding equivalent fields for FlexNet Operations default attributes. You can view and edit these mappings of FlexNet Operations fields and Salesforce objects on the **Field Mapping** tab in the Salesforce Connector (see Editing or Deleting Field Mappings).

However, because Salesforce is highly customizable, it is possible that some FlexNet Operations attributes cannot be automatically mapped to Salesforce fields—the field names depend on your specific implementation. As a result, you might need to manually specify certain Salesforce field names on the **Field Mapping** tab to complete the mapping process. Fields that cannot be automatically mapped will be blank on the **Field Mapping** tab.

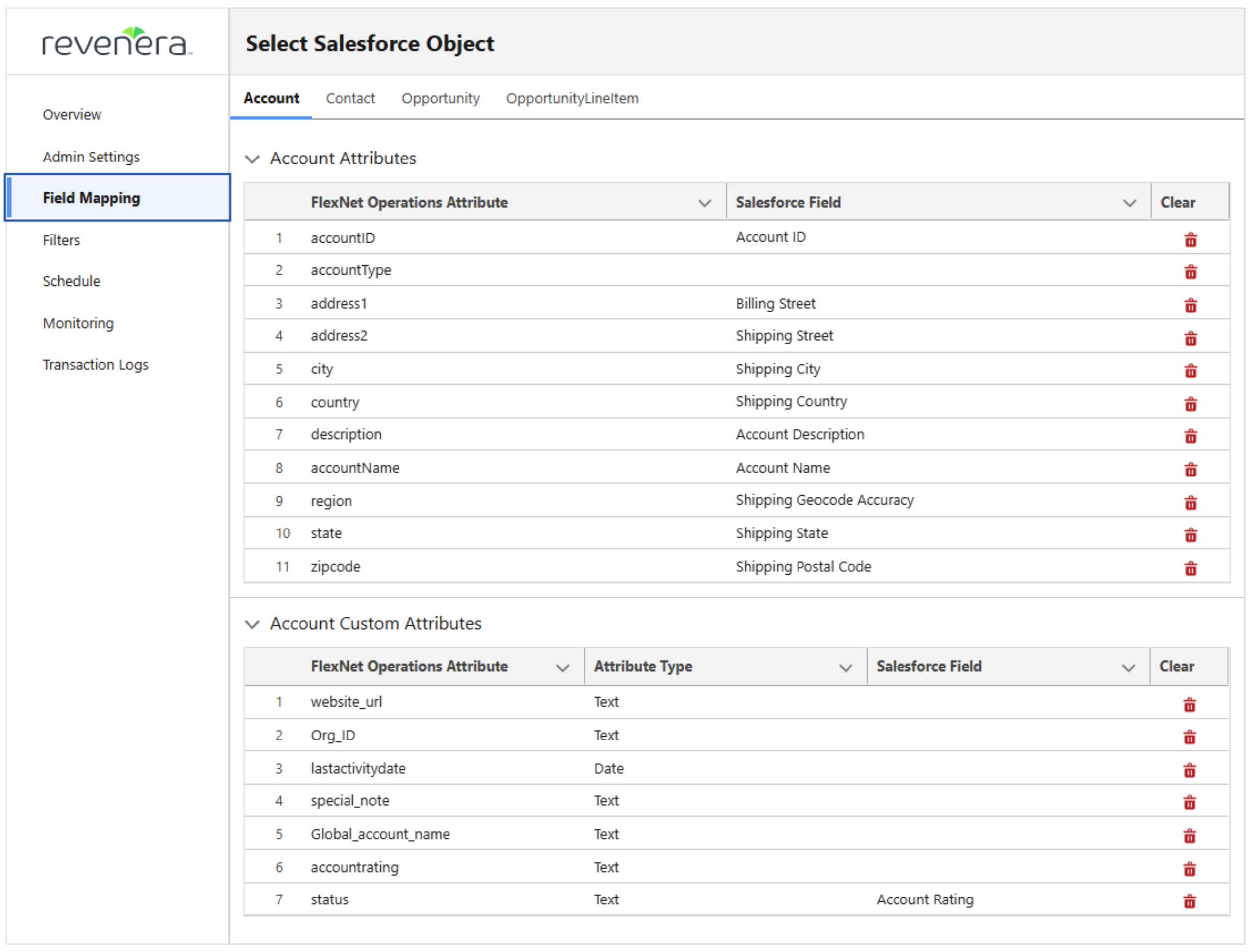



**Figure 2-6:** Example of the **Field Mapping** tab.

The following tables list the FlexNet Operations attributes that the Salesforce Connector installer adds automatically. For each attribute, the tables either show the corresponding Salesforce field—if it can be mapped automatically—or provide a description of the type of Salesforce field it should be mapped to in an implementation-specific configuration.

***Important ▪*** *FlexNet Operations attributes that MUST be mapped to a Salesforce field are marked as Required in the table. If the default mapping is removed and not replaced by a custom Salesforce field, the sync will fail.*

For information about how to edit fields, see Editing or Deleting Field Mappings.

Use the following links to jump to the relevant table:

- Account Object Field Mappings
- Contact Object Field Mappings
- Opportunity Object Field Mappings
- OpportunityLineItem Object Field Mappings

# Account Object Field Mappings

The following table lists the predefined mappings made by the Salesforce Connector for Account attributes.

**Table 2-3 ▪** Mappings for Account objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| accountName | Account Name | Account Name of the organisation | **Yes** |
| accountID | Account Id | Account Identifier for the organization. No need to map from Salesforce unless you want to. This will be auto generated and filled as part of Account creation in FlexNet Operations. | **Yes** |
| description | Account Description | Description for the Account | No |
| address1 | Billing Street | First line of the Address of this Account | No |
| address2 | Shipping Street | Second line of the Address of this Account | No |
| city | Shipping City | City part of the address of the Account | No |
| state | Shipping State | State part of the address of the Account | No |
| zipcode | Shipping Postal Code | Postal code of the address of the Account | No |
| country | Shipping Country | Country in this address of the Account | No |
| region | | The region where the account is situated. For instance, EMEA or APAC. Region is an optional field in the account creation process in FlexNet Operations and can contain any region designation the user enters. | No |

**Table 2-3 ▪** Mappings for Account objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| accountType | | Optional. Identifies an account as one of the following types:<br>• CUSTOMER—Regular customer accounts.<br>• SELF_REGISTERED—Self-registered accounts.<br>• CHANNEL_PARTNER—Channel partner accounts.<br>• PUBLISHER—Producer accounts.<br>Accounts without a standard account type are shown as UNKNOWN. | No |

# Contact Object Field Mappings

The following table lists the predefined mappings made by the Salesforce Connector for Contact attributes (equivalent to users in FlexNet Operations).

**Table 2-4 ▪** Mappings for Contact objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| **firstName** | First Name | User First Name | **Yes** |
| **lastName** | Last Name | User Last Name | **Yes** |
| **emailAddress** | Email | User email address | **Yes** |
| **displayName** | Full Name | User's  Display name | No |
| **optIn** | Email Opt Out | Whether the user wants to receive emails from FlexNet Operations. | **Yes** |
| **phoneNumber** | Phone | User's phone number | No |
| **faxNumber** | Fax | User's fax number | No |
| **street** | MailingStreet | User's address - street name | No |
| **city** | MailingCity | User's address - city Name | No |
| **state** | MailingState | User's address - state name | No |

**Table 2-4 ▪** Mappings for Contact objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| **zipcode** | MailingPostalCode | User's address - zip code | No |
| **country** | MailingCountry | User's address - country | No |
| **locale** | | User's address - locale | No |
| **status** | | Active or Inactive | No |
| **timezone** | | User's timezone<br>ISO-8601 format (+/-hh:mm) as an offset from GMT | No |

# Opportunity Object Field Mappings

The following table lists the predefined mappings made by the Salesforce Connector for Opportunity attributes (equivalent to entitlement line items in FlexNet Operations).

**Table 2-5 ▪** Mappings for Opportunity objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| EntitlementOwnerAccount | | | No |
| EntitlementOwnerContact | | | No |
| description | Description | A brief, optional description of the entitlement. | No |
| emailTemplateVariation | | (Optional) Specifies an email template in FlexNet Operations.<br>• If no template is specified, then the email template configured for the license technology is used.<br>• If there is no email template configured for the license technology, then the default email template is chosen.<br>• If the chosen template is not active or the send indicator is not switched on, no email is sent. | No |
| entitlementId | | Entitlement ID of the entitlement that contains the activatable entitlement line item. | No |

**Table 2-5 ▪** Mappings for Opportunity objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| shipToAddress | Ship-to mail | Postal address for the sold-to account. | No |
| shipToEmail | Ship-to email | Email address for a contact in the sold-to account where license certificates are shipped. | No |
| soldTo | SoldTo Account | Linked to Salesforce Account (lookup account field). Used when both a partner and end customer are involved in entitlement creation. | **Yes** |

# OpportunityLineItem Object Field Mappings

The following table lists the predefined mappings made by the Salesforce Connector for OpportunityLineItem attributes (equivalent to entitlement line items in FlexNet Operations).

**Table 2-6 ▪** Mappings for OpportunityLineItem objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| description | Description | A description of the line item. | No |
| partNumber | ProductCode | The part number that can be used to identify a product. | **Yes** |
| numberOfCopies | Quantity | The number of copies included in the entitlement line item that can be activated. | **Yes** |
| FNPTimeZoneValue | | The time zone value is given as the contents of the name column of the time zone entry in the PROD_FNP_TIMEZONE table (not the time zone string that will be written into the license file). | No |
| activationId | | The unique identifier of the entitlement line item as defined in FlexNet Operations. | No |
| licenseModel | | The license model used for the line item. | No |
| orderID | | Order ID. This may be imported from your ERM/CRP application. | No |
| orderLineNumber | | Order line number. This may be imported from your ERM/CRP application. | No |

**Table 2-6 ▪** Mappings for OpportunityLineItem objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| startDate | Start Date | Start date of the line item | No |
| startDateOption | Start Date Option | Type of defined start date, as one of the following:<br>• **Specify at each activation**—(Not available for FlexNet Embedded licensing.) The user is prompted to specify a start date each time the line item is activated. Each fulfillment record gets a new start date, and for duration-based entitlements, each fulfillment record’s expiration date is set to start date specified + duration.<br>• **Specify value now**—The start date was specified at the time of the entitlement’s creation. All fulfillment records of this line item get this start date.<br>• **Use first activation date**—The date of the first activation is used as the start date. All fulfillment records for this line item get the same start date.<br>• **Specify at first activation**—(Not available for FlexNet Embedded licensing.) The user is prompted to specify a start date when first activating the line item. This start date is used for all fulfillment records.<br>• **Use each activation date**—Every time the line item is activated, the activation date is used as the start date. Each fulfillment record gets a new start date. As a result, for duration-based entitlements, each fulfillment record’s expiration date is set to activation date + duration. | No |
| expirationDate | Expiration Date | Expiration date of the line item. | **Yes** |
| term | Expiration Term | The length of time after the start date that the entitlement, and the licenses activated from it, are valid. | **Yes** |

**Table 2-6 ▪** Mappings for OpportunityLineItem objects

| FlexNet Operations Attribute | Salesforce Field | Description | Required |
|---|---|---|---|
| versiondate | | In a license, this date is converted into the Version Date Format that is specified in the system configuration. | No |

# Mapping Fields for FlexNet Operations Custom Attributes

If your organization is using custom attributes in FlexNet Operations and wants to mirror that information in Salesforce, you'll need to manually map these custom attributes to fields in Salesforce. This differs from default FlexNet Operations attributes, which are automatically mapped (see Mapping Fields for FlexNet Operations Default Attributes).

Custom attributes must always exist in FlexNet Operations first before you can map them to corresponding fields in Salesforce. The following custom attribute entity types are supported: **account**, **user**, **entitlement**, and **entitlement line**.

When mapping custom attributes to fields in Salesforce, you can either create new fields specifically for the custom attributes or map them to existing standard Salesforce objects.

This topic explains how to:

- View existing custom attributes in FlexNet Operations. See Viewing Custom Attributes in FlexNet Operations.
- Create new custom attributes in FlexNet Operations. See Creating Custom Attributes in FlexNet Operations
- Create custom fields in Salesforce to map to custom attributes. See Creating Salesforce Fields for Custom Attributes.

***Tip ▪*** *Once the custom attributes and their equivalent Salesforce fields are in place, they can have any value assigned to them programmatically, using the FlexNet Operations SOAP APIs (see FlexNet Operations SOAP Web Services Guide).*

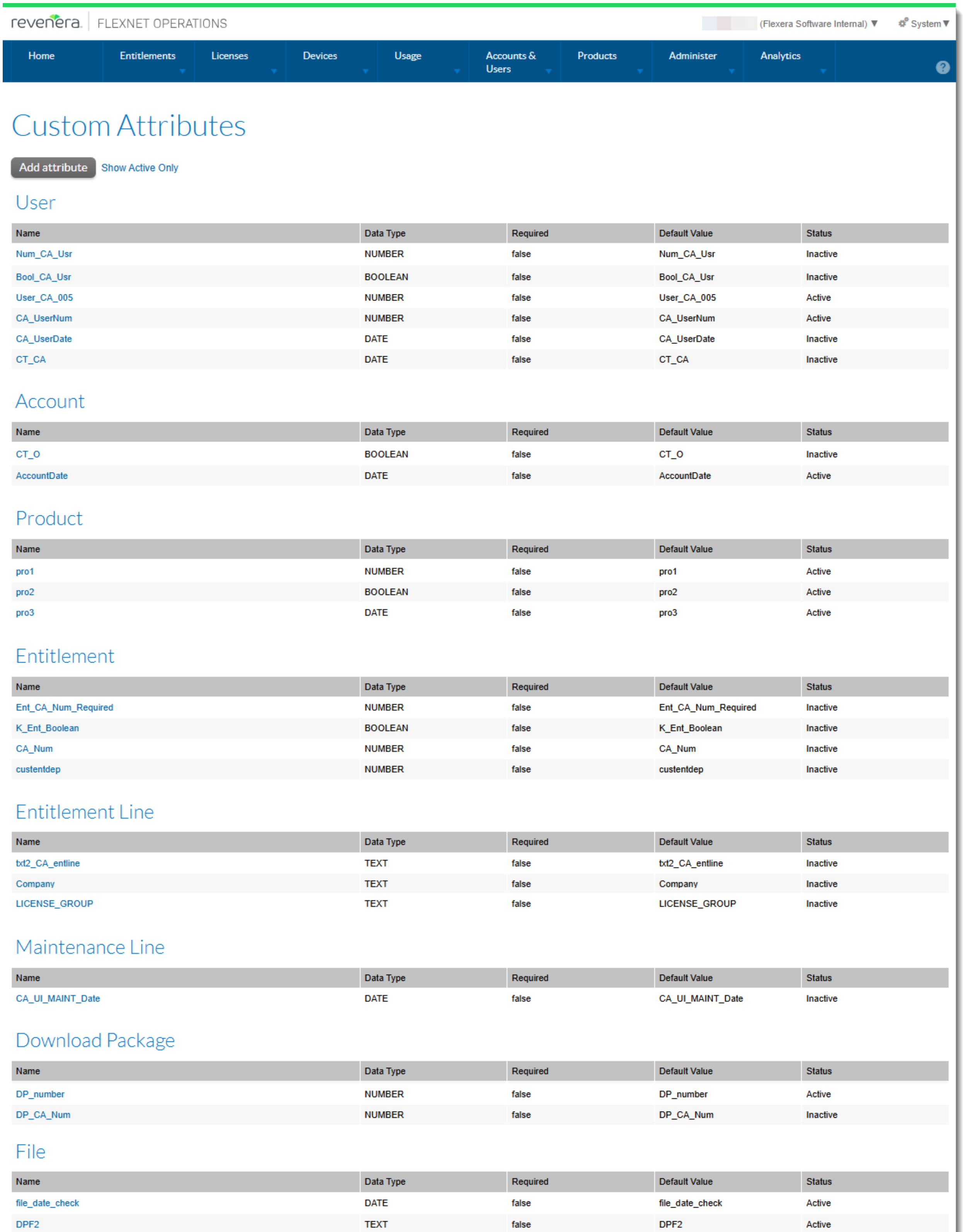
## Viewing Custom Attributes in FlexNet Operations

In FlexNet Operations, custom attributes are listed on the **Custom Attributes** page.

***Note ▪*** *The Salesforce Connector only supports the following custom attribute entity types:* ***account***, ***user***, ***entitlement***, *and* ***entitlement line***. *You can therefore disregard custom attributes of the entity types* ***product***, ***maintenance line***, ***download package***, *and* ***file***.

***Task*** ***To list all custom attributes***

1. In the Producer Portal, click **Administer** > **Custom Attributes**. The **Custom Attributes** page is displayed, which lists all custom attributes.
2. Optionally, use the **Show All / Show Active Only** link beneath the header to switch between displaying all custom attributes or only those that are currently active.




User

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| Num_CA_Usr | NUMBER | false | Num_CA_Usr | Inactive |
| Bool_CA_Usr | BOOLEAN | false | Bool_CA_Usr | Inactive |
| User_CA_005 | NUMBER | false | User_CA_005 | Active |
| CA_UserNum | NUMBER | false | CA_UserNum | Active |
| CA_UserDate | DATE | false | CA_UserDate | Inactive |
| CT_CA | DATE | false | CT_CA | Inactive |

Account

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| CT_O | BOOLEAN | false | CT_O | Inactive |
| AccountDate | DATE | false | AccountDate | Active |

Product

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| pro1 | NUMBER | false | pro1 | Active |
| pro2 | BOOLEAN | false | pro2 | Active |
| pro3 | DATE | false | pro3 | Active |

Entitlement

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| Ent_CA_Num_Required | NUMBER | false | Ent_CA_Num_Required | Inactive |
| K_Ent_Boolean | BOOLEAN | false | K_Ent_Boolean | Inactive |
| CA_Num | NUMBER | false | CA_Num | Inactive |
| custentdep | NUMBER | false | custentdep | Inactive |

Entitlement Line

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| txt2_CA_entline | TEXT | false | txt2_CA_entline | Inactive |
| Company | TEXT | false | Company | Inactive |
| LICENSE_GROUP | TEXT | false | LICENSE_GROUP | Inactive |

Maintenance Line

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| CA_UI_MAINT_Date | DATE | false | CA_UI_MAINT_Date | Inactive |

Download Package

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| DP_number | NUMBER | false | DP_number | Active |
| DP_CA_Num | NUMBER | false | DP_CA_Num | Inactive |

File

| Name | Data Type | Required | Default Value | Status |
|---|---|---|---|---|
| file_date_check | DATE | false | file_date_check | Active |
| DPF2 | TEXT | false | DPF2 | Active |

**Figure 2-7:** An example of the list of custom attributes in FlexNet Operations, showing all active and inactive attributes.

