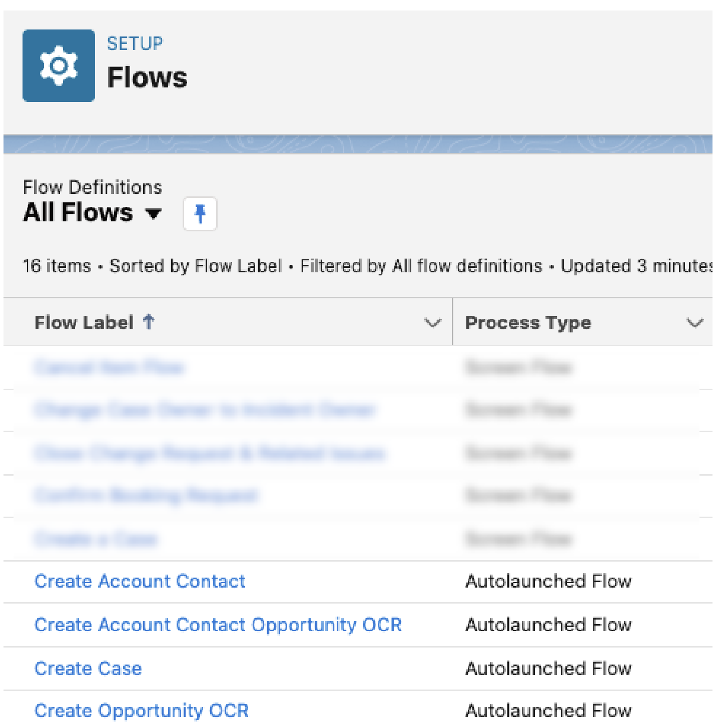
Account Engagement Automates… Record Creation

Installation and Setup

1. Install the app here:
    a. What if existing component names conflict with ones in this package?
        i. We recommend “Rename conflicting components in package.”
    b. Select Install for Admins Only and Install.

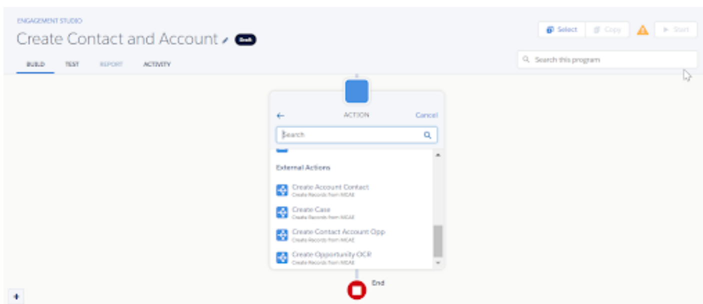
2. Once installation is complete, click Done.

3. In **Setup**, navigate to **Flow.** Make changes to each of the following Flows according to your organizations needs. (Review the **User Guide and Customization** and **How to Send Additional Prospect Data From Account Engagement to the Flows** sections below for information about each.)
    a. Create Account Contact
    b. Create Account Contact Opportunity OCR (**mandatory change required before use — review the information for the Create New Opportunity for New/Existing Account Flow step below**)
    c. Create Opportunity OCR (**mandatory change required before use — review the information for the Create Opportunity Flow step below**)
    d. Create Case (**mandatory change required before use — review the information for the Create Case Flow step below**)



4. In **Setup**, navigate to **Marketing App Extensions**.
    a. Click into the **Create Records from Account Engagement** app extension.
    b. Click into the **Related** tab.
    c. In the Business Units section, click **New**. Choose the business units that will use these App Extensions to create new records in Salesforce and then click **Save**.

5. Navigate to the **Account Engagement Lightning App** tab **Automations**.
    a. Click **+ Add Engagement Studio Program**.
    b. Where you want to send Account Engagement data into Salesforce to create a new record, add an **Action** step using one of the new **External Actions**.



