Marketing Cloud Connect Toolbox

Setup Guide (v1.5)

Overview

Marketing Cloud Connect Toolbox is an AppExchange product that enhances the integration between Salesforce and Marketing Cloud. This Package adds features on top of Marketing Cloud Connect and it is recommended you already have this setup (though not required).

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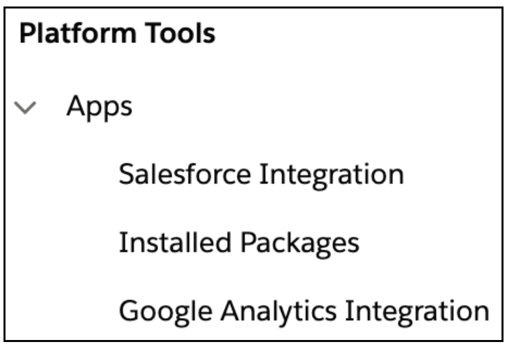
Salesforce AppExchange Package

Install the Marketing Cloud Connect Toolbox AppExchange Package into your Salesforce instance.

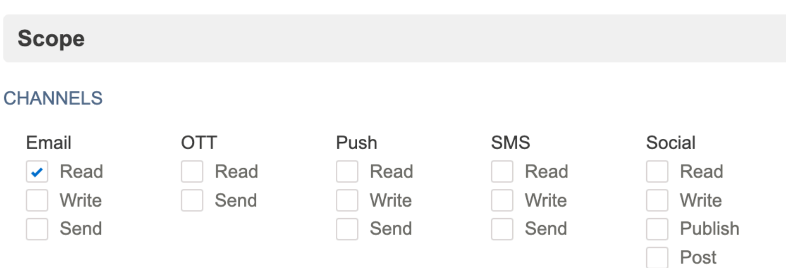
Setup Marketing Cloud Integration Package

You need to setup an API Integration Package for Salesforce to be able to do API calls to Marketing Cloud

1. Login to Marketing Cloud as an Admin user
2. Ensure you are in the Parent Business Unit
3. Click your profile name drop down top right
4. Click “Setup”
5. Click “Apps” -> Click “Installed Packages”



6. Click “New” top right
7. Type “Marketing Cloud Connect Toolbox” or you can provide any name you like
8. Description “Allows Salesforce package Marketing Cloud Connect Toolbox to make API calls”
9. Click “Save”
10. Click “Add Component”
11. Select “API Integration” -> “Next”
12. Select “Server-to-Server” -> “Next”
13. The integration requires the following permissions enabled



AUTOMATION

Automations
- [x] Read
- [x] Write
- [x] Execute

Journeys
- [x] Read
- [ ] Write
- [ ] Execute
- [x] Activate/Stop/Pause/Resume/Send/Schedule
- [ ] Delete

CONTACTS

Audiences
- [ ] Read
- [ ] Write

Contact to Business Unit Mapping
- [ ] Create
- [ ] View
- [ ] Update
- [ ] Delete

List and Subscribers
- [x] Read
- [x] Write

DATA

Data Extensions
- [x] Read
- [x] Write

File Locations
- [ ] Read
- [ ] Write

Tracking Events
- [x] Read
- [ ] Write

14. Click “Save”
15. Copy Client Id, Client Secret, Authentication Base URI, REST Base URI, SOAP Base URI to use in future step

API Integration

Client Id
vjw[redacted]4a7

Client Secret
EY5[redacted]QKScM9

Integration Type
Server-to-Server

Authentication Base URI
https://m[redacted]vwzqfl0.auth.marketingcloudapis.com/

REST Base URI
https://m[redacted]vwzqfl0.rest.marketingcloudapis.com/

SOAP Base URI
https://m[redacted]vwzqfl0.soap.marketingcloudapis.com/

16. Copy the MID of the parent Marketing Cloud Business Unit. This can be found top right of your Marketing Cloud screen by hovering over your business name.