# Creating Custom Attributes in FlexNet Operations

In FlexNet Operations, custom attributes are created on the **Create Custom Attribute** page.

***Tip** ▪ For detailed information about custom attributes in FlexNet Operations, see Administering Custom Attributes in the FlexNet Operations User Guide.*

***Task*** ***To add a custom attribute***

1. In the Producer Portal, click **Administer** > **Custom Attributes**. The **Custom Attributes** page is displayed.
2. On the **Custom Attributes** page, click **Add Attribute**.
3. On the **Create Custom Attribute** page, specify custom attribute settings.

| Setting | Description |
|---|---|
| **Name** | Type a name to uniquely identify this custom attribute. This name must be unique for the entity type you select next. Custom attribute names can contain upper and lower case alphabet characters, numbers, and underscores.<br><br>The name you choose here must exactly match the name of the Salesforce field that you create later. |
| **Entity Type** | For **Entity Type**, choose entity to which you want this attribute added. Choose from:<br>● **Account**<br>● **User**<br>● **Entitlement**<br>● **Entitlement Line**<br><br>The following entity types are NOT supported in Salesforce:<br>● **Product**<br>● Maintenance Line<br>● **Download Package**<br>● **File**<br><br>After the attribute is saved, you cannot change its entity type. |
| **Required?** | Choose **Yes** or **No** to specify whether this custom attribute is required or optional. If required, a value for this attribute must be set when the entity is created. |
| **Status** | Sets the custom attribute to active or inactive status. |

| Setting | Description |
|---|---|
| **Type** | The data type of the values the custom attribute accepts. Type cannot be changed once set.<br>Choose from the following:<br>• **Number**<br>• **Text** (requires **Max. Length** and **Text Type** settings)<br>• **Long Text** (requires **Display Type** setting)<br>• **Boolean**<br>• **Date** |
| **Copy to Data Warehouse** | If selected, this attribute is included in the data transformation for reporting. Otherwise, the custom attribute is not available for reporting.<br>Note that some data types cannot be copied to the data warehouse and, as a result, cannot be made available for reporting. For details, see About Custom Attributes in the FlexNet Operations User Guide. |

4. Click **Save**.

The Producer Portal adds the custom attribute using the settings you provided, and returns to the **Custom Attributes** page.

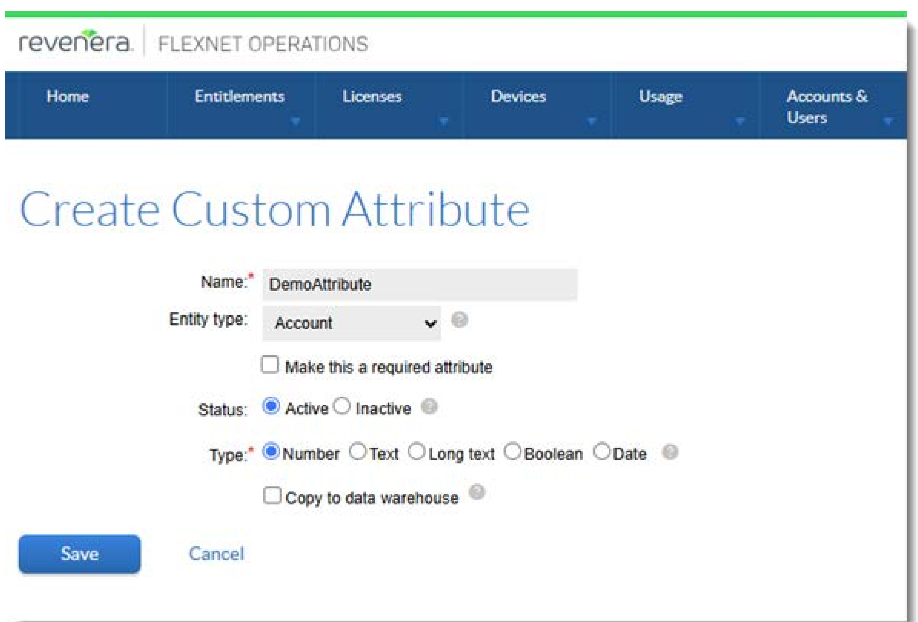



**Figure 2-8:** Example of the **Create Custom Attribute** page in the FlexNet Operations Producer Portal.

# Creating Salesforce Fields for Custom Attributes

If you want to map the custom attributes from FlexNet Operations to new fields in Salesforce, you need to create these fields in Salesforce.

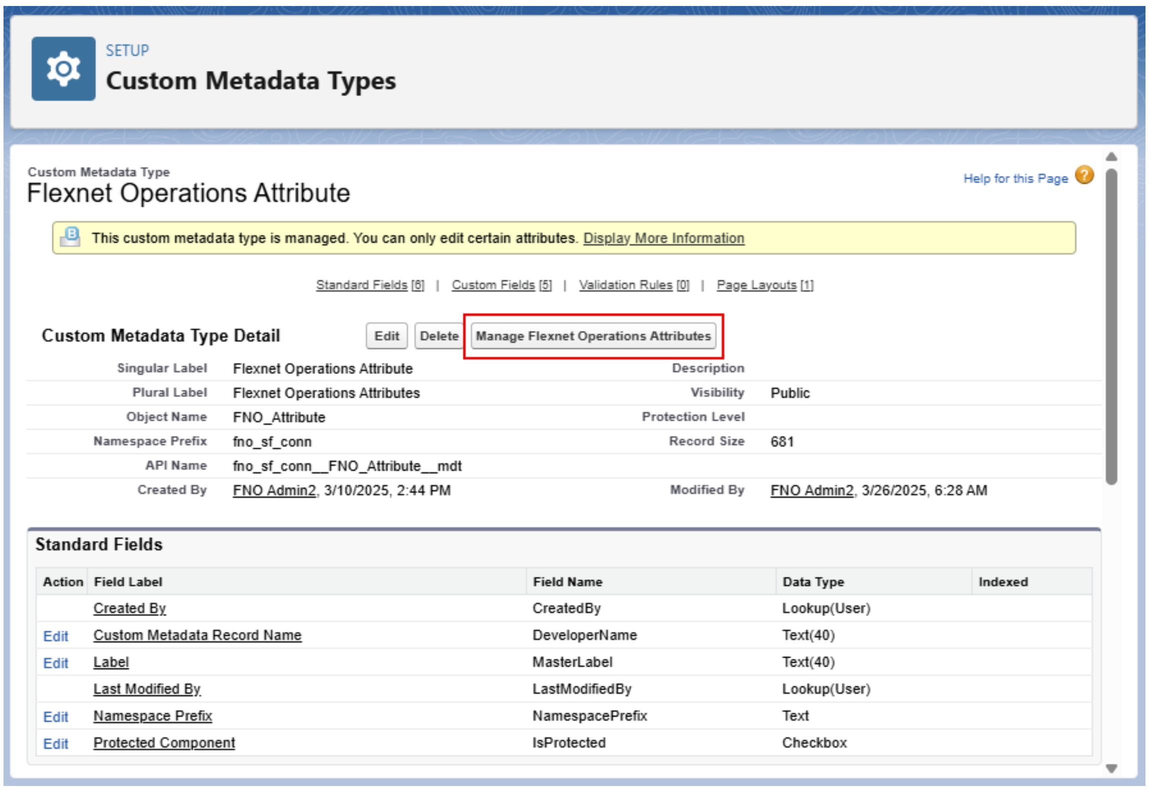
***Task*** ***To create Salesforce fields for custom attributes***

1. From **Setup**, enter `Custom Metadata Types` in the **Quick Find** box, then select **Custom Metadata Types**.

2. On the **Custom Metadata Types** page, click the label **FlexNet Operations Attribute**.

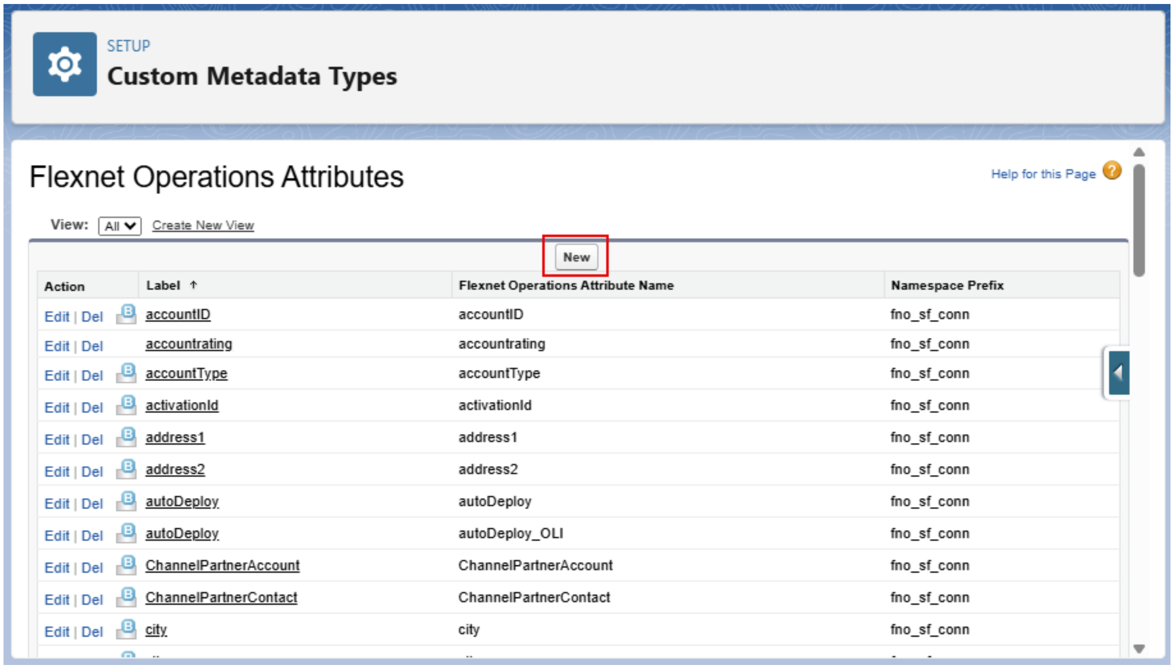
   The page **Custom Metadata Types | FlexNet Operations Attribute** is displayed.

3. Click the **Manage FlexNet Operations Attributes** button:




   The page **Custom Metadata Types | FlexNet Operations Attributes** is displayed, showing a list of Salesforce fields for FlexNet Operations attributes (custom and default attributes).

4. At the top of the list, click the **New** button:




5. Provide the following information to create a field for a custom attribute (refer to the screenshot below to help you fill out the fields):

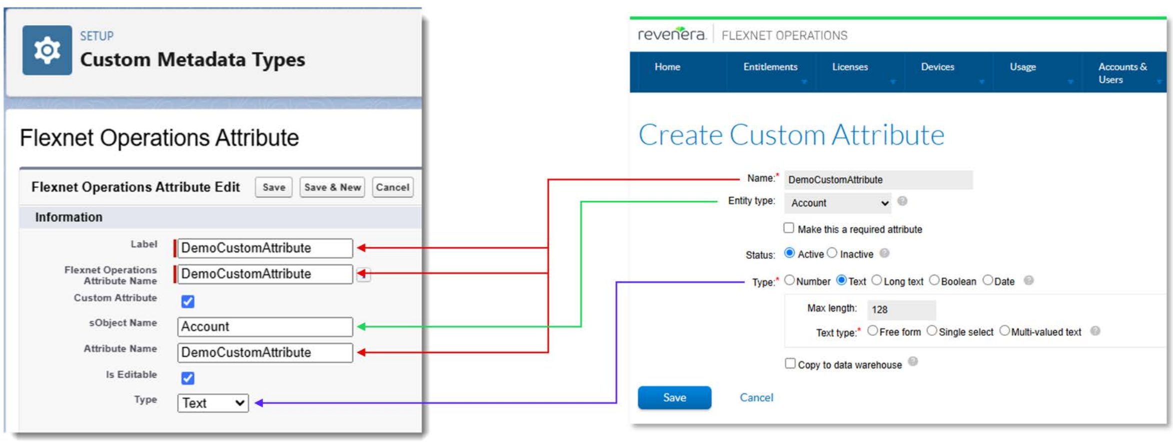
- **Label**—Enter the name of the custom attribute as it is defined in FlexNet Operations.
- **FlexNet Operations Attribute Name**—Enter the name of the custom attribute as it is defined in FlexNet Operations.
- **Custom Attribute**—Select this check box to indicate that the field that you are creating is for a custom attribute.
- **sObject Name**—Enter the custom attribute's entity type that will be used for the resulting Salesforce object. In some cases, Salesforce has a different nomenclature for object than that used by FlexNet Operations. Therefore, select the equivalent object name from the following table:

| FlexNet Operations Entity | Equivalent Salesforce sObject |
|---|---|
| **Account** | **Account** |
| **User** | **Contact** |
| **Product** | Not supported |
| **Entitlement** | **Opportunity** |
| **Entitlement Line** | **OpportunityLineItem** |
| **Maintenance Line** | Not supported |
| **Download Package** | Not supported |

| FlexNet Operations Entity | Equivalent Salesforce sObject |
|---|---|
| **File** | Not supported |

- **Attribute Name**—Enter the name of the custom attribute as it is defined in FlexNet Operations.
- **Is Editable**—If selected, the value for the custom attribute in the equivalent **Salesforce Field** in the **Field Mapping** list in the Salesforce Connector can be changed.
- **Type**—Select the type of the custom attribute. This must match the attribute type specified in FlexNet Operations.
- **Protected Component**—Leave unselected.

The following screenshot shows how the custom attribute fields in FlexNet Operations relate to attribute information that must be provided in Salesforce:




6. Click **Save**, or **Save & New** to create another Salesforce field for a custom attribute.

The field mapping that you created will now be displayed in the Salesforce Connector on the **Field Mapping** page for the relevant Salesforce object.

# Viewing Field Mappings for Salesforce Objects

***Task*** ***To view mappings of Salesforce objects to FlexNet Operations fields***

1. In the Salesforce Connector, in the navigation menu on the left, click **Field Mapping**.
2. Use the navigation tabs at the top—**Account**, **Contact**, **Opportunity**, and **OpportunityLineItems**—to view mappings for attributes and custom attributes.

# Editing or Deleting Field Mappings

You can edit and delete field mappings between Salesforce and FlexNet Operations.

***Task*** ***To edit or delete mappings of Salesforce objects to FlexNet Operations fields***

1. In the Salesforce Connector, in the navigation menu on the left, click **Field Mapping**.
2. Use the navigation tabs at the top—**Account**, **Contact**, **Opportunity**, and **OpportunityLineItems**—to navigate to the relevant object.
3. **To edit a mapping**—In the **Salesforce Field** column, click the pencil icon for the field that you want to edit. You will see a dropdown list with available Salesforce fields. Click the desired field label to select it.
4. **To delete a mapping**—In the **Clear** column, click the trash can icon for a row to delete it.
5. Click **Save** to save your changes.

# Syncing Data

The Salesforce Connector offers the following ways to sync data:

- **Scheduled Sync**—Executes at defined intervals and performs a bidirectional data exchange.

  For details, refer to Scheduling a Regular Sync.

- **Immediate Sync**—Allows an on-demand bidirectional sync, transferring only data modified within a specified time window.

  For details, refer to Triggering an Immediate Sync.

- **One-Time Sync**—Conducts a single, one-way sync from Salesforce to FlexNet Operations for a designated account.

  For details, refer to Initiating a One-Time Sync.

Synchronization always begins at the account level in Salesforce. All related data for the selected account is included in the sync. Syncing specific sales orders independently is not supported.

# Scheduling a Regular Sync

When the sync between Salesforce and FlexNet Operations has been set up, the Salesforce Connector performs a bidirectional sync. It first retrieves opportunities in the Closed Won state in Salesforce and maps them to entitlements in FlexNet Operations, using the data mapping that has been set up (see Mapping Fields for Salesforce Objects and FlexNet Operations Attributes). After this sync, data flows in the opposite direction—from FlexNet Operations back to Salesforce.

***Tip*** ▪ *You can change the filters for syncing data on the* ***Filters*** *tab of the Salesforce Connector. For more information, see Defining Filters for Syncing Data.*

The scheduled sync will sync data for all accounts. It also creates new accounts and users using information from the synced opportunities. When entitlements are created in FlexNet Operations, the Salesforce Connector updates the corresponding Salesforce opportunity.

You can configure the timing and frequency of these sync operations on the **Schedule** tab. This page also displays the last and next scheduled sync dates.

