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1. Install on a content management or standalone server

This section covers how to install Sitecore Connect for Salesforce CRM on a content management or standalone server.

1.1. Prerequisites

Before you install Sitecore Connect for Salesforce, you must have:

- Sitecore Experience Platform 10.0.
- Sitecore Data Exchange Framework 5.0.
- Access to a Salesforce CRM instance and a user account on Salesforce at a minimum, this account must have rights to read data from Salesforce. To write data to Salesforce, the account must also have rights to write data to Salesforce.
- Network connectivity you must install on a Sitecore server that has network connectivity to your Salesforce instance. This can require firewall configuration, based on your network setup.

1.2. Install Sitecore Connect for Salesforce

To install Sitecore Connect for Salesforce, download and install the following package from the Sitecore download page:

• Sitecore Connect for Salesforce CRM 5.0

1.3. Deploy the xConnect collection model

Sitecore Connect adds new facets to associate information from Salesforce with Sitecore contacts and interactions. You must deploy a collection model that defines these new facets to xConnect.

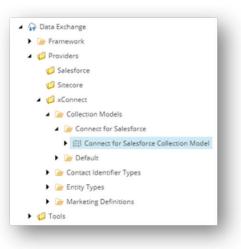
NOTE

For more information on how to deploy a custom collection model to xConnect, see the xConnect developer documentation.



To deploy the xConnect collection model:

- 1. In Sitecore, open the Content Editor.
- Navigate to sitecore/system/Settings/Data Exchange/Providers/xConnect/ Collection Models/Connect for Salesforce/Connect for Salesforce Collection Model.



3. On the ribbon, click **Convert Model to JSON**.



- 4. Your browser downloads a JSON file. Save this file to your local machine.
- 5. Deploy the JSON file to your xConnect Collection server, in the \App_Data\Models folder.
- 6. Deploy the JSON file to your xConnect indexing server. You have to copy the JSON file to two folders:
 - \App_Data\Models\
 - \App Data\jobs\continuous\IndexWorker\App Data\Models\

1.4. Configure the Salesforce Connected App

To make Salesforce Connect communicate with Salesforce, you must configure the Salesforce Connected app.



NOTE

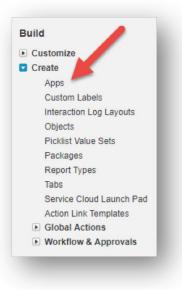
These instructions assume you are using the Salesforce Classic user interface. The same configuration is available using the Salesforce Lightning user interface. We recommend you switch to the Salesforce Classic user interface temporarily to complete these steps.

To configure the Salesforce Connected app:

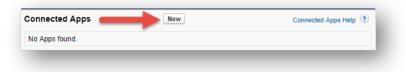
- 1. Log in to your Salesforce account.
- 2. On the top menu, click Setup.



3. In the left menu, click **Create** and then click **Apps**.



4. In the **Connected Apps** section, click **New**.



5. Enter the following values:

| Field name | Value | Notes |
|--------------------|----------------------------|--|
| Connected App Name | Sitecore Data Exchange App | The specific value does not matter. |
| API Name | Sitecore_Data_Exchange_App | Salesforce generates this value based on the app name. It is recommended that this value not be changed. |



| Field name | Value | Notes |
|---------------------------------------|-----------------------------------|---|
| Contact Email | [your email address] | The specific value does not matter. |
| Enable OAuth Settings | Selected | |
| Callback URL | http://localhost | This value is not used, so the value you enter does not matter. |
| Selected OAuth Scopes | Access and manage your data (api) | |
| Require Secret for Web Server Flow | Selected | |

6. At the bottom of the screen, click **Save**.

| Canvas App Settings |
|---------------------|
| Force.com Canvas |

7. Salesforce informs you that a new connected app was created. Click **Continue**.

| ew Connected | Арр |
|----------------------------|---|
| ow from 2-10 minutes for y | your changes to take effect on the server before using the connected app. |
| _ | Continue |

1.5. Add a custom field in Salesforce (optional)

If you plan to write contact data from Sitecore to Salesforce, you must add a custom field in Salesforce. This field is used to associate the Salesforce contact with the corresponding Sitecore contact.

