Quick Start Series

101

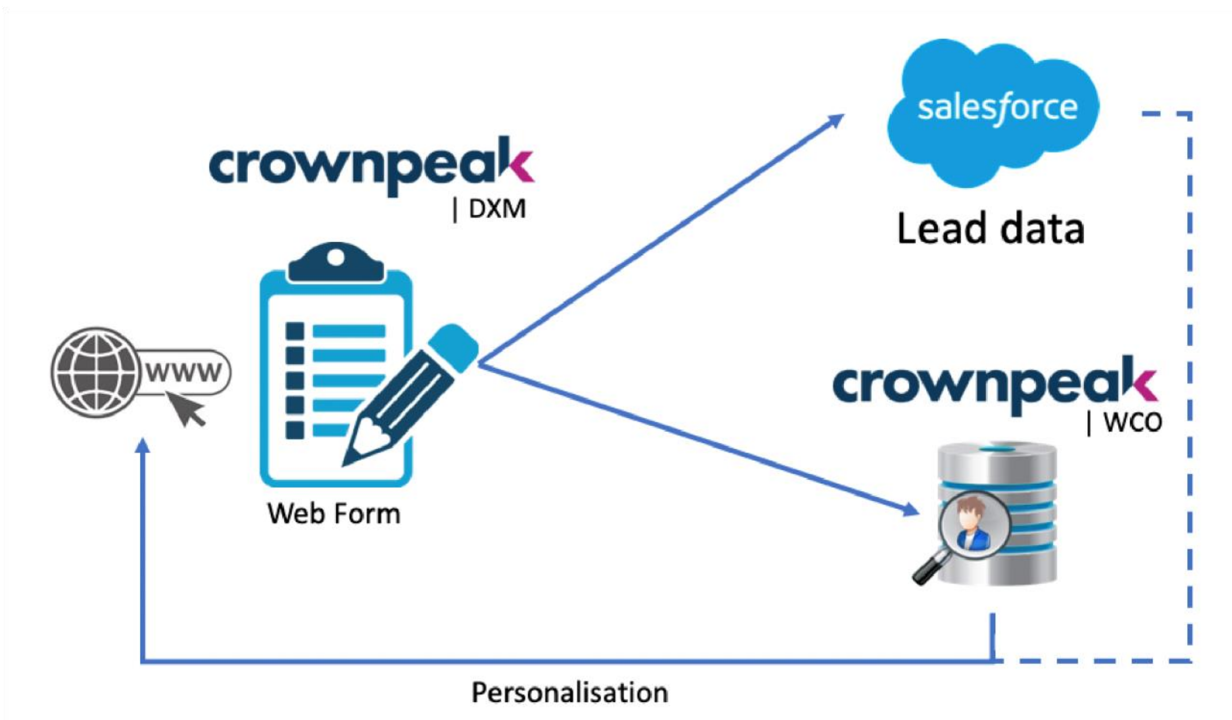
Salesforce Connector

Crownpeak DXM

Introduction

Crownpeak DXM provides an in-built connector to Salesforce CRM.

In this tutorial, we will create a connector between Crownpeak DXM and Salesforce CRM that will generate leads. The connector also allows you to create content in the Web Content Optimization (WCO) module that is built in to the Crownpeak DXM platform and allows you to personalise content based on lead data.