6. Once you **start** your Engagement Studio program, you are now able to create new records in Salesforce through Account Engagement automation!

User Guide and Customization

Out of the box, Account Engagement can only create new Lead records when a Prospect record is synced to Salesforce by assigning it an owner. The Marketing App Extension and Flows included in this app expand the standard Account Engagement sync, allowing you to conditionally create Contacts and related records rather than Leads.

After installing the app, you will find four new External Actions available in Engagement Studio. Add these actions to your existing engagement programs or dedicate specific engagement programs to these actions respectively for your Account Engagement instance to create records when creating Leads is not ideal.

Each of these External Actions are connected to an autolaunched Salesforce Flow. **Before using any of the External Action included in this app, consider customizing the associated Flow to meet your organization's needs.** A description of each flow and some suggestions for customization are provided below. You should also test the Flows and External Actions after you update them. Use a sandbox if you have access to one.

Note that if you are looking to only use Contacts in Salesforce and not Leads, work with Salesforce Support to enable a reverse sync. Using some of these actions would be supplemental to that integration sync setting.

Create Account Contact Opportunity OCR

What does it do?
This action allows you to directly create a Contact in Salesforce and subsequently create the new Account to relate to it should a matching one not exist to relate the new Contact to in addition use the Contact and Account data to automatically create an

Opportunity (and Opportunity Contact Role) to represent the interest/activity.

When should you use it?
Use the Create Account Contact Opportunity OCR External Action when a prospect should be synced to Salesforce as a Contact record, rather than a Lead, and be related to a new Opportunity. If your instance of Account Engagement creates new Lead records when you assign an owner to a prospect (the default sync behavior), and you usually create Opportunities at lead conversion, this action may be best suited to use in the scenario of when you need to create a contact that you feel bypasses lead qualification.

Examples:

1. A Prospect submits a form for a free trial and should be considered a customer rather than a lead.
2. A Prospect submits a request for information (RFI) form and should immediately be synced to Salesforce as a Contact instead of a Lead (a common scenario for nonprofit organization and higher education institutions.)

You must update the Create New Opportunity for New Contact, Account and Create New Opportunity for Existing Contact and Account Flow steps mentioned below.

1. You must set the Stage field when creating a new Opportunity. You should edit this step to select an active Stage value.
2. With a recent release, we are finding running the flow as the B2BMA Integration User is causing the flow to error. If you run into this error (in your External Actions Errors in Account Engagement Settings), you'll need to update Create Account Contact Opportunity OCR flow below:
    a. Click into the Flow → View Properties in the top left (gear icon)
    b. Expand the Edit Properties pop up by clicking on 'Show Advanced'
    c. Under 'How to Run the Flow' select the option 'System Context Without Sharing—Access All Data'

Here are the other steps you should consider editing as well.

FIND B2BMA INT ID

The Flow assigns all new records it creates to the B2BMA Integration User, since all Account Engagement customers have this user in their org. Your organization may want to update this step to assign new Contact, Account, Opportunity, or Opportunity Contact Roles to a different user.

If you update or alter this step in the Flow, you will also need to alter all steps that create records.

LOOK FOR DUPLICATE CONTACTS

The Flow checks that no other contact record has the same email address as the Account Engagement Prospect before it creates a new contact record.

If you have other criteria to check, you will need to edit this step and the next step step labeled **Are there existing contacts?**

FIND EXISTING ACCOUNTS

The Flow checks that no other account has the same Company Name as the Account Engagement Prospect before it creates a new account record.

If you have other criteria for preventing the creation of duplicate accounts, you will need to edit this step, as well as the proceeding step, labeled “Are There Existing Accounts?”