NOTE

These instructions assume you are using the Salesforce Classic user interface. The same configuration is available using the Salesforce Lightning user interface. We recommend you switch to the Salesforce Classic user interface temporarily to complete these steps.

To add a custom field in Salesforce:

1. Log in to your Salesforce account. On the top menu, click **Setup**.





2. In the left menu, open the Build/Customize/Contacts node. Click Fields.

| Build | | | | | |
|--------------------------------|--|--|--|--|--|
| Customize | | | | | |
| Tab Names and Labels | | | | | |
| ▶ Home | | | | | |
| Activities | | | | | |
| Campaigns | | | | | |
| Leads | | | | | |
| Accounts | | | | | |
| D&B Companies | | | | | |
| Contacts | | | | | |
| Fields | | | | | |
| Related Lookup Filters | | | | | |
| Validation Rules | | | | | |
| Triggers | | | | | |
| Page Layouts | | | | | |
| Field Sets | | | | | |
| Compact Layouts | | | | | |
| Search Layouts | | | | | |
| Buttons, Links, and Actions | | | | | |
| Record Types | | | | | |
| Limits | | | | | |
| ▶ Notes | | | | | |

3. In the **Contact Custom Fields & Relationships** section, click **New**. In the **New Custom Field** dialog, select **Text** as the data type. Click **Next**.



Help for this Page 🔞

New Custom Field

| Step 1. Choose the field type | Step 1 |
|---|---|
| | Next Cancel |
| Specify the type of information that the custom field will contain. | |
| Data Type | |
| O None Selected | Select one of the data types below. |
| O Auto Number | A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record. |
| O Formula | A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change. |
| O Roll-Up Summary 1 | A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list. |
| O Lookup Relationship | Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list. |
| O External Lookup Relationship | Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org. |
| O Checkbox | Allows users to select a True (checked) or False (unchecked) value. |
| Оситтепсу | Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet. |
| O Date | Allows users to enter a date or pick a date from a popup calendar. |
| O Date/Time | Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field. |
| ○ Email | Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails. |
| O Geolocation | Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance. |
| ONumber | Allows users to enter any number. Leading zeros are removed. |
| ○ Percent | Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number. |
| O Phone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| ○ Picklist | Allows users to select a value from a list you define. |
| O Picklist (Multi-Select) | Allows users to select multiple values from a list you define. |
| Text | Allows users to enter any combination of letters and numbers. |

- 4. In the **Enter the details** dialog, enter the following values:
 - Data Type Text
 - Field Label Sitecore Id
 - Length 36
 - Field Name Sitecoreld
 - External ID selected

| Step 2. Enter the details | Step 2 of 4 |
|---------------------------|---|
| | Previous Next Cancel |
| Field Label | SitecoreId |
| Length Field Name | Please enter the maximum length for a text field below. 36 SitecoreId I |
| Description | Sitecore use this field to store Sitecore Contact Id |
| Help Text | |
| Required | Always require a value in this field in order to save a record |
| Unique | Do not allow duplicate values |
| | Treat "ABC" and "abc" as duplicate values (case insensitive) Treat "ABC" and "abc" as different values (case sensitive) |
| External ID | Set this field as the unique record identifier from an external system |
| Default Value | Show Formula Editor Use formula contact and policit quice.00 names in double quotes: ("the_liert") include numbers without (b) form Forentage as devined: (b) (b), b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersive date calculations in the standard format; ("forsign") + 10, b) dispersiv |
| | Previous Next Cancel |

5. Click **Next**. In the **Establish field-level security** dialog, click **Next**. In the **Add to page layouts** dialog, click **Save**.