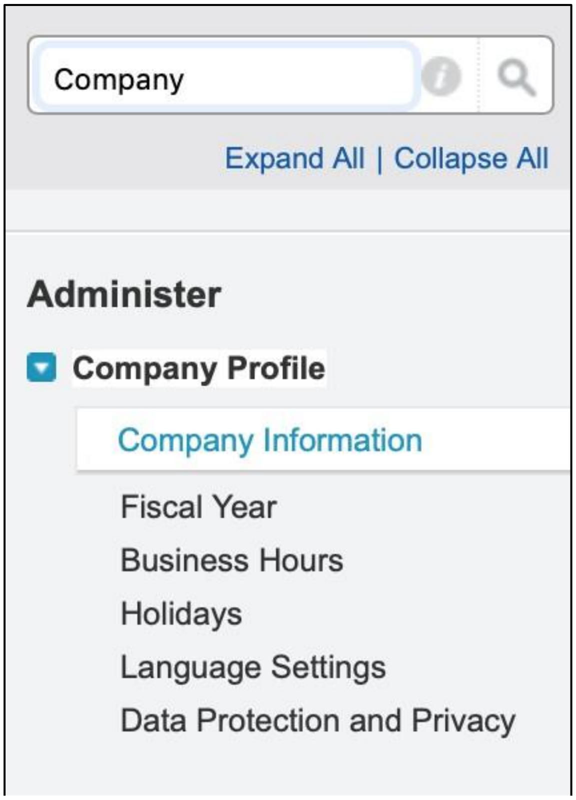


Overview of tutorial steps

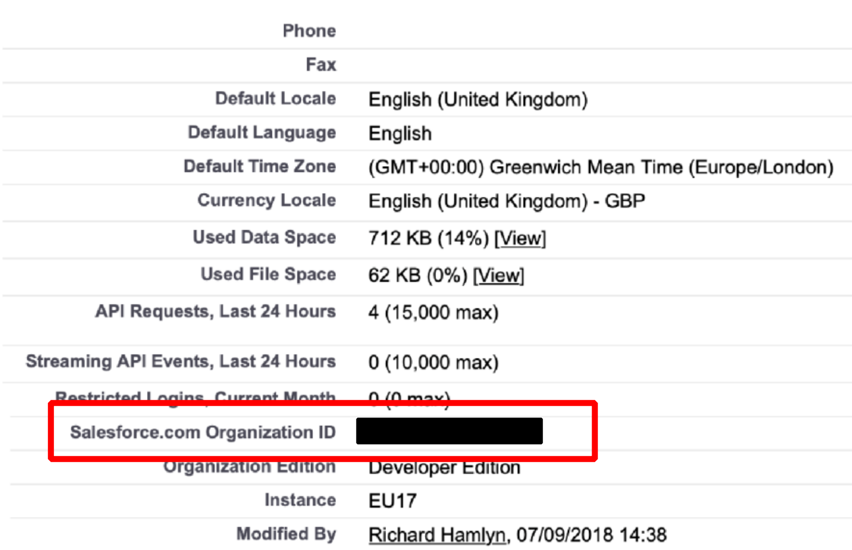
1. Create the connector in Crownpeak DXM.
2. Create a Crownpeak DXM Web Form (to create your lead).
3. Apply to Web Form to a Page.

Creating the Salesforce Connector

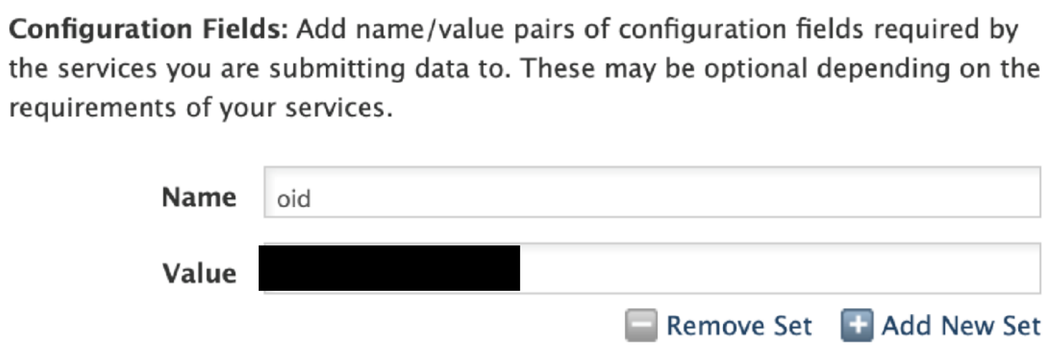
1. Open your Salesforce account and find your Organisational ID. In the Salesforce Quick Find box type '**Company**'.