CREATE NEW OPPORTUNITY FOR NEW CONTACT, ACCOUNT /
CREATE NEW OPPORTUNITY FOR EXISTING CONTACT AND ACCOUNT

Both of these Flows create new Opportunity records. To create an Opportunity, you must provide each Opportunity a Name, Close Date, and Stage. **Before using this Flow, you must change the stage that new Opportunities are placed in if you have customized the Stage field for your business process. You may also want to change the naming and close date formulas and whatever other fields you need.**

The CloseDateFormula sets the Close Date field of a new Opportunity’s Close Date to 30 days from the current date.
TODAY() + 30
Find and update the formula labeled CloseDateFormula from the Toolbox to change the Close Date.

The OppNameFormula names each new opportunity based on this pattern:
<Company Name from Prospect record> - <Close Date>
{!CompanyName} & ‘ - ‘ & TEXT({!CloseDateFormula})
If your organization uses a different naming convention for Opportunities, find and update the formula labeled OppNameFormula from the Toolbox.

Additionally, you may want to populate other fields on new Opportunities depending on your organization’s requirements. Update both of the Flow steps mentioned above with the fields and values you’d like to populate on new Opportunities created from Account Engagement.

CREATE NEW OPPORTUNITY CONTACT ROLE FOR NEW OPPORTUNITY /
CREATE NEW OPPORTUNITY ON EXISTING OPPORTUNITY

Both of these Flow steps create an Opportunity Contact Role connecting the Contact record found or created as part of the Flow and the new Opportunity record created in the previous step.

To create an Opportunity Contact Role record, you must supply a Contact Id and an Opportunity Id. The Flow will supply those, but you may choose to update this step with the specific Role or fill other fields on the Opportunity Contact Role.

Create Account Contact

What does it do?
This action allows you to directly create a Contact in Salesforce, and either relate it to an existing Account (matched by name) or create a new Account. The difference between this External Action and the Create Account Contact Opportunity OCR action is this action stops at creation of Accounts and does not generate an Opportunity to go with it.

When should you use it?
Use the Create Account Contact Opportunity OCR External Action when a prospect should be synced to Salesforce as a Contact record, rather than a Lead, but a new Opportunity should not necessarily be created. If your instance of Account Engagement creates new Lead records when you assign an owner to a prospect (the default sync behavior), and you usually do not create Opportunities at lead conversion, this action may be best suited to use in the scenario of when you need to create a contact that you feel bypasses lead qualification.

Examples:

1. A Prospect submits a form for a free trial and should be considered a customer rather than a lead.

2. A Prospect submits a request for information (RIF) form and should immediately be synced to Salesforce as a Contact instead of a Lead (a common scenario for nonprofit organization and higher education institutions.)

Consider editing the following steps in the Flow according to your organization's needs.

FIND B2BMA INT ID

The Flow assigns all new records it creates to the B2BMA Integration User, since all Account Engagement customers have this user in their org. Your organization may want to update this step to assign new Contacts or Accounts to a different user.

If you update or alter this step in the Flow, you will also need to alter all steps that create records.

LOOK FOR DUPLICATE CONTACTS

The Flow checks that no other contact record has the same email address as the Account Engagement Prospect before it creates a new contact record.

If you have other criteria to check, you will need to edit this step and the proceeding step, labeled "Are there existing contacts?"

FIND EXISTING ACCOUNTS

The Flow checks that no other account has the same Company Name as the Account Engagement Prospect before it creates a new account record.

If you have other criteria for preventing the creation of duplicate accounts, you will need to edit this step, as well as the proceeding step, labeled "Are There Existing Accounts?"

Create Opportunity OCR

What does it do?
This action allows you to generate a new Opportunity and Opportunity Contact Role related to prospects you already know exist in Salesforce.

When should you use it?
If a Contact takes some action that represents a hand-raise or expression of interest, this Flow would create a new Opportunity related to that Contact.

Customers who rely on the default sync to create Lead records in Salesforce and customers who have reserve sync enabled should be able to use this Action.

Examples:

1. A current customer engages with a CTA that indicates a cross-sell or upsell opportunity exists.
2. A current customer or contact engages with a CTA for the launch of a new product.

