



Sprinklr - Salesforce Lightning Connector

Admin Guide



Sprinklr's certified connector to Salesforce

Provides an integrated social care experience and supports omnichannel case management

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Sprinklr: Salesforce Lightning Connector

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Prerequisites

Prerequisites

Sprinklr

- Modern Care must be enabled and configured within the Sprinklr platform
- Salesforce Webhooks must be enabled and configured within the Sprinklr platform



Prerequisites

Salesforce

- Service Cloud Unlimited and Enterprise Editions
- Group and Professional Editions not Supported
- “My Domain” must be enabled and configured in Salesforce
- Whitelisted Sprinklr API Addresses
- A Salesforce System Administrator to install and configure the Sprinklr Connector in Salesforce.
- An **Integration User** in Salesforce to be created assigned required permissions outlined in Slide 6
- A Sprinklr Global Admin User from the customer to perform authentication and authorization in Sprinklr.



Salesforce Integration User Permissions

	Read	Create	Edit	Delete	View All	Modify All
Accounts	☒	☒	☒	☒ •	☒	
Assets	☒	☒	☒	☒ •		
Cases	☒	☒	☒	☒ •	☒	☒
Contacts	☒	☒	☒	☒ •	☒	
Images	☒	☒	☒	☒ •		

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Sprinklr Social Personas	☒	☒	☒	☒ •	☒	☒
Sprinklr Social Posts	☒	☒	☒	☒ •	☒	☒

****** Integration User must be assigned **Sprinklr_Admin** Permission Set in Salesforce. The **Sprinklr_Admin** Permission Set is included in the Managed Package from the AppExchange.

****** Also ensure that the **Sprinklr_Admin** Permission Set has the following **App Permissions** assigned:
Users → Manage Users
System → Customize Application

****** Integration User must have READ Permission to the customer Platform Event (CaseChangeEvent) object



Supported Use-Cases

Supported Use-Cases

1. Data flowing from Sprinklr to Salesforce:

- Store social care interactions spanning across all the digital channels supported on Sprinklr as Cases in Salesforce
- Store social profile information as Contact/Account in Salesforce

2. Data retrieved from Salesforce into Sprinklr:

- Use CRM data on Case to power Sprinklr's Automation Engine to enrich and prioritize social interactions
- Use Salesforce as the source of truth to subscribe or unsubscribe any customer activities and also assist Agents working on Sprinklr

3. Use the Sprinklr UI component within the Salesforce Service Cloud Agent Console to respond directly to Cases created by Sprinklr

4. Agents on either platform can internally collaborate by leveraging Sprinklr Case Notes which synchronizes with Case Comments in Salesforce



Sprinklr Support for Salesforce Contact and Person Account Records (for fully automated and Macro enabled case workflows)

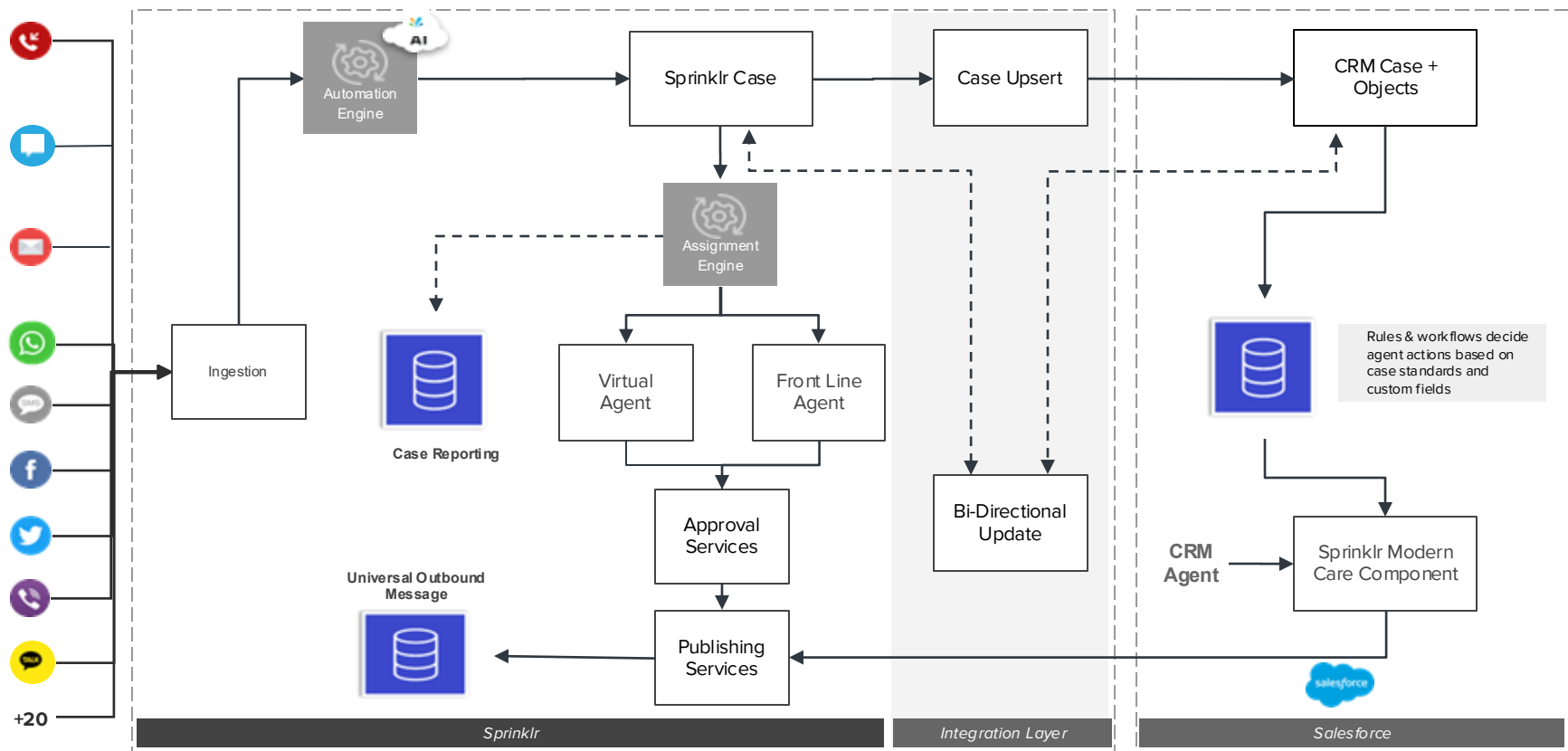
	Salesforce Contact Record			Salesforce Person Account Record		
Salesforce Case Creation Mode in Sprinklr	Automatic Contact Creation Support	Contact Search	Automatic Contact Association to the Case	Automatic Person Account Creation	Person Account Search	Automatic Person Account Association
Automated Salesforce Case Creation from Sprinklr by an automation rule or by applying a Sprinklr Macro.	Supported under these conditions: Social Persona (Profile) record does NOT exist in the Sprinklr Social Persona Object in Salesforce AND that record is NOT linked to a Contact record in Salesforce. OR Social Persona (Profile) record does NOT exist in the Sprinklr Social Persona Object in Salesforce.	Not supported.	Supported under these conditions: Social Persona (Profile) record exists in the Sprinklr Social Persona Object in Salesforce AND that record is linked to a Contact record in Salesforce.	Not supported.	Not supported.	Supported under these conditions: Social Persona (Profile) record exists in the Sprinklr Social Persona Object in Salesforce AND that record is linked to a Person Account record via the Contact field in the Sprinklr Social Persona Object.

Sprinklr Support for Salesforce Contact and Person Account Records (for agent initiated (manual) case workflows)

	Salesforce Contact			Salesforce Person Account		
Salesforce Case Creation Mode in Sprinklr	New Contact Creation	Contact search	Contact Association to the Case	New Person Account Creation	Person Account Search	Person Account Search Association to the Case
Manual Salesforce Case Creation from Sprinklr by an agent.	Supported.	Supported.	Supported.	Supported.	Supported.	Supported.



Architecture Diagram



Connector uses two custom objects i.e Sprinklr Social Persona for Social Profile and Sprinklr Social Post for Social message which are **similar to Social Studio's Social Persona and Social Post objects**. Complete field details in these two objects with their description can be found [here](#).





Downloading and Configuring the Sprinklr App

Note: Sprinklr Technical Services will assist you with the setup and installation of the Connector.

Navigate to Salesforce AppExchange and search for “Sprinklr”

The screenshot shows the Salesforce AppExchange search results page for the keyword 'sprinklr'. The browser address bar displays 'appexchange.salesforce.com/appxSearchKeywordResults?keywords=sprinklr'. The page features a search bar at the top with the text 'Search AppExchange'. Below the search bar, a 'Recent Items' dropdown menu is visible, showing 'Sprinklr App - Sprinklr'. The main content area displays a table of search results. The table has columns for 'LISTING', 'LATEST RELEASE', 'RATING', and 'PRICE'. The first result is 'Sprinklr', which is highlighted. Below it are other results like 'Workato: Advanced Integrations for Salesforce*', 'Oracle CPQ (Configure Price Quote)', 'Social25 - Connect WhatsApp, Instagram DM's en Facebook messenger to Salesforce', and 'Spredfast'.

LISTING	LATEST RELEASE	RATING	PRICE
Sprinklr	11/23/2021	★★★★☆ (4)	Free
Workato: Advanced Integrations for Salesforce*		★★★★★ (48)	Paid
Oracle CPQ (Configure Price Quote)	8/15/2019	★★★★★ (564)	Paid
Social25 - Connect WhatsApp, Instagram DM's en Facebook messenger to Salesforce	3/1/2022	★★★★★ (7)	Paid
Spredfast		★★★★★ (1)	Free

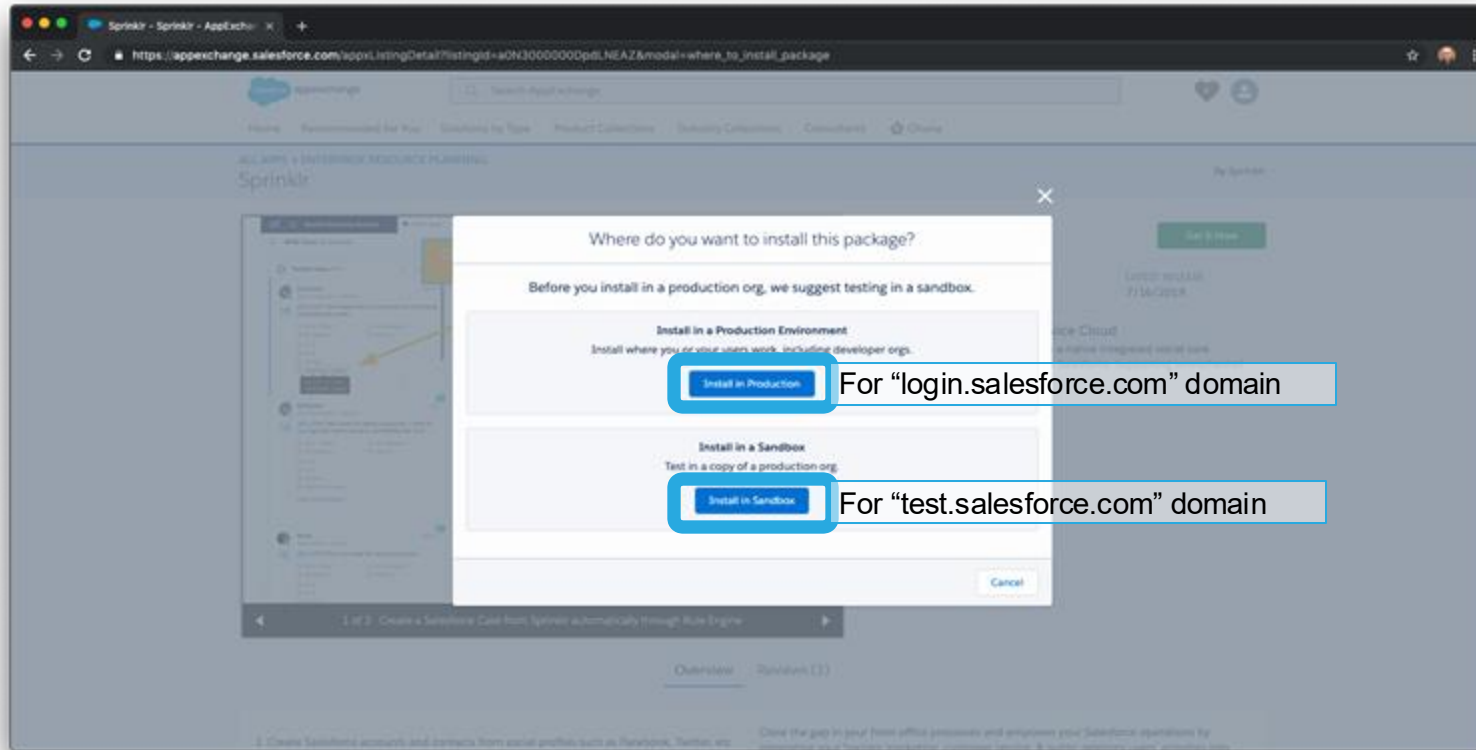


Click “Get It Now” to install the connector

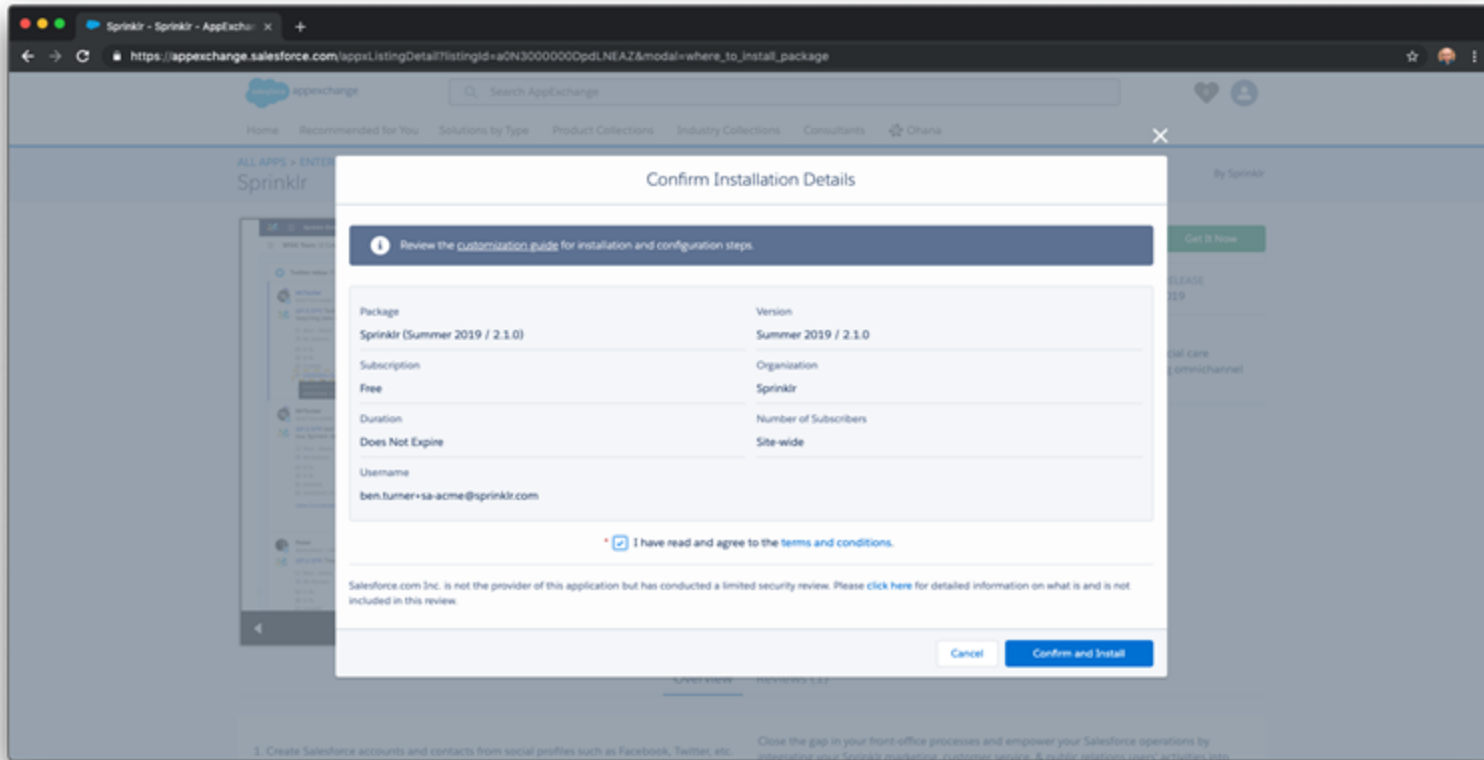
The screenshot displays the AppExchange listing for the Sprinklr Salesforce Connector. The page layout includes a header with the AppExchange logo and a search bar. Below the header, the app is categorized under 'Enterprise Resource Planning' and 'Sprinklr'. The main content area features a large preview image of the connector's interface, which includes a list of cases and a sidebar. An orange callout box with an arrow points to a 'Click Salesforce Case Number to redirect to Salesforce Case' button in the preview. To the right of the preview, the app is listed as 'Free' with a 'Get It Now' button. Below this, the app's rating (4.5 stars), listing date (8/7/2017), and latest release date (7/16/2019) are shown. The description states: 'Modern Care on Salesforce Service Cloud. Sprinklr Salesforce Connector provides a native integrated social care experience for Sprinklr users directly in Salesforce, supporting omnichannel case management.' At the bottom, there are tabs for 'Overview' and 'Reviews (1)', and a list of features including '1. Create Salesforce accounts and contacts from social profiles such as Facebook, Twitter, etc.'



