

Sitecore Connect for SFMC 7.0 Activity for Marketing Automation Installation Guide

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1. Introduction

The Salesforce Marketing Cloud (SFMC) Activity for Marketing Automation (MA) enables you to synchronize xConnect contact details to SFMC using Marketing Automation campaigns.

It can synchronize the contacts from Sitecore to SFMC Centralized Data Extension. It can also trigger SFMC Journey Builder API events.

1.1. Requirements

You must install this product on a Sitecore Content Management (CM) server.

You must install the following packages in sequence before you install SFMC for MA:

- Sitecore Experience Platform 10.2.
- Data Exchange Framework (DEF) 7.0.0.
- DEF Activity Plugin for Marketing Automation 7.0.0.
- Sitecore Connect for Salesforce Marketing Cloud - Behavioral Data Exchange 7.0.0
- DEF Tenant Web Service 7.0. You must deploy this service as a separate IIS site.

1.2. Installation

To install the Salesforce Marketing Cloud (SFMC) Activity for Marketing Automation (MA):

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. Download the Sitecore Connect for Salesforce Marketing Cloud - BDE Action Plugin for Marketing Automation 7.0.0.scwdp.zip package.
5. Deploy the package on top of the xConnect Marketing Automation Service.

To check that you have installed the SFMC Activity for MA successfully:










1. On your Marketing Automation Service, verify that the `<Marketing Automation Service>\AppData\Config\sitecore\MarketingAutomation` folder contains the configuration file.

NOTE

<Marketing Automation Service> is where the AutomationEngine folder is on your MA installation. The placement of that folder depends on your type of installation.

2. On your Marketing Automation Service, verify that the <Marketing Automation Service> folder contains all the DLL files from the package.

3. On your content management server, In the **Content Editor**, verify that the item `/sitecore/system/Settings/Analytics/Marketing Automation/Activity Types/Trigger DEF SFMC Sync Process` exists.

- ▲  Settings
 - ▶  Insert Rules
 - ▲  Analytics
 - ▶  ContactList Types
 -  Filters
 - ▶  Lookups
 - ▲  Marketing Automation
 - ▲  Activity Types
 - ▶  Taxonomies
 - ▶ ☐ Campaign Entry
 - ▶ ☐ Campaign Exit
 - ▶ ☐ Campaign listener
 - ▶ ☐ Change behavior profile value
 - ▶ ☐ Custom listener
 - ▶ ☐ Decision Point
 - ▶ ☐ Delay
 - ▶ ☐ Email clicked
 - ▶ ☐ Email opened
 - ▶ ☐ Goal triggered
 - ▶ ☐ Increase engagement value
 - ▶ ☐ Move to another campaign
 - ▶ ☐ Outcome registered
 - ▶ ☐ Remove from campaign
 - ▶ ☐ Return to start
 - ▶ ☐ Send email
 - ▶ ☐ Subscribe to list
 - ▶ ☐ Trigger DEF SFMC Sync Process
 - ▶ ☐ Trigger DEF Sync Process