Lightbox Logic Pty Ltd

ACCOUNT
Lightbox Logic Pty Ltd MID: 54[redacted]13

Salesforce Integration Setup

These steps configure Salesforce to call the Marketing Cloud Integration App you setup above. First login to Salesforce as a System Administrator.

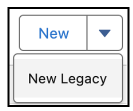
Named Credentials

This stores the API endpoints for your Marketing Cloud instance

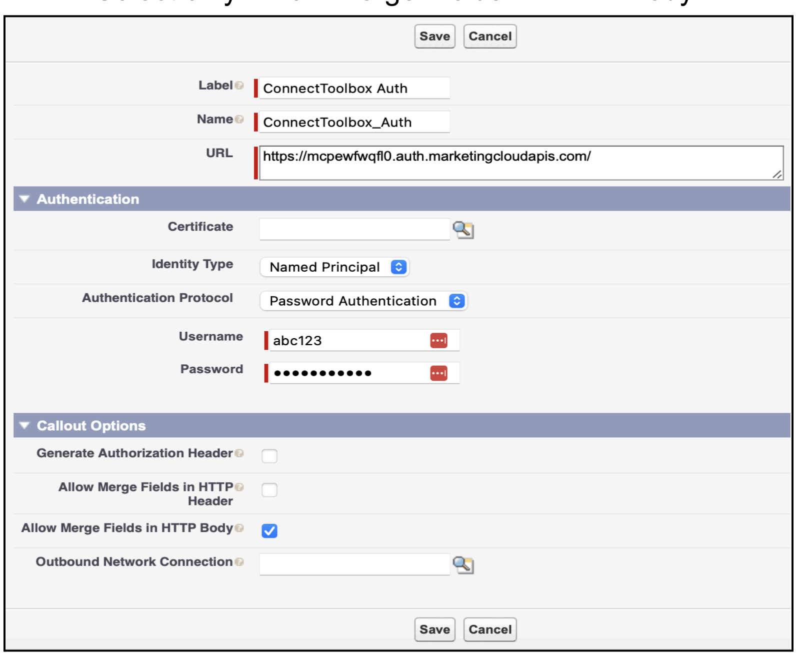
1. Navigate to “Setup”
2. Type “Named Credentials” into the Setup search
3. Click “Named Credentials”

Authentication URL

4. Click arrow next to “New”, then “New Legacy”

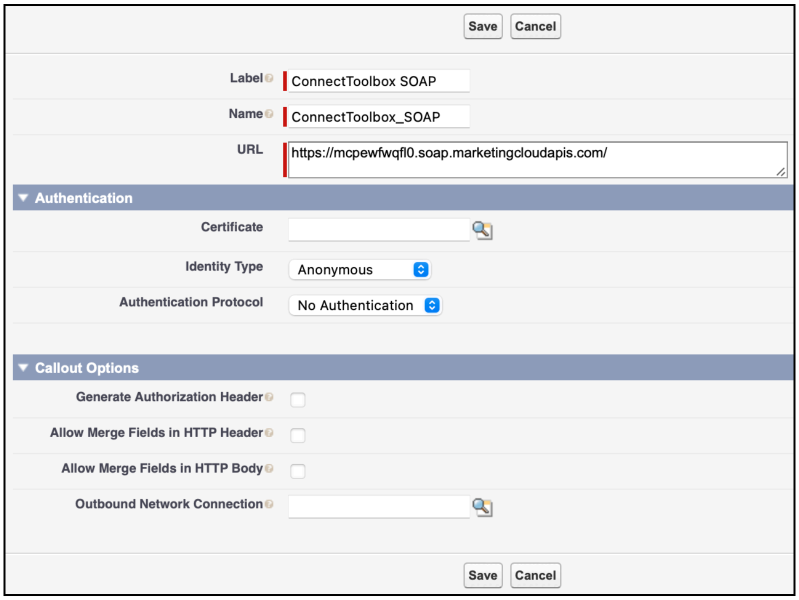


5. Enter Label as “ConnectToolbox Auth”
6. Enter Name as “ConnectToolbox_Auth”
7. From your Marketing Cloud Integration App URLs you copied, update the “URL” and paste in the Authentication Base URI
8. Set Identity Type to “Named Principal”
9. Set Authentication Protocol to “Password Authentication”
10. Username set to Client Id from Marketing Cloud
11. Password set to Client Secret from Marketing Cloud
12. Select only “Allow Merge Fields in HTTP Body”