Select the Salesforce Environment Type



Review components, agree to terms, confirm and install



Install for All Users

Upgrade Sprinklr
By Sprinklr

Information An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Summer 2019 (2.1) New Version: Summer 2019 (2.1)

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Sprinklr	Sprinklr	Summer 2019	2.1

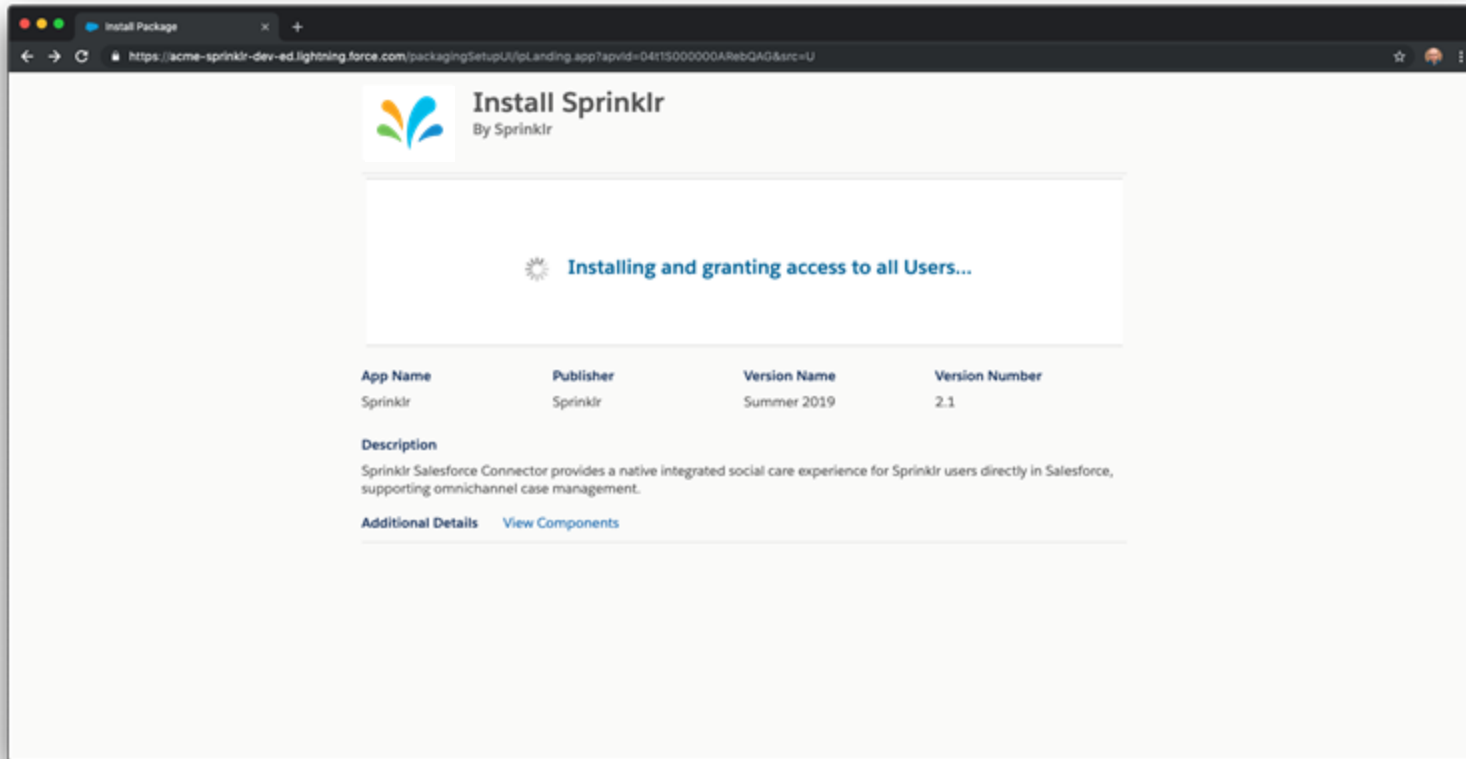
Description
Sprinklr Salesforce Connector provides a native integrated social care experience for Sprinklr users directly in Salesforce, supporting omnichannel case management.

Additional Details [View Components](#)

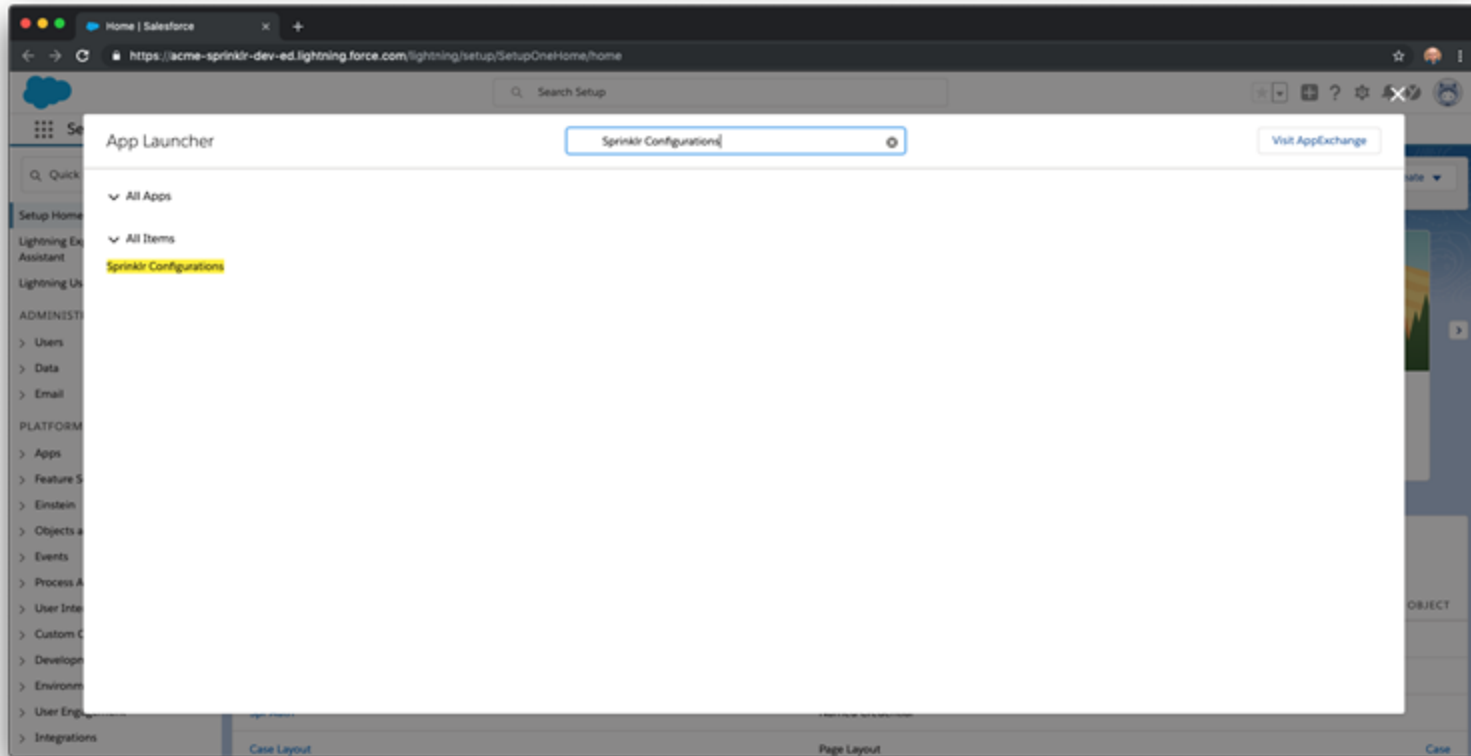
Unless otherwise required, the Sprinklr Application should be installed for all users.



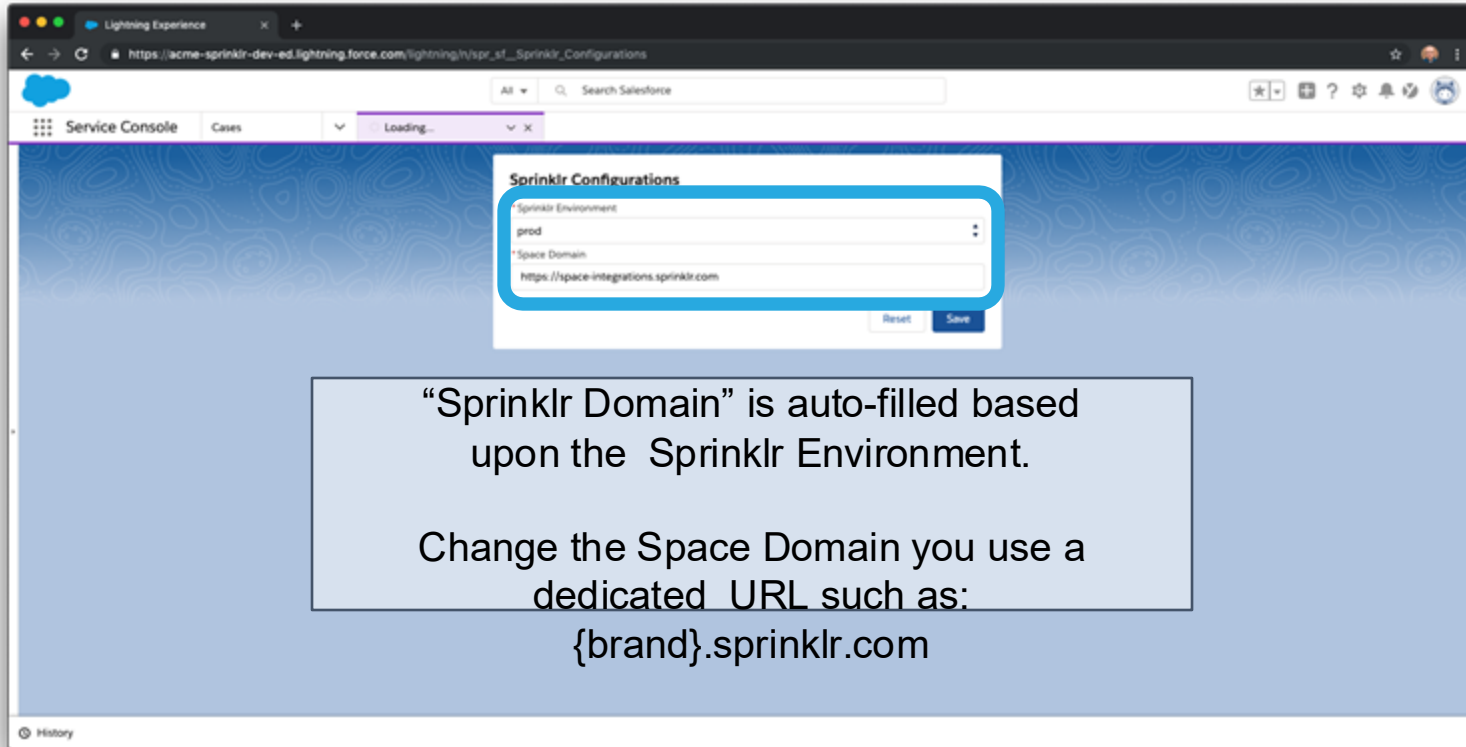
Application will install and grant access to users



Select “Sprinklr Configurations” from App Launcher



Select appropriate “Sprinklr Environment”



The screenshot shows the Salesforce Lightning Experience interface with the 'Sprinklr Configurations' dialog box open. The dialog has two main fields: 'Sprinklr Environment' with a dropdown menu showing 'prod', and 'Space Domain' with a text input field containing 'https://space-integrations.sprinklr.com'. A blue rectangular box highlights the 'Space Domain' field. Below the fields are 'Reset' and 'Save' buttons. The background shows the Salesforce Service Console with a 'Loading...' tab.

