



engage

PLATFORM THAT DELIVERS EXPERIENCES

PARTNER ECOSYSTEM MANAGEMENT – SALESFORCE INTEGRATION

360insights' Partner Ecosystem Management Solution, Engage, offers robust integration with Salesforce, enabling seamless two-way data synchronization for key objects such as Accounts, Contacts, Leads, and Opportunities. This integration enhances your CRM capabilities by ensuring data consistency and providing a comprehensive view of your customer (partner) interactions.

Key Features

- **Accounts & Contacts Integration:** Essential for maintaining up-to-date customer information.
- **Leads & Opportunities Integration:** Facilitates efficient lead management and opportunity tracking.
- **Custom Settings & Remote Site Configuration:** Tailored settings to match your specific business needs.
- **Validation Rules:** Ensures data integrity and compliance with business processes.
- **Field Security & Accessibility:** Granular control over data access and permissions.

Requirements

- **Salesforce Enterprise Edition:** Designed for the Enterprise version of Salesforce.
- **Administrator Access:** Necessary for installation and configuration.
- **Sandbox & Production Environments:** Separate instances for testing and live deployment.
- **Trusted User & Connected App:** Required for secure API access and data synchronization.

Installation & Configuration

- **Install the Managed Package:** Available on the Salesforce AppExchange.
- **Configure Custom Settings:** Update with provided values for seamless integration.
- **Set Up Remote Site Settings:** Ensure connectivity between Salesforce and 360insights' Engage.
- **Create Validation Rules:** Implement rules to maintain data quality.
- **Assign Permissions:** Use the provided Permission Set or configure manually.

Support & Resources

360insights supports your business during implementation and configuration of the managed services package for your Engage instance. Our Client Solutions Team offers:

- **Implementation Consultant:** Assistance with setup and deployment.
- **Configuration Settings Document:** Detailed guide provided during implementation.
- **Installation Checklist:** Ensure all steps are completed for a successful integration.



ARE YOU ON THE RIGHT PLATFORM TO SUPPORT YOUR CHANNEL?
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how it all makes sense.