Salesforce Integration Quick Guide

Overview

Certain provides built-in integration with Salesforce.com if you have an account with Salesforce. This integration enables you to:

- Import Salesforce Contacts and Leads into Certain as profiles
- Update Certain profiles that were created via import from Salesforce
- Automatically generate activities in Salesforce when registration statuses change in Certain for imported Leads and Contacts
- Import Salesforce campaign members as registrations into a Certain event
- Update Salesforce campaign member statuses based on registration status changes in Certain

This document provides detailed information about enabling and configuring Salesforce integration in Certain. It also provides step-by-step instructions for mapping fields, importing Salesforce Leads and/or contacts into Certain and inviting them/registering them for events, importing Salesforce campaign members into a Certain event, and configuring registration status changes to generate activities and update campaign member statuses in Salesforce.

Contents

Enabling Salesforce Integration

To enable Salesforce integration for an account, follow these steps:

1. As a Certain Administrator, go to **Account Settings** > **Implementation** > **Products**.
2. Scroll down to the **Integration Module** section.
3. Select the **Salesforce Integration** option, and click **Save**.

Setting up your Salesforce Connection

With that Salesforce Integration option enabled, you can set up the details of the integration.

As a Certain Administrator, go to **Account Settings > Implementation > Salesforce**.

The **Salesforce Integration** page has three sections, as described below:

Connection Information

To configure a Salesforce connection for your Certain account:

Enter and **Save** the following information in the **Connection Information** section of the **Salesforce Integration** page:

- **Username** – your Salesforce username
- **Password** – your Salesforce password
- **Security Token** – your Salesforce security token. For more information, see **Notes about the Security Token** below.
- **URL** – Select the URL for your connection to Salesforce.com.
  The default is *https://login.salesforce.com*, but you may choose *https://test.salesforce.com* to point to your Salesforce "sandbox" for testing.

Notes about the Security Token:

1. A security token is used to grant API access to Salesforce. If you don't have your security token, you can obtain it by going to this location in Salesforce, **Setup > My Personal Information > Reset your security token**, and clicking **Reset Security Token**. The new token will be emailed to for you to paste into the **Security Token** field in Certain.

2. **Security Token** is not a required field. However, if you do not enter one, you must grant Certain network access to Salesforce; you do this by entering an IP address range in Salesforce. For more information on using this approach, consult Salesforce's documentation. To obtain the IP address range for Certain's servers, contact Certain Support via the ❓▾ **Help and Support** global navigation icon (in the top right corner of any Certain page).

You can deactivate the connection at any time by clearing the **Active** check box and saving the connection. If this checkbox is cleared, you will not be able to perform any Salesforce-related functions within the account (import contacts and leads, or campaign members), and Certain will not update Salesforce (create activities, or update campaign member statuses).

Important notes about Salesforce.com password expiry and changes:

1. If your Salesforce.com password is about to expire, and you haven't changed it yet, Certain may not be able to connect to Salesforce.com until you change your password in both places.

2. When you change your password on Salesforce.com, your Security Code there will change automatically. You will then need to edit both those fields on this Implementation > Salesforce Integration page before Certain can connect.

Configure Salesforce > Certain Field Mappings

Once you have created a Salesforce connection, you must define the mappings between the Salesforce Lead and Contact objects and the Certain profile object.

To define field mappings, follow these steps:

1. As a Certain Administrator, remain on the Account Settings > Implementation > Salesforce Integration page.

1. Scroll down to the **Field Mappings** section.

   Certain provides the following default field mappings for each object.

Certain Profile Field	Salesforce Object	Salesforce Field
First Name	Lead	FirstName
Last Name	Lead	LastName
Email	Lead	Email
Organization	Lead	Company
First Name	Contact	FirstName
Last Name	Contact	LastName
Email	Contact	Email

3. To add a new field mapping, click ⊕ **Map a new field**.

4. Define the mapping by selecting a field from the **Certain Profile Field** list, selecting the Salesforce object (*Lead* or *Contact*) from the list, and selecting the Salesforce field from the **Salesforce Contact/Lead Field** list.