- 6. In the left menu, open the Build/Customize/Activities node. Click Activity Custom Fields.
- 7. In the **Activity Custom Fields** section, click **New**. In the **New Custom Field** dialog, select **Text** as the data type. Click **Next**.
- 8. In the Enter the details dialog, enter the following values:
 - Data Type Text
 - Field Label Sitecoreld
 - Length 36
 - Field Name Sitecoreld
 - Unique selected
 - Treat "ABC" and "abc" as duplicate values (case insensitive) selected
 - External ID selected
- 9. Click **Next**. In the **Establish field-level security** dialog, click **Next**. In the **Add to page layouts** dialog, click **Save**.

By default, synchronization does not include anonymous contacts. To enable synchronization of anonymous contacts, you must;

- In the wwwroot\<sitecoreInstanceName>_xconnect\App_Data\jobs\continuous \IndexWorker\App_data\config\sitecore\SearchIndexer\ folder, open the sc.Xdb.Collection.IndexerSettings.xml file.
- 2. Locate the Sitecore\XConnect\SearchIndexer\Services\IndexerSettings\Options \IndexAnonymousContactData node, and set it to *true*.



2. Install on a content delivery server

The connector includes extra features that you can use on your Sitecore content delivery (CD) server, such as personalization rules or Forms integration. In order to use these features, you must install Sitecore Connect for Salesforce CRM on your CD server.

NOTE

You only need to install the connector on your CD server if you want to use the extra features.

2.1. Prerequisites

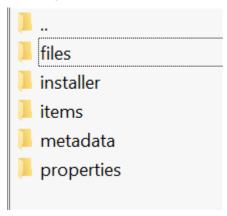
Before you install Sitecore Connect for Salesforce CRM on your CD server, you must have:

- Sitecore Experience Platform 10.0
- Data Exchange Framework 5.0.

2.2. Installation

The CD server does not have an interface to install Sitecore packages, so you must install the necessary files manually. To do so:

- 1. Download the Sitecore Connect for Salesforce CRM 5.0 package.
- 2. In the package file, open the package.zip file. The files in the package.zip file are in the following structure:



3. Extract the files in the files folder into the website root folder of your CD server.



NOTE

When you extract the files you must preserve the folder structure from the files folder. For example, the files folder in the zip contains a subfolder named bin, and the files in this folder must go in the <website>\bin folder on your CD server.

4. Restart the CD server.



3. Upgrade a content management or standalone server

This section describes how to upgrade a content management or standalone server from Sitecore Connect for Salesforce (SCS) 4.0 to 5.0.

3.1. Prerequisites

Before you upgrade SCS you must have the following installed:

- Sitecore Experience Platform 10.0
- Sitecore Connect for Salesforce 4.0
- Sitecore Data Exchange Framework (DEF) 5.0

NOTE

If you have a previous version of DEF installed, you must upgrade it to 5.0 before upgrading SCS.

3.2. Install the upgrade

To upgrade SCS, you must:

- 1. Download and install the Sitecore Connect for Salesforce CRM 5.0 Update Package.
- 2. Deploy the xConnect collection model.

NOTE

If you have created tenants in version 3.0 of the connector, the tenants will work as usual after the upgrade. You do not need to upgrade them.



4. Upgrade a content delivery server

Before you upgrade Sitecore Connect for Salesforce CRM on your content delivery (CD) server, you must have:

- Sitecore Experience Platform 10.0
- Data Exchange Framework 5.0.

4.1. Installation

The CD server does not have an interface to install Sitecore update packages, so you must update the files manually.

NOTE

For all of the following file operations you must preserve the folder structure from the zip file folders. For example, if the changedfiles folder in the zip file contains a bin subfolder, the files from this folder must go in the <website>\bin folder on your CD server.

To perform the upgrade:

1. Download the Sitecore Connect for Salesforce CRM 5.0 update package.



- 2. In the update package file, open the package.zip file. The files in the package.zip file are in the following structure:
 - addedfiles
 - addedfolders
 - addeditems
 - changedfiles
 - changeditems
 - deletedfiles
 - deletedfolders
 - deleteditems
 - installer
 - 📕 metadata
 - properties

NOTE

The actual update package may not contain all of the folders shown in the image.