You must update the Create Opportunity and Create Opportunity Contact Role steps mentioned below.

1. You must set the Stage field when creating a new Opportunity. You should edit this step to select an active Stage value.
2. With a recent release, we are finding running the flow as the B2BMA Integration User is causing the flow to error. If you run into this error (in your External Actions Errors in Account Engagement Settings), you'll need to update Create Opportunity OCR flow below:

a. Click into the Flow → View Properties in the top left (gear icon)
b. Expand the Edit Properties pop up by clicking on ‘Show Advanced’
c. Under ‘How to Run the Flow’ select the option ‘System Context Without Sharing—Access All Data’

Here are the other steps you should consider editing as well.

FIND B2BMA INTEGRATION USER ID

The Flow assigns all new records it creates to the B2BMA Integration User, since all Account Engagement customers have this user in their org. Your organization may want to update this step to assign new Opportunities and Opportunity Contact Roles to a different user.

If you update or alter this step in the Flow, you will also need to alter all steps that create records.

CREATE OPPORTUNITY

To create an Opportunity, you must provide each Opportunity a Name, Close Date, and Stage. **Before using this Flow, you must change the stage that new Opportunities are placed in if you have customized the Stage field for your business process. You may also want to change the naming and close date formulas and whatever other fields you need.**

The CloseDateFormula sets the Close Date field of a new Opportunity’s Close Date to 30 days from the current date.
TODAY() + 30
Find and update the formula labeled CloseDateFormula from the Toolbox to change the Close Date.

The OppNameFormula names each new opportunity based on this pattern:
<Company Name from Prospect record> - <Close Date>
{!CompanyName} & ‘ - ‘ & TEXT({!CloseDateFormula})
If your organization uses a different naming convention for Opportunities, find and update the formula labeled OppNameFormula from the Toolbox.

Additionally, you may want to populate other fields on new Opportunities depending on your organization’s requirements. Update both of the Flow steps mentioned above with the fields and values you’d like to populate on new Opportunities created from Account Engagement.

CREATE OPPORTUNITY CONTACT ROLE

Both of these Flow steps create an Opportunity Contact Role connecting the Contact record found or created as part of the Flow and the new Opportunity record created in the previous step.

To create an Opportunity Contact Role record, you must assign a Contact Id and an Opportunity Id. The Flow will supply those, but you may choose to update this step with the specific Role or any other information your organization needs to record on the Opportunity Contact Role.

Create Case

What does it do?
This action allows you to generate a new Case related to prospects who are known to be existing contacts.

When should you use it?
Whenever a prospect engages in a way that warrants tracking support response.

Customers who rely on the default sync to create Lead records in Salesforce and customers who have reserve sync enabled should be able to use this Action.

Examples:

1. A prospect fills out a Contact Us form because they need to contact customer support

You must update the Create Case steps mentioned below.

1. With a recent release, we are finding running the flow as the B2BMA Integration User is causing the flow to error. If you run into this error (in your External Actions Errors in Account Engagement Settings), you'll need to update Create Case flow below:
   a. Click into the Flow → View Properties in the top left (gear icon)
   b. Expand the Edit Properties pop up by clicking on 'Show Advanced'
   c. Under 'How to Run the Flow' select the option 'System Context Without Sharing—Access All Data'

CREATE CASE

To create a new Case record in Salesforce, you must set values for the Account Id, Contact Id, Origin, Priority, Status, and Subject fields in the flow.

Your organization might also collect other information for cases. Update this Flow step to add additional data to each newly created case. Review the **How to Send Additional Prospect Data from Account Engagement to the Flows** section below to learn about pulling in additional data from Account Engagement.