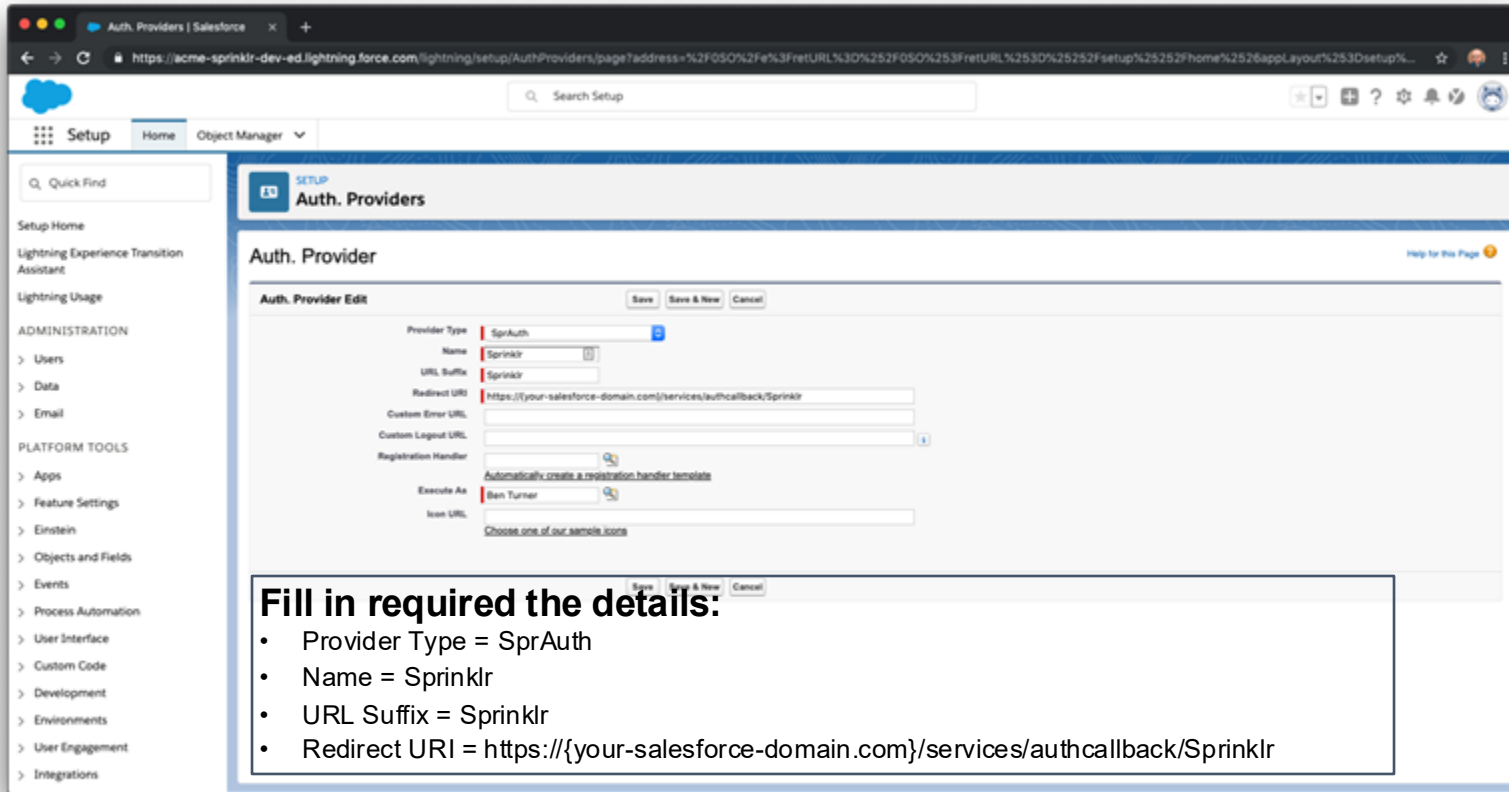
“Sprinklr Domain” is auto-filled based upon the Sprinklr Environment.

Change the Space Domain you use a dedicated URL such as:

`{brand}.sprinklr.com`



Navigate to and Configure “Auth. Providers” from Setup



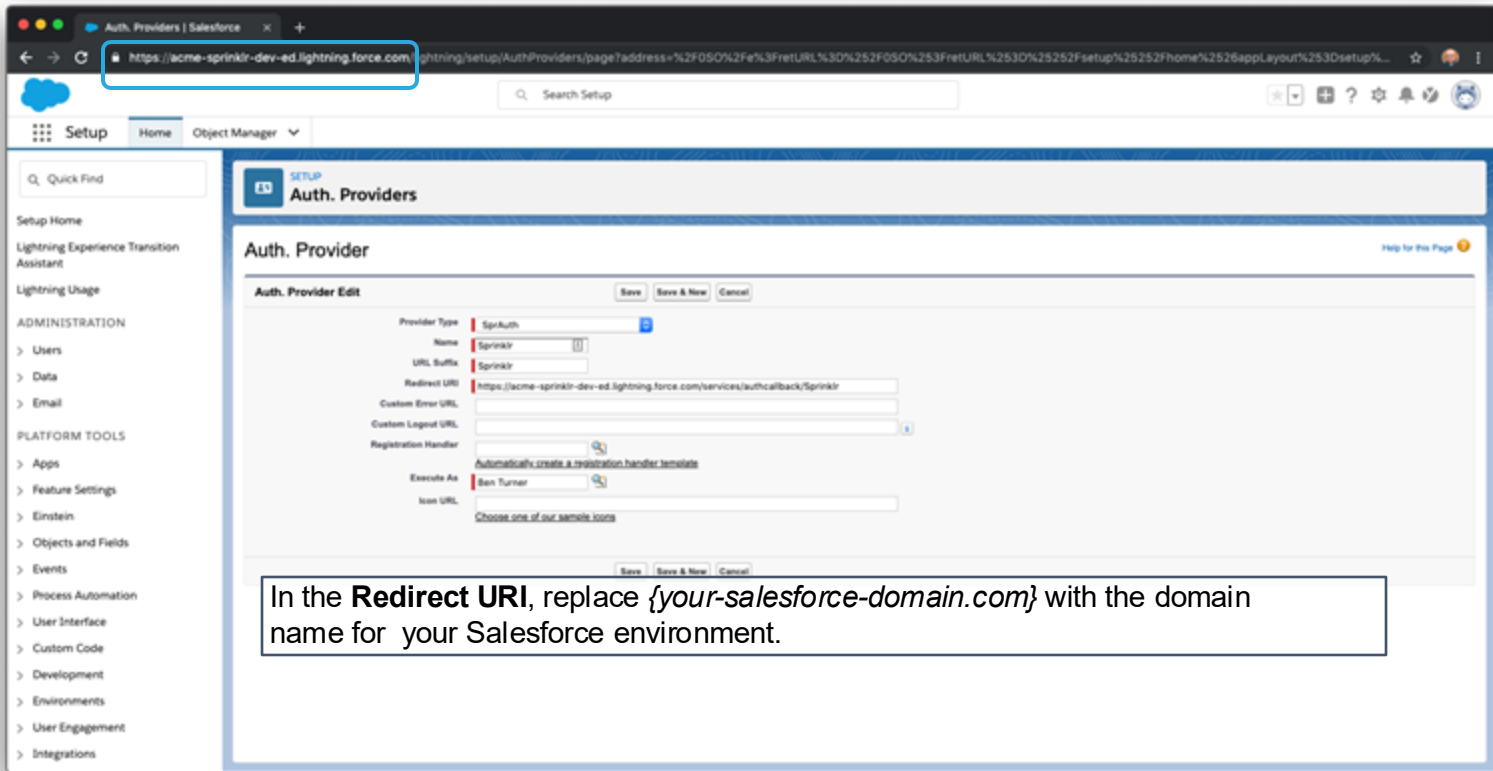
The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Quick Find, Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, Feature Settings, Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code, Development, Environments, User Engagement, Integrations). The main content area is titled "Auth. Providers" and shows the "Auth. Provider Edit" form. The form fields are: Provider Type (SprAuth), Name (Sprinkl), URL Suffix (Sprinkl), Redirect URI (https://{your-salesforce-domain.com}/services/authcallback/Sprinkl), Custom Error URL, Custom Logout URL, Registration Handler (with a link to "Automatically create a registration handler template"), Execute As (Ben Turner), and Icon URL (with a link to "Choose one of our sample icons").

Fill in required the details:

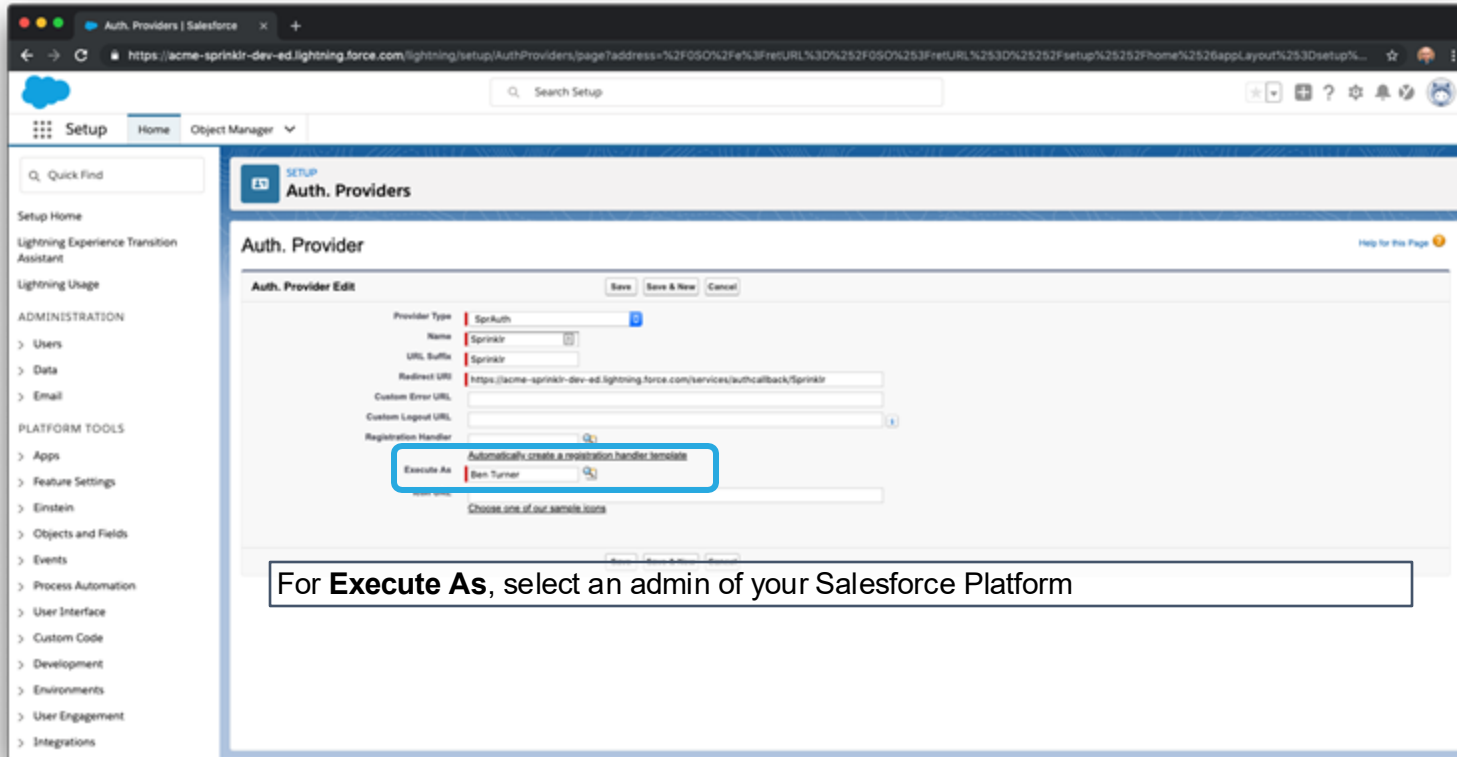
- Provider Type = SprAuth
- Name = Sprinkl
- URL Suffix = Sprinkl
- Redirect URI = https://{your-salesforce-domain.com}/services/authcallback/Sprinkl



Navigate to and Configure “Auth. Providers” from Setup



Navigate to and Configure “Auth. Providers” from Setup



The screenshot shows the Salesforce Setup interface for configuring an authentication provider. The left sidebar contains navigation links for Setup, Home, and Object Manager, along with a search bar and a list of administrative and platform tool categories. The main content area is titled "Auth. Providers" and displays the "Auth. Provider Edit" form. The form includes fields for Provider Type (SprAuth), Name (Sprinklr), URL, Buffer (Sprinklr), Redirect URL (https://acme-sprinklr-dev-ed.lightning.force.com/services/authorize/sprinklr), Custom Error URL, Custom Logout URL, and Registration Handler. A blue box highlights the "Execute As" field, which is set to "Ben Turner". Below this field, there is a link that says "Automatically create a registration handler template" and another link that says "Choose one of our sample apps".

Auth. Provider

Auth. Provider Edit

Provider Type: SprAuth

Name: Sprinklr

URL: Sprinklr

Buffer: Sprinklr

Redirect URL: https://acme-sprinklr-dev-ed.lightning.force.com/services/authorize/sprinklr

Custom Error URL:

Custom Logout URL:

Registration Handler:

Execute As: Ben Turner

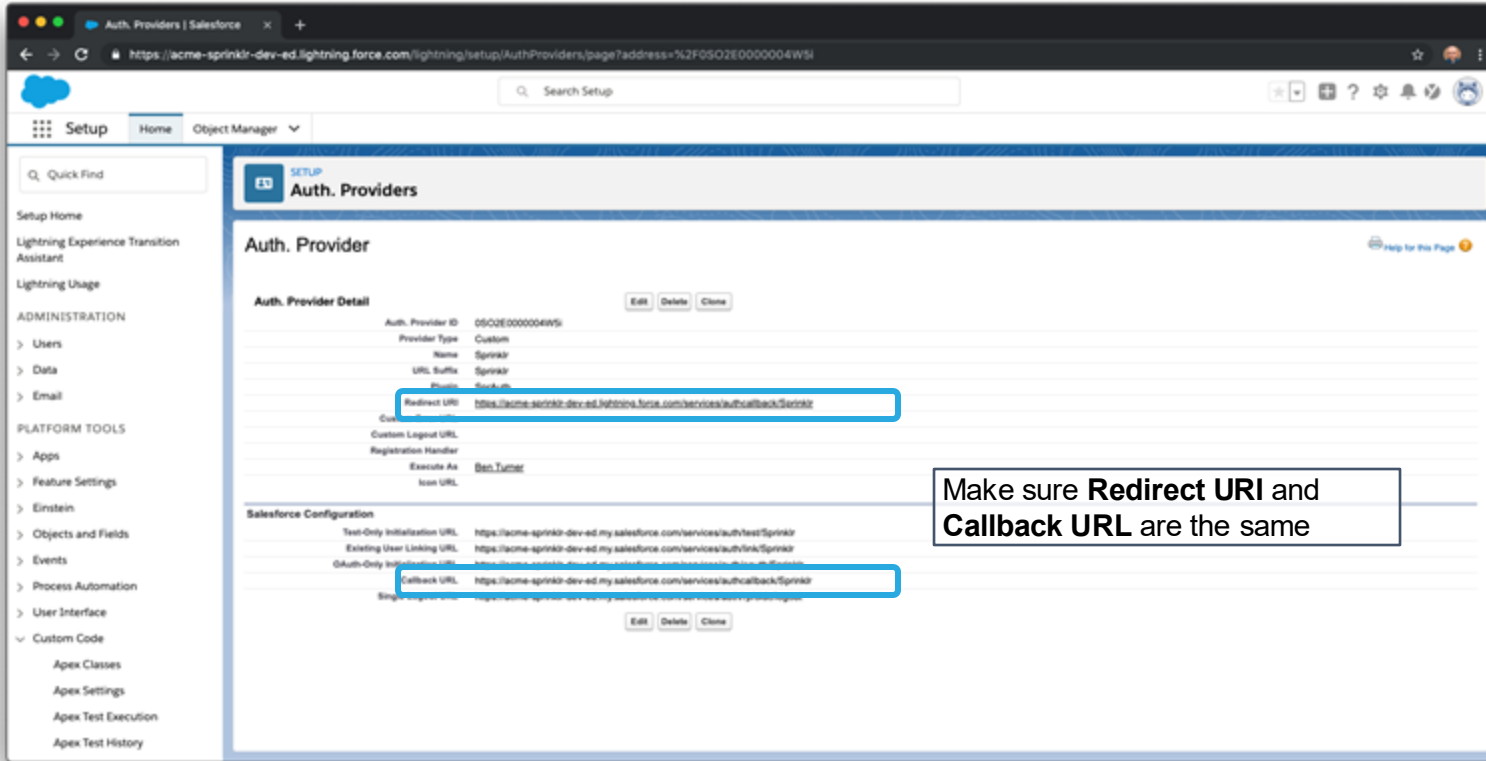
Automatically create a registration handler template

Choose one of our sample apps

For **Execute As**, select an admin of your Salesforce Platform



Navigate to and Configure “Auth. Providers” from Setup



The screenshot shows the Salesforce Setup interface for configuring an authentication provider. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Auth. Providers" and displays the "Auth. Provider Detail" for a custom provider named "Sprinklr". The "Redirect URI" field is highlighted with a blue box and contains the URL "https://acme-sprinklr-dev-ed.lightning.force.com/services/auth/callback/Sprinklr". Below this, the "Salesforce Configuration" section shows the "Callback URL" field, also highlighted with a blue box, containing the URL "https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/callback/Sprinklr". A text box on the right side of the image states: "Make sure Redirect URI and Callback URL are the same".