- 3. Add the folders in the addedfolder folder into the website root folder of your CD server.
- 4. Add the files in the addedfiles folder into the website root folder of your CD server.
- 5. Delete the folders in the deletedfolder folder from the website root folder of your CD server.
- 6. Delete the files in the deletedfiles folder from the website root folder of your CD server.
- 7. Add the files in the changedfiles folder into the website root folder of your CD server, overwriting the existing files.
- 8. Restart the CD server.



5. Configuration

This section covers basic configuration options for Sitecore Connect for Salesforce.

5.1. Get connection string values from Salesforce

Before you can configure the connection string, you must collect the following values from Salesforce:

- **User ID** the ID that Sitecore uses to call the Salesforce API. This user ID does not have to have administrator rights, but it must have sufficient rights to perform the activities you expect to be able to from Sitecore. For example:
 - To have Salesforce contacts created in Sitecore, the user must have read-access on contacts and campaigns.
 - To push contact data from Sitecore into Salesforce, the user must have write-access on contacts.
- Password the password for the Salesforce user that Sitecore uses to call the Salesforce API.

NOTE

The password must not contain the ; character (semicolon).

- Security token
- Client ID and secret key

5.1.1. Get the security token value

The security token value comes from the Salesforce user who used the connected app.

To get the security token:

- 1. In Salesforce, log in with the user ID you plan to use in the connection string.
- 2. In the top menu, click the user name.

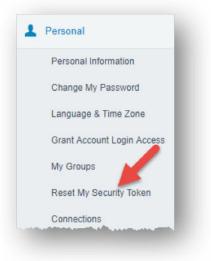




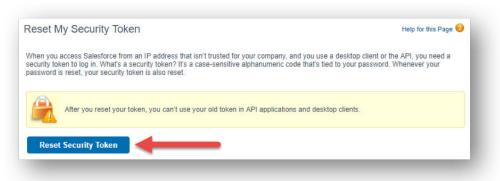
3. Click My Settings.



4. In the left menu, click Personal, Reset My Security Token.

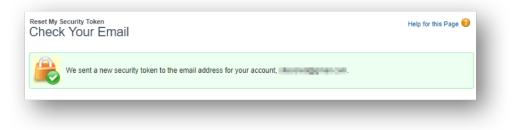


5. Read the warning on the screen carefully and then click **Reset Security Token**.

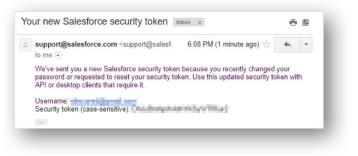




Salesforce informs you that the new security token will be emailed to you.



6. Check your inbox to find the email message with the new security token value.

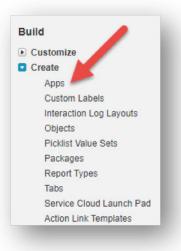


5.1.2. Get the client key and secret key values

The client key and secret key values come from the Salesforce connected app.

To get these values:

1. In Salesforce, in the left menu, in the **Build** section, expand **Create** and the click **Apps**.





2. In the **Connected Apps** section, click the name of the connected app you created.



3. In the **API (Enable OAuth Settings)** section, copy the values for the **Consumer Key** and **Consumer Secret**.

| NOTE | |
|--|-------------|
| In the connection string, the Consumer Key value is called the client Consumer Secret value is called the secret key. | id, and the |

5.2. Add the connection string to Sitecore

When you have collected the connection string values from Salesforce, you must add the connection string to Sitecore.

To add the connection string to Sitecore:

• Add the following connection string to the ConnectionStrings.config file on your Sitecore server, replacing the values in brackets with the values you collected from Salesforce:

```
<add name="mysf" connectionString="user id=[user id];password=[password];client id=[client
id];secret key=[secret key];security token=[security token]" />
```

The following is an example of what the connection string looks like after you have replaced the values in brackets:

```
<add name="mysf" connectionString="user id=someone@email.com;password=b;client
id=GEH9z1TNB8o8BA45pAeDtC8W.DIqrAzuky2uffEEOwtHxIEhLzkmPwjz8KF_vzWY8dNIfurWHpfbZPGdtc3b;secret
key=5468568999798354123;security token=g3ygFuNzGgm33YTfsM3WKG3AA" />
```

NOTE

If you connect to a Salesforce sandbox, you must add the parameter sandbox=true to the connection string.