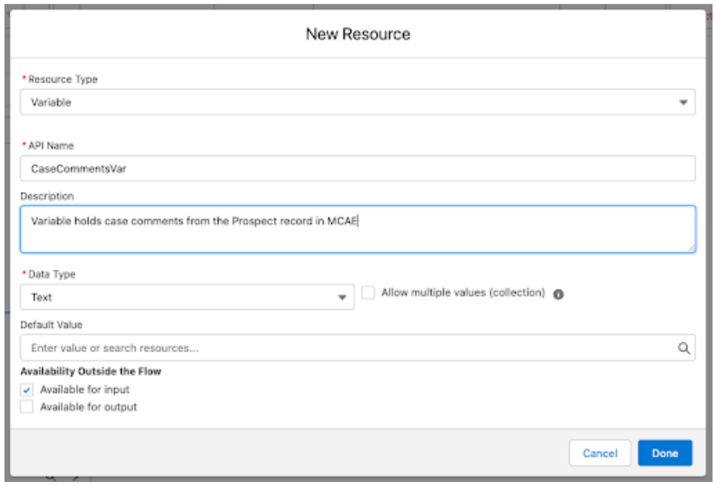
How to Send Additional Prospect Data From Account Engagement to the Flows

You can pull in additional data from a Account Engagement Prospect record to a Flow, but you have to build an input variable in the Flow to hold the data.

For example, you might want to collect Case Comments through an Account Engagement form, store them in a Prospect record field, and then send that field data to Flow when you create a new Case.

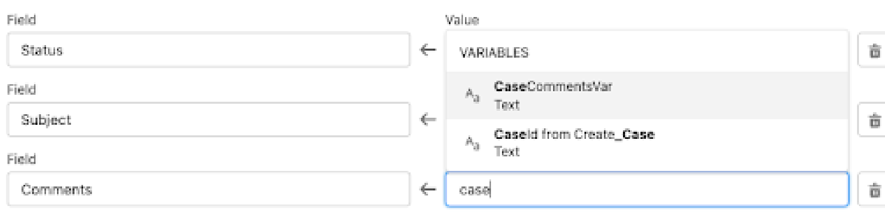
Here's how to do it:

1. Create a new version of the Flow you want to update.
2. Open the Toolbox, and click **New Resource.**
3. Choose **Variable** as the **Resource Type**.
4. Provide an API Name for the variable, and choose the appropriate **Data Type**, such as Text, Number, Date, or Boolean, based on the Account Engagement field.
5. Select **Available for input**. This step is very important and what allows you to send data from Account Engagement to Flow.
6. Your screen will look similar to this. Click Done when you're finished.



Now use this variable in the Create Records step you want to update, such as the **Create Case** step.

1. Open the Create Records step you want to update.
2. Scroll down and click **+ Add Field**.
3. On the left hand side, click **Search fields…** and find the field you want to fill in.
4. On the right hand side, find the variable you created. In this example, we're filling in the Comments field on the Case record with the contents of the new variable, which we named CaseCommentsVar. Eventually, this variable will connect back to Engagement Studio and we'll pass the Prospect record value through to this variable to use in the Flow.

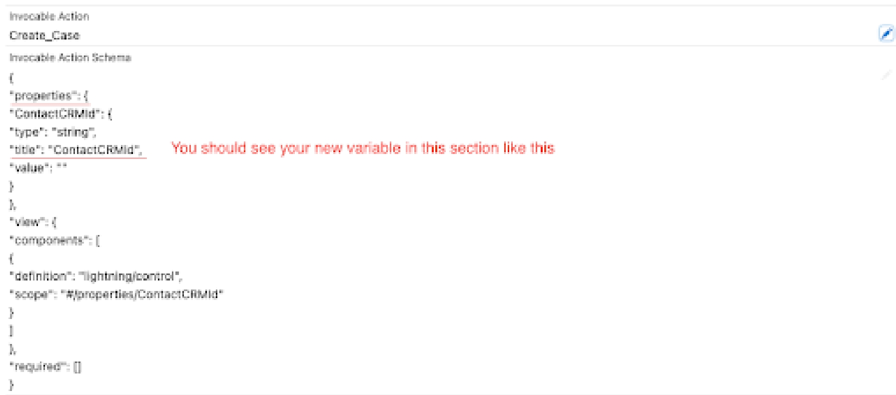


Save the Flow. Debug it. And when satisfied that it is working correctly, activate the new Flow version. But be sure you test your Flow before you activate it.