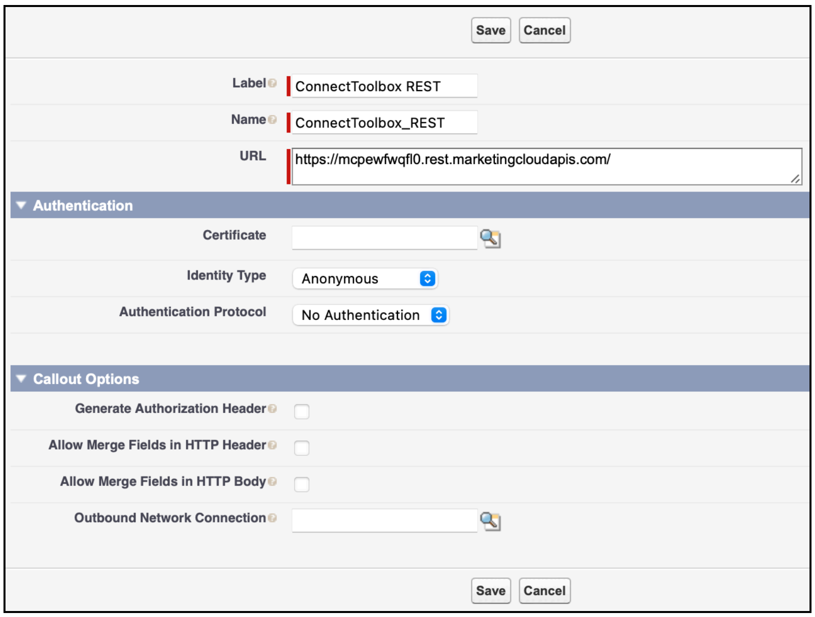
SOAP URL

13. Repeat and add another Legacy Named Credential
14. Enter Label as "ConnectToolbox SOAP"
15. Enter Name as "ConnectToolbox_SOAP"
16. From your Marketing Cloud Integration App URLs you copied, update the "URL" and paste in the SOAP Base URI
17. Set Identity Type to "Anonymous"
18. Unselect all under "Callout Options"



REST URL

19. Repeat and add another Legacy Named Credential
20. Enter Label as “ConnectToolbox REST”
21. Enter Name as “ConnectToolbox_REST”
22. From your Marketing Cloud Integration App URLs you copied, update the “URL” and paste in the REST Base URI
23. Set Identity Type to “Anonymous”
24. Unselect all under “Callout Options”



Settings

1. Navigate to “Setup”
2. Type “Custom Metadata”
3. Click “Custom Metadata Types
4. Find “ConnectToolbox: Setting” and click “Manage Records”
5. Click “Edit” for Settings
6. For “SOAP URL” enter the Marketing Cloud SOAP URI (same as from Named Credential)
7. For “MID” enter the MID of the parent Marketing Cloud Business Unit

Setup Salesforce

Permissions - Required

End Users

Assign Permission Set to any users that will interact with Connect Toolbox or add them to any Permission Set Groups you might have

- ConnectToolbox: User

Admins

For admin features assign (documentation will state "Admin Permission" required)

- ConnectToolbox: Admin

Features

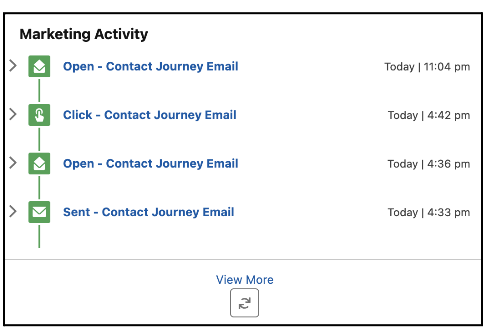
The following features within Salesforce all work independently. You can configure all, choose just the ones relevant or add them over time as needed.