5.3. Create a tenant

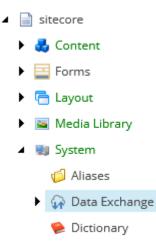
A tenant is the basic unit of configuration in Sitecore Connect for Salesforce. All of the settings that determine how data between Salesforce and Sitecore is synchronized are contained in the tenant.

NOTE

Usually, a tenant represents a specific Salesforce instance. You can configure multiple tenants if you have multiple Salesforce instances you want to connect. It is also possible to configure a single tenant to connect to multiple Salesforce instances. However, that configuration is not covered in this guide.

To create a tenant:

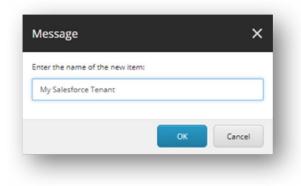
1. In the Content Editor, navigate to sitecore/system/Data Exchange.



2. To add a new item, click **Connect for Salesforce Tenant**.



3. Enter a name for the tenant and click **OK**.





Exchange.

Creating the tenant takes some time. As it is created, a progress box appears.

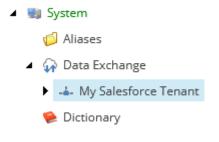
| Creating tenant | × |
|-------------------------------------|---------------------------------|
| Adding the new branch | |
| | |
| View all messages | |
| After the tenant is created it appe | ears under sitecore/System/Data |
| 🔺 闄 System | |
| 💋 Aliases | |
| 🔺 🞧 Data Exchange | |
| - My Salesforce Tenant | |
| ⋟ Dictionary | |

5.4. Enable the tenant

By default, the tenant is disabled. This is to ensure that no synchronization process is run until an administrator makes a conscious decision to enable the tenant.

To enable the tenant:

1. In the Content Editor, select your tenant.



2. On the **Content** tab, in the **Administration** section, select the **Enabled** check box.

| Administration | ^ |
|------------------|---|
| Enabled [shared] | |



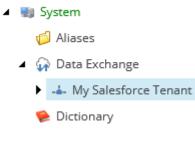
3. Save the item.

5.5. Configure endpoints

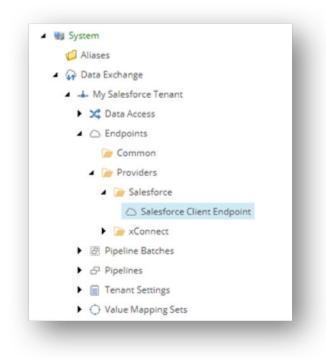
Endpoints are used to identify the source of data that is read and the target of data that is written. Sitecore Connect for Salesforce uses endpoints to represent Sitecore and a Salesforce instance.

To configure endpoints:

1. In the Content Editor, select your tenant.



2. Navigate to Endpoints/Providers/Salesforce/Salesforce Client Endpoint.





3. In the **Connection String Name** field, enter the name of the connection string that you added previously.

| Connection String Name [shared]: | |
|----------------------------------|--|
| mysf | |

NOTE

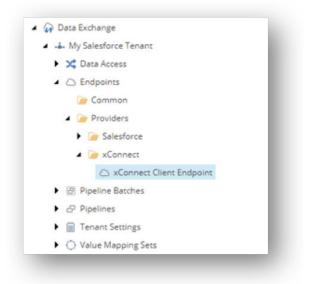
If you enter a connection string that is not defined on your Sitecore server, a validation error is displayed.