   Note that the **Salesforce Contact/Lead Field** list is filtered by the selected object and includes all standard and custom fields for the object.

5. You can remove a field mapping by clicking the **Delete** icon ⊖ at the end of the row.

6. Once you have defined all field mappings, click **Save**.

Importing (and Updating) Salesforce Contacts/Leads

Salesforce Contacts and/or Leads can be imported into your Certain profiles database (which is held at account level). Once a contact or lead has been imported into Certain as a profile, it will not be imported again. All imported records are identified in Certain using the **Salesforce ID**. If you make any changes to the record in Salesforce, then run the import process again to update the record in Certain.

Before importing from Salesforce, be sure that a Salesforce connection has been enabled for your Certain account; see **Connection Information** above.

To import Leads or Contacts from Salesforce, follow these steps:

1. Click the top left Menu icon ☰, select **Profiles**, and click the **Import Profiles** button.

2. The **Import Profiles** page is displayed.

3. Select the type of record you wish to import from Salesforce: either **Contacts** or **Leads**. Note that you can import only one type of record at a time.

4. Under **By Additional Fields** you can define up to five filter criteria for finding records in Salesforce. Note that these criteria are joined using the AND operator, as shown on screen.
    To specify a filter condition, first select a field from the **Field** drop-down list. This list contains all standard and custom fields for the selected object.
    Next, select an **Operator**: equals, not equal to, starts with, contains, or ends with.
    Finally, enter a **Value**.
    Some examples of filter conditions follow:

    a. Lead Source equals Trade Show
    b. MailingCity equals San Francisco

2. Click the **Search** button.

5. The page reloads and a message is displayed in the **Search Results** section, advising you how many records will be imported.

6. To import the records, click the **Import** button.

7. If you do not wish to import the records (for example, if the number of search results does not seem correct), click the **Cancel** button.

Note that if the search returns more than 50 contacts or leads, when you click the **Import** button you will see a confirmation message that the import is scheduled. You will receive an email message when the import completes.

Locating Profiles Imported from Salesforce

To locate profiles that were imported from Salesforce, follow these steps:

1. Click the top left Menu icon ☰, select **Profiles**, and click the **Find Profiles** button.


2. In the **Contact Filters** section:

   • select **Source of profile** in the **Columns** list,

   • select **=** in the **Operator** list,

   • type **Salesforce** in the **Value** field,

   • optionally specify a **Date Filter** to find profiles imported on a specific day.

3. Click **Search**.

The **Report Results – Profile Query** window opens, listing the profiles that were imported from Salesforce. Click on any profile in the list to view its details.

Inviting Imported Salesforce Profiles to an Event

Once you have imported all relevant Leads and/or Contacts from Salesforce into Certain as profiles, you can invite them to an event. To do so, follow these steps:

1. Click the top left **Menu** icon ☰, select **Profiles**, and click the **Reports** menu.

2. Click **Create Report** and create a report that will return the imported profiles you wish to invite to your event. (On the **Filters** page for your report, select **Source of Profile** as an **Advanced Filter** – see the item above on using the **Source of Profile** column to report on imported profiles.)

3. Run the report.

4. In the **Report Results** window, select profiles by selecting their check boxes (or select the check box at the top of the column to select all of them).

5. Click **Actions** and select **Invite/Register**.

6. Select the event from the drop-down list.

7. Select whether you wish to **invite** or **register** the profiles for the event.

8. Click **Next**.

9. Select an **Attendee Type** and **Status** to assign to the registrations.

10. Click **Next**.
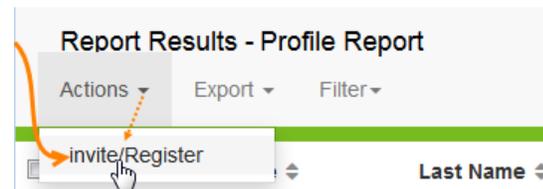
11. Review the details and click **Finish**.

Creating Salesforce Activities for Imported Contacts and Leads

You can configure Certain to automatically create activities when the registration status changes for imported Salesforce Contacts and Leads.