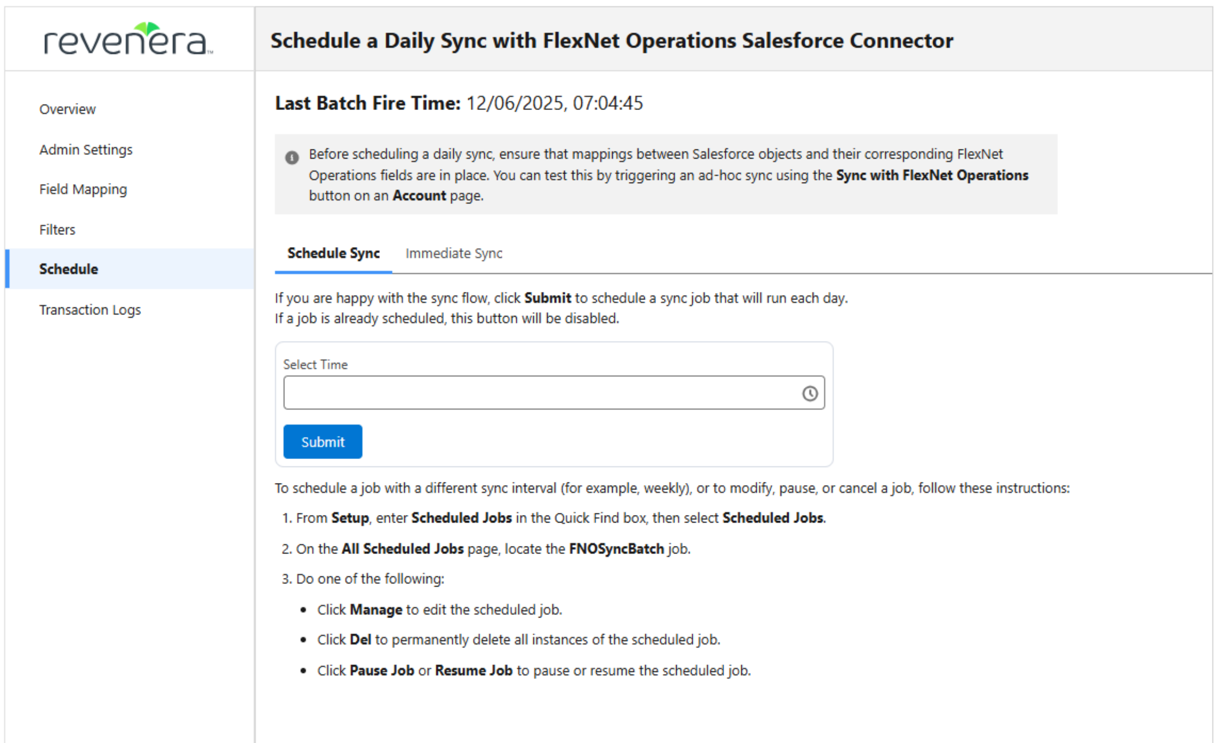



**Figure 2-9:** Example of the **Schedule** tab.

***Note*** ▪ *If a sync fails, you can find troubleshooting details in the logs available on the **Transaction Logs** page (see Tracking and Troubleshooting Transactions).*

### Prerequisites for Syncing Data

Before attempting to sync data, ensure that you completed the steps described in the previous sections of this document, notably:

- Mappings between Salesforce objects and their corresponding FlexNet Operations fields are in place (see Mapping Fields for Salesforce Objects and FlexNet Operations Attributes)
- You tested the mappings using the **Sync with FlexNet Operations** button on your **Account** page to ensure that data can be synced successfully (see Example Flow for Syncing an Opportunity/Entitlement From Salesforce to FlexNet Operations and Initiating a One-Time Sync).

## Configuring the Sync Interval

This topic describes how to schedule a daily sync using the options in the Salesforce Connector. You can also specify a different sync interval (for example, weekly) using the options in Salesforce. The steps to do this are described in section Editing or Deleting the Sync Schedule, Step 2.

***Task*** ***To schedule a daily sync of data between FlexNet Operations and Salesforce***

1. In the Salesforce Connector, in the navigation menu on the left, click **Schedule**.
2. Select the **Schedule Sync** tab.
3. In the **Select Time** dropdown, set the time when the data should be synced every day.

   ***Note*** ▪ *If the **Select Time** dropdown and the **Submit** button are greyed out, this means that a sync has already been scheduled. To change the schedule, see the instructions in Editing or Deleting the Sync Schedule.*

4. Click **Submit**.

A green banner indicates that the job **FNOSyncBatch** has been scheduled successfully and the **Select Time** dropdown and **Submit** button are greyed out.

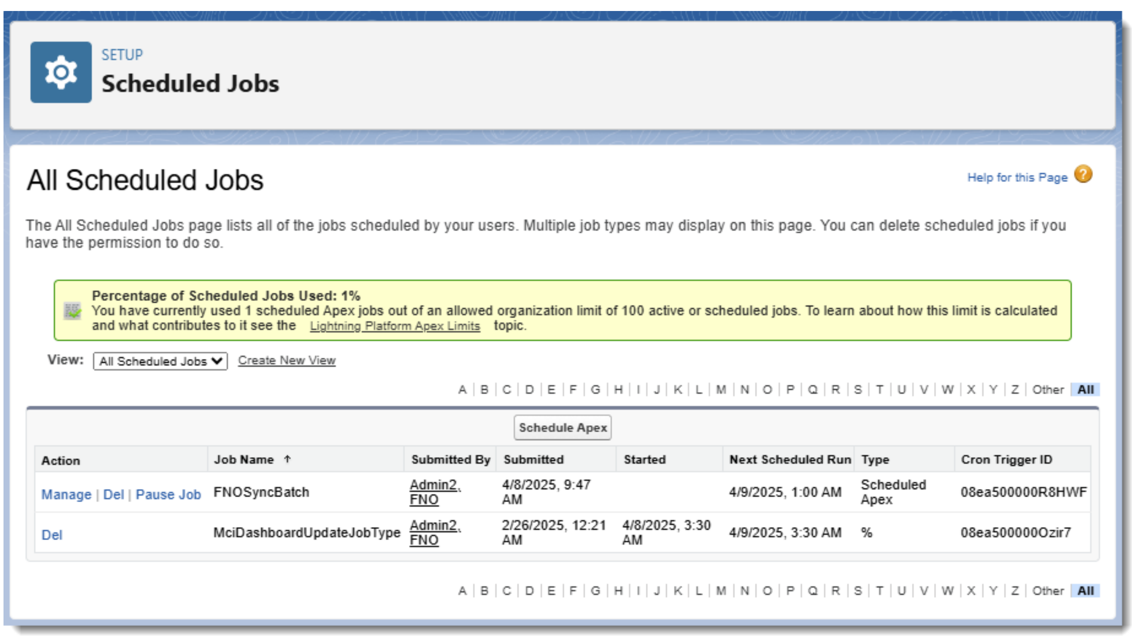
# Editing or Deleting the Sync Schedule

Perform the following steps to change the sync time or to cancel the sync.

***Task*** ***To edit or cancel the daily sync schedule***

1. From **Setup**, enter `Scheduled Jobs` in the **Quick Find** box, then select **Scheduled Jobs**.

   The **All Scheduled Jobs** page displays a list of all jobs scheduled by users in Salesforce.




2. Locate the **FNOSyncBatch** job. You now have the following options:

   - Click **Manage** to change the time of the job.

a. Select the **Schedule Builder** option and schedule the job using the options in the **Schedule Apex Execution** section.

b. Click **Reschedule Job**.

- Click **Pause** to halt the job. To resume the job, open the **All Scheduled Jobs** page again and click **Resume Job**.
- Click **Del** to delete the job. You are prompted to confirm the deletion. When you click **OK**, the job is deleted. The button **Schedule a daily sync** button will once again be enabled on the **Schedule** tab.

***Note** ▪ For more information about scheduling jobs in Salesforce, see the topic Monitoring Scheduled Jobs in the Salesforce documentation (external link).*

# Triggering an Immediate Sync

If a scheduled sync completes with errors and some data is not successfully transferred (for example due to connectivity issues), you can initiate an immediate sync. Similar to a scheduled sync, an immediate sync is bidirectional—data is exchanged both from Salesforce to FlexNet Operations and from FlexNet Operations back to Salesforce.

The **Last Batch Fire Time**, displayed on the **Schedule** page, indicates the timestamp of the most recent sync attempt. To synchronize data that has changed since that time, navigate to the **Immediate Sync** tab, specify the desired time range, and initiate the sync process.

***Task*** ***To trigger an immediate sync***

1. In the Salesforce Connector, in the navigation menu on the left, click **Schedule**.
2. Select the **Immediate Sync** tab.
3. To specify the period for which data should be synchronized, choose one of the following options:
   - **Date Range**—Select this option to define a specific start and end date for the sync.

     **Example**: If today is June 7 and the **Last Batch Fire Time** is June 4 at 11:02:25, you would set the **Start Date** to June 4 and the **End Date** to June 7 to capture all data changes within that period.
   - **Hours**—Select this option to define the synchronization window in terms of hours prior to the current time.
4. Click **Quick Sync**.

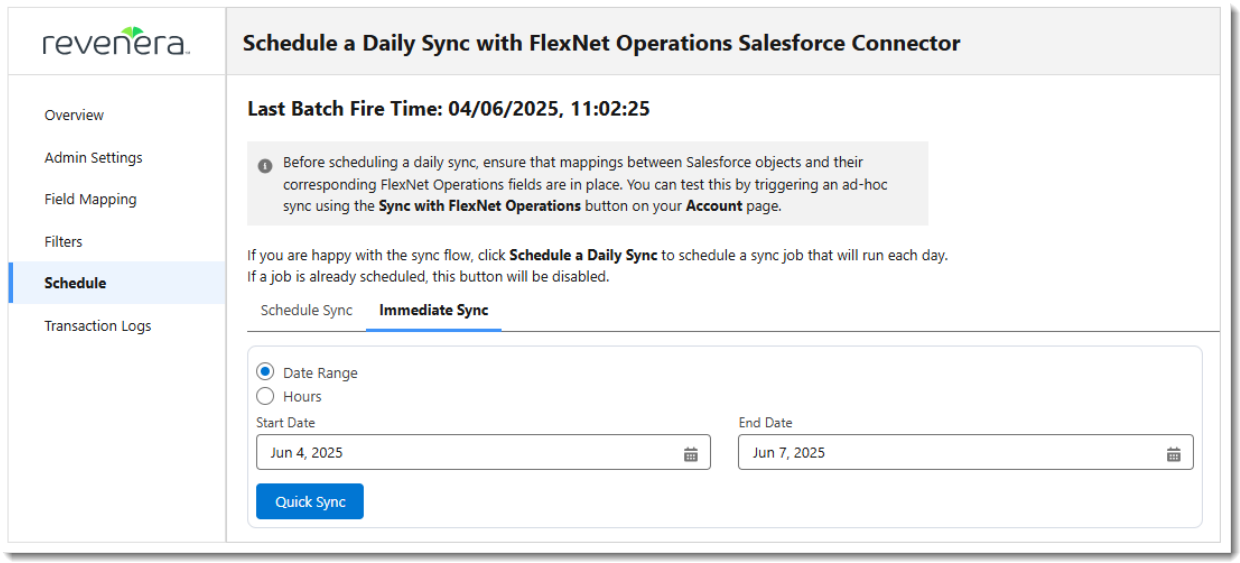



**Figure 2-10:** An example of the **Immediate Sync** tab. ‘

# Initiating a One-Time Sync

In addition to the regular scheduled sync, you can manually trigger a one-time sync. In contrast to a scheduled sync, which will sync data for all accounts, a one-time sync will sync data only for the specific account. A one-time sync is triggered by the **Sync with FlexNet Operations** button on the account page. Synced data includes account information and its associated contacts, opportunities, and opportunity line items.

A one-time sync is unidirectional, with data flowing only in one direction: from Salesforce to FlexNet Operations.

This type of sync is particularly useful for testing scenarios or when the Sales team prefers not to rely on a scheduled sync.

***Note*** ▪ *For information on configuring a regular syncing schedule, see Scheduling a Regular Sync.*

***Task*** ***To trigger a manual sync for testing purposes***

1. In Salesforce, navigate to the page of the account for which you want to sync data.
2. On the account page, click the **Sync with FlexNet Operations** button.

   If the **Sync with FlexNet Operations** button is not displayed, click the down arrow button in the top right corner to select it.

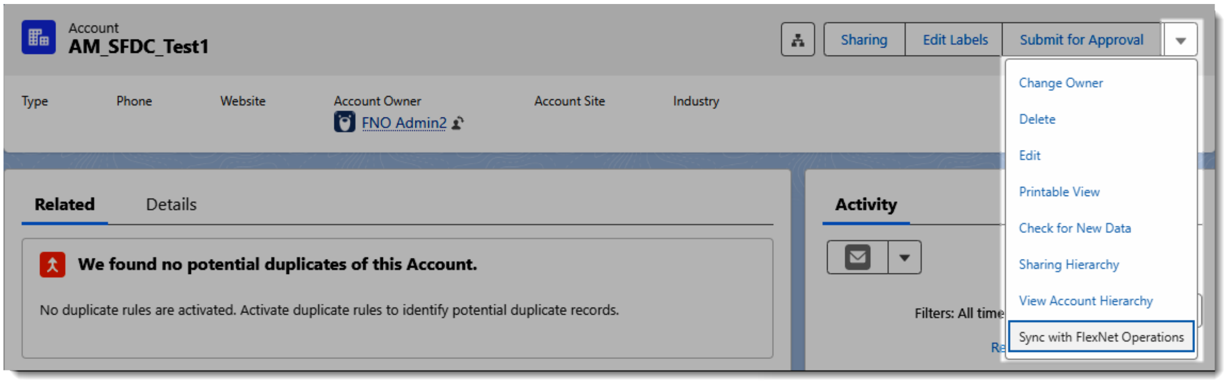



**Figure 2-11:** If the **Sync with FlexNet Operations** button is not displayed on the Account page, you can select it by clicking the down arrow button.

A message will indicate that the syncing has started.

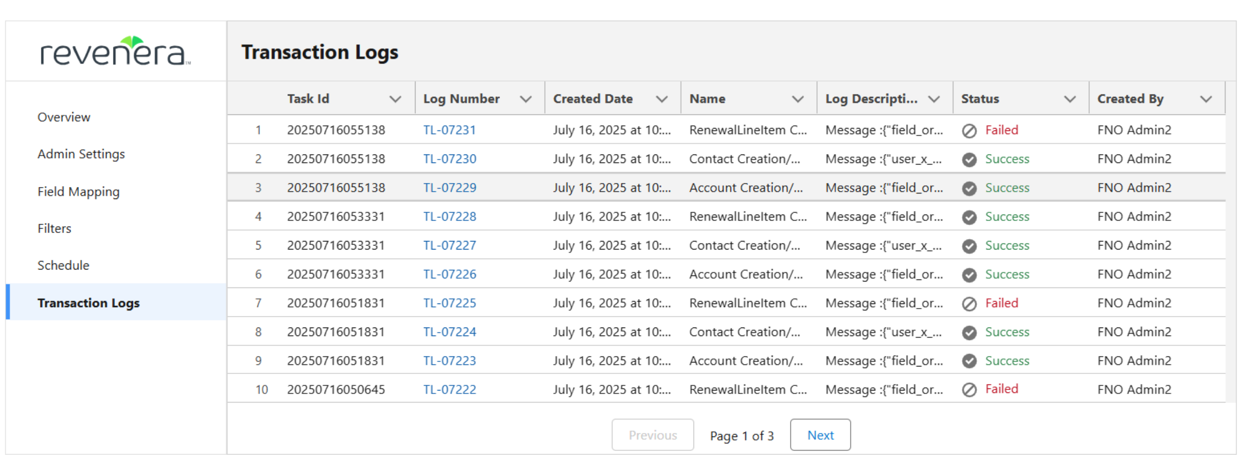
***Note*** ▪ *If a sync fails, you can find troubleshooting details in the logs available on the **Transaction Logs** page (see Tracking and Troubleshooting Transactions).*

# Tracking and Troubleshooting Transactions

You can view the logs for Salesforce Connector transactions on the **Transactions Logs** page that is available from the side navigation in the Salesforce Connector. The page shows whether the latest transactions in Salesforce have been processed successfully or if there has been an error.

A transaction can have one of the following status values:

- **Completed**—Transaction processed successfully.
- **Failed**—Transaction failed. The reason can be an API issue, data error, or external factors.
- **Error**—Transaction encountered an unexpected error or exception.




| | Task Id | Log Number | Created Date | Name | Log Descripti... | Status | Created By |
|---|---|---|---|---|---|---|---|
| 1 | 20250716055138 | TL-07231 | July 16, 2025 at 10:... | RenewalLineItem C... | Message :{"field_or... | Failed | FNO Admin2 |
| 2 | 20250716055138 | TL-07230 | July 16, 2025 at 10:... | Contact Creation/... | Message :{"user_x_... | Success | FNO Admin2 |
| 3 | 20250716055138 | TL-07229 | July 16, 2025 at 10:... | Account Creation/... | Message :{"field_or... | Success | FNO Admin2 |
| 4 | 20250716053331 | TL-07228 | July 16, 2025 at 10:... | RenewalLineItem C... | Message :{"field_or... | Success | FNO Admin2 |
| 5 | 20250716053331 | TL-07227 | July 16, 2025 at 10:... | Contact Creation/... | Message :{"user_x_... | Success | FNO Admin2 |
| 6 | 20250716053331 | TL-07226 | July 16, 2025 at 10:... | Account Creation/... | Message :{"field_or... | Success | FNO Admin2 |
| 7 | 20250716051831 | TL-07225 | July 16, 2025 at 10:... | RenewalLineItem C... | Message :{"field_or... | Failed | FNO Admin2 |
| 8 | 20250716051831 | TL-07224 | July 16, 2025 at 10:... | Contact Creation/... | Message :{"user_x_... | Success | FNO Admin2 |
| 9 | 20250716051831 | TL-07223 | July 16, 2025 at 10:... | Account Creation/... | Message :{"field_or... | Success | FNO Admin2 |
| 10 | 20250716050645 | TL-07222 | July 16, 2025 at 10:... | RenewalLineItem C... | Message :{"field_or... | Failed | FNO Admin2 |

**Figure 2-12:** Transaction logs are available from the **Transaction Logs** tab.

## Viewing Transaction Details

To display details of a particular transaction, click the hyperlinked log number. The log will open in a new tab.