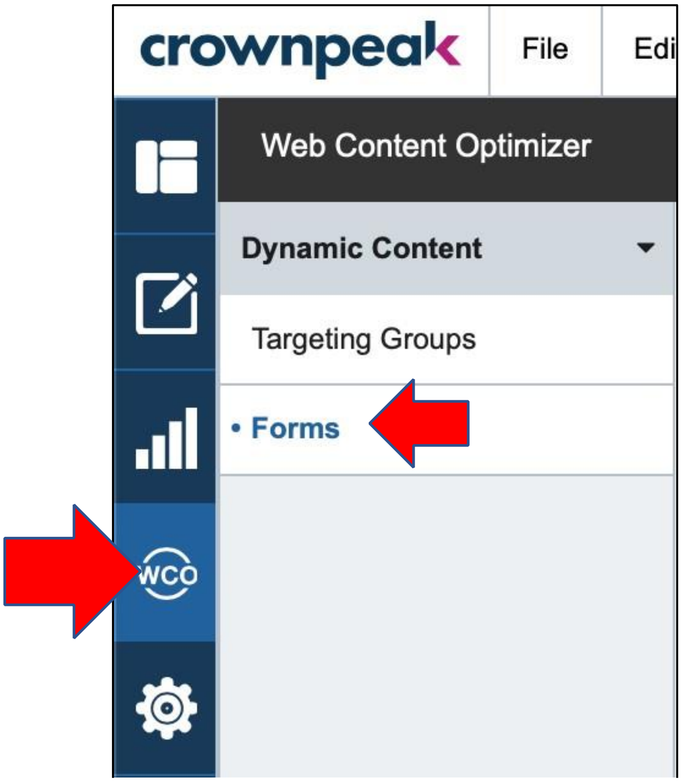
2. Click on '**Company Information**'.
3. In the Company Information window, locate the Organisation ID.



4. Save this ID for later.
5. In Crownpeak DXM (at this time you can only do this in Classic or Volte):
    a. Open Web Content Optimizer.
    b. Select Settings -> Global Settings.
    c. Select Manage Connectors.
    d. Select the Salesforce Connector.
    e. Add the Organisational ID you copied previously.



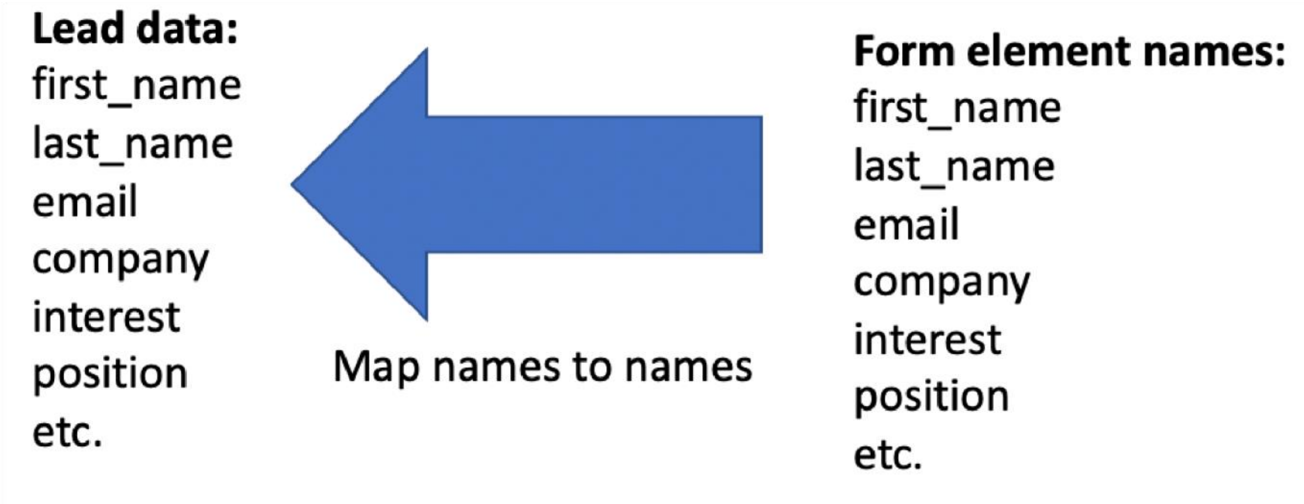
6. Enter your OID in the Value field and save the connector.
7. You can now go back to your V3 instance to continue the setup.
8. Open **WCO** and select **Forms**.