Auth. Provider

Auth. Provider Detail

Auth. Provider ID: 05Q0E0000004W5I

Provider Type: Custom

Name: Sprinklr

URL Prefix: Sprinklr

URL Suffix: Sprinklr

Redirect URI: <https://acme-sprinklr-dev-ed.lightning.force.com/services/auth/callback/Sprinklr>

Custom Login URL:

Custom Logout URL:

Registration Handler: Ben Turner

Execute As:

Is an URL:

Salesforce Configuration

Test-Only Initialization URL: <https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/test/Sprinklr>

Existing User Linking URL: <https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/link/Sprinklr>

OAuth-Only Initialization URL: <https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/init/Sprinklr>

Callback URL: <https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/callback/Sprinklr>

Single Sign-On URL: <https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/sso/Sprinklr>

Make sure **Redirect URI** and **Callback URL** are the same



Navigate to and Configure “Named Credentials” from Setup

The screenshot shows the Salesforce interface for configuring Named Credentials. The browser address bar displays the URL: `https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/NamedCredential/home`. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Named Credentials" and includes a description: "A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials." Below this, there is a table with columns for Action, Label, URL, and Username. The table contains one entry with the label "Sec.Auth" and the URL "https://api2.sprinklr.com".

Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials.

View: All Create New View

Action	Label	URL	Username
Edit	Sec.Auth	https://api2.sprinklr.com	



Navigate to and Configure “Named Credentials” from Setup

The screenshot shows the Salesforce Setup interface for configuring a Named Credential. The browser address bar shows the URL: `https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/NamedCredential/page?address=%2F0XA2E000000Cbc%2F%3FURL%3D%2F0XA2%2FURL%253D%252Fsetup%252FPhone%2526appLay...`. The left sidebar contains navigation links: Setup, Home, Object Manager, Quick Find, Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, Feature Settings, Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code), Apex Classes, Apex Settings, Apex Test Execution, and Apex Test History. The main content area is titled "Named Credentials" and "Named Credential Edit: Spr Auth". Below the title, it says "Specify the callout endpoint's URL, and the authentication settings that are required for Salesforce to make callouts to the remote system." The form includes fields for Label (Spr Auth), Name (Spr_Auth), and URL (https://api2.sprinklr.com). The Authentication section is expanded, showing Certificate, Identity Type (Named Principal), Authentication Protocol (OAuth 2.0), Authentication Provider (Sprinklr), Scope, and Authentication Status (Authenticated as Sprinklr). A checkbox labeled "Start Authentication Flow on Save" is checked and highlighted with a red box. The Callout Options section is also expanded, showing checkboxes for "Generate Authorization Header" (checked), "Allow Merge Fields in HTTP Header" (checked), and "Allow Merge Fields in HTTP Body" (unchecked). Two callout boxes are overlaid on the form: one pointing to the Authentication section with the text "Fill in the required details:" and a list of "Authentication Protocol = OAuth 2.0" and "Authentication Provider = Sprinklr"; and another pointing to the "Start Authentication Flow on Save" checkbox with the text "Select 'Start Authentication Flow on Save'".

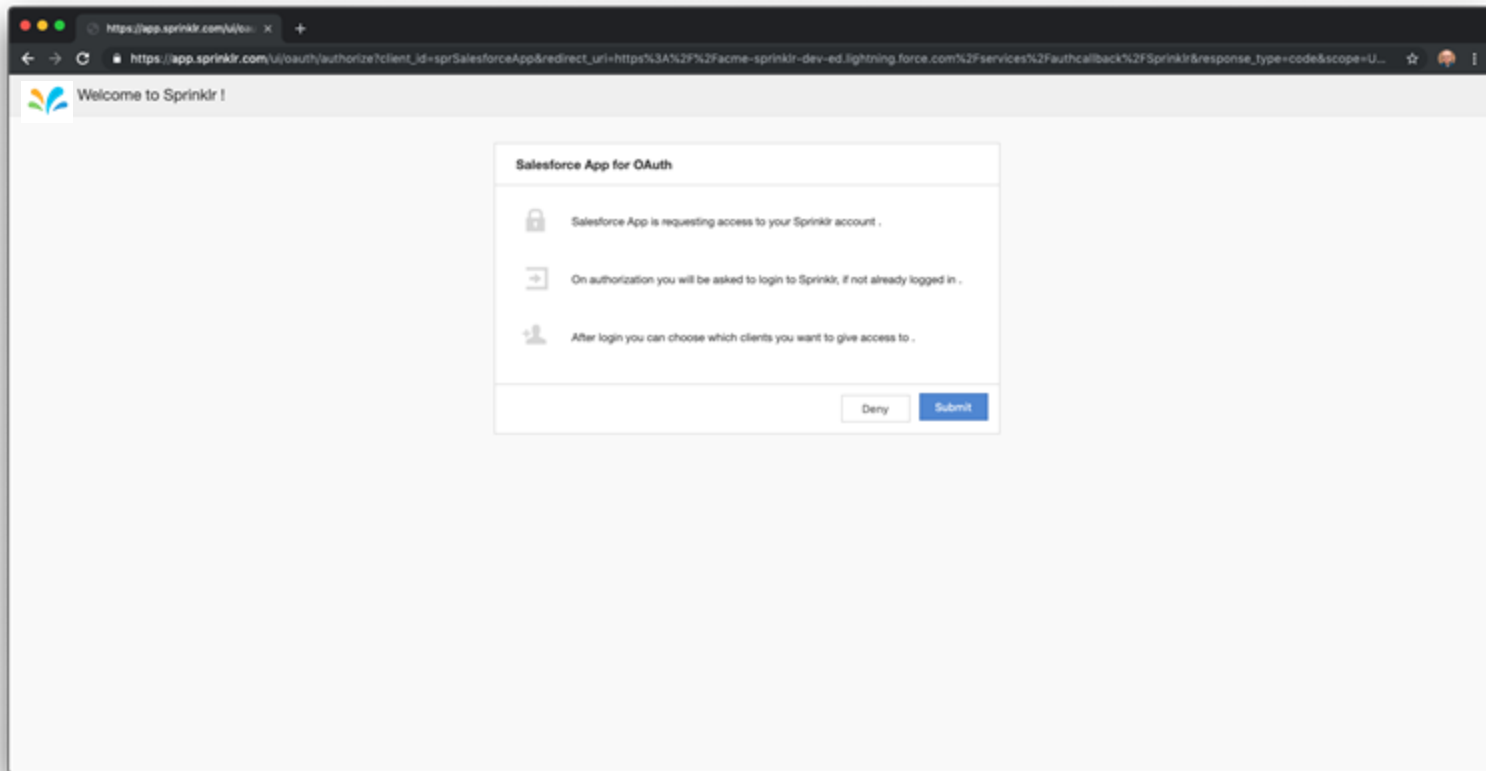
Fill in the required details:

- Authentication Protocol = OAuth 2.0
- Authentication Provider = Sprinklr

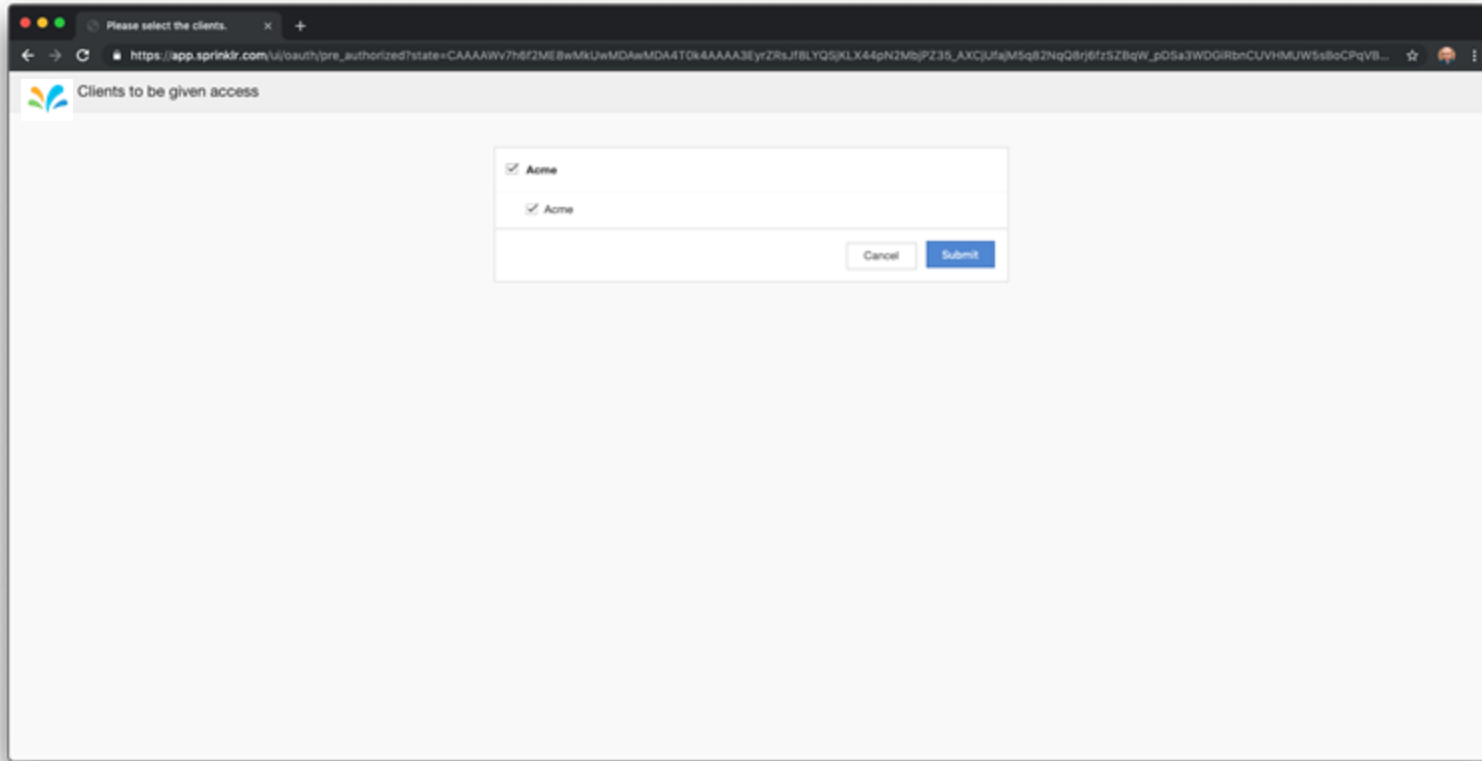
Select **"Start Authentication Flow on Save"**



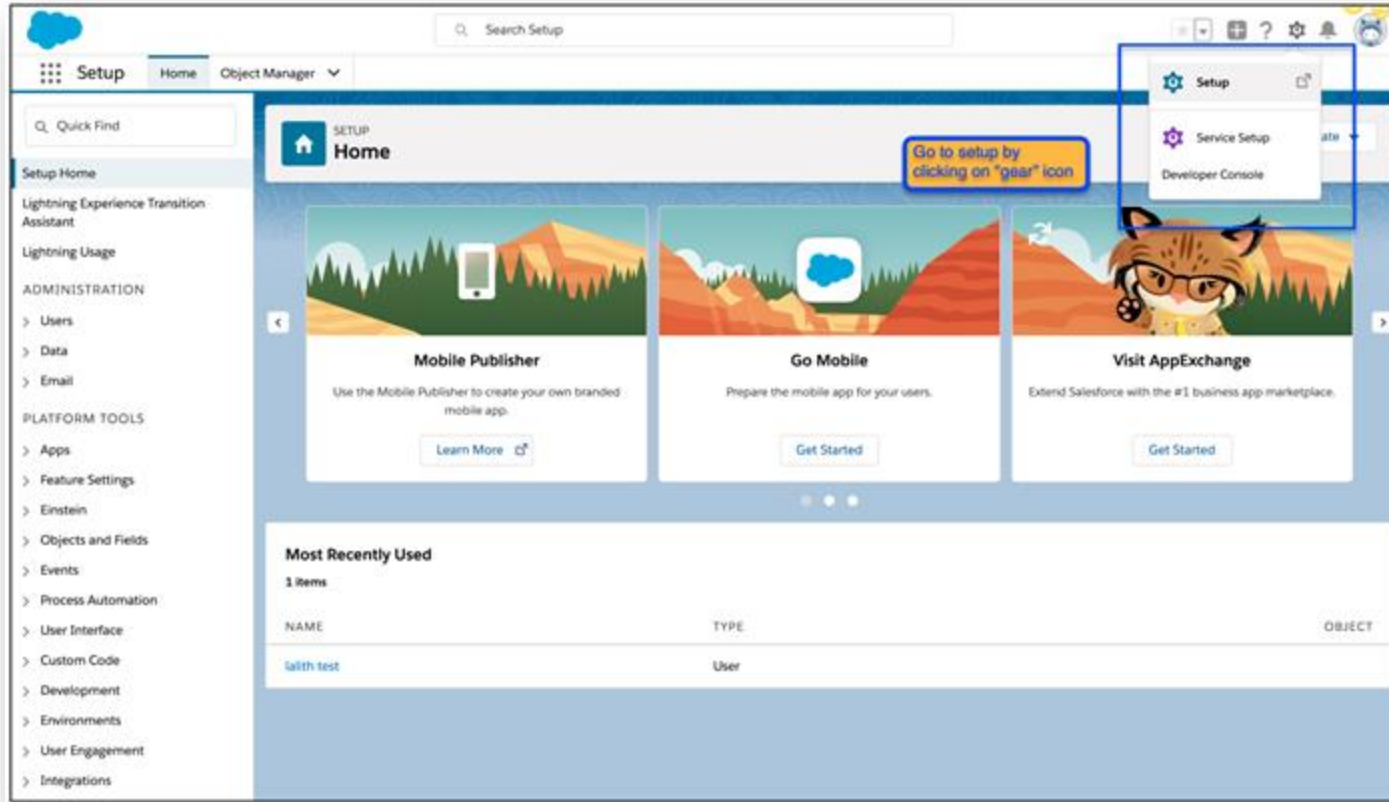
Navigate to and Configure “Named Credentials” from Setup



Navigate to and Configure “Named Credentials” from Setup



Navigate to Setup window by clicking on gear icon



The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation bar includes "Setup", "Home", and "Object Manager". A blue box highlights the gear icon in the top right corner, with a callout box stating "Go to setup by clicking on 'gear' icon". The main content area features three cards: "Mobile Publisher", "Go Mobile", and "Visit AppExchange". A left sidebar contains a "Quick Find" search bar and a list of categories: "Setup Home", "ADMINISTRATION", "PLATFORM TOOLS", and "Integrations". At the bottom, a "Most Recently Used" section displays a table with one item.