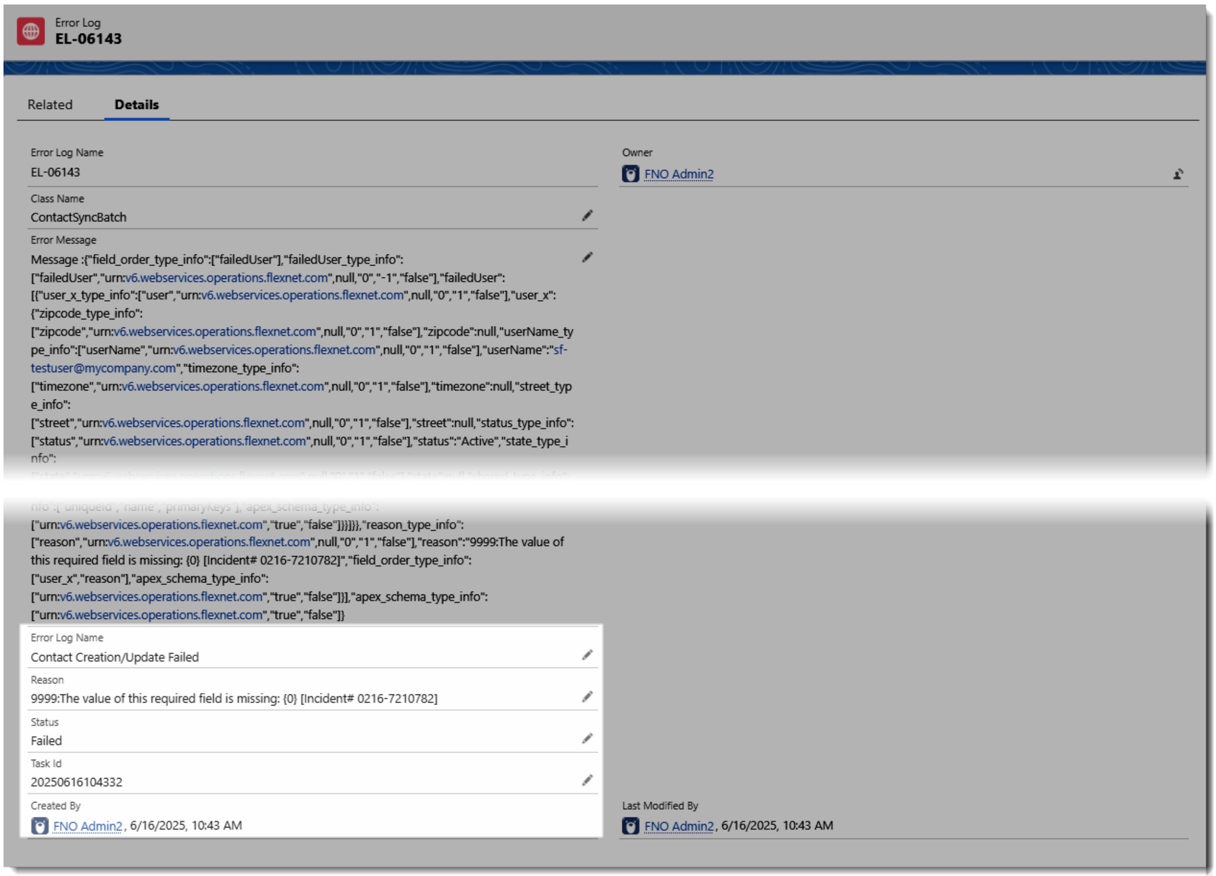



**Figure 2-13:** Example of a log entry (cropped view)

# 3

# Common Tasks in the FlexNet Operations Salesforce Connector

This chapter lists and provides examples of all of the paragraph, character, and table styles used in the FrameMaker Chapter Template file.

**Table 3-1 ▪** Topics covered in this section

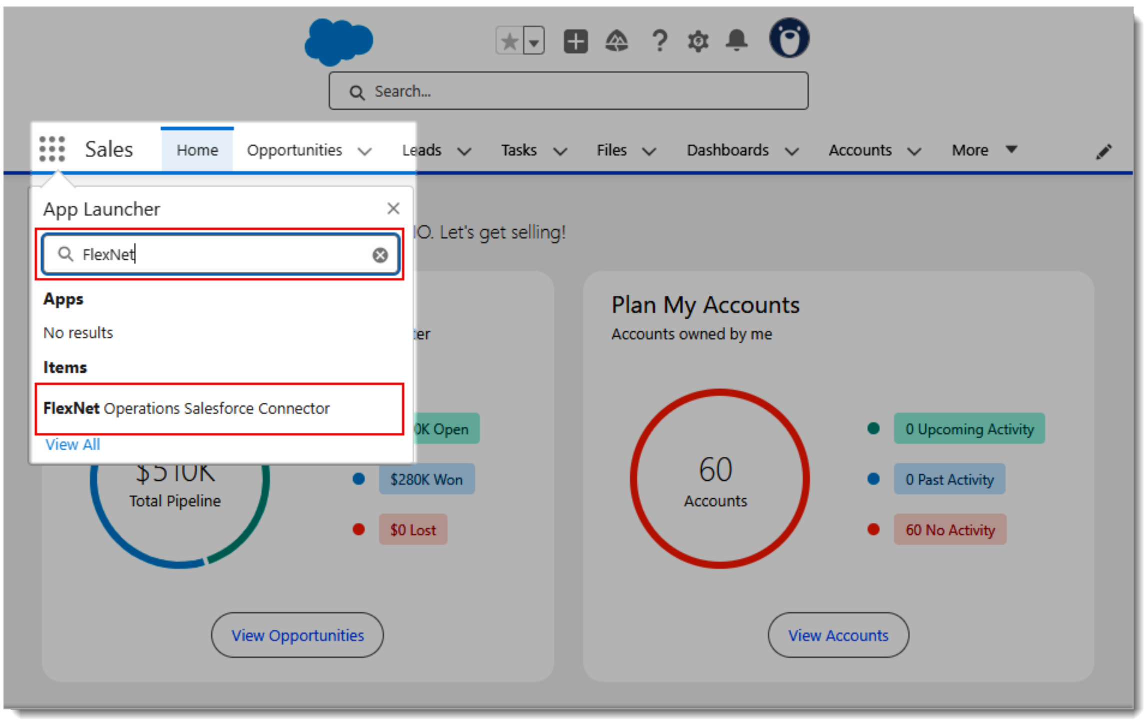
| Section | Description |
|---|---|
| Starting the Salesforce Connector | Shows how to start the Salesforce Connector. |
| Defining Filters for Syncing Data | Describes how to configure filters that determine which opportunity stages are included in the sync from Salesforce to FlexNet Operations. |
| Controlling the Entitlement State Post Sync | Details how to specify the status that entitlements are assigned in FlexNet Operations after an opportunity is synced from Salesforce." |
| Providing Opportunity Product Information in Salesforce | Helps populating the **FlexNet Operations Salesforce Connector** section for opportunity products. |
| Information for Partner Accounts | Describes how to assign the correct account type—Customer or Channel Partner—to an account. |
| Example Flow for Syncing an Opportunity/Entitlement From Salesforce to FlexNet Operations | Outlines the step-by-step process for syncing an opportunity and its associated line item from Salesforce to FlexNet Operations, including creating a test product, account, contact and opportunity, meeting product naming requirements in both systems, selecting the product for sync, and triggering a one-time sync. |
| Sales Order Flow | Shows a flow diagram that visualizes the order in which the Salesforce Connector syncs data with FlexNet Operations. |

# Starting the Salesforce Connector

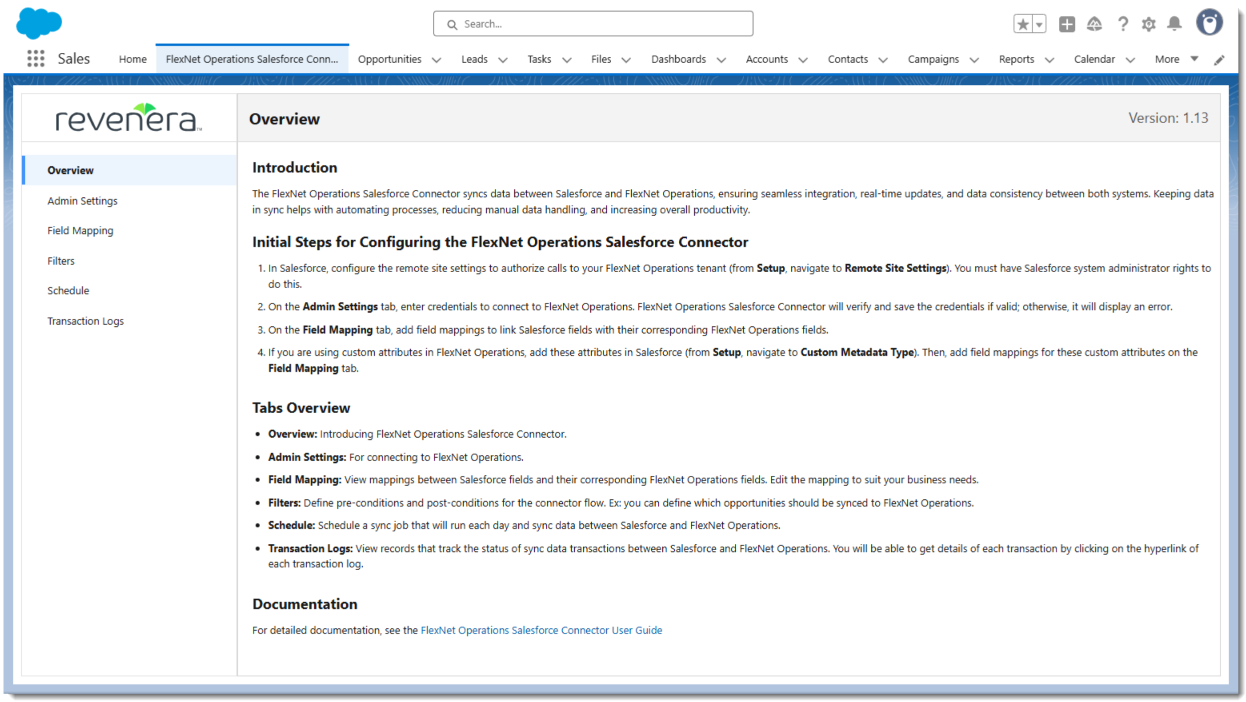
You start the Salesforce Connector from the App Launcher.

***Task*** ***To start the Salesforce Connector***

In Salesforce, click the App Launcher in the top left corner and type `FlexNet Operations Salesforce Connector`, then select **FlexNet Operations Salesforce Connector** from the list of items.




Salesforce will start the Salesforce Connector, with the **Overview** tab selected:




Use the navigation tabs on the left to access and perform various actions within the Salesforce Connector.

# Defining Filters for Syncing Data

The Salesforce Connector gives you control over which data is synced from Salesforce to FlexNet Operations. By default, only opportunities in the Closed Won stage are synced. However, on the **Filters** tab, under **Pre-Conditions**, you can define that opportunities in other stages are synced.

A second dropdown, under **Post-Conditions**, lets you set the entitlement state for opportunities synced to FlexNet Operations. This dropdown can be used when the entitlement state is not selected on an individual opportunity. Setting a value here ensures consistent behavior during synchronization when the **Entitlement State** field for an opportunity is left blank.

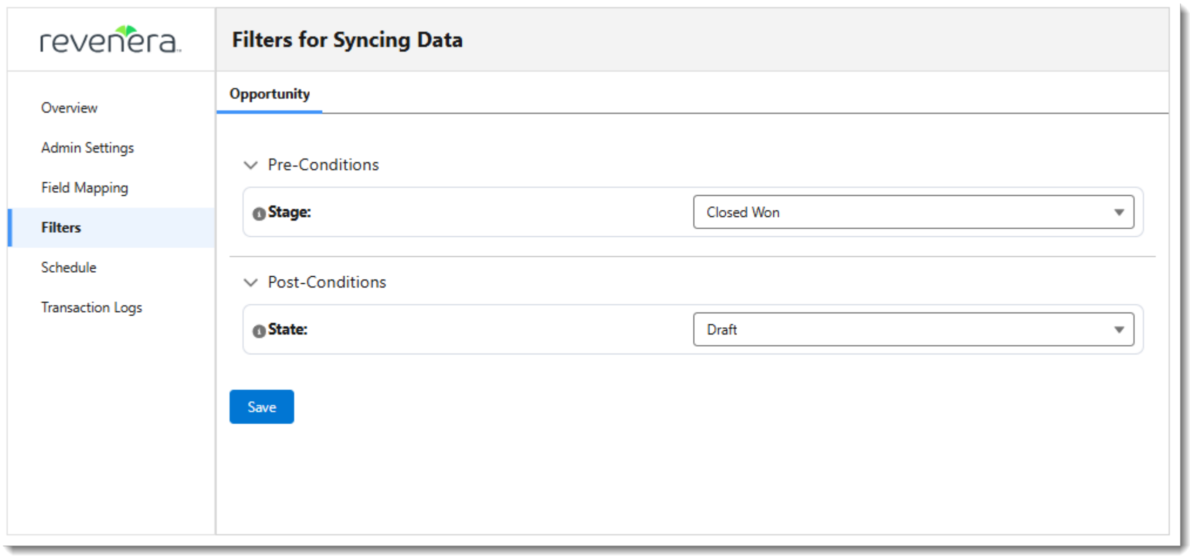



**Figure 3-1:** The **Filters** panel in the Salesforce Connector.

***Note •*** *The value set under **Post-Condition** is overridden if the **Entitlement State** is specified on the individual opportunity. For more information, see Controlling the Entitlement State Post Sync.*

# Controlling the Entitlement State Post Sync

When an opportunity is synced from Salesforce to FlexNet Operations—where it becomes an entitlement—it is assigned an entitlement state. You can control this status in two ways:

- **At the opportunity level**
    - In the **FlexNet Operations Connector Information** section of the opportunity, set the **Entitlement State** field.
    - Default: Not set.
    - If a value is specified here, it overrides the setting defined in the Salesforce Connector's **Filters** tab.

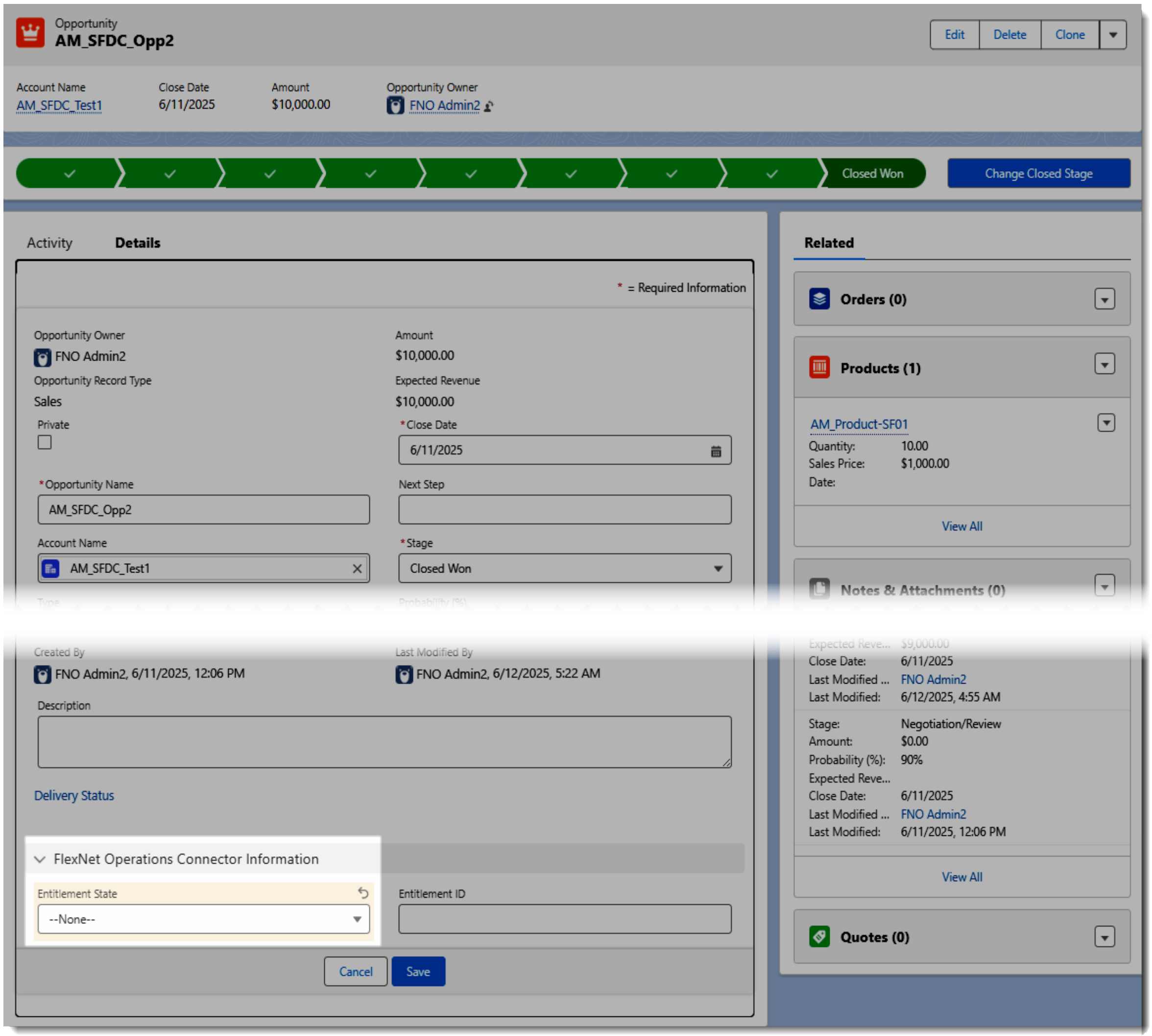



**Figure 3-2:** The **Entitlement State** field on the Opportunity page sets the entitlement status (Draft or Deployed) in FlexNet Operations after sync.

- **At the Connector level**
    - In the Salesforce Connector, on the **Filters** tab, set the **Post-Condition** field.
    - Default: Draft.
    - This setting applies to all opportunities unless overridden by the **Entitlement State** field on an individual opportunity.