Activities will be created under the Lead or Contact that was imported and invited to/registered for the event. Activities will be displayed in the Activity History related list, with this subject line:
    <Registration Status (status the registration changed to)>: <Event Name>.

To configure which Certain registration status changes trigger the creation of an activity in Salesforce, follow these steps:

1. As an Administrator, go to **Account Settings > Implementation > Salesforce**.

2. In the **Configure Salesforce Activities** section, select the check boxes for the default Certain registration statuses for which you would like to generate activities. Note that an activity will be generated when a Salesforce-imported registration changes *to* that registration status.

    Configure Salesforce Activities

    Generate an Activity in Salesforce.com when the registration status changes to: (Select All | Clear All)

    ☐ New   ☐ Requested Invitation   ☐ Waitlist Hold
    ☐ Invited   ☐ Request Denied   ☐ Invitation Sent
    ☐ Pre-Registered   ☐ Declined Invitation   ☐ Cancelled
    ☐ No-show   ☐ Attended

    (Note however that none of these statuses may be selected if (as is very unlikely) your account does not have the option selected to **Show default statuses**. This may be done by your account Administrator in Account Settings > Implementation Security, but is a very specialized choice made by only a very small minority of Certain customers.)

3. If you have defined custom registration statuses in your events, this page also includes six select lists, in which you can select up to six custom event-level registration statuses.

    or one of these event-level custom registration statuses:

4. Click **Save** to save your changes.

Associating Salesforce Campaigns with Events

You can associate one or more Salesforce campaigns with a Certain event. This enables you to import campaign members into the event, and to update each associated campaign member's status in Salesforce as their registration status changes in Certain.

To associate a campaign with an event, follow these steps:

1. Navigate to the event, click **Configure** on the **Plan** menu, and select the **Salesforce** page.

2. In the **Search Campaign Criteria** section, specify the search criteria for locating the campaign in Salesforce. To do so, select a field from the **Field** list, select an operator (such as *equals*), and enter a value. You can enter up to five criteria, all of which will be joined using the AND operator (as shown on screen).

3. Click **Search** to search for campaigns in Salesforce that match those criteria.

4. The matching campaigns are displayed in the **Campaign Search Results** section.

5. Select one or more campaigns, and click **Save** to add them to the event.

Updating Salesforce Campaign Member Statuses

You can configure Certain to automatically update associated campaign member statuses when the Certain registration status changes. This is done separately for each event, so you must have associated one or more campaigns with the event(s)

To configure which status changes trigger the update of campaign members' statuses in Salesforce, follow these steps:

1. Navigate to the event, click **Configure** on the **Plan** menu, and select the **Salesforce** page.

2. The campaigns associated with event (see **Associating Salesforce Campaigns with Events** on page 7, above) are listed under **Associated Campaigns**.

3. Below each campaign is a table where you can match **Certain Registration Statuses** to **Salesforce Statuses**.

4. For each Certain Status you want to map, select the appropriate Salesforce Status Mapping. For example:

Certain Registration Status	Salesforce Campaign Member Status
New	Sent
Attended	Responded

5. Note that the list of Salesforce Campaign Member Statuses in the **Salesforce Status Mapping** **c**olumn includes both standard and custom campaign member statuses.

6. Note that Certain will update the associated campaign member's status in Salesforce when the registration status changes *to* the status selected in the **Certain Status** list. The campaign member's status will be changed to the status specified in the **Salesforce Status Mapping** column.

7. Click **Save** to save changes.

Importing Salesforce Campaign Members into an Event

Once a campaign has been associated with an event, you can import the campaign members as registrants. To import campaign members, follow these steps:

1. Navigate to the event, click **Registrations** on the **Manage** menu, and click the **Import Salesforce Members** button.

2. A Salesforce page opens. In the **Associated Campaigns** section, select the radio button for the campaign from which you wish to import members.

3. A message confirms the number of campaign members about to be imported.

4. Click the **Import** button (at the bottom of the page).

5. Note that if the campaign has more than 50 members, a message is displayed advising the import is scheduled. You will receive an email when the import completes.

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