Activity Timeline Component

Overview

The Toolbox Activity Timeline component displays Marketing Cloud email activity via API calls. This means you no longer need to sync all this to Salesforce via Marketing Cloud Connect and consume the limited and expensive data storage.

To display Marketing Cloud Activities, do the following for any page you would like this to display
Compatible with: Lead, Contact and Account



Steps to Configure

Add the Custom Managed "ConnectToolbox: Activity" component to desired Lightning Page

Detailed Steps:

1. Navigate to a record on the relevant page you would like to add the component
2. Click “Setup” Icon -> “Edit Page”
3. On the left “Components” panel find “Custom - Managed” section
4. Drag “ConnectToolbox: Activity” onto the page in desired location
5. Save

Additional Advantages:

- Marketing Cloud Connect syncs the activities directly with the matching syncing Lead or Contact, so a converted Lead to Contact loses those activities. There are also situations where a Subscriber is sent an email not via the synced Lead/Contact record which means you lose visibility of those sends.
  The Activity Timeline Component searches for all activity for the Converted Lead, Contact and any matching Email Addresses.
- When viewing on the Account page, a summary of all activity across all the Contacts will be displayed

Subscriber Status Sync

Overview

Allow you to Sync the Status field from All Subscribers list to the Lead/Contact record. This is via a new field “lbox__EmailSubscriberStatus__c” on both Lead/Contact.

Marketing Cloud Connect syncs Unsubscribe to the Lead/Contact to the field “HasOptedOutOfEmail”. However there is a “Status” field which contains additional Bounce/Held information that is not.

Why is this beneficial? It is important to know from Salesforce which of your Lead/Contacts has emails that are bouncing or being held.

Marketing Cloud - All Subscriber List

Email Address	Status	Subscriber Key
rib[redacted]om	Active	00Q[redacted]EAR
fre[redacted]faw	Bounced	00Q[redacted]FEAX
ma[redacted]m.au	Unsubscribed	0032[redacted]AAM

Status Descriptions

Status	**Description**
Active	Emails will be be sent
Unsubscribed	The subscriber has Unsubscribed. This will likely also be represented in the “Opted Out” field as being Checked.
Bounced	Email sent to this Subscriber are bouncing back. Marketing Cloud will still attempt to send but you should attempt to contact use Lead/Contact to resolve this.
Held	Marketing Cloud will not send any emails to this subscriber. A subscriber is marked as Held from a few rules eg. Subscriber gets a bounced count more than 3 times.

More detailed information on how Marketing Cloud manages bounces
https://help.salesforce.com/s/articleView?id=sf.mc_es_bounce_mail_management.htm&type=5

Steps to Configure (Admin Permission)

This will schedule 2 Jobs that will run hourly to sync the data

1. Navigate to the “Connect Toolbox” app
2. Click “Admin” tab (if not already selected)
3. Click “Create Sync Services”
4. Click “Schedule Jobs”

Optional:

- Add “lbox__EmailSubscriberStatus__c” to the Lead/Contact Page Layout or Dynamic Form for Users to see
- Create a Triggered Flow or Apex Trigger on Lead/Contact for field EmailSubscriberStatus__c when the Status is either “Bounced” or “Held” for an action to happen for a follow to get an updated Email
- Create a scheduled report for the same filter criteria
- Ensure if you create any email campaigns for Sends, you filter out users with these statuses to ensure you have accurate numbers of who will receive the emails

Email Address Sync

Overview

Sync Email Address changes to Marketing Cloud's All Subscriber List for Leads and Contacts (this does not automatically happen with Marketing Cloud Connect)

When an email address is updated on a Lead or Contact, the matching All Subscriber Email will be updated for the matching Salesforce Id with the Subscriber Key.

If the All Subscriber had a Status of Bounced, it will be set back to Active so future emails will send.