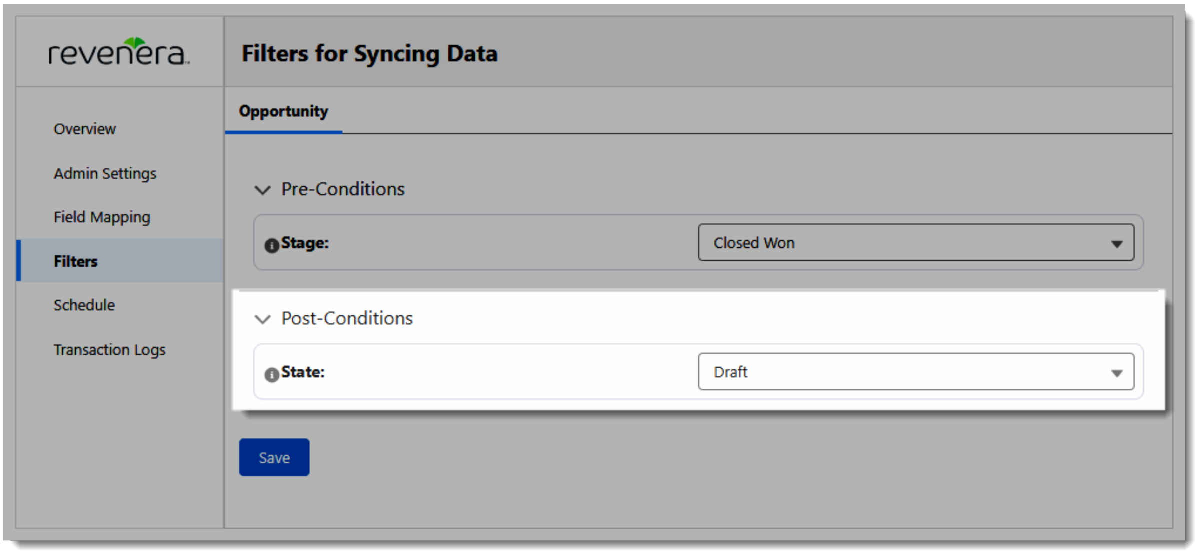



**Figure 3-3:** The **Entitlement State** field on the Opportunity page sets the entitlement status (Draft or Deployed) in FlexNet Operations after sync.

## How to Use These Settings

If you want all synced opportunities to have the same entitlement state (e.g., Draft or Deployed), set the desired value in the **Post-Condition** field in the Salesforce Connector. Since the **Entitlement State** field on individual opportunities is not set by default, the post-condition value will be assigned to all entitlements synced to FlexNet Operations.

If you need to assign a specific entitlement state to a particular opportunity, set the **Entitlement State** field directly on that opportunity. This ensures it takes precedence over the global setting.

## Resulting Entitlement State

The final entitlement state in FlexNet Operations depends on the combination of:

- The **Entitlement State** set on the opportunity (if any), and
- The **Post-Condition** value set in the Salesforce Connector.

The following table outlines the resulting status based on these combinations.

**Table 3-2 ▪** Resulting entitlement status based on opportunity and Connector settings

| Entitlement State in Opportunity | Post-Condition Value on Filters Tab | Resulting Entitlement State in FlexNet Operations |
|---|---|---|
| Not set | Draft | **Draft** |
| Not set | Deployed | **Deployed** |
| Deployed | Draft | **Deployed** |
| Deployed | Deployed | **Deployed** |

**Table 3-2 ▪** Resulting entitlement status based on opportunity and Connector settings

| Entitlement State in Opportunity | Post-Condition Value on Filters Tab | Resulting Entitlement State in FlexNet Operations |
|---|---|---|
| Draft | Draft | **Draft** |
| Draft | Deployed | **Draft** |

# Providing Opportunity Product Information in Salesforce

Note the following when filling out the fields in the **FlexNet Operations Salesforce Connector** section for an opportunity product in Salesforce:

- **Start Date Option**
    - If you select **Specify Value Now**, you must also provide a **Start Date**.
    - If you select **Use First Activation Date** or **Use Each Activation Date**, do not set a **Start Date**.
- **Expiration Date Option**
    - If you select **Specify Duration**, you must define both an **Expiration Term** and an **Expiration Term Option**. Do not set an **Expiration Date**.
    - If you select **Permanent**, do not set an **Expiration Date**, an **Expiration Term** or an **Expiration Term Option**.
    - If you select **Specify Expiration Date**, you must enter a specific **Expiration Date**. Do not set an **Expiration Term** or an **Expiration Term Option**.
- **Expiration Term** and **Expiration Term Option**
    - Only set this if you selected **Specify Duration** as **Expiration Date Option**.
- **Remaining Quantity** and **Activation ID**
    - These fields are populated automatically, by data fed back from FlexNet Operations.

# Information for Partner Accounts

In FlexNet Operations, accounts can be classified as either Customer (CUSTOMER) or Channel Partner (CHANNEL_PARTNER).

To create an account in FlexNet Operations:

- Select **Accounts & Users** > **Create Account** for a Customer account.
- Select **Accounts & Users** > **Create Partner Account** for a Channel Partner account.

To ensure that accounts synced from Salesforce to FlexNet Operations are assigned the correct type—Customer or Channel Partner—navigate to the **FlexNet Operations Connector Information** section during account creation and select the appropriate value from the **Account Type** dropdown.

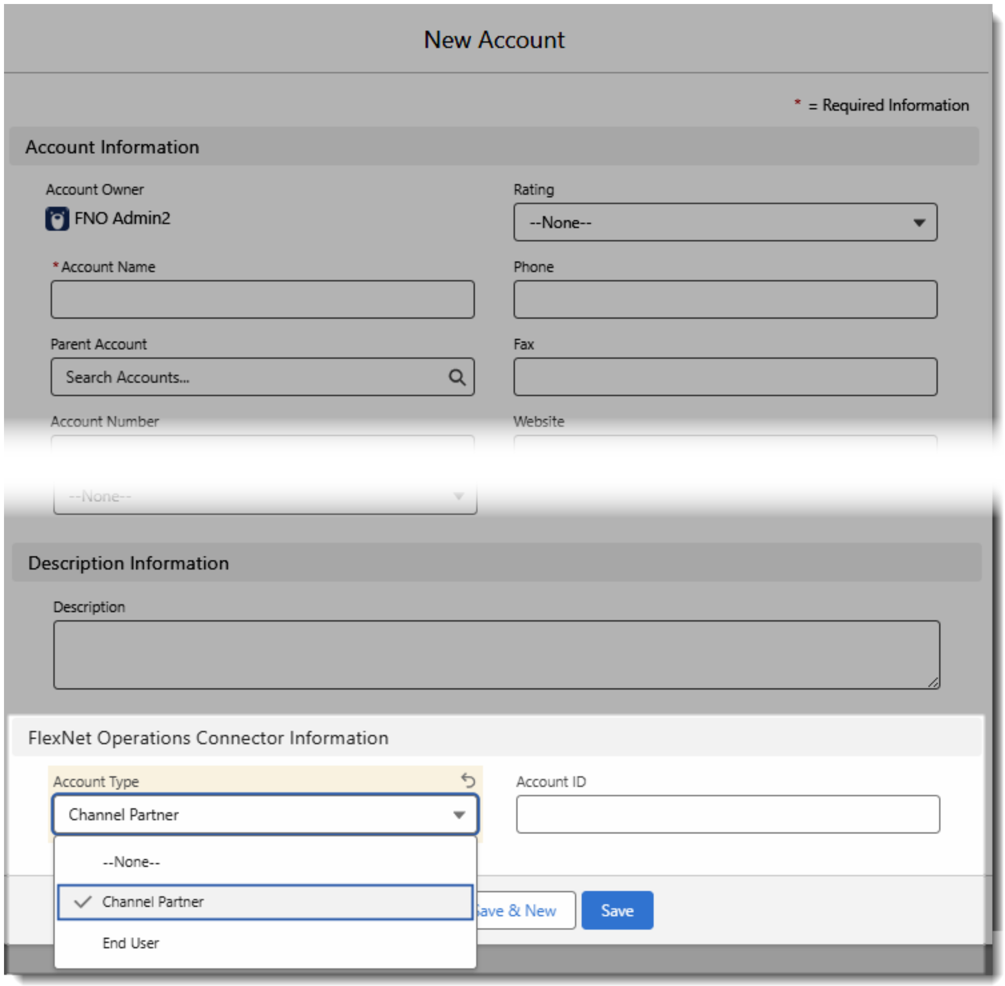



**Figure 3-4:** The **New Account** dialog, where you can select either **Channel Partner** or **End User** as account type (cropped view).

# Example Flow for Syncing an Opportunity/ Entitlement From Salesforce to FlexNet Operations

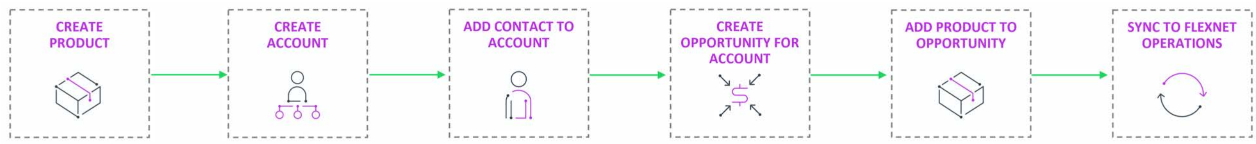
This section guides you through the process of syncing an opportunity from Salesforce to FlexNet Operations. The steps provided illustrate the data flow and can also be used to validate the field mappings between Salesforce and FlexNet Operations before configuring a scheduled sync.

The workflow for creating and syncing a sales order from Salesforce to FlexNet Operations using a one-off sync involves the following steps:

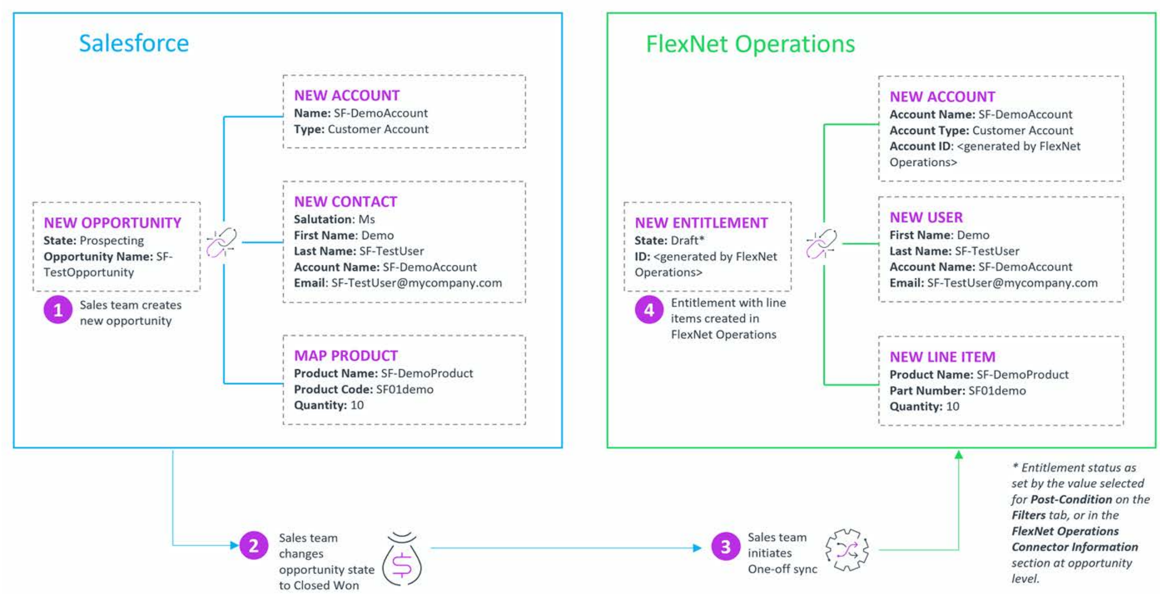
1. Creating a Test Product
2. Creating a Test Account in Salesforce
3. Adding a Test Contact to the Test Account in Salesforce

4. Creating a Test Opportunity for the Test Account in Salesforce
5. Adding a Test Product to Your Test Opportunity in Salesforce
6. Initiating a One-Off Sync
7. Verifying the Results of the One-Off Sync

This diagram outlines the steps that will be covered in this example:




This flowchart visually outlines which actions occur on each platform in the sales order creation and synchronization process between Salesforce and FlexNet Operations.




# Creating a Test Product

To perform the steps in this exercise section, a test product must already exist in FlexNet Operations and in Salesforce. The product in FlexNet Operations must be uniquely mapped to its corresponding product in Salesforce. This requires the part number in FlexNet Operations to exactly match the product code in Salesforce.

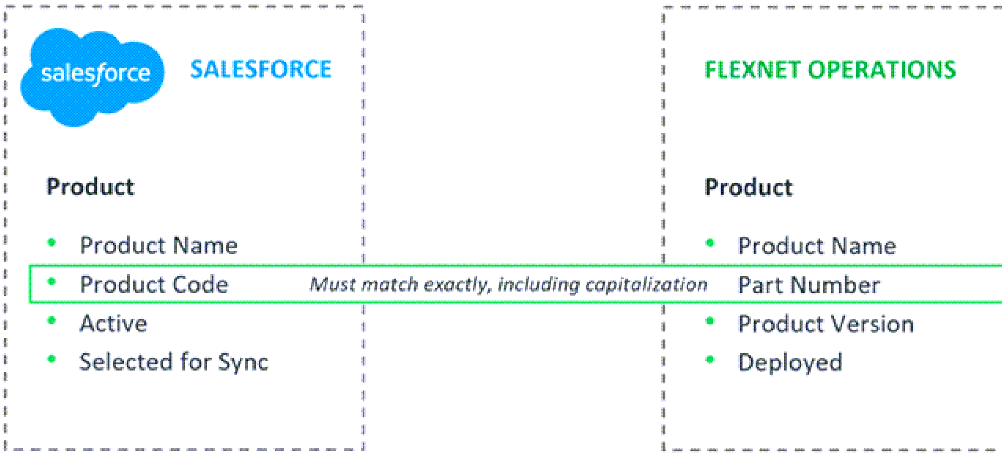



**Figure 3-5:** The part number in FlexNet Operations must exactly match the product code in Salesforce, else the product will fail to sync.

Perform the steps in the following sections, Creating a Test Product in FlexNet Operations and Replicating the Test Product in Salesforce, to create a test product in FlexNet Operations and Salesforce.

# Creating a Test Product in FlexNet Operations

Due to the complexity and level of detail of product information stored in FlexNet Operations, products that are managed in Salesforce and downstream in FlexNet Operations must be created manually in FlexNet Operations. Information such as licensing technology, license generator, product version, etc. is not tracked in Salesforce.

***Note*** ▪ *This example assumes that the following are available in FlexNet Operations for testing purposes:*

- *Feature*
- *Deployed license model*
- *Part number. This exercise uses the part number **SF01demo**, but you can use any part number.*

***Task*** ***To create a test product in FlexNet Operations***

1. In the Producer Portal, click **Products > Products**. This opens the **Package Products** page.
2. Click the **Add new Product** button. This opens the **Package Products | Create A Product** page.
3. On the **Package Products | Create A Product** page, provide the following information:
    - **Product Name**—Enter a product name, for example, **SF-DemoProduct**.
    - **Version**—Enter a version for this test, for example, **1.0**.

    ***Note*** ▪ *The version in combination with the product name uniquely identifies the product in FlexNet Operations.*

- **Licensing Technology**—Accept the default licensing technology.

*Tip* ▪ *For information about the remainder of the fields on this page, see Creating a Product in the FlexNet Operations User Guide.*

4. On the **Package Products | Create A Product** page, click **Add Features** and select features.

   *Tip* ▪ *For information about selecting features, see Adding Features or Feature Bundles to a Product in the FlexNet Operations User Guide.*

5. Scroll down and click **Next**. This opens the **Package Products | Link License Models To Product** page.

6. On the **Package Products | Link License Models To Product** page, click **Link license models** and select a license model for the product. Ensure that the license model is deployed. (You can verify under **Administer > License Models** whether the license model is deployed.)

   *Tip* ▪ *For information about linking license models, see Linking License Models to a Product in the FlexNet Operations User Guide.*

7. Scroll down and click **Next**. This opens the **Package Products | Map Part Numbers To Product** page.

8. On the **Package Products | Map Part Numbers To Product** page, click **Map to part numbers** and select a part number. For this exercise, we're using the part number **SF01demo**. (You can create a part number by clicking **Products > Part Numbers > Add**.)

   *Tip* ▪ *For information about mapping a part number, see Mapping a Product to a Part Number in the FlexNet Operations User Guide.*

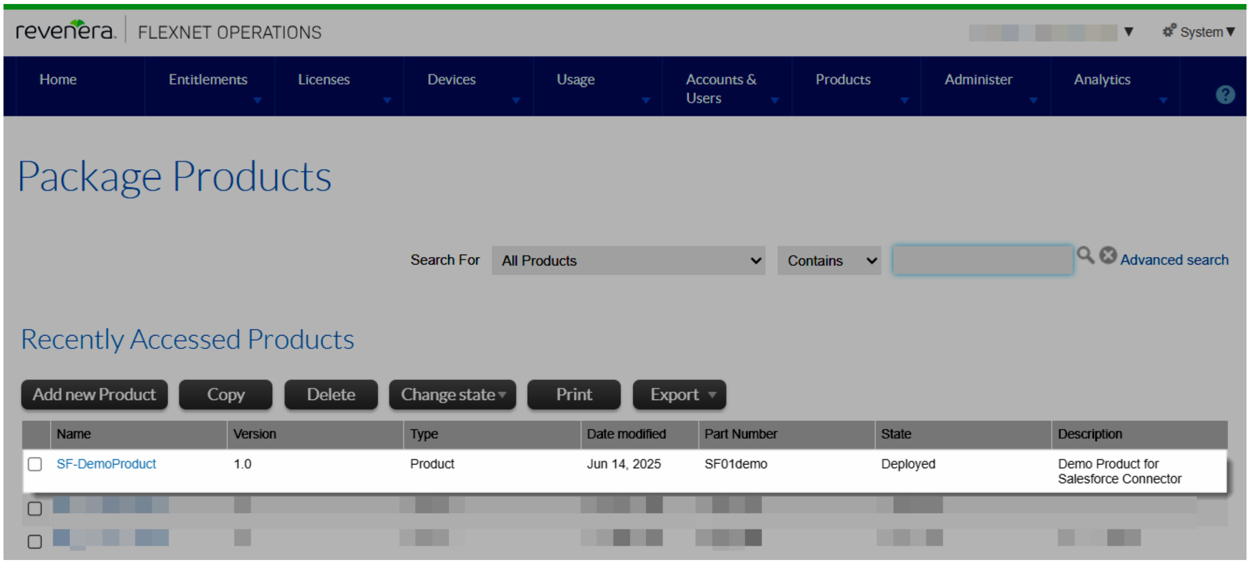
9. Scroll down and click **Save**.