Most Recently Used

1 items

NAME	TYPE	OBJECT
lailth test	User	



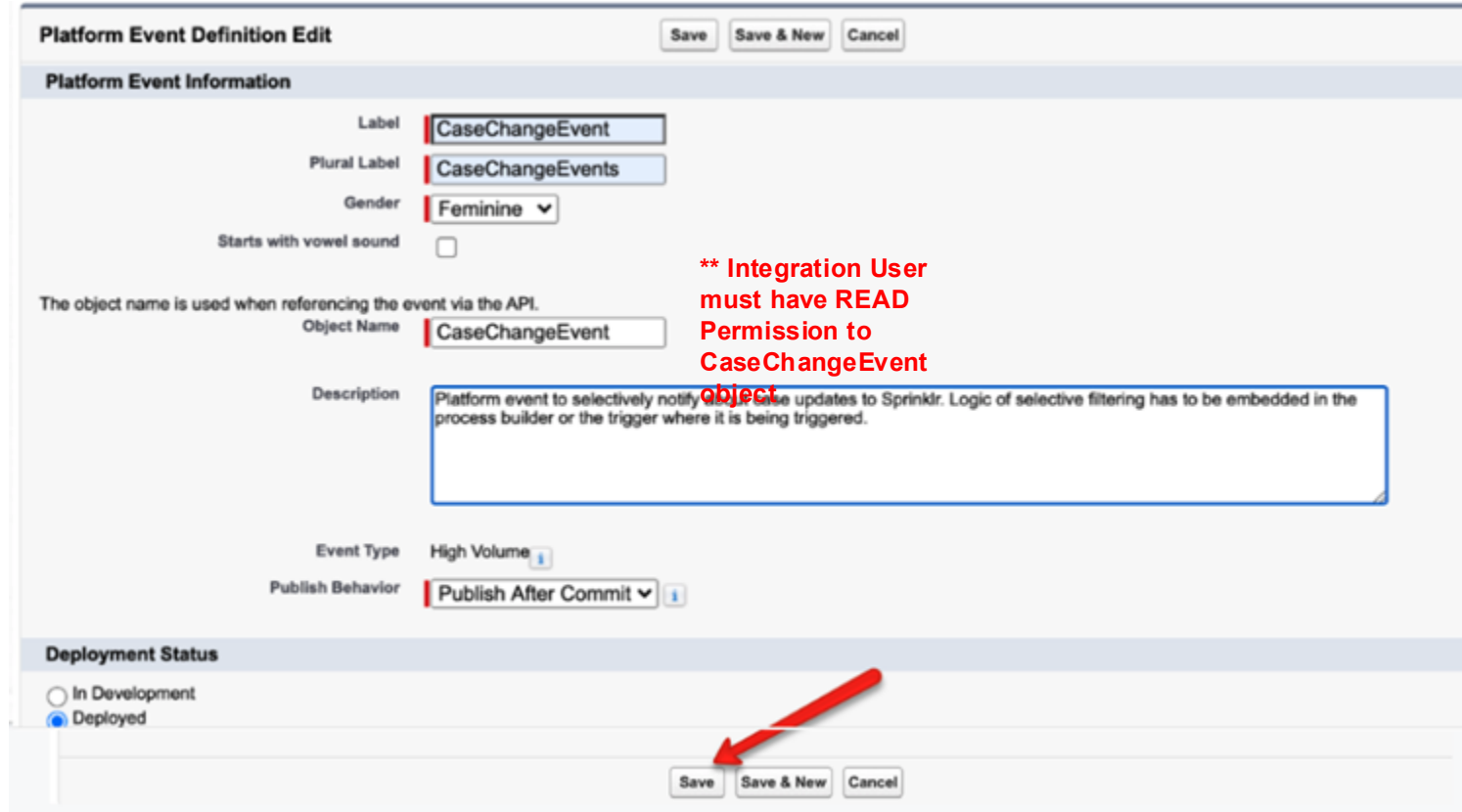
Search for "Platform Events" and select from search results

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below the search bar, the navigation menu includes "Setup", "Home", and "Object Manager". On the left side, a search filter "platform" is applied, showing a list of results under the "Einstein" category, including "Einstein Platform", "Einstein AI", "Custom Code", "Platform Cache", and "Integrations". The "Platform Events" option is highlighted in the left sidebar. The main content area is titled "Platform Events" and includes a sub-header "Platform Events" and a description "Use platform events to define the data to be delivered in custom notifications." Below this, there is a button labeled "New Platform Event" and a message "No platform events have been defined." A red arrow points to the "New Platform Event" button.



Configure the Platform Event

**** Object name must be `SprinklrCaseChangeEvent`**



The screenshot shows the 'Platform Event Definition Edit' form. The 'Platform Event Information' section contains the following fields:

- Label: `CaseChangeEvent`
- Plural Label: `CaseChangeEvents`
- Gender: `Feminine` (dropdown)
- Starts with vowel sound: ☐
- Object Name: `CaseChangeEvent` (with a note: 'The object name is used when referencing the event via the API.')
- Description: Platform event to selectively notify object case updates to Sprinklr. Logic of selective filtering has to be embedded in the process builder or the trigger where it is being triggered.
- Event Type: `High Volume` (dropdown)
- Publish Behavior: `Publish After Commit` (dropdown)

The 'Deployment Status' section shows:

- ☐ In Development
- ☒ Deployed

At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. A red arrow points to the 'Save' button.

**** Integration User must have READ Permission to `CaseChangeEvent` object.**

The completed Platform Events

Integrations
Platform Events
Didn't find what you're looking for?
Try using Global Search.

SETUP
Platform Events

Platform Event: CaseChangeEvent

Standard Fields (2) | Custom Fields & Relationships (2)

Platform Event Definition Detail

Singular Label

CaseChangeEvent

Plural Label

CaseChangeEvents

Object Name

CaseChangeEvent

API Name

CaseChangeEvent__c

Event Type

High Volume

Publish Behavior

Publish After Commit

Created By

Surathi Prasad, 16/06/2020 16:31

Description

Platform event to selectively notify about case updates to Sprinklr. Logic of selective filtering has to be embedded in the process builder or the trigger where it is being triggered.

Deployment Status

Deployed

Modified By

Surathi Prasad, 16/06/2020 16:31

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Id	Id__c	Text(18)			Surathi Prasad, 16/06/2020 16:32
Edit Del	ObjectName	ObjectName__c	Text(255)			Surathi Prasad, 16/06/2020 16:34

Triggers

No triggers defined

Subscriptions

Proceed to configuration of Flow

The screenshot displays the Salesforce Setup interface for configuring a Platform Event. The left sidebar shows the navigation menu with 'Flows' highlighted under 'Process Automation'. A red arrow points to this 'Flows' link.

The main content area is titled 'Platform Events' and shows the configuration for the 'CaseChangeEvent'.

Platform Event Definition Detail

Field	Value
Singular Label	CaseChangeEvent
Plural Label	CaseChangeEvent
Object Name	CaseChangeEvent__e
API Name	CaseChangeEvent__e
Event Type	High Volume
Publish Behavior	Publish After Commit
Created By	Surabhi Prasad, 16/06/2020 16:31
Modified By	Surabhi Prasad, 16/06/2020 16:31
Description	Platform event to selectively notify about case updates to Sprinklr. Logic of selective filtering has to be embedded in the process builder or the trigger where it is being triggered.
Deployment Status	Deployed

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

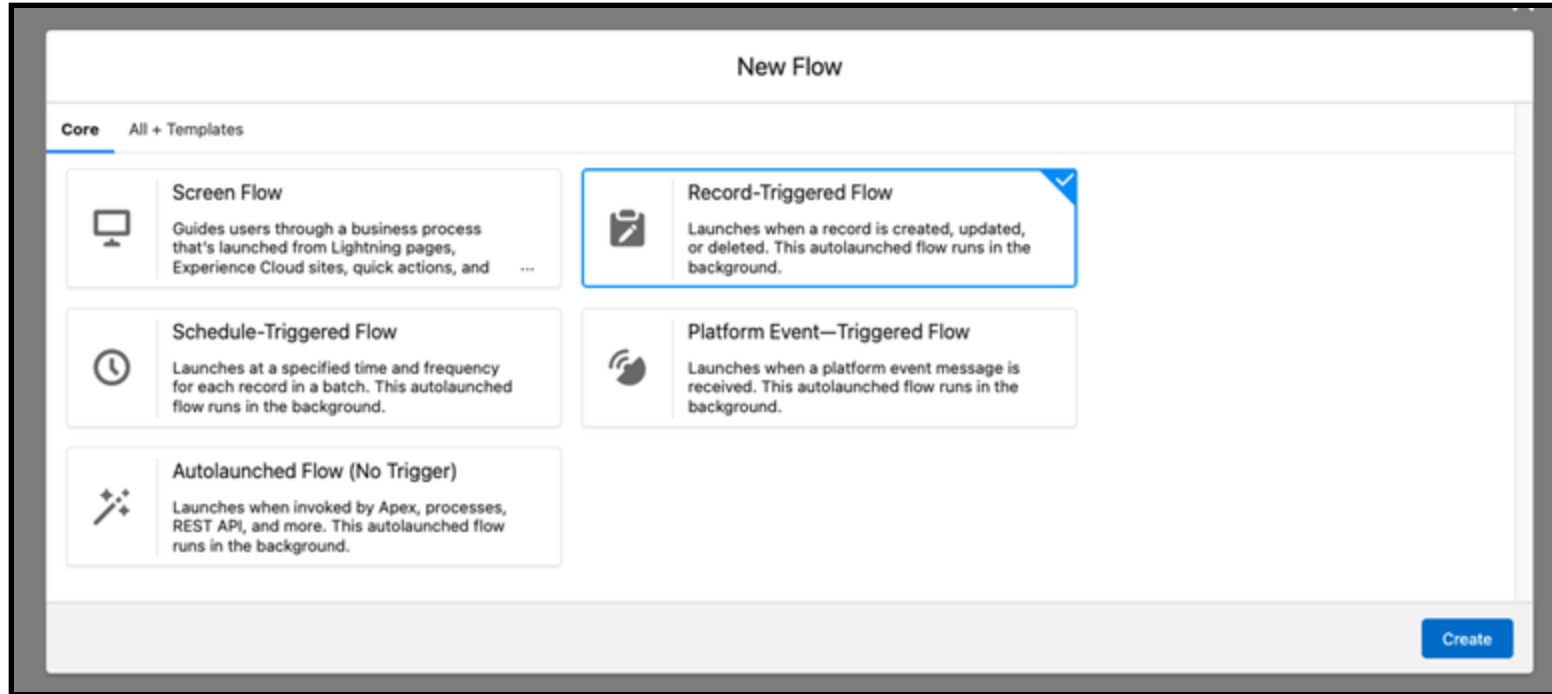
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Id	Id__c	Text(18)			Surabhi Prasad, 16/06/2020 16:32
Edit Del	ObjectName	ObjectName__c	Text(255)			Surabhi Prasad, 16/06/2020 16:34

Triggers

No triggers defined

Subscriptions

Use Flow Builder to configure Platform Events trigger (1/3)



Use Flow Builder to configure Platform Events trigger (2/3)

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Case

Configure Trigger

Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
spr_sf__Sprinklr_Case_Number__c	Is Null	False X
LastModifiedById	Does Not Equal	0055h0000005Z1owAAC

+ Add Condition

Cancel Done

When to Run the Flow for Updated Records ⓘ

☒ Every time a record is updated and meets the condition requirements

☐ Only when a record is updated to meet the condition requirements

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

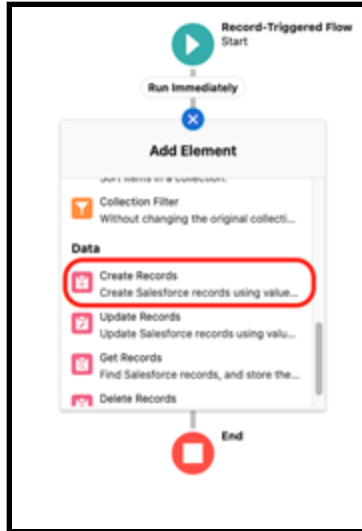
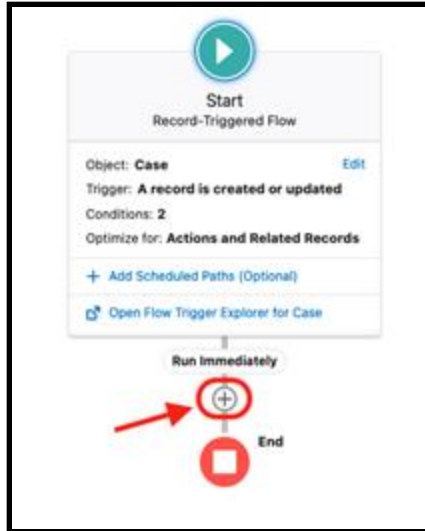
Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Save

Use Flow Builder to configure Platform Events trigger (3/3)



The screenshot shows the 'New Create Records' configuration screen in Flow Builder. The configuration is as follows:

- Create Salesforce records using values from the flow.**
- Label:** CreateCaseEventRecord
- API Name:** CreateCaseEventRecord
- Description:** (Empty text area)
- How Many Records to Create:** One (selected)
- How to Set the Record Fields:** Use separate resources, and literal values (selected)
- Create a Record of This Object:** DVLRsprinklrCaseChangeEvent
- Set Field Values for the DVLRsprinklrCaseChangeEvent:**
 - Field:** Id__c, **Value:** A_ \$Record > Case ID X
 - Field:** ObjectName__c, **Value:** Case
- Buttons:** + Add Field, Manually assign variables (checkbox), Cancel, Done



Edit Case Page Layout

Case Page Layout

The screenshot displays the Salesforce Object Manager interface. On the left, a table lists various objects with their labels and API names. The 'Case' object is highlighted. A search bar at the top right contains the text 'Case'. A dropdown menu is open, showing search results for 'Case'. The 'Case' object is highlighted in the dropdown. A callout box points to the 'Case' object in the dropdown with the text 'Select Case from the Object Manager'.