Steps to Configure

1. Navigate to "Setup"
2. Quick Find -> "custom metadata"
3. Click "Custom Metadata Types"
4. Find "Toolbox Setting" and click "Manage Records"
5. Click "Edit" for "Settings"
6. Select "Email Address Sync - Lead" and "Email Address Sync - Contact" (you can select only 1 if desired)
7. Click "Save"

Journey Membership Component

Overview

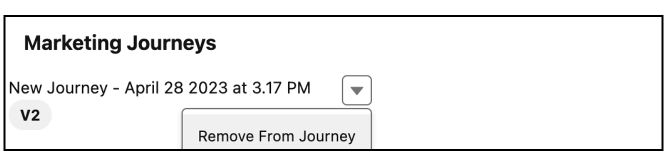
Allows you to see what Marketing Cloud Journeys a Lead or Contact are currently in. Also enables the ability to remove them from the Journey.

Steps to Configure

Add the Custom Managed "ConnectToolbox: Journeys" component to Lead and/or Contact Lightning Page

Detailed Steps:

1. Navigate to a record on the relevant page you would like to add the component
2. Click "Setup" Icon -> "Edit Page"
3. On the left "Components" panel find "Custom - Managed" section
4. Drag "ConnectToolbox: Journeys" onto the page in desired location
5. Save



Email Validation

Overview

Marketing Cloud validates email addresses at the time of sending and does not pass this back to Salesforce. This feature allows you to have the email validation done at the time it is entered onto the Lead or Contact. By checking at entry time, it allows you to pick up and correct invalid emails before you are trying to email.

There is a new field called “lbox__EmailValidation__c” added to both Lead and Contact. When the email address is entered or updated this field will update to any of the following status

Status	Description
Checking	Email is in the process of being validated by Marketing Cloud
Valid	Valid email address
Failed - Incorrect Syntax	Format of the email address is invalid
Failed - Invalid Domain	Domain name of email address is not valid. This is the part after the @ symbol. Eg. support@incorrectDomain.com Means “incorrectDomain.com” is not a valid domain
Failed - List Detective	Marketing Cloud has marked this as a likely spam or bad email address For more information https://help.salesforce.com/s/articleView?id=000387004&type=1

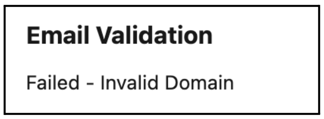
Steps to Configure

1. Navigate to “Setup”
2. Quick Find -> “custom metadata”
3. Click “Custom Metadata Types”
4. Find “Toolbox Setting” and click “Manage Records”
5. Click “Edit” for “Settings”
6. Select “Email Validation - Lead” and “Email Validation - Contact” (you can select only 1 if desired)

7. Click “Save”

Optional - Make Visible to Users:

- Add “Ibox__EmailValidation__c” to Page Layout or Dynamic Form for Lead/Contact for users to see
- On Lead/Contact Lightning page add the component “ConnectToolbox: Email Validation”. This will check the status of the validation which is being done in the background and update the record page/component in real time once validated.
  If you do not add this component, the “Ibox__EmailValidation__c” field will just say “Checking” on the record page after an email update until you refresh the page manually.

Optional - Automations

- Creating an automation via a Triggered Flow or Apex Trigger if the Status contains “Failed” to alert someone or create a Task to check the record can be a great way to keep your email addresses clean.
- OR a scheduled report with the same filter

Appendix

Marketing Cloud Permissions

Here is a table showing what each permission enables. Not all permissions are required if you are not using all the features.

Marketing Cloud Permissions	**Salesforce Feature Usage**
Email - Read	Activity Timeline Component
Tracking Events - Read	Activity Timeline Component
List and Subscribers - Read	Activity Timeline Component Subscriber Status Sync
List and Subscribers - Write	Subscriber Status Sync
Automations - Read,Write,Execute	Subscriber Status Sync
Data Extension - Read, Write	Subscriber Status Sync
Journeys - Read	Journey Membership Component
Journeys - Activate/Stop/Pause/Resume/Send/Schedule	Journey Membership Component: Remove Contact