10. Deploy your product: Click **Products > Products**, select the checkbox for the product **SF-DemoProduct** you just created, and click **Change state > Deploy**. In the prompt, confirm that you want to deploy the product.

11. Scroll down and click **Deploy**. You see a blue banner confirming that the product has been deployed.

    *Tip* ▪ *For information about deploying a product, see Deploying a Product in the FlexNet Operations User Guide.*

The list on the **Products** page should now list a product that looks similar to the following:




# Replicating the Test Product in Salesforce

This topic describes how to create a test product in Salesforce. The product you create must match the product you created in the previous topic, Creating a Test Product in FlexNet Operations, specifically:

- The product code in Salesforce exactly matches the part number in FlexNet Operations, **SF01demo**.

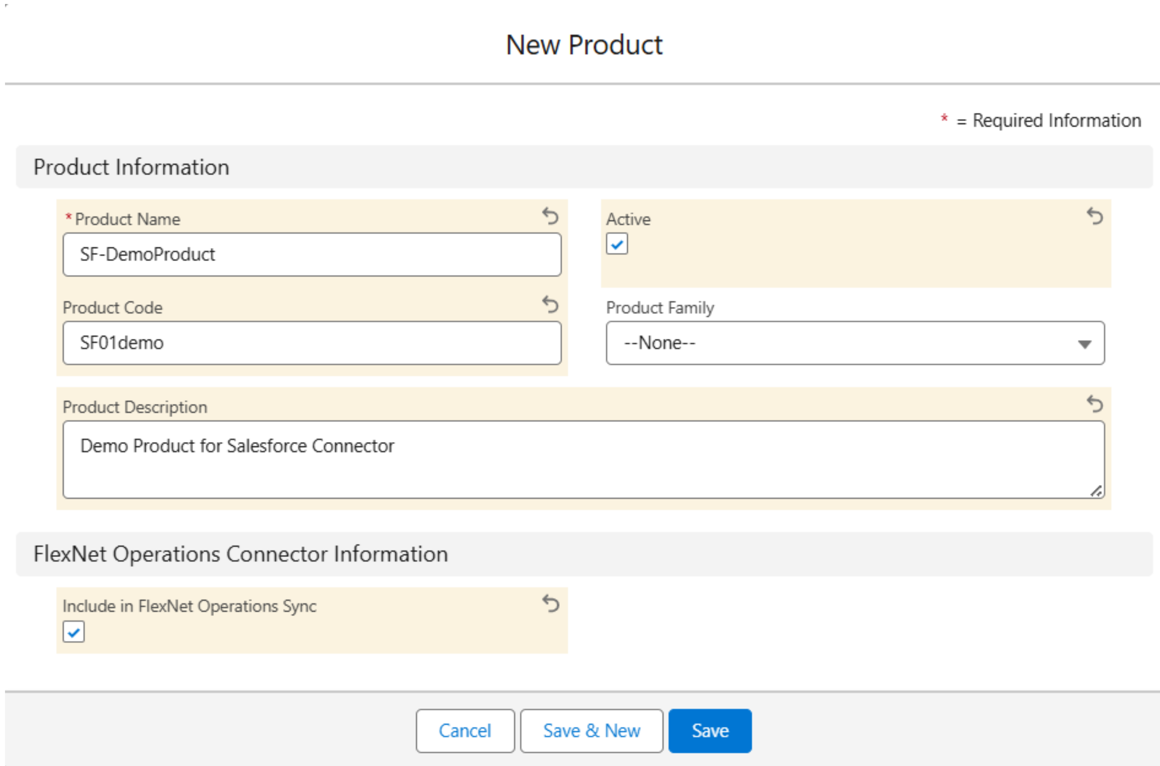
In addition, the product in Salesforce must:

- Have a status of Active.
- Be selected for sync with FlexNet Operations.

***Task*** ***To create a test product in Salesforce***

1. Click the App Launcher in the top left corner and type **`Products`**, then select **Products** from the list of items. Salesforce will open the **Products** tab.
2. Click **New**.
3. In the **New Product** dialog, for **Product Name**, enter a name for the product. For the purposes of this exercise, enter **SF-DemoProduct**.
4. In the **Product Code** field, enter the string that you used as part number when you created the product in FlexNet Operations. For the purposes of this exercise, we're using **SF01demo**.
5. Select the **Active** check box.
6. Select the **Include in FlexNet Operations Sync** check box.

   The new product should look similar to the following:




7. Click **Save**. This opens the **Product** detail page.
8. Click the **Related** tab.
9. In the **Price Books** section, click **Add Standard Price**.
10. In the **New Price Book Entry** dialog, add a list price and click **Save**.

# Creating a Test Account in Salesforce

In this topic, you create a test account.

***Task*** ***To create a test account in Salesforce***

1. Click the App Launcher in the top left corner and type `Accounts`, then select **Accounts** from the list of items. Salesforce will open the **Accounts** tab.
2. Click **New**.
3. Enter a name for the account, for example, **SF-DemoAccount**. Accept the default settings for all other fields.

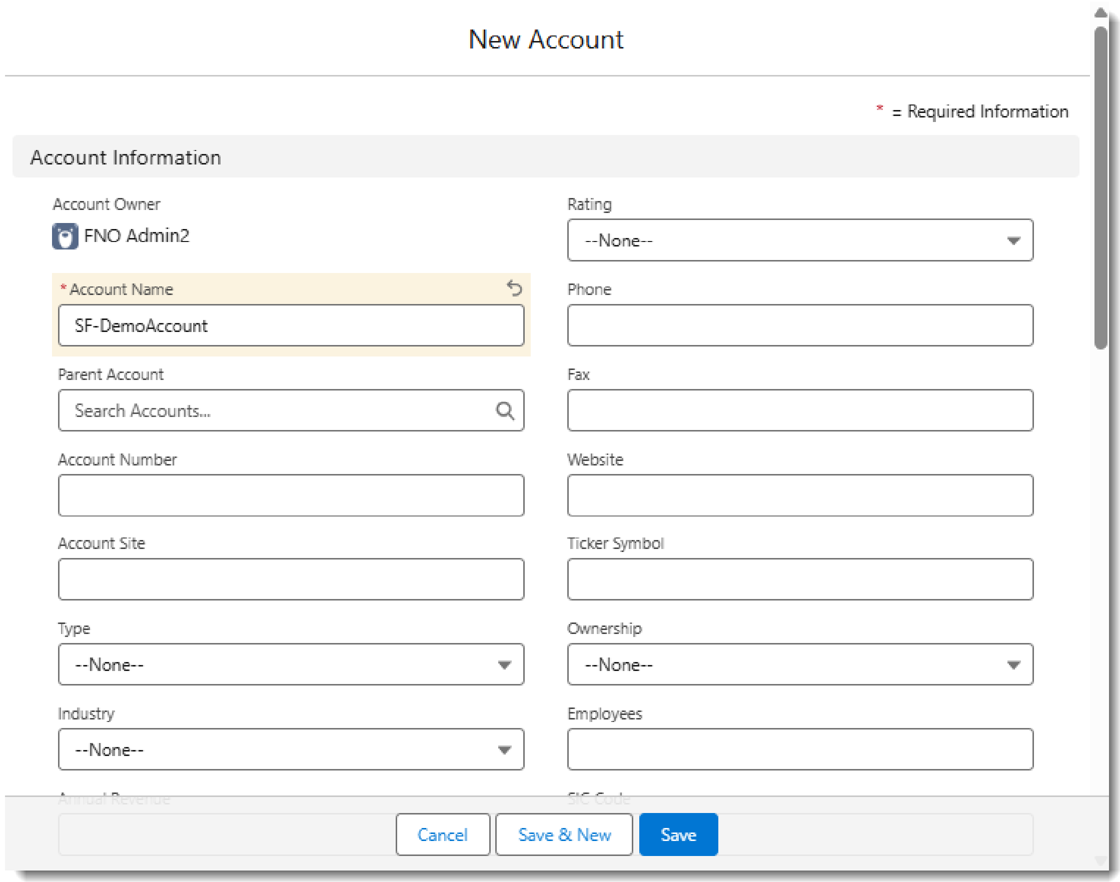



**Figure 3-6:** An example of the **New Account** dialog in Salesforce, where an account named **SF-DemoAccount** is created.

4. Click **Save**.

Do not close the page for the test account you just created. Continue with the next step, Adding a Test Contact to the Test Account in Salesforce.

# Adding a Test Contact to the Test Account in Salesforce

The steps outlined in this section build upon those covered in the previous topic, Creating a Test Account in Salesforce.

***Note*** ▪ *In FlexNet Operations, the equivalent of a contact is a user.*

***Task*** ***To create a test contact in Salesforce***

1. On the page of the test account that you just created, locate the **Contacts** section and click **New**.
2. Fill out the following fields:

- **Salutation**—Select a salutation.
- **First Name**—Enter a first name, for example, **Demo**.
- **Last Name**—Enter a last name, for example, **SF-TestUser**.
- **Account Name**—This field should be prepopulated with the name of the account you created in Creating a Test Account in Salesforce. If it isn't, manually enter the name of the test account, **SF-DemoAccount**.
- **Email**—Type an email address. This can be a ficticious address.

***Note ▪** Filling out the fields listed above is mandatory. If information for one of the fields is missing, the sync with FlexNet Operations will fail.*

3. Accept the default settings for all other fields.

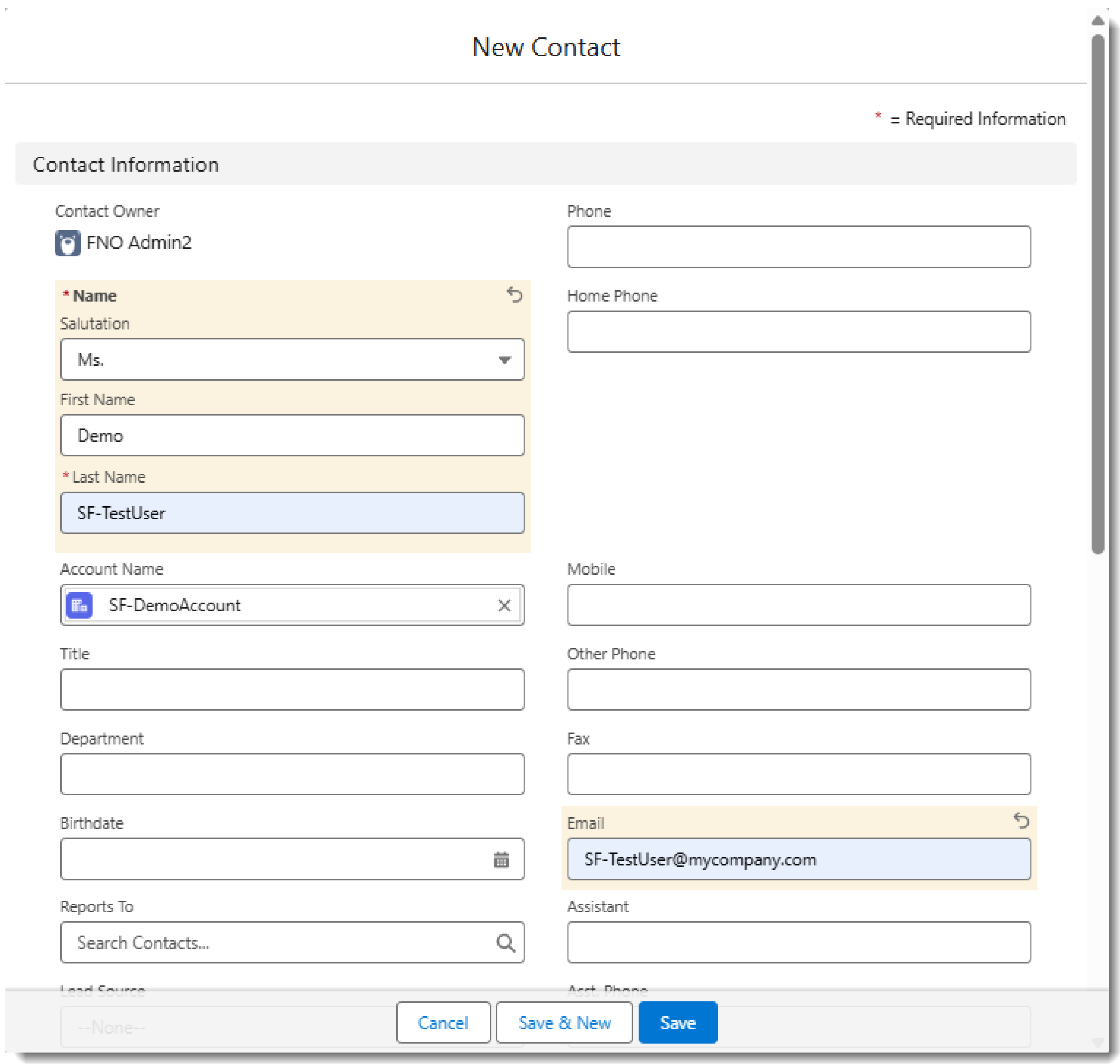



**Figure 3-7:** An example of the **New Contact** dialog in Salesforce, where a contact named **SF-TestUser** is created.

4. Click **Save**.

Do not close the page for the test contact you just created. Continue with the next step, Creating a Test Opportunity for the Test Account in Salesforce.

# Creating a Test Opportunity for the Test Account in Salesforce

The steps outlined in this section build upon those covered in the previous topic, Adding a Test Contact to the Test Account in Salesforce.

***Note*** *▪ In FlexNet Operations, the equivalent of an opportunity is an entitlement.*

***Task*** ***To create a test opportunity in Salesforce***

1. On the page of the test account that you just created, locate the **Opportunities** section and click **New**.
2. In the **New Opportunity** window, select the record type **Sales** and click **Next**.
3. In the **New Opportunity: Sales** window, in the **Opportunity Information** section, fill out the following fields:
    - **Opportunity Name**—Enter a name, for example, **SF-TestOpportunity**.
    - **Account Name**—Enter name of the account you created in Creating a Test Account in Salesforce (**SF-DemoAccount**).

      ***Note*** *▪ In scenarios where a channel partner is involved in selling products, this field should reflect the channel partner account.*

    - **Close Date**—Enter a date that is a few days in the future.
    - **Stage**—From the dropdown list, select **Prospecting**.

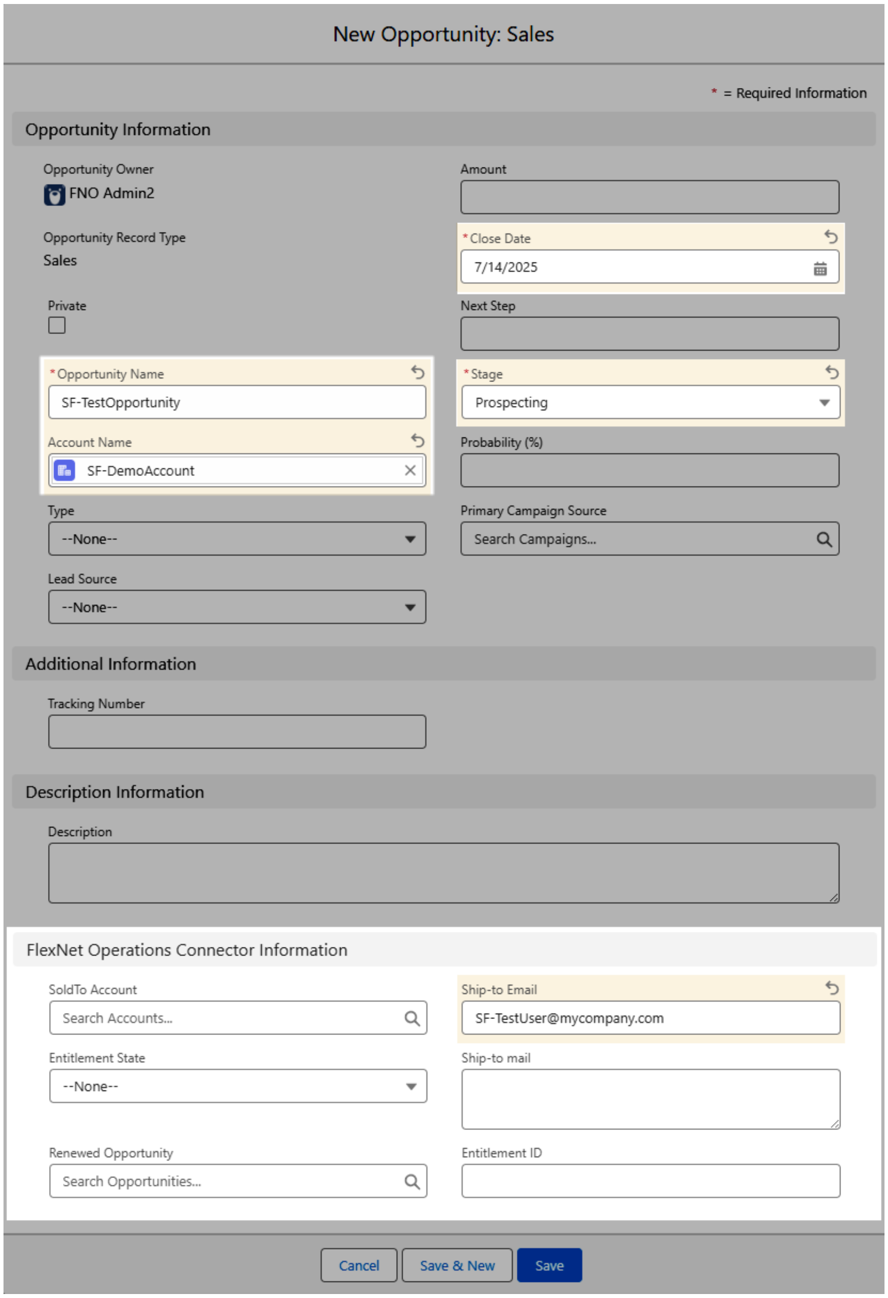



**Figure 3-8:** An example of the **New Opportunity** dialog in Salesforce, where an opportunity named **SF-TestOpportunity** is created.