Since you've updated the Flow and added a new input variable, you need to reconnect your updated Flow back to Account Engagement so that the new variable shows up in Engagement Studio. Here are the steps:

1. From Salesforce Setup, search for **Marketing App Extensions** in the Quick Find box and click on the menu item.
2. Find the extension named **Create Records from Account Engagement** and click on its name to view the extension.
3. Click the Related tab to view the External Actions related to this extension.
4. Find the action related to the Flow you updated. The name of the action should resemble the Flow's name. Click on the action name to view the record.
5. From the Details tab of the action you selected, find the **Invocable Action** field and confirm that the value matches the name of the Flow you want to update.
6. Click the pencil icon next to Invocable Action to edit the extension. Click the **x** for the current Invocable Action, then search for and select the new Flow. (Unless you created an entirely new Flow, it will have the same name.)
7. Click Done.

When you select the updated Flow, the input variable you created should now appear in the properties section of the Invocable Action Schema.



Finally, return to Account Engagement, open an Engagement Studio program, add a new Action node with the External Action related to the Flow you just updated. You should see your new input variable available for input. Use [Account Engagement Handlebars Merge Language]() to fill in the input variable with data from a Prospect field.

Considerations & Best Practices

There are some general considerations and best practices to keep in mind when incorporating any of the External Actions included in this app into your Account Engagement/Salesforce integration.

EXISTING ENGAGEMENT PROGRAMS VS DEDICATED ENGAGEMENT PROGRAM

The External Actions included in this app can be used in two ways:

1. As a step in an Engagement Studio program with a broader purpose
2. As a step in an Engagement Studio program dedicated to that action

Let's examine each.

In a program with a broader purpose, the program may include a Trigger node followed by one of the External Action included in this app. For example, the program may listen for a link click that indicates a prospect is interested for a certain product and then use one of the app's External Actions to create an Opportunity.

Alternatively, for automating processes like creating new Contacts or Account, consider creating an Engagement Studio program dedicated to that purpose. You can control which prospects the action runs on by adding prospect to a list that enters them into the dedicated program.

Also, consider how heavily you use Engagement Studio, especially in terms of your account limits and how centralized you want these actions to be.

REPEATING ENGAGEMENT PROGRAMS

Actions that incorporate the creation of Opportunities and Cases will likely be set to repeat, so that on an ongoing basis, Contacts can still generate the resulting Opportunity or Case needed at that time.

When building repeatable programs, it's important to keep in mind how often someone could trigger that action while putting in safe-guards to ensure people don’t repeat from a binary match.

For example, if you choose to dedicate an Engagement program to the creation of Accounts and Contacts or Accounts, Contacts, and Opportunities, a prospect may enter the dedicated program as a result of activity from another Engagement Studio program. Consider adding a Remove from List action in other programs to ensure that prospects only re-enter your dedicated programs after a second qualifying activity.

RULE EVALUATION STEPS FOR SALESFORCE STATUS

The Flows included in this app are set up to avoid creating duplicates in Salesforce if possible. However, we still recommend adding logic to your Engagement Studio programs to prevent Prospects landing on External Actions when they shouldn’t.

For example, if you use the **Create Opportunity OCR** or **Create Case** External Actions, add a Rule to check if a Prospect is related to an existing Contact in Salesforce. Prospects who are not yet synced to Salesforce or are synced as Leads should not land on the External Actions.