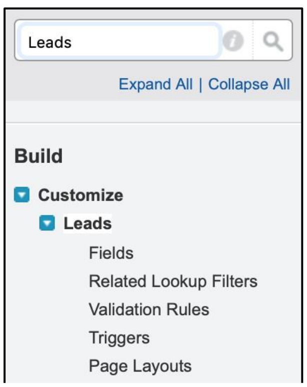
9. Now, create a new form. We will use this form on a Web Page to inject visitor data to WCO and Salesforce using the Connector we created earlier.

This example form will create an initial lead in Salesforce. You may add fields you want to map.

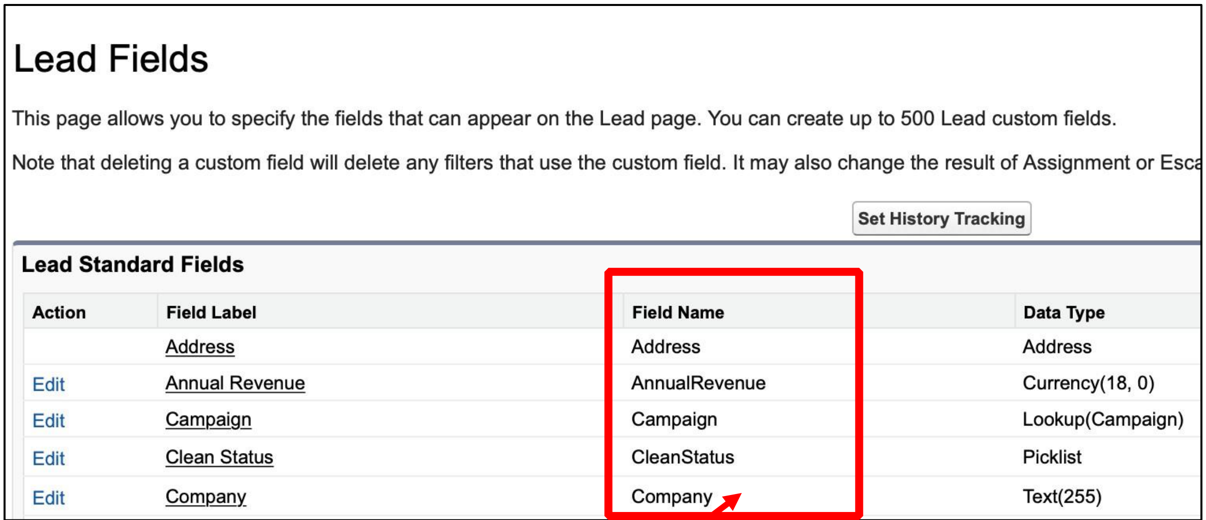
10. Click on Edit for each field and ensure each Form Element's **Name** maps to your Salesforce Data Field **Names** exactly.



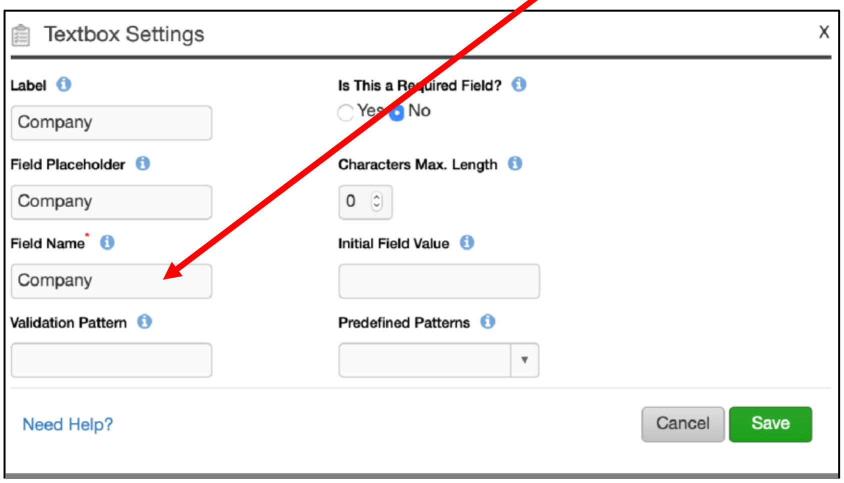
11. To find the names of your Salesforce Lead fields, open Salesforce and in the Quick Find box type '**Leads**'. Select **Build -> Customize -> Leads -> Fields.**