4. Save the item. On the ribbon, in the **Data Exchange** tab, click **Run Troubleshooter**, and in the message that appears to indicate that a connection could be established to your Salesforce instance, click **OK**.

| | HOME | NAVIGATE | |
|--|--------|--------------|----|
| | | 3 | |
| Save | Run Tr | oubleshooter | |
| Write | Tro | ubleshoot | |
| Messag | e | | × |
| Connection was successfully established. | | | |
| | | | ок |



5. Select your tenant and navigate to Endpoints/Providers/xConnect/xConnect Client Endpoint.



6. In the **Collection Service** section, enter values for the following fields:

| Collection Service | ^ |
|--|---|
| Use Collection Service Settings For All Services [shared, standard value] | |
| Collection Model [shared]: | |
| Collection Models/Connect for Salesforce/Connect for Salesforce Collection Model | • |
| Collection Service Connection String Name [shared, standard value]: | |
| xconnect.collection | |
| Collection Service Certificate Connection String Name [shared]: | |
| xconnect.collection.certificate | |
| Collection Service Credentials Connection String Name [shared]: | |
| | |
| | |

NOTE

All of these values are connection string names from the ConnectionStrings.config file on your Sitecore server.

| Field name | When required | Description |
|--|--|--|
| Collection Service Connection String Name | Always required. | Connection string that identifies the xConnect collection service. By default the value is xconnect.collection. |
| Collection Service Certificate Connection String Name | Required if SSL is enabled on the xConnect server. | Connection string that identifies the certificate to use when establishing a secure connection to the xConnect server. By default the value is <pre>xconnect.collection.certificate.</pre> |



| Field name | When required | Description |
|--|--|---|
| Collection Service Credentials Connection String Name | Required if authentication is enabled on the xConnect server. | Connection string that specifies the credentials to use to connect to an xConnect server with authentication enabled. Authentication is not enabled on the xConnect server by default. For more information on supported formats for this connection string, see the Data Exchange Framework developer documentation. |

7. If your xConnect server is using a self-signed certificate for SSL, select the **Allow Invalid Certificates** check box.



- 8. Save the item. Click **Run Troubleshooter**. A message appears indicating if a connection could be established. Click **OK** to close the message.
- 9. In the same tenant, navigate to Endpoints/Providers/xConnect/xDB Reference Data Client Endpoint.
- 10. In the Settings section, in the Client Connection String field, enter xdb.referencedata.client. In the Client Certificate Connection String, enter xdb.referencedata.client.certificate.
- 11. Save the item. Click **Run Troubleshooter**. A message appears indicating if a connection could be established. Click **OK** to close the message.

If you are planning to write contact data from Sitecore to Salesforce, you must add a custom field. This field is used to associate the Salesforce contact with the corresponding Sitecore contact.

5.6. Run pipeline batches

You execute the data synchronization by running the tenant pipeline batches. By default, the pipeline batches are not scheduled to run. For more information on how to run pipeline batches, please refer to the developer documentation for the Sitecore Data Exchange Framework.

5.7. Enable a Salesforce contact custom field (optional)

If you are planning to write contact data from Sitecore to Salesforce, you must add a custom field to Salesforce. You must enable this field on the tenant.

To enable a Salesforce contact custom field:



- 1. In the Content Editor, select your tenant.
 - ▲ 動 System 🏳 Aliases
 - 🔺 🎧 Data Exchange
 - -i- My Salesforce Tenant
 - 🗭 Dictionary
- 2. Navigate to Data Access/Value Accessor Sets/Providers/Salesforce/Salesforce Contact Fields/Sitecore Id on Salesforce Contact.
- 3. In the Administration section, select the Enabled check box.

| | Administration | ^ |
|----|------------------|---|
| | Enabled [shared] | |
| 4. | Save the item. | |

5.8. Prepare an xConnect to Salesforce synchronization

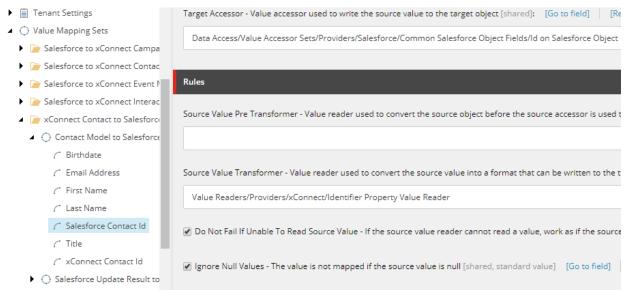
If you synchronize from xConnect to Salesforce CRM, the synchronization might fail the first time you run it, because contacts in xConnect have not yet been assigned a Salesforce Contact ID. To avoid this error, you must enable the *Do Not Fail If Unable To Read Source Value* setting before synchronizing.