4. Accept the default settings for all other fields.

5. Click **Save**.

***Note*** ▪ *None of the fields in the **FlexNet Operations Connector Information** section are mandatory or required for this test scenario; you can leave them blank. The following is for your information only:*

- ***SoldTo Account****—This field is used in channel partner scenarios to identify the end customer.*

- ***Ship-to Email****—This field is used to specify the email address of the contact who will receive the entitlement. You could enter the email you created in Adding a Test Contact to the Test Account in Salesforce; however, this is not mandatory.*
- ***Entitlement State****—This field is used to set the state of the entitlement once the opportunity has been synced to FlexNet Operations. See also Controlling the Entitlement State Post Sync.*
- ***Ship-to mail****—This field is used to specify the mailing address of the contact who will receive the entitlement.*
- ***Renewed Opportunity****—If an opportunity has been renewed, the original opportunity name can be specified here.*
- ***Entitlement ID****—This field is populated automatically, by data fed back from FlexNet Operations.*

Salesforce closes the opportunity window and displays the page of the account that you created in the previous step. Continue with the next step, Adding a Test Product to Your Test Opportunity in Salesforce.

# Adding a Test Product to Your Test Opportunity in Salesforce

The steps outlined in this section build on those from the previous sections. It is assumed that:

- You have already created an opportunity called **SF-TestOpportunity** and are currently on the **Related** tab of the account page.
- It is assumed that you created a test product named **SF-DemoProduct** in FlexNet Operations and Salesforce, as described in section Creating a Test Product. If you didn't do this, you can use any product for testing, as long as it adheres to the requirements set out in Preparing Products for Sync.

This topic describes how to add the test product to your opportunity and change the opportunity's state to Closed Won.

***Task*** ***To add a test product to the test opportunity in Salesforce***

1. On the account page, under **Opportunities**, click the hyperlinked name of the test opportunity to navigate to it.
2. Locate the **Products** section on the right side. Click the down arrow and select **Add Products**.

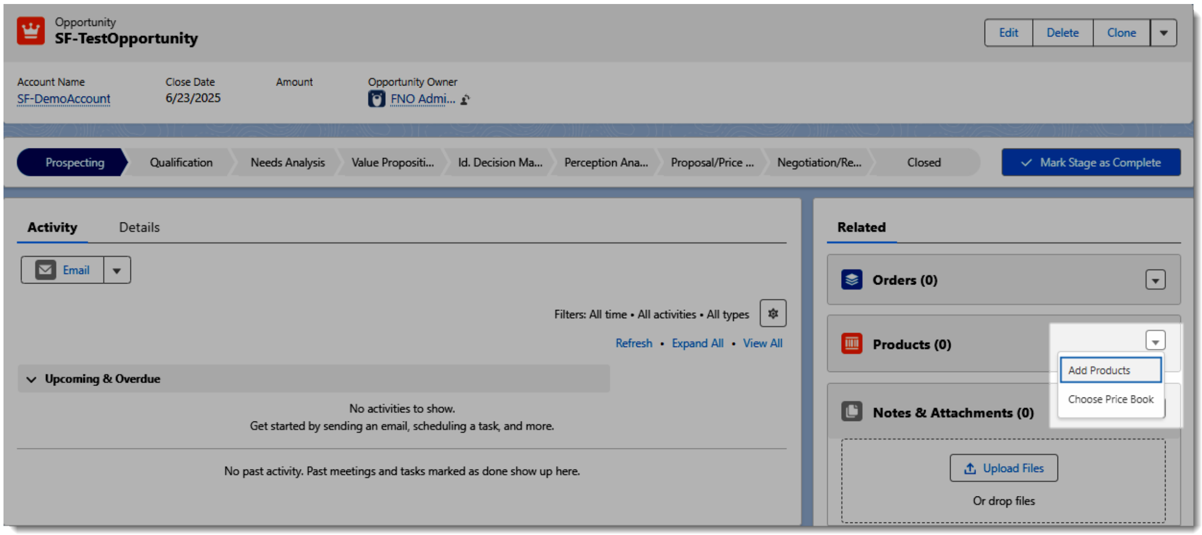
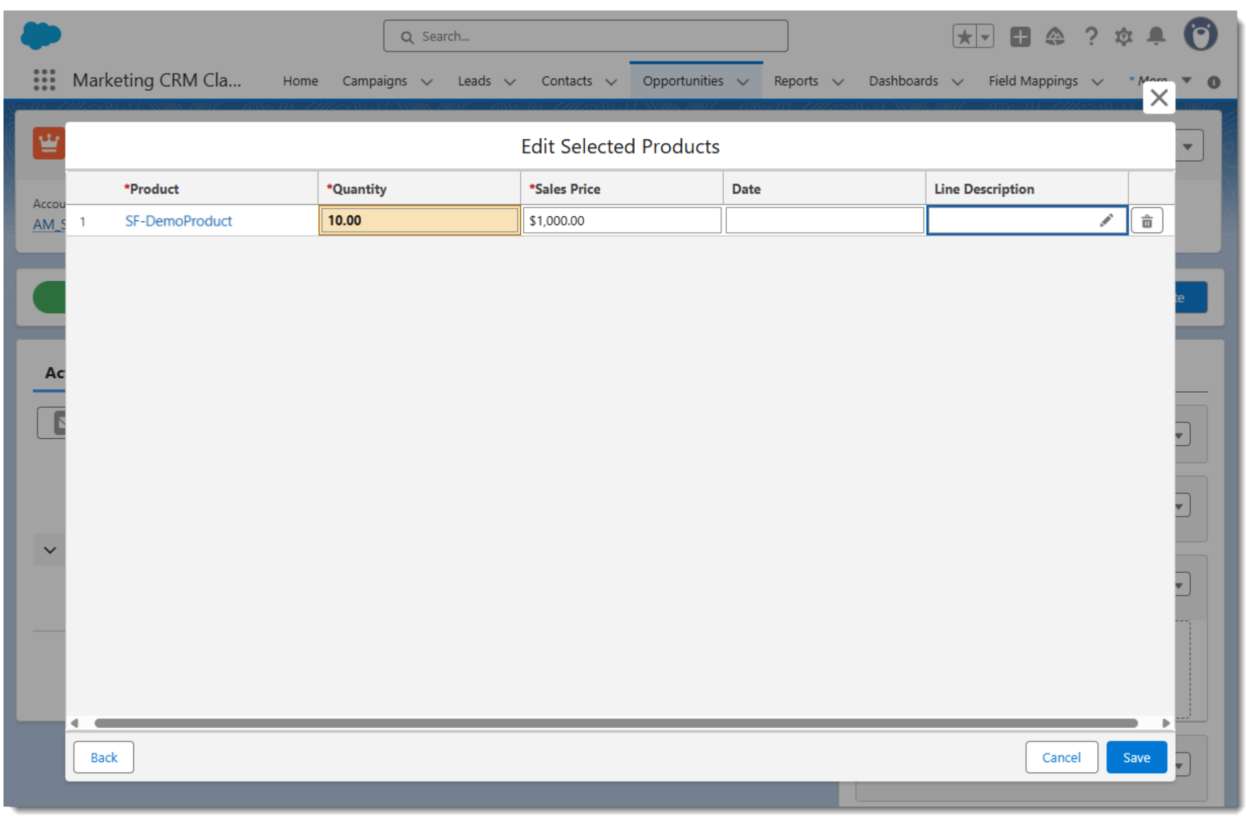



**Figure 3-9:** Use the **Add Products** button in the **Products** section to add a product to your opportunity.

3. A dialog prompts you to select a price book. Select a price book and click **Save**.
4. The **Add Products** dialog is displayed. Select the checkbox for the test product that you prepared earlier, and click **Next**.
5. In the **Edit Selected Products** window, enter a quantity and click **Save**.




Salesforce returns to the Opportunity page, where the test product is associated with your test opportunity.

6. On the **Opportunity** page, under **Products**, click the hyperlinked name of your test product.
7. Salesforce opens the **Details** tab for the product, which is now a line item of your test opportunity. On the tab, scroll down to the **FlexNet Operations Connector Information** section.
8. In the **FlexNet Operations Connector Information** section, provide a start and end date option. For this exercise, select the following:
    - **Start Date Option**—Select **Use First Activation Date**.
    - **Start Date**—Leave blank.
    - **Expiration Date Option**—Select **Specify Duration**.
    - **Expiration Date**—Leave blank.
    - **Expiration Term**—Enter **1**.
    - **Expiration Term Option**—Select **Months**.
    - **Remaining Quantity** and **Activation ID**—Do not enter anything. These fields are populated automatically after the sync with FlexNet Operations.

***Tip*** *▪ For more information about the options listed above, see Providing Opportunity Product Information in Salesforce.*

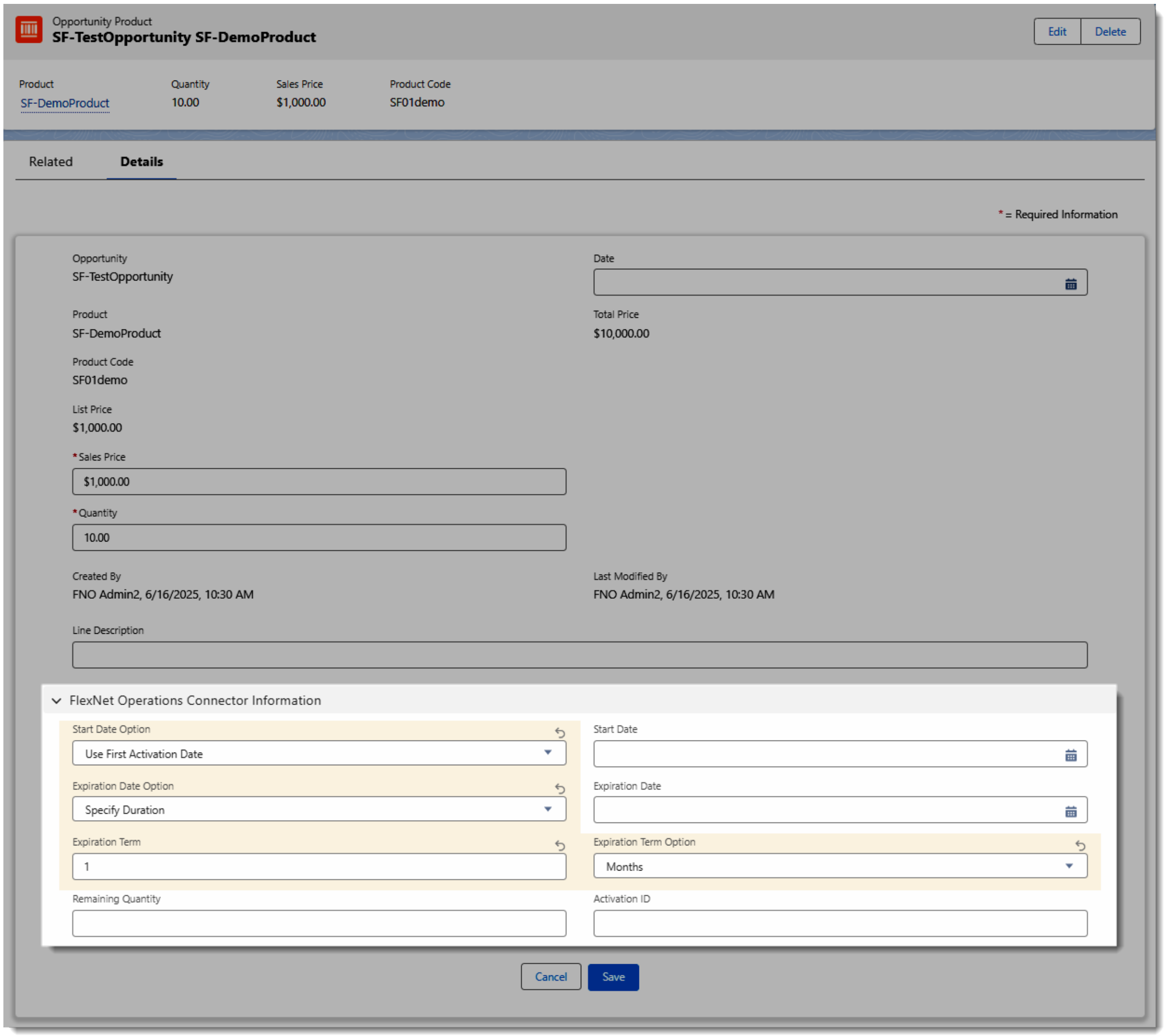



**Figure 3-10:** Example of **FlexNet Operations Connector Information** for a test opportunity line item.

9. Click **Save** to save the changes made to your opportunity line item.
10. In the same dialog, scroll up and click the hyperlinked opportunity name to switch to the **Opportunity** page.
11. On the **Opportunity** page, in the Sales Path, click the last stage of the path, **Closed**.
12. Click the **Select Closed Stage** button to change the opportunity status to **Closed Won**. Click **Save**.

***Tip*** *▪ On the opportunity page on the* ***Details*** *tab, scroll down to the* ***FlexNet Operations Connector Information*** *section and make a note of the* ***Entitlement ID****. You can use this after the sync to identify the entitlement in FlexNet Operations.*

Now that the opportunity is closed, you can sync it with FlexNet Operations. Continue with the steps in the next section, Initiating a One-Off Sync.

# Initiating a One-Off Sync

***Note*** ▪ *The steps outlined in this section assume that you performed all the steps as listed in Example Flow for Syncing an Opportunity/Entitlement From Salesforce to FlexNet Operations. They will therefore use the same names for the test account, contact, etc.*

Now that the test opportunity is in the Closed Won stage, you can sync it with FlexNet Operations.

For testing purposes, you manually trigger a sync by clicking the **Sync with FlexNet Operations** button on the relevant **Account** page. This action syncs data only for the specific account where the button is used. Synced data includes account information, contacts, opportunities, and opportunity line items. In contrast, a scheduled sync will sync data for **all** accounts.

The sync triggered by the **Sync with FlexNet Operations** button is unidirectional, with data flowing only in one direction: from Salesforce to FlexNet Operations.

***Note*** ▪ *For information on configuring a regular syncing schedule, see Scheduling a Regular Sync.*

***Task*** ***To trigger a one-off sync for testing purposes***

1. In Salesforce, navigate to the page of the account called **SF-DemoAccount** to sync data.
2. On the **SF-DemoAccount** page, click the **Sync with FlexNet Operations** button.

   If the **Sync with FlexNet Operations** button is not displayed, click the down arrow button in the top right corner to select it.

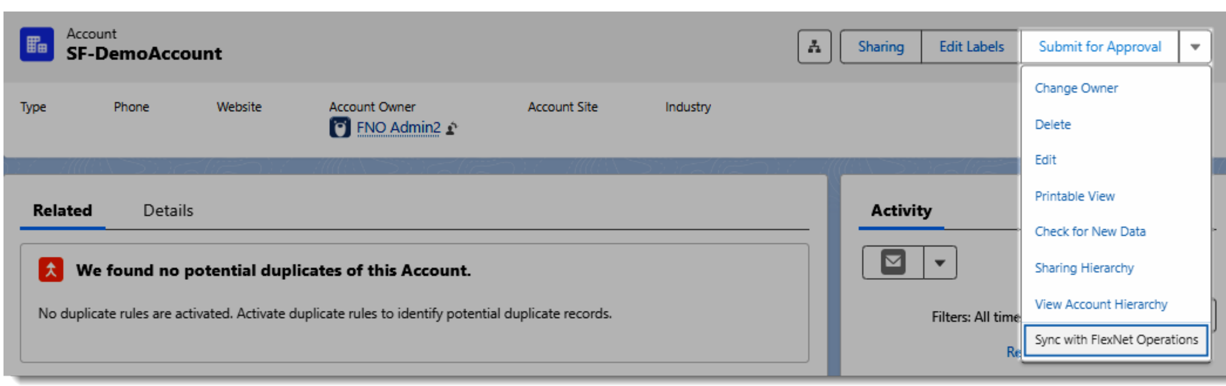



**Figure 3-11:** The **Sync with FlexNet Operations** button is available by clicking the down arrow.

A green banner will indicate that the syncing has started.

# Verifying the Results of the One-Off Sync

After you triggered a one-off sync as discussed in the previous section, Initiating a One-Off Sync, you need to verify that the sales order information linked to the account from which you triggered the sync has been transferred to FlexNet Operations.

***Task*** ***To verify that the sales order data has been synced from Salesforce to FlexNet Operations***

1. Log in to the FlexNet Operations Producer Portal.
2. **Verify that the account called SF-DemoAccount has been created:**
   a. Click **Accounts & Users** > **All Accounts**.
   b. On the **Manage Accounts** page, on the **Customers** tab, verify that the **SF-DemoAccount** account has been synced to FlexNet Operations.

