Sitecore Connect for SFMC 7.0 Activity for Sitecore Sync Installation guide

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1. Introduction

The Salesforce Marketing Cloud (SFMC) Activity for Sitecore Sync enables you to synchronize xConnect contact status from SFMC to Sitecore using a custom Journey Builder activity.

When a contact enters the custom Journey Builder activity, it triggers the synchronization.

This guide describes how you install the connector.

For information on how to set up synchronization, see the developer documentation on the Sitecore documentation site.

2. Requirements

You must install the following packages in sequence:

- Sitecore Experience Platform 10.2
- Data Exchange Framework (DEF) 7.0
- Sitecore Connect for Salesforce Marketing Cloud - Behavioral Data Exchange (SFMC) 7.0
- DEF Tenant Web Service 7.0.

> **IMPORTANT**
> You must deploy this service as a separate IIS site.

Before you set up an SFMC to Sitecore sync activity, you must also perform the following actions from the SFMC Behavioral Data Exchange installation guide:

- Create an SFMC tenant
- Configure and test an SFMC endpoint
- Test the xConnect endpoint
- Run the pipeline batch that creates the required data folders

3. Installation

To install the Salesforce Marketing Cloud (SFMC) Activity for Sitecore Sync Developer:

1. Download the Sitecore Connect for Salesforce Marketing Cloud-BDE Plugin for Tenant Service 7.0.0.scwdp.zip package.

2. Deploy the package on top of the Tenant Service server.

3. Verify that the `<tenant service>\bin` folder contains all the DLL files from the package.

4. Verify that the `<tenant service>\sync-activity` folder and all its contents is available on the installation.
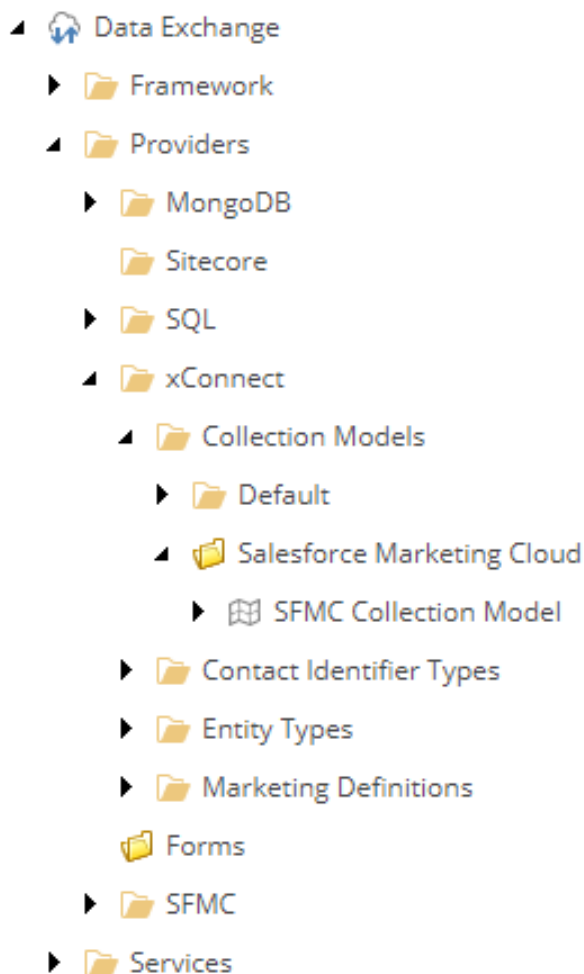
3.1. Deploy xConnect Collection Model

Sitecore Connect adds new facets to associate information from Salesforce with Sitecore contacts and interactions. In order to use these facets, you must deploy a collection model that creates these new facets to xConnect.
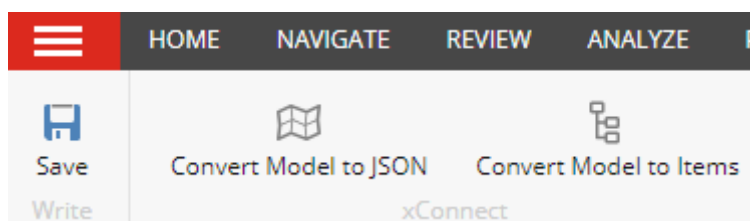
To deploy the xConnect collection model:

1. In Sitecore, open the Content Editor.

2. Navigate to `/sitecore/system/Settings/Data Exchange/Providers/xConnect/`
   `Collection Models/Salesforce Marketing Cloud/SFMC Collection Model`.

   ▲ ☁ Data Exchange
   　▶ 📁 Framework
   　▲ 📁 Providers
   　　▶ 📁 MongoDB
   　　　📁 Sitecore
   　　▶ 📁 SQL
   　　▲ 📁 xConnect
   　　　▲ 📁 Collection Models
   　　　　▶ 📁 Default
   　　　　▲ 🗐 Salesforce Marketing Cloud
   　　　　　▶ 🗐 SFMC Collection Model
   　　　▶ 📁 Contact Identifier Types
   　　　▶ 📁 Entity Types
   　　　▶ 📁 Marketing Definitions
   　　　🗐 Forms
   　　▶ 📁 SFMC
   　▶ 📁 Services

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

☰	HOME	NAVIGATE	REVIEW	ANALYZE	P

   💾 Save　　　🗺 Convert Model to JSON　　　🗂 Convert Model to Items
   Write　　　　　　　　　xConnect

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 must copy the JSON file to two folders:

   • `\App_Data\Models\`

   • `\App_Data\jobs\continuous\IndexWorker\App_Data\Models\`

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

3.2. Install predicates for Marketing Automation

In order to view Salesforce rules in Marketing Automation (MA) you must install predicates for MA.

To install predicates:

1. Download the `Sitecore Connect for Salesforce Marketing Cloud-BDE Marketing Automation 7.0.0 scwdp.zip` package from the Sitecore download page.

2. Deploy the package on top of your xConnect Marketing Automation Service.

3. Navigate to the `sitecore_xconnect\App_data\continuous\AutomationEngine \App_Data\config\sitecore\MarketingAutomation` folder.

4. Open the `sc.MarketingAutomation.Contactloader.xml` file. In the `MarketingAutomation.Loading.ContactFacetsConfigurator` node, add the following:

```
<options>
    <includeFacetNames>
        <SfmcJourneyInformation>SfmcJourneyInformation</SfmcJourneyInformation>
    </includeFacetNames>
</options>
```

If you are on an XP scaled instance of Sitecore, you must also perform the following steps:

1. Copy the `Sitecore.DataExchange.XConnect.SalesforceMarketingCloud.dll` file from the `cm\bin` folder to the `cd\bin` folder.

2. Copy the following two files from the `App_Config\Sitecore\DataExchange \SalesforceMarketingCloud` folder on your content management server to the same folder on your content delivery server:

   - `Sitecore.XConnect.Client.config`

   - `Sitecore.DataExchange.SalesforceMarketingCloud.Tracker.config`