To enable the Do Not Fail setting:

- 1. On the Sitecore Launchpad, open the Content Editor.
- Navigate to the /sitecore/system/Data Exchange/<tenant>/Value Mapping Sets/ xConnect Contact to Salesforce Contact Mappings/Contact Model to Salesforce Contact/Salesforce Contact Id node.



3. In the Rules section, select the Do Not Fail If Unable To Read Source Value check box:



5.9. Enable indexing for PII sensitive fields

If you synchronize from xConnect to Salesforce CRM, you must enable indexing for personally identifiable information (PII) sensitive fields. The Read Contacts from xConnect pipeline step searches **FirstName** and **Email** fields to identify which contacts to process. By default, xConnect does not index these fields for privacy reasons.

NOTE

Before enabling indexing on PII sensitive fields, we encourage you to review the security and data protection features of your chosen search provider (Azure Search or Solr).

If you synchronize from Salesforce CRM to xConnect, you do not have to enable indexing for PII sensitive fields.

To enable indexing:

- In the wwwroot\<sitecoreInstanceName>_xconnect\App_Data\Config\Sitecore \SearchIndexer\ folder, open the sc.Xdb.Collection.IndexerSettings.xml file.
- Locate the Sitecore\XConnect\SearchIndexer\Services\IndexerSettings\Options \IndexPIISensitiveData node, and set it to true:

```
<IndexerSettings>

<Type>Sitecore.Xdb.Collection.Indexing.IndexerSettings, Sitecore.Xdb.Collection</Type>

<LifeTime>Singleton</LifeTime>

<Options>

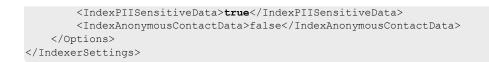
<!-- Indexer will split change set on chunks to improve memory consumption. Setting

this option to 0, a negative value or removing the element completely, results in no

splitting.-->

<SplitRecordsThreshold>25000</SplitRecordsThreshold>
```





- 3. In the wwwroot\<sitecoreInstanceName>_xconnect\App_Data\jobs\continuous \IndexWorker\App_data\config\sitecore\SearchIndexer\ folder, open the sc.Xdb.Collection.IndexerSettings.xml file.
- 4. Locate the Sitecore\XConnect\SearchIndexer\Services\IndexerSettings\Options \IndexPIISensitiveData node, and set it to *true*.

5.10. Add personalization to your site

If you have installed Sitecore Connect for Salesforce CRM on a content delivery server, you can add personalization to your site.

To add personalization:

- 1. In the Sitecore Content Editor, navigate to the item to which you want to add personalization, for example **/sitecore/content/home**.
- 2. In the top menu, click **Presentation**, then click **Details**.
- 3. On the **Default** device, click **Edit**.

| | Sample Layout | | |
|---------------|--------------------------|---|--|
| ے۔ Default | Controls | Placeholder Settings | |
| | 📰 Sample Sublayout | [No placeholder settings were specified | |
| | 🧮 Sample Inner Sublayout | | |
| | 📄 Sample Rendering | | |
| | Edit Copy To | | |

- 4. In the left hand menu, click the **Controls** tab.
- 5. Select the rendering you want to personalize and click **Personalize**.



6. Add a new rule. In the search field, enter *salesforce* to narrow the results.

| Personalize the compo | Create rule |) × | |
|------------------------------|---|-----|--|
| Personalize the present | Choose conditions salesforce | Q | |
| salesforce | Salesforce where contact is a member of <u>specific</u> campaign from the Salesforce tenant <u>specific</u> | | |
| This rule has no conditions. | | | |
| | | | |
| Default | Edit rule | | |

- 7. In the *Salesforce* rule, select the *list* and the *tenant* you want for the personalization.
- 8. Publish the item, and test that the personalization works as you expect.