   ***Tip*** *▪ In the accounts table, click the **Created On** column header to sort accounts by creation date. If you created the **SF-DemoAccount** today, it should appear at the top of the list. Alternatively, use the search function above the table to quickly locate the account.*

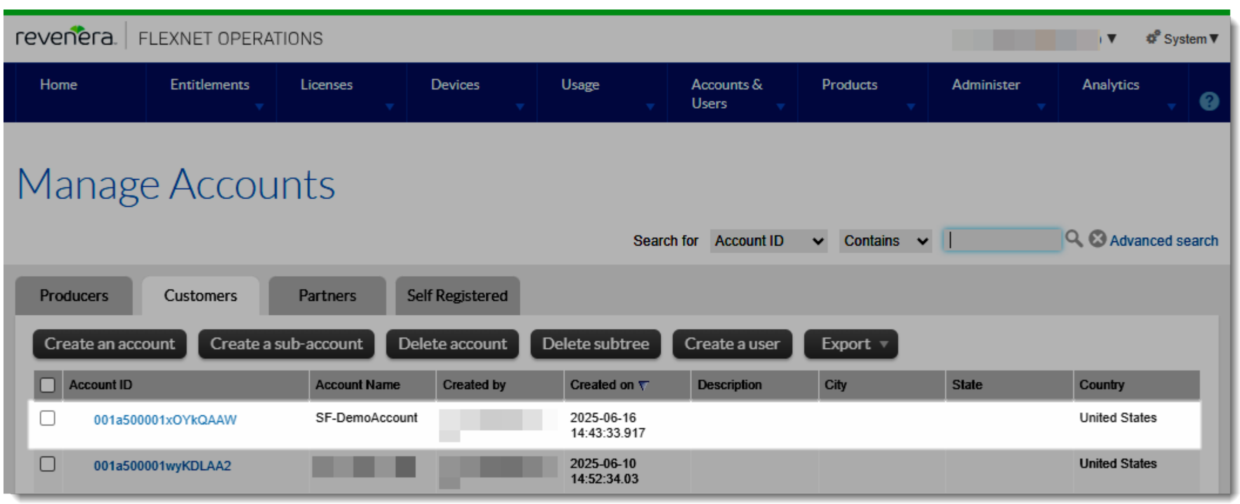



**Figure 3-12:** Verify in the Producer Portal that the account named **SF-DemoAccount** has been created.

3. **Verify that the user called testUser is linked to the account:**
   a. On the **Manage Accounts** page, click the hyperlinked account ID for **SF-DemoAccount** to see the account details. The **Create An Account** page is displayed.
   b. In the table on the **Create An Account** page, locate the user called **Demo SF-TestUser**.

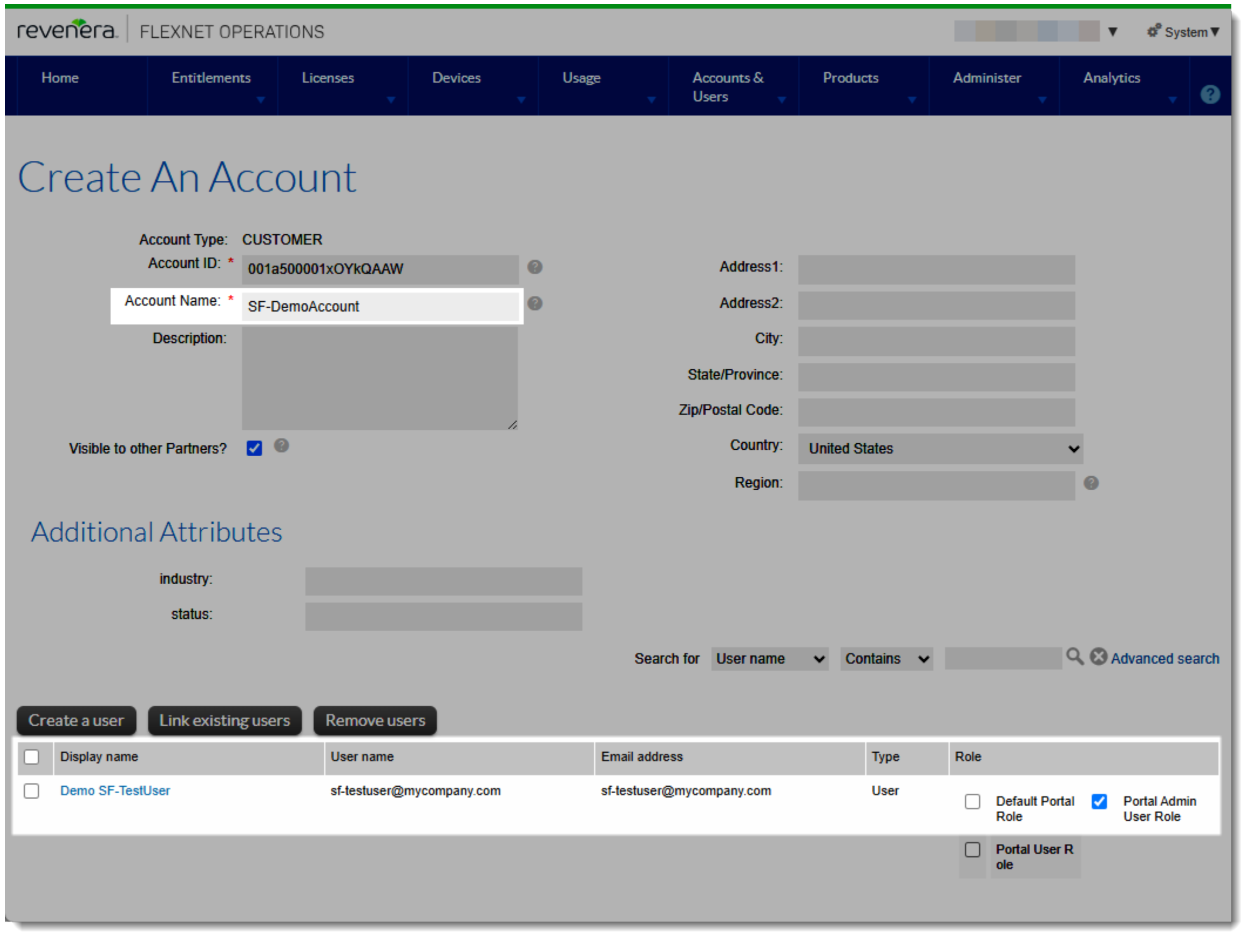



**Figure 3-13:** Verify in the Producer Portal that the user named **Demo SF-TestUser** has been created.

***Note** ▪ When a contact is created in Salesforce and subsequently synced to FlexNet Operations, the user is automatically assigned the Portal Admin User role.*

4. **Verify that the entitlement TestOpportunity has been created:**

    a. Click **Entitlements** > **List Entitlements by Order** to open the list of entitlements.

    b. In the list of entitlements, locate the entitlement.

    ***Tip** ▪ Use the search function to locate the entitlement. For example, search for the **Sold-to Account** name starting with **SF-DemoAccount**. Alternatively, if you made a note of the entitlement ID at the end of the task in Adding a Test Product to Your Test Opportunity in Salesforce, you can search for it instead.*

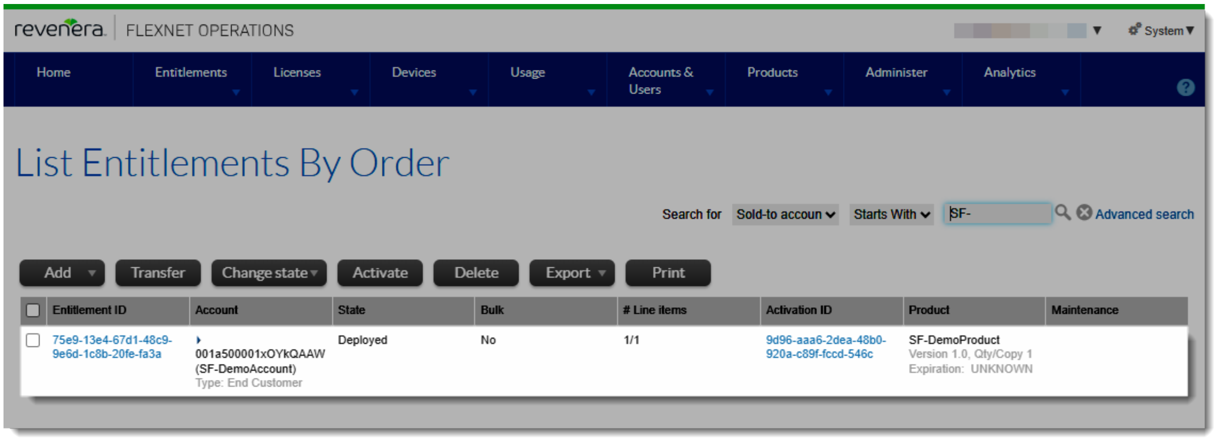
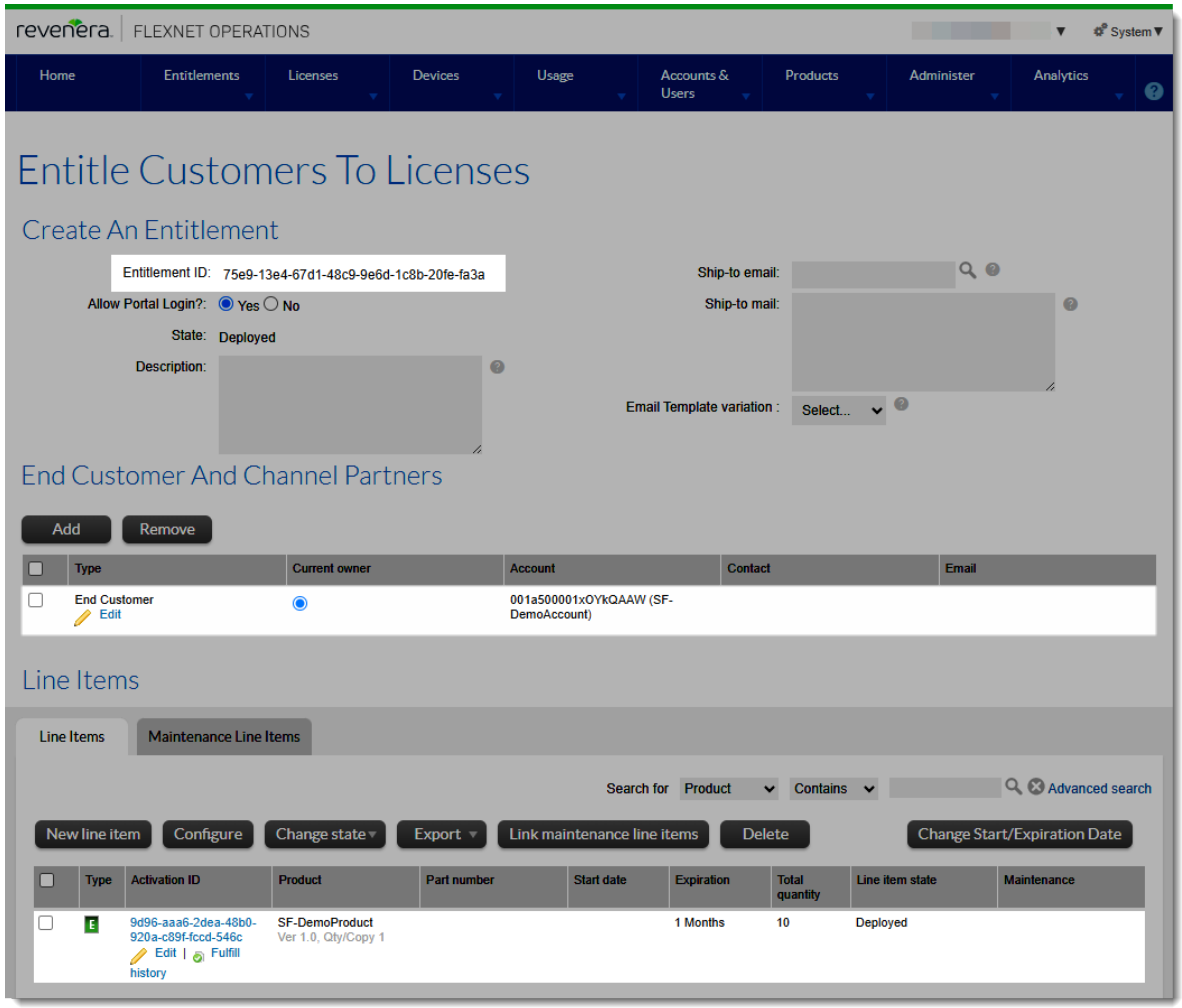



**Figure 3-14:** Verify in the Producer Portal that the entitlement for product **SF-DemoProduct** has been created.

c. In the list of entitlements, click the entitlement's hyperlinked ID to see the details. The **Entitle Customers To Licenses | Create An Entitlement** page is displayed.

d. Verify that the following fields have been populated:

- **Account**—The test account that you entered in Salesforce, **SF-DemoAccount**. (This field will be located under **End Customer and Channel Partners**.)
- **Contact**—The test contact that you entered in Salesforce, **SF-TestUser**. (This field will be located under **End Customer and Channel Partners**.)
- **Product and quantity**—The test product and its quantity that you associated with the test opportunity in Salesforce. (This information will be located under **Line Items**.)



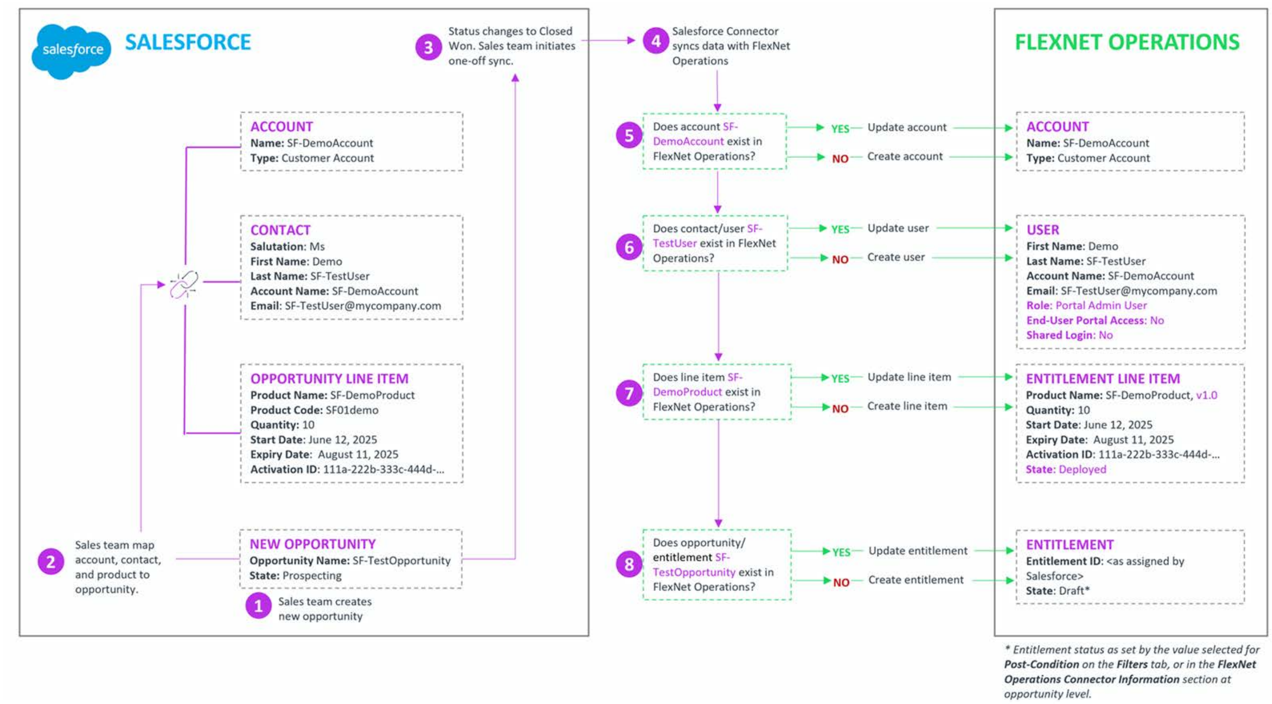

***Note** ▪ FlexNet Operations automatically assigns an activation ID to the product.*

5. Examine whether the information from Salesforce is replicated as expected in FlexNet Operations. If needed, make adjustments to the field mappings.

***Note** ▪ If a sync fails, you can find troubleshooting details in the logs available on the* ***Transaction Logs*** *page (see Tracking and Troubleshooting Transactions).*

# Sales Order Flow

This section illustrates the order in which the Salesforce Connector syncs data from Salesforce to FlexNet Operations. It uses the example scenario from the previous section, Example Flow for Syncing an Opportunity/ Entitlement From Salesforce to FlexNet Operations.


salesforce
SALESFORCE
3 Status changes to Closed Won. Sales team initiates one-off sync.
ACCOUNT
Name: SF-DemoAccount
Type: Customer Account
CONTACT
Salutation: Ms
First Name: Demo
Last Name: SF-TestUser
Account Name: SF-DemoAccount
Email: SF-TestUser@mycompany.com
OPPORTUNITY LINE ITEM
Product Name: SF-DemoProduct
Product Code: SF01demo
Quantity: 10
Start Date: June 12, 2025
Expiry Date: August 11, 2025
Activation ID: 111a-222b-333c-444d-...
2 Sales team map account, contact, and product to opportunity.
NEW OPPORTUNITY
Opportunity Name: SF-TestOpportunity
State: Prospecting
1 Sales team creates new opportunity
4 Salesforce Connector syncs data with FlexNet Operations
5 Does account SF-DemoAccount exist in FlexNet Operations?
YES Update account
NO Create account
6 Does contact/user SF-TestUser exist in FlexNet Operations?
YES Update user
NO Create user
7 Does line item SF-DemoProduct exist in FlexNet Operations?
YES Update line item
NO Create line item
8 Does opportunity/ entitlement SF-TestOpportunity exist in FlexNet Operations?
YES Update entitlement
NO Create entitlement
FLEXNET OPERATIONS
ACCOUNT
Name: SF-DemoAccount
Type: Customer Account
USER
First Name: Demo
Last Name: SF-TestUser
Account Name: SF-DemoAccount
Email: SF-TestUser@mycompany.com
Role: Portal Admin User
End-User Portal Access: No
Shared Login: No
ENTITLEMENT LINE ITEM
Product Name: SF-DemoProduct, v1.0
Quantity: 10
Start Date: June 12, 2025
Expiry Date: August 11, 2025
Activation ID: 111a-222b-333c-444d-...
State: Deployed
ENTITLEMENT
Entitlement ID: <as assigned by Salesforce>
State: Draft*
* Entitlement status as set by the value selected for Post-Condition on the Filters tab, or in the FlexNet Operations Connector Information section at opportunity level.