



Data Cloud Connector User Manual

Softtrends Data Cloud Connector app synchronizes data between your Data Cloud for Platform, Data Cloud for Marketing and other marketing environments such as Salesforce Marketing Cloud, and data stores like Postgres, AWS Redshift, Google Big Query etc.

Use Data Cloud & Marketing Connector to:

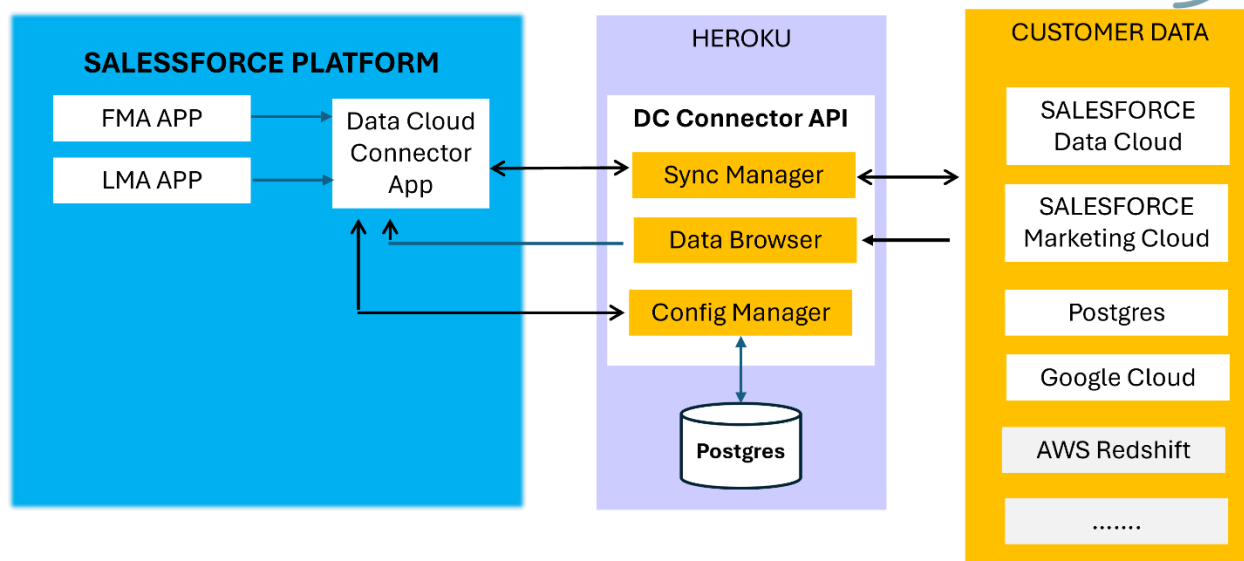
- Sync Data Cloud Unified Profiles into Postgres to leverage the 360° view of your consumers.
- Sync Data Cloud Segments into Postgres to