12. You can now map your Form Field Names with Salesforce Lead Field Names:



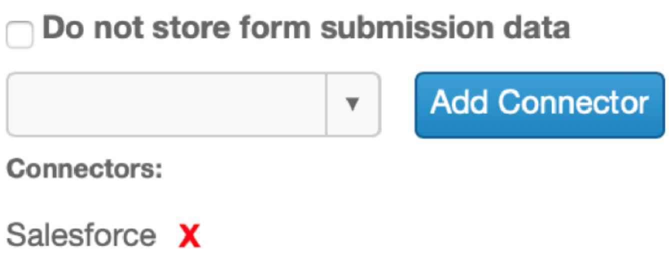
Salesforce Lead Fields



Crownpeak DXM Form

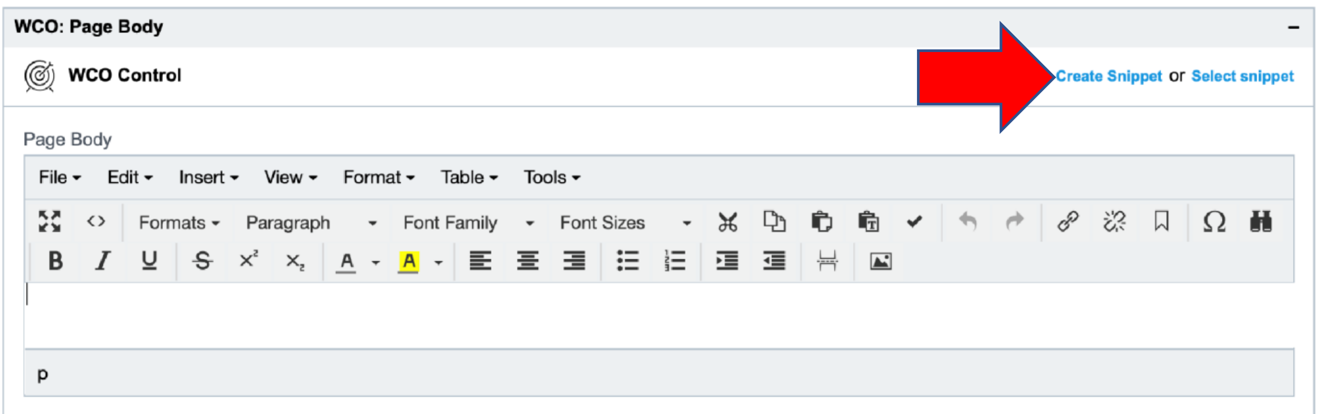
13. Click **Next** in the Form Builder tool.

General (tab): Give your form a name i.e. **Salesforce Lead Form**
Notification: Add details if you want to inform an individual that a form was submitted. Note, you can also set this up in Salesforce when the Lead is generated.
Rules: Add a redirect page URL for when the form is submitted. In the Connector, click on the dropbox and select the **Salesforce** Connector created previously.



Auto-Reply: Add a standard response email that will be sent when the visitor submits the form.

14. Now, save the form.
15. The form is now ready for insertion into a Page.
16. Open an asset that has a WCO enabled WYSIWYG field embedded in it. Click on the option to '**Create Snippet**'.



17. Provide a suitable name for the Snippet and then save the asset.
18. Now, click on the '**Form**' option.

19. On the Form you created previously, select '**Insert a form**'.
20. Save and Preview the page.
    Note, the form will not show styling in the WYSIWYG unless it has been bound with a StyleSheet; however, Preview should show the form exactly how it will look on the site.
21. You can now Publish the Page with your Lead Generating Form and test it out.

When a visitor submits the form, it will create a record in WCO and a Lead in Salesforce.

Considerations

At the time of writing, the Salesforce integration only works to inject data in to the CRM; however, it is possible to gather lead data at the front-end using a coded solution (covered in a separate Quick Start Guide).

You may create personalisation rules around the lead data that was gathered in WCO. In the example within this guide, that could be set to deliver content dependant on the visitor's Company or other data that you have chosen acquire.