Take another example: A Rule should be added to your program so that only Prospects who are not synced to Lead records land on either the **Create Account Contact** or **Create Account Contact Opportunity OCR** actions. If the prospect is an existing Contact, an Opportunity could still be created. If the prospect isn’t yet synced to Salesforce at all, the record may be created as a Contact directly. This is to ensure a duplicate Contact isn’t created for an existing Lead. However, that is something that can be configured differently should you want to create a duplicate contact that a lead then can convert into.

DUPLICATE AND ORPHANED CONTACTS

When creating a new Contact in these two contact-generating actions, there are steps in the Flows to look for matching Contacts before creating net new. There are also steps to look for matching Accounts before creating new records. The intent here is to always create new Contact records related to a either a new or existing Account to avoid creating orphaned Contacts.

None of the External Actions included in this app will create a new Account for an already existing Contact that is not yet related to one. In other words, if an existing orphaned Contact exists, these flows do not assume that it should then be related to this new Account. This can be adjusted in the flows if desired, but indicates a larger data issue than Account Engagement should be relied on to correct.

NOTIFICATIONS AND FAULT EMAILS IN FLOW

Because everyone’s business processes differ and the users involved in them, the Flows included in this app will not notify users when records are created or of certain data scenarios. Consider customizing the Flows to notify users under certain conditions.

Possible areas to consider for notifications or fault messages

- Existing Account, new Contact to notify the Account Owner
- Existing Account/Contact, new Opportunity to notify the Account or Contact Owner
- New Case to notify the Account or Contact Owner
- Existing Contact doesn’t have an Existing Account to create Opportunity
- Existing Lead that should be followed up on and possibly converted to Contact, Account, Opportunity

ACCOUNT ENGAGEMENT PROSPECT RECORD ASSIGNMENT

To use the External Actions included in this app to create Contact records instead of Lead, a Prospect should not be assigned a user. Therefore automation to assign prospects needs to be applied conditionally to new prospects. Otherwise if a Prospect is assigned to a user, Account Engagement will sync that Prospect to Salesforce as a Lead.

SALESFORCE FIELD LEVEL SECURITY

If you customize the Flows included in this app to insert data into additional fields than initially included, ensure the B2BMA Integration User profile has visibility to those fields.

RECORD TYPES

This package does not account for scenarios where numerous record types are present. If multiple record types are present for the relevant objects to this app, either use separate automation to assign the correct record type or update the Flows in this package to account for the record type based on the data provided through Account Engagement.

If records originating from Account Engagement should always be created with a certain record type, a default record type can be set on the B2BMA Integration User profile.

ACCOUNT ENGAGEMENT MULTIPLE BUSINESS UNITS AND MARKETING DATA SHARING RULES

This package has not been tested for Account Engagement instances with multiple business units. If you are using multiple business units, this user guide still applies, however, in your configuration of the External Actions and Flows, you'll want to ensure that certain data needed in Salesforce for setting your Marketing Data Sharing field is set up to pass along for the Contact/Account/Opportunity creation.

GOVERNOR LIMITS

This app was designed with the idea that Prospects would run through an Engagement Studio program one by one, not en masse. This package has not been tested against Salesforce governor limits. Test this package in a sandbox if you plan to use the External Actions in an Engagement Studio program initially started with hundreds or thousands of prospects.

CHANGE DATA CAPTURE ENABLED & PLATFORM EVENTS

If Change Data Capture is enabled in your Salesforce org, and any of the objects relevant to this are selected entities, note that Account Engagement's creating or editing of these records will generate Platform Events.

Salesforce orgs are typically provisioned with an allocation of 50,000 platform event messages per 24 hours. This allocation is shared by applications within your instance which may be using Platform Events. Additional platform events can be purchased directly from your Salesforce AE. For full details, see the Platform Event Allocation Documentation.

Roadmap

- This is a living document. Future features and updates will be listed here.

Last updated Today - added steps for updating 'How to Run the Flow - System Context' due to errors for Opportunity & Case related flows
Last updated 1/27/23