Object Manager | Salesforce

https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager
51 Items, Sorted by Label

LABEL	API NAME
Account	Account
Activity	Activity
Asset	Asset
Asset Relationship	AssetRelationship
Authorization Form	AuthorizationForm
Authorization Form Consent	AuthorizationFormConsent
Authorization Form Data Use	AuthorizationFormDataUse
Authorization Form Text	AuthorizationFormText
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Consumption Rate	ConsumptionRate
Consumption Schedule	ConsumptionSchedule
Contact	Contact
Contact Point Type Consent	ContactPointTypeConsent
Contact Request	ContactRequest

Search: Case

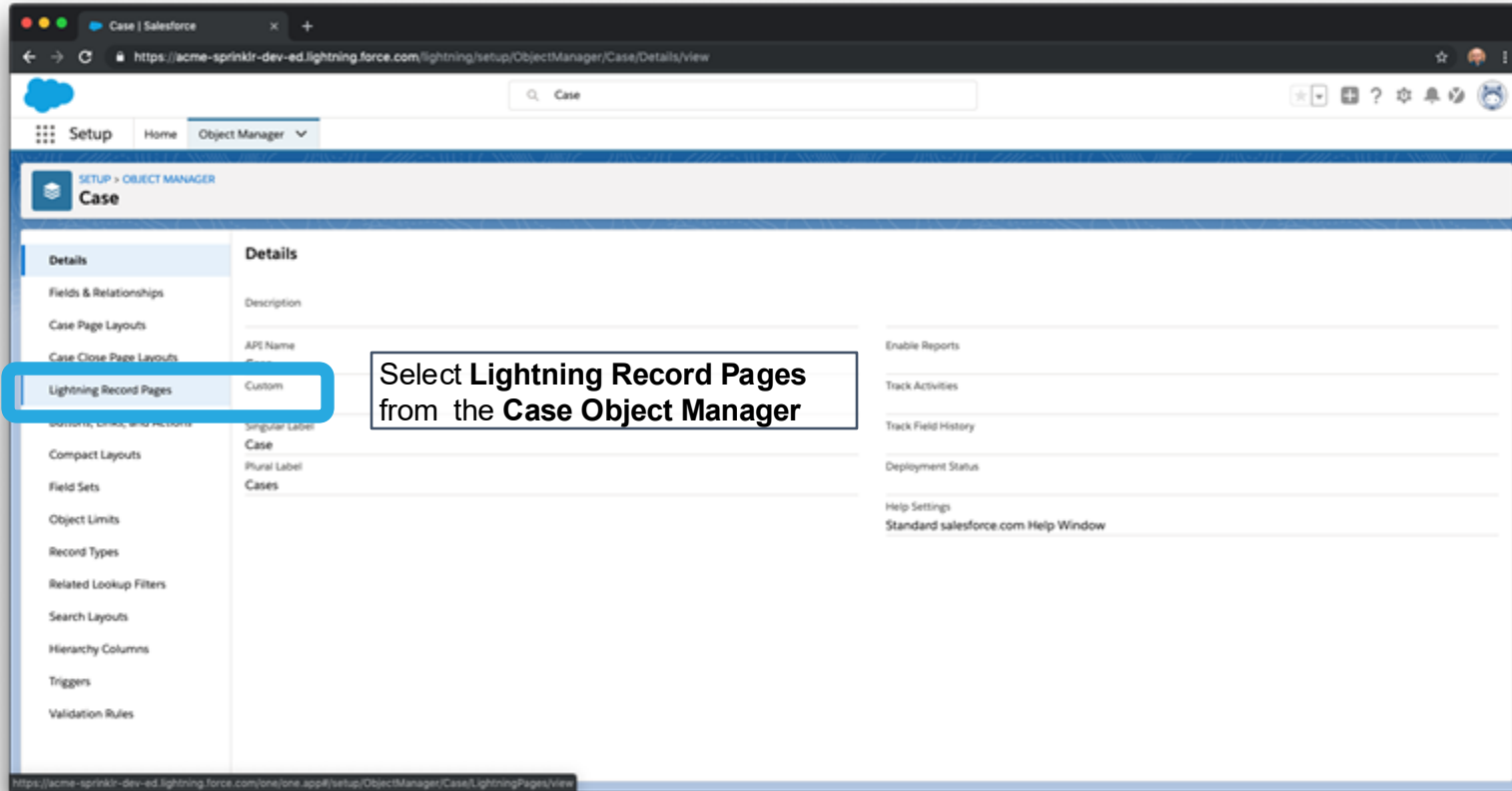
- "Case" in Setup
- "Case" in Objects
- Case Auto-Response Rules
Object • Feature Settings > Service
- Case Comment Triggers
Object • Feature Settings > Service
- Case Team Roles
Object • Feature Settings > Service > Case Teams
- Predefined Case Teams
Object • Feature Settings > Service > Case Teams
- Email-to-Case
Object • Feature Settings > Service
- Case**
Object • Object Manager
- Case Comment
Object • Object Manager
- Case Contact Role
Object • Object Manager
- Case ID
Object • Object Manager > Case > Fields & Relationships
- Case Number
Object • Object Manager > Case > Fields & Relationships

Select **Case** from the Object Manager

Quick Find Schema Builder Create

LAST MODIFIED	DEPLOYED	CUSTOM
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Case Page Layout



The screenshot displays the Salesforce interface for the 'Case' object in the Object Manager. The left sidebar contains a 'Details' section with various configuration options. The 'Lightning Record Pages' option is highlighted with a blue box. A text box with a black border and white background is overlaid on the 'Custom' value next to 'Lightning Record Pages', containing the text: 'Select Lightning Record Pages from the Case Object Manager'. The main content area shows the 'Details' for the 'Case' object, including fields like 'Description', 'API Name', 'Singular Label', 'Plural Label', and 'Cases'. The right sidebar contains various settings like 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', and 'Help Settings'.

Case | Salesforce

https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Case/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Custom

Customize, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Hierarchy Columns

Triggers

Validation Rules

Details

Description

API Name

Singular Label

Case

Plural Label

Cases

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

https://acme-sprinklr-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/Case/LightningPages/view

Case Page Layout

The screenshot shows the Salesforce Lightning Record Pages configuration interface for the 'Case' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages (highlighted), Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Hierarchy Columns, Triggers, and Validation Rules. The main content area is titled 'Lightning Record Pages' and shows '1 Item, Sorted by Label'. A table lists the record pages, with the first entry 'Case Record Page' highlighted in blue. A text box with a blue border and rounded corners is overlaid on the 'Case Record Page' entry, containing the text: 'Select the Case Record Page you want to edit or create a new one'. The table has columns for LABEL, OTHER ASSIGNMENTS, and MODIFIED BY. The 'Case Record Page' entry is associated with 'Desktop' and 'Desktop (2)' under OTHER ASSIGNMENTS, and was modified by 'Ben Turner' on '7/16/2019, 3:57 AM'. The top of the page shows the 'Setup' tab and the 'Object Manager' dropdown menu.

Case | Salesforce

https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Case/LightningPages/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Case

Lightning Record Pages

1 Item, Sorted by Label

Labels

Case Record Page

Select the Case Record Page you want to edit or create a new one

LABEL	OTHER ASSIGNMENTS	MODIFIED BY
Case Record Page	Desktop Desktop (2)	Ben Turner, 7/16/2019, 3:57 AM

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Hierarchy Columns

Triggers

Validation Rules

https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Case/LightningPages/OM02E000000p3x15AA/view

Case Page Layout

The screenshot shows the Salesforce 'Case' page layout configuration page. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, **Lightning Record Pages** (highlighted), Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Hierarchy Columns, Triggers, and Validation Rules.

The main content area is titled 'Case Record Page' and includes a 'Lightning Page Detail' section with 'Edit', 'Clone', and 'Delete' buttons. Below this is an 'Information' section with a table:

Name	Case_Record_Page	Label	Case Record Page
Description	Working on your case, please wait.		

A text box with the text 'Edit the Case Record' is overlaid on the table.

Below the table are two sections: 'Assignments By App' and 'Assignments By App, Record Type, and Profile'.

Assignments By App

App	Form Factor
Sales Console	Desktop
Service Console	Desktop

Assignments By App, Record Type, and Profile

No Assignments to display

At the bottom, there is a 'Back To Top' link and a note: 'Always show me [more](#) records per related list'.

Case Page Layout

The screenshot displays the Salesforce Lightning App Builder interface for a 'Case Record Page'. The top navigation bar includes the 'Lightning App Builder' tab, a 'Pages' dropdown, and the page title 'Case Record Page'. Below this is a toolbar with icons for undo, redo, zoom, and a 'Desktop' view selector. The main workspace is divided into three columns. The left column contains a 'Lightning Components' sidebar with a search bar and a list of components. The middle column shows a preview of the 'Case Record Page' layout, which includes a 'Case Details' section, a 'Contact Details' section, and a 'Sprinklr Case Detail' component. The right column contains a 'Page' configuration panel with fields for 'Label', 'Developer Name', 'Page Type', 'Object', 'Template', and 'Description'. A text box at the bottom of the screenshot provides instructions on how to drag the 'Sprinklr Case Detail' component from the 'Custom - Managed' section of the components list to the appropriate section of the 'Case Record Page'.

Case Record Page - Lightning

https://acme-sprinklr-dev-ed.lightning.force.com/visualforce/appBuilder.app?id=0M02E000000p3x15AA&clone=false&retUrl=%2Fone%2Fone_app%23%2Fsetup%2FObjectManager%2FCase%2FLightningPages%2F0M02E00... Back Help

Lightning App Builder Pages Case Record Page

Desktop Shrink To View Refresh Save Activation...

Lightning Components

Search components...

Standard (31)

Custom (0)

No components available.

Custom - Managed (1)

Sprinklr Case Detail

Case Details

Case Number: 00001067 Case Owner: Jen Smith

Status: New Priority: Medium

Subject: Needs help with order tracking

Description: Hey Acme, I need some help tracking down my order. Can you help me? #SFDCEmo

Contact Details

Link a related record

Search contacts...

We can't display this information because the record has no parent or you don't have access. Ask your admin for help.

Case

Needs help with order tracking

Follow Edit

Feed Details Sprinklr Case Detail

Post Pull

Share an update...

Share

Most Recent Activity

Search this feed...

All Updates Call Logs Text Posts Status Changes

Jen Smith Case created

Subject: Needs help with order tracking

Priority: Medium

Status: New

Case Number: 00001067

Comment

Related

Attachments (0)

Upload Files

Or drop files

Activity History (0)

Open Activities (0)

Page

*Label: Case Record Page

*Developer Name: Case_Record_Page

Page Type: Record Page

Object: Case

Template: Three Regions Change

Description:

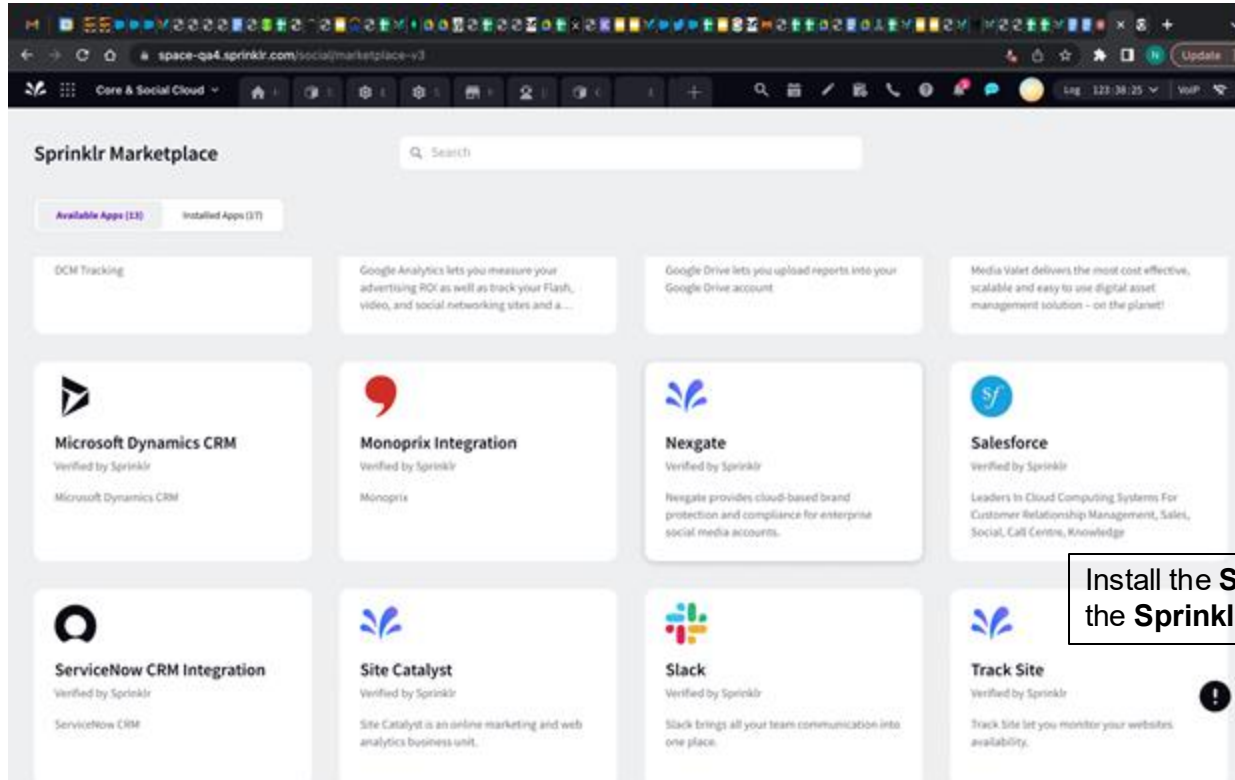
Drag Sprinklr Case Detail from the **Custom – Managed** components to the appropriate section of the **Case Record Page**

Get more on the AppExchange



Installing the Sprinklr Salesforce App

Install Salesforce from Sprinklr Marketplace



Install the **Salesforce** app from within the **Sprinklr New Marketplace**

Install Salesforce from Sprinklr Marketplace

Install Salesforce
Start by adding the Salesforce account user and then map the users

Salesforce Details ⓘ ▾

Configuration Name ⓘ ▾

Salesforce Environment Settings ⓘ ▾

Workspace
Core & Social Cloud

Environment Type
☒ Production Environment ☐ Test Environment

Log 123.43.20 VoIP

Cancel Save

Fill in the **Name** for the Salesforce app

Select the type of **Environment** in sprinklr to be mapped to the installed Salesforce app.

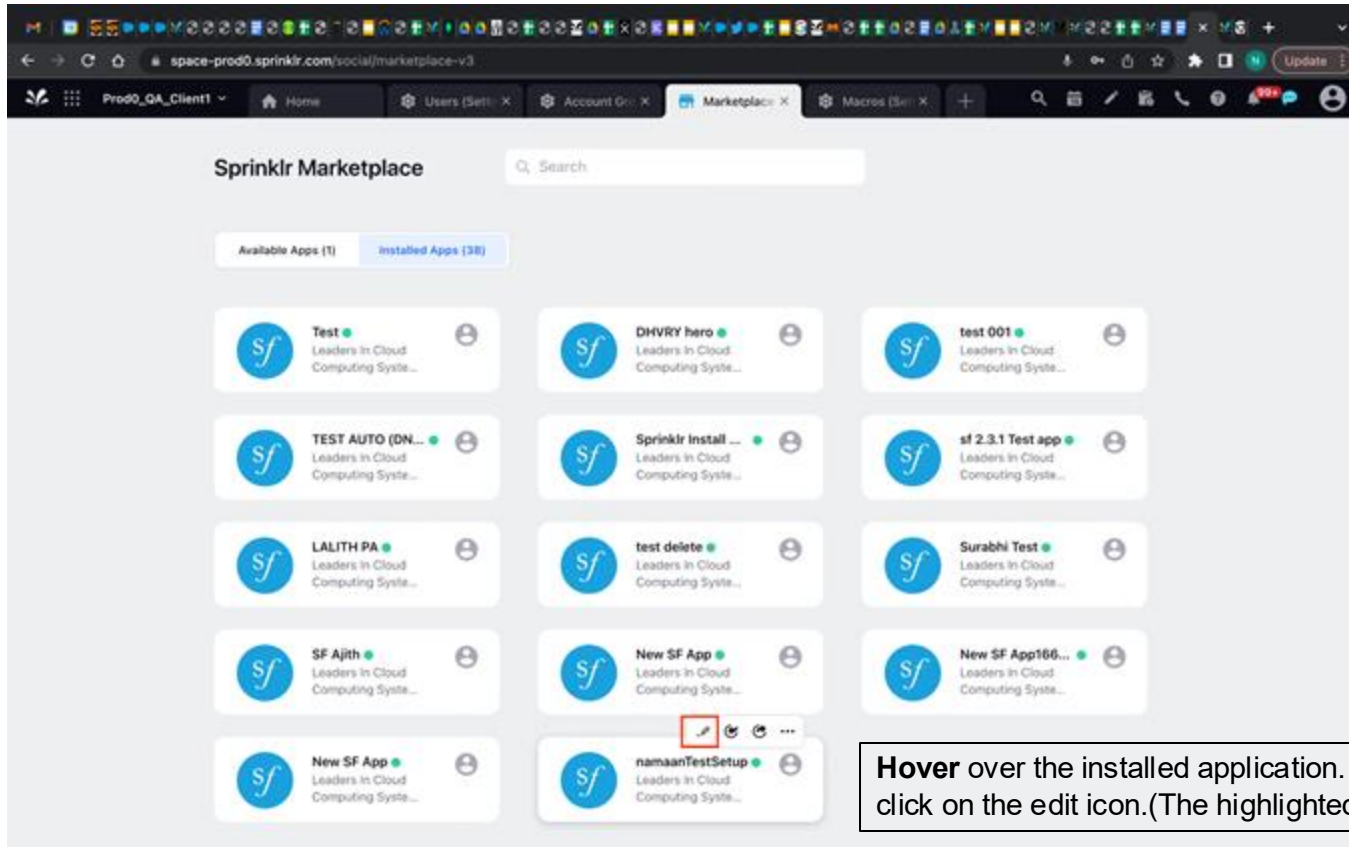
NOTE: This can not be changed once the app is created

Clicking on save will redirect you to Salesforce instance to add a user.



Authenticate Users

Authenticating Users



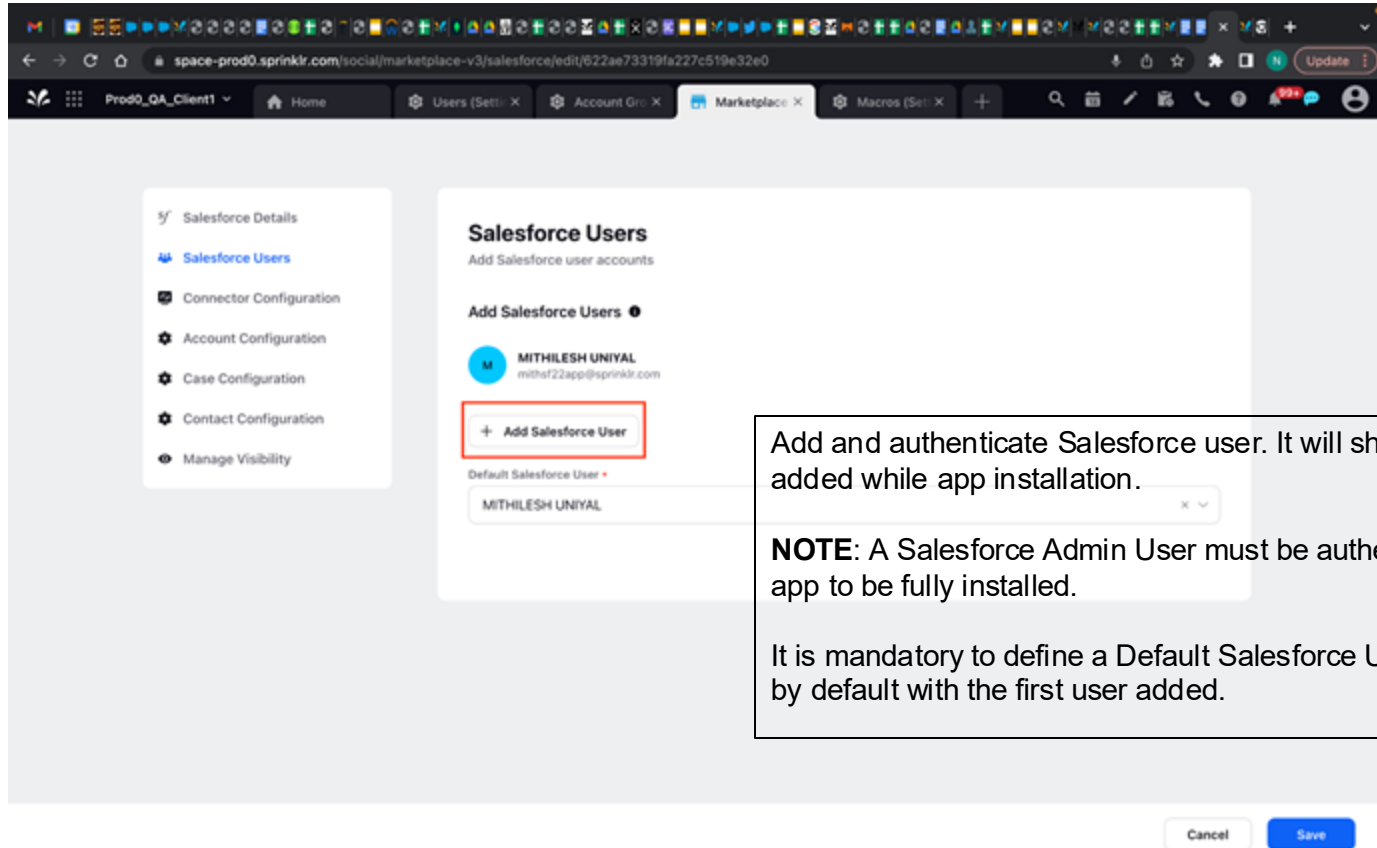
Hover over the installed application. you will find 4 icons. click on the edit icon.(The highlighted one)

Authenticating Users

Click on Salesforce Users.

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/ed3/622ae73319fa227c519e32e0`. The top navigation bar includes links for 'Prod0_QA_Client1', 'Home', 'Users (Set: X)', 'Account Gr: X', 'Marketplace X', and 'Macros (Set: X)'. The left sidebar contains a menu with 'Salesforce Details' (selected) and 'Salesforce Users' (highlighted with a red box). Below these are 'Connector Configuration', 'Account Configuration', 'Case Configuration', 'Contact Configuration', and 'Manage Visibility'. The main content area is titled 'Install Salesforce' and includes the instruction 'Start by adding the Salesforce account user and then map the users'. Under 'Salesforce Details', there is a 'Configuration Name' field with the value 'MithSF22App'. Below this, 'Installed on' is '11 Mar 2022' and 'Installed by' is 'Mithlesh Uniyal'. Under 'Salesforce Environment Settings', the 'Workspace' is 'Prod0_QA_Client1' and the 'Environment Type' is 'Production Environment' (selected). At the bottom right, there are 'Cancel' and 'Save' buttons.

Authenticating Users



The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/622ae73319fa227c519e32e0`. The browser's address bar and tabs are visible at the top. The main content area is titled "Salesforce Users" and includes a sidebar on the left with navigation links: "Salesforce Details", "Salesforce Users" (highlighted), "Connector Configuration", "Account Configuration", "Case Configuration", "Contact Configuration", and "Manage Visibility". The main panel has the heading "Salesforce Users" and the subtitle "Add Salesforce user accounts". Below this is a section "Add Salesforce Users" with a red box around the "+ Add Salesforce User" button. A user card for "MITHILESH UNİYAL" with email "mithi22app@sprinklr.com" is shown. Below the card, a dropdown menu labeled "Default Salesforce User" is set to "MITHILESH UNİYAL". At the bottom right, there are "Cancel" and "Save" buttons.

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/622ae73319fa227c519e32e0

Prod0_QA_Client1 | Home | Users (Sett) | Account Gro | Marketplace | Macros (Sett) | Update

Salesforce Users
Add Salesforce user accounts

Add Salesforce Users

MITHILESH UNİYAL
mithi22app@sprinklr.com

+ Add Salesforce User

Default Salesforce User
MITHILESH UNİYAL

Cancel Save

Add and authenticate Salesforce user. It will show the user added while app installation.

NOTE: A Salesforce Admin User must be authenticated for app to be fully installed.

It is mandatory to define a Default Salesforce User. It is filled by default with the first user added.



Connector Configuration

Connector Configuration

Connector Configuration
Configure required properties for connector

Notification Types
Email

Enter email addresses
mahitha.dalmieda@sprinklr.com

Default Origin
Enter value

Case Record Type
Select Case Record Type

☐ Proxy Enabled

☒ Contact Creation

☒ Contact Association

☒ Default Sync

☐ Push Message Media as Attachment in case

Cancel Save

Add notification type as Email and Email address on which you want to receive failure notifications.

Connector Configuration

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c`. The browser's address bar and tabs are visible at the top. The page has a sidebar on the left with a menu containing the following items: "Salesforce Details", "Salesforce Users", "Connector Configuration" (which is highlighted with a blue checkmark), "Account Configuration", "Case Configuration", "Contact Configuration", and "Manage Visibility". The main content area is titled "Connector Configuration" with the subtitle "Configure required properties for connector". It contains several configuration fields: "Notification Types" with a dropdown menu showing "Email"; "Enter email addresses" with a text input field containing "mahitha.dalmieda@sprinklr.com"; "Default Origin" with a text input field containing "Enter value"; "Case Record Type" with a dropdown menu showing "Select Case Record Type"; and a list of toggle switches: "Proxy Enabled" (disabled), "Contact Creation" (enabled), "Contact Association" (enabled), "Default Sync" (enabled), and "Push Message Media as Attachment in case" (disabled). At the bottom right of the page, there are two buttons: "Cancel" and "Save".

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c

Prod0_GA_Client1 Home Users (Settings) Account (Settings) Marketplace (Settings) Macros (Settings)

Salesforce Details
Salesforce Users
Connector Configuration
Account Configuration
Case Configuration
Contact Configuration
Manage Visibility

Connector Configuration

Configure required properties for connector

Notification Types

Email

Enter email addresses

mahitha.dalmieda@sprinklr.com

Default Origin

Enter value

Case Record Type

Select Case Record Type

☐ Proxy Enabled

☒ Contact Creation

☒ Contact Association

☒ Default Sync

☐ Push Message Media as Attachment in case

Cancel Save



Mapping of Objects

Mapping Object Fields

The screenshot displays the 'Case Details' configuration page in the Sprinklr interface. The left sidebar contains a menu with options: Salesforce Details, Salesforce Users, Connector Configuration, Account Configuration, Case Configuration (highlighted), Contact Configuration, and Manage Visibility. The main content area is titled 'Case Details' and includes a subtitle 'Configure your Salesforce case within Sprinklr'. Below this is the 'Define Field Mapping' section, which shows a table of mappings between Sprinklr fields and Salesforce fields:

Sprinklr fields mapped to Salesforce fields		
Message	→	Description
Status	→	Status
Case Type	→	Case Type
Priority	→	Priority
Case Date Cf	→	Created Date

Below the mapping table is the 'Screen Layouts' section, which lists two layouts, both named 'Case'. Each layout has a checkbox for 'Hide this Layout' and a link to 'Edit Fields'. The 'Default Record Type' section features a dropdown menu labeled 'Default Record type while case creation' and a checkbox labeled 'Is Customer Mandatory for Case Creation?'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Like Account, **Case** Object Fields can be mapped.

Customer can be made mandatory while case creation using the checkbox.

Select Default Record Type while case creation using the dropdown.

Mapping Object Fields

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/615d33865f359945/cd2f1f1f`. The browser's address bar and tabs are visible. The main content area is a configuration page for Salesforce. On the left, there is a sidebar menu with the following items: Salesforce Details, Salesforce Users, Connector Configuration, Account Configuration, Case Configuration, Contact Configuration (highlighted in blue), and Manage Visibility. The main content area is divided into two sections. The top section is titled 'Mapping Object Fields' and contains a table with two columns: 'Source Field' and 'Target Field'. The table has six rows, each with a 'Phone Number' source field mapped to a target field: Business Phone, Mobile Phone, Home Phone, Other Phone, Asst. Phone, and Email. Each row has a small 'x' icon to the right of the source field and a small gear icon to the right of the target field. The bottom section is titled 'Searchable Fields' and contains two rows of fields. The first row is labeled 'Searchable Fields' and contains 'Last Name', 'First Name', 'Full Name', 'Email', and 'SF_CONTACT_BOOL...'. The second row is labeled 'Search Result Fields' and contains 'Full Name', 'Business Phone', 'Email', and 'SF_CONTACT_BOOL...'. Below these sections, there is a 'Screen Layouts' section with a 'Contact' layout. At the bottom of the page, there is a checkbox labeled 'Is Account Mandatory for Contact Creation?' and a blue 'Edit Fields' button. At the very bottom, there are 'Cancel' and 'Save' buttons.

Source Field	Target Field
Phone Number	Business Phone
Phone Number	Mobile Phone
Phone Number	Home Phone
Phone Number	Other Phone
Phone Number	Asst. Phone
Email	Email

Searchable Fields

Last Name x First Name x Full Name x Email x SF_CONTACT_BOOL... x

Search Result Fields

Full Name x Business Phone x Email x SF_CONTACT_BOOL... x

Screen Layouts

Contact

☐ Is Account Mandatory for Contact Creation?

Edit Fields

Cancel Save

There is a separate option now to map contact fields, from contact configuration.

Additionally, the account can now be made mandatory while case creation using the checkbox from UI.



Configuring Layouts

Edit Screen Layouts

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b808f91ab44c3f0c

Prod0_GA_Client1 Home Users (Sett...) Account Con... Marketplace X Macros (Sett... Update

Salesforce Details

Salesforce Users

Connector Configuration

Account Configuration

Case Configuration

Contact Configuration

Manage Visibility

Define Field Mapping

Sprinklr fields mapped to Salesforce fields

Name	→	Account Name	✕
Phone Number	→	Account Phone	✕
Social Network Profile Id	→	Social Network Profile Id	✕

Searchable Fields

Account Name ✕ Social Network Profil... ✕ Social Network ✕

Search Result Fields

Account Name ✕ Account Phone ✕ Account Site ✕

Screen Layouts

Account

☐ Hide this Layout [Edit Fields](#)

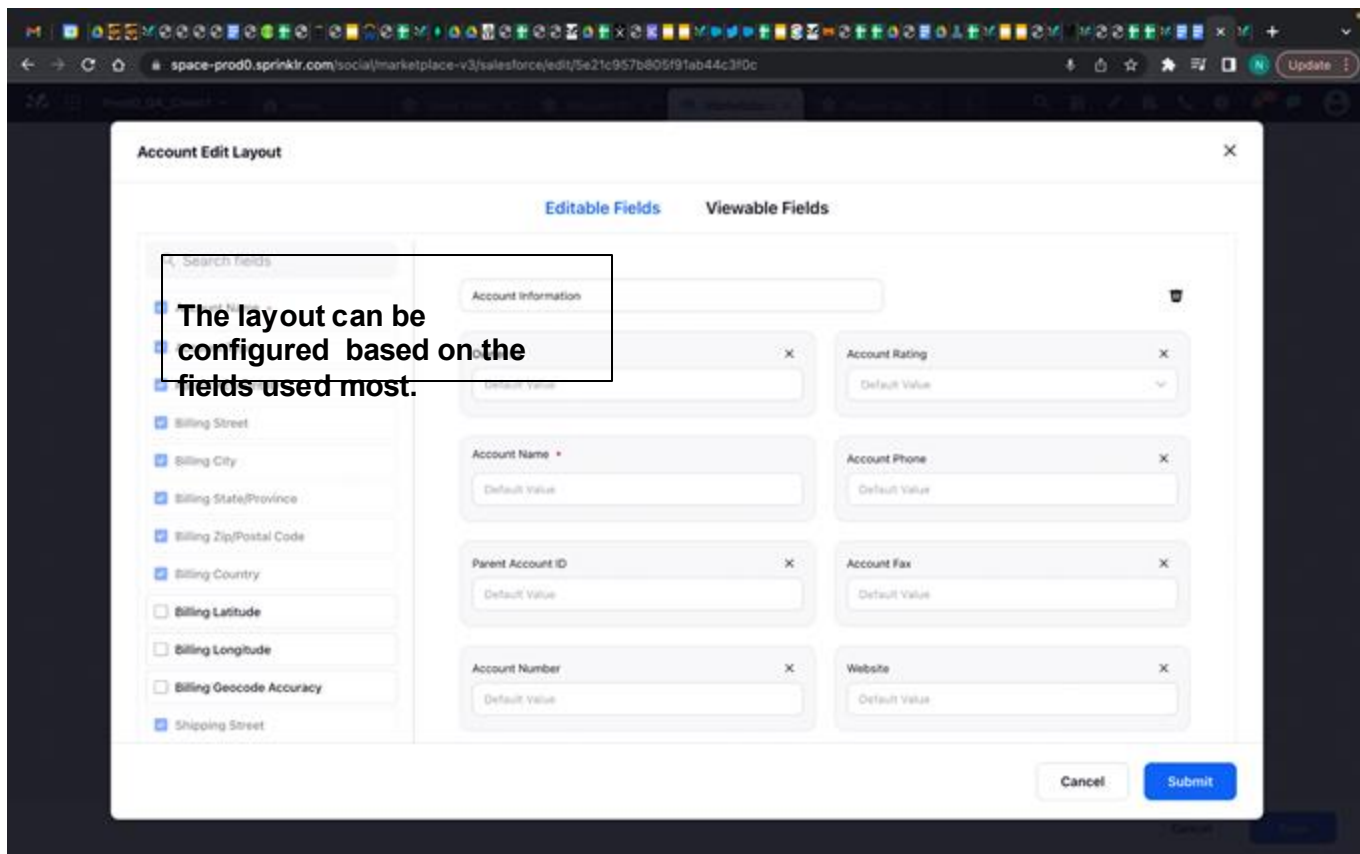
Account

☐ Hide this Layout [Edit Fields](#)

Cancel Save

Screen Layouts are used when **Searching For, Linking To, or Viewing** Salesforce Customer Records

Edit Screen Layouts





Manage Visibility

Manage Visibility

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/615d33065f359945fcd2f1ff`. The browser's address bar and tabs are visible at the top. The main content area is titled "Manage Visibility" and includes a sub-header "Configure visibility to other workspaces, users, and/or groups". On the left side, there is a sidebar menu with the following items: "Salesforce Details", "Salesforce Users", "Connector Configuration", "Account Configuration", "Case Configuration", "Contact Configuration", and "Manage Visibility" (which is highlighted with a blue icon). The main content area contains two sections: "Workspaces" and "Users / Users Groups". Each section has a checkbox labeled "Visible in all workspaces" and "Visible to all users" respectively, followed by a text input field labeled "Select Workspaces / Workspace Groups" and "Select Users / User Groups". At the bottom right of the page, there are "Cancel" and "Save" buttons.

Manage Visibility
Configure visibility to other workspaces, users, and/or groups

☐ Visible in all workspaces

Workspaces
Select Workspaces / Workspace Groups

☐ Visible to all users

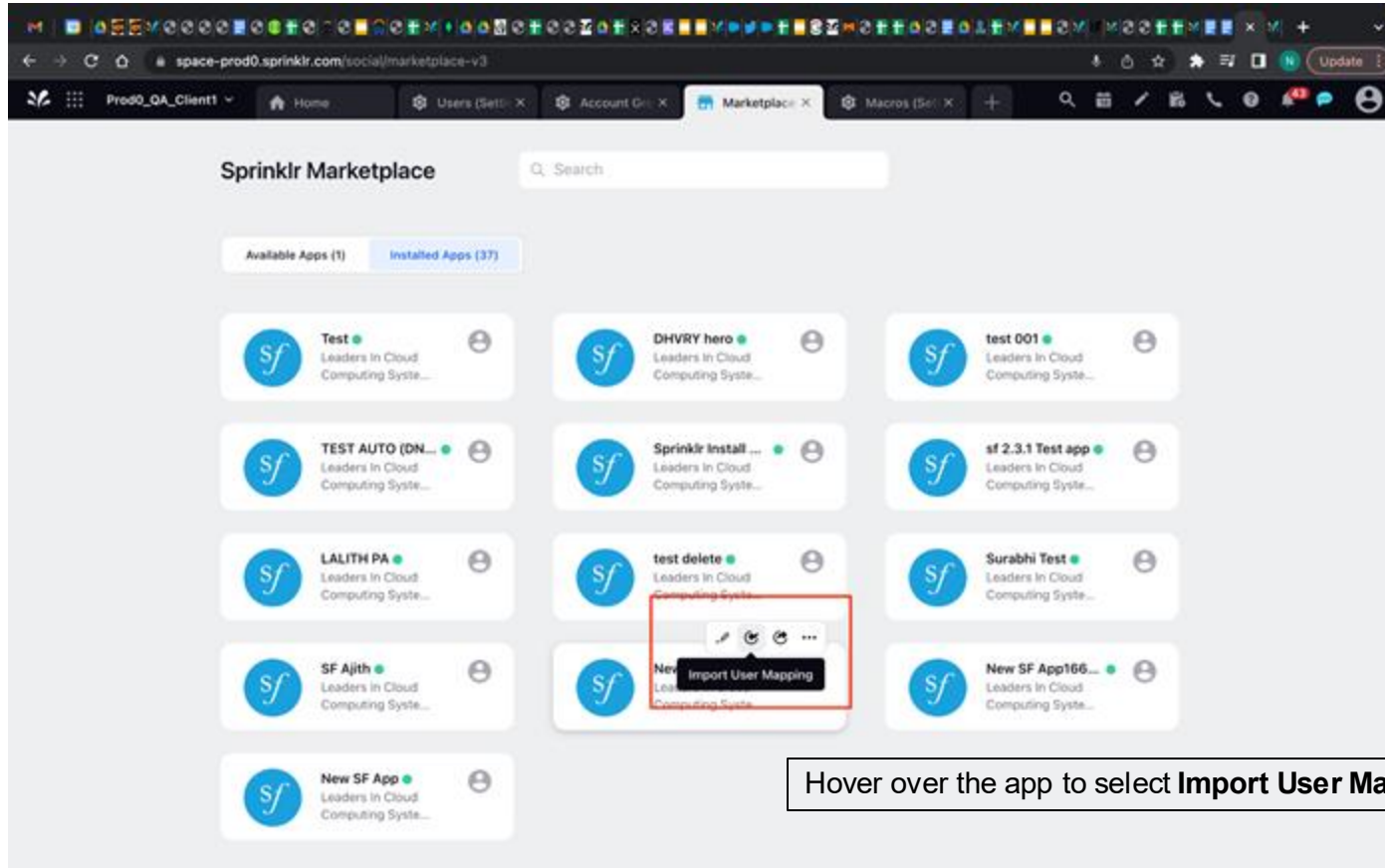
Users / Users Groups
Select Users / User Groups

Unlike the older version of Marketplace, the newer version has an option to manage which **work spaces and user groups** will be able to see the Salesforce app.

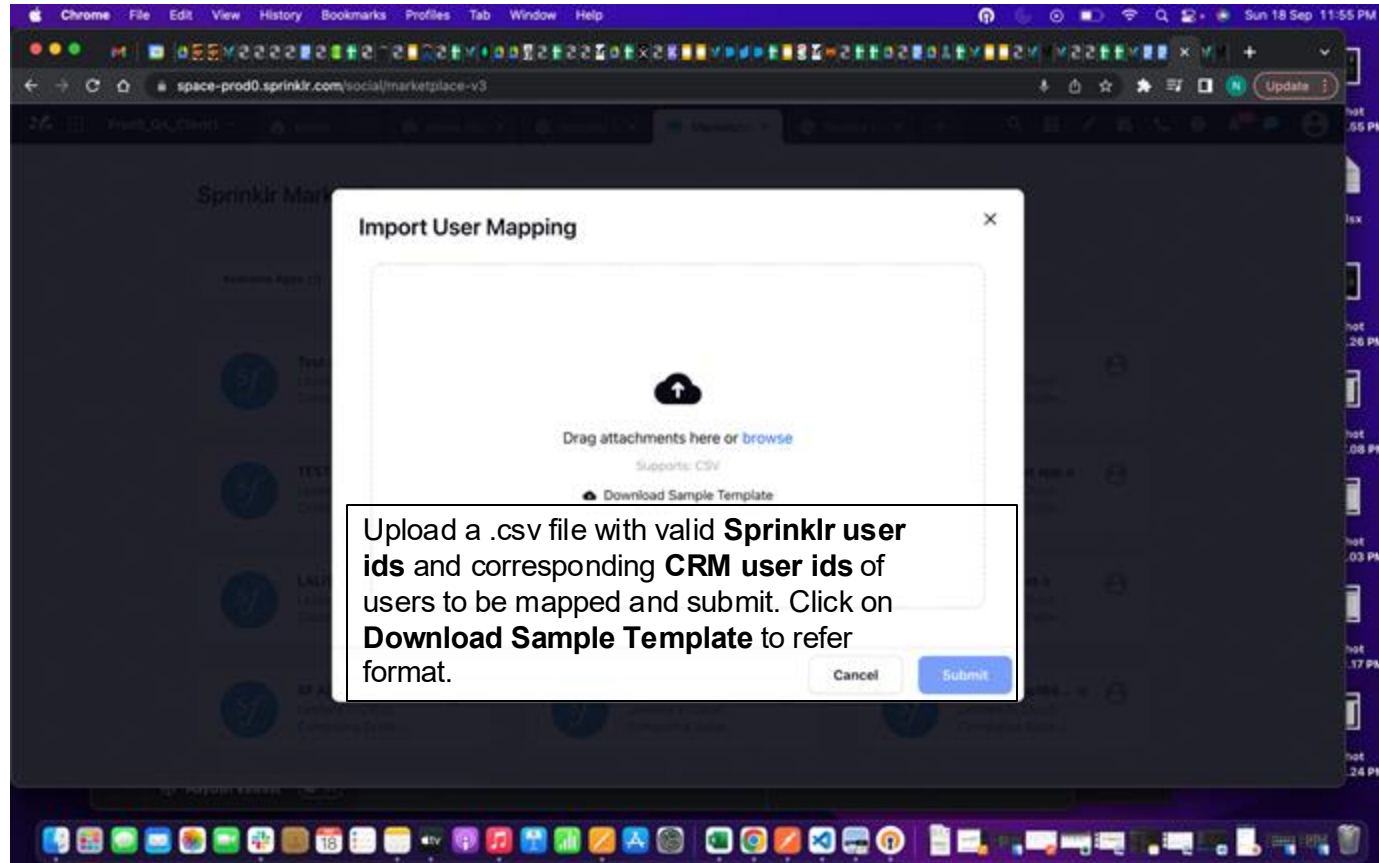


User Mapping

User Mapping



User Mapping



User Mapping

The screenshot displays the Sprinklr Marketplace interface. At the top, there's a navigation bar with tabs for Home, Users (Settings), Account (Settings), Marketplace (active), and Macros (Settings). Below the navigation bar, the 'Sprinklr Marketplace' header is visible, followed by a search bar. The main content area shows a grid of installed apps, categorized under 'Available Apps (1)' and 'Installed Apps (37)'. Each app card features the Sprinklr logo (sf) and a title. A red box highlights the 'Export User Mapping' option in the dropdown menu of the 'New SF App' card.

Available Apps (1) Installed Apps (37)

Test Leaders In Cloud Computing Syste...

TEST AUTO (DN... Leaders In Cloud Computing Syste...

LALITH PA Leaders In Cloud Computing Syste...

SF Ajith Leaders In Cloud Computing Syste...

New SF App Leaders In Cloud Computing Syste...

DHVRV hero Leaders In Cloud Computing Syste...

Sprinklr Install ... Leaders In Cloud Computing Syste...

test delete Leaders In Cloud Computing Syste...

New SF Leaders In Cloud Computing Syste...

test 001 Leaders In Cloud Computing Syste...

sf 2.3.1 Test app Leaders In Cloud Computing Syste...

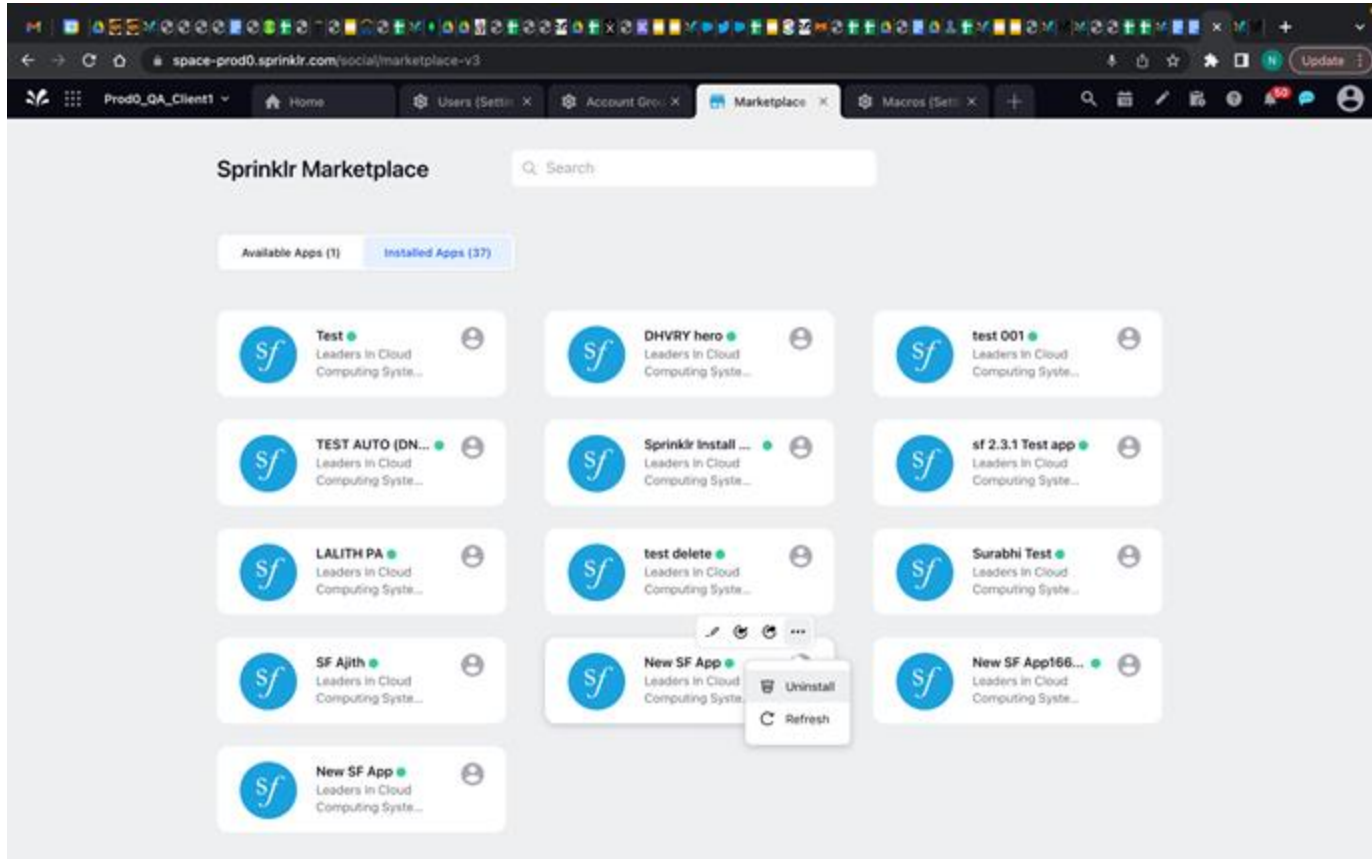
Surabhi Test Leaders In Cloud Computing Syste...

New SF App166... Leaders In Cloud Computing Syste...

Export User Mapping

Hover over the app to select **Export User Mapping**. This will give a downloadable .csv file with all the existing user mappings for this Salesforce App.

Refresh Or Uninstall App



Thank you

For any further queries, you can
reach out to your account team or

support@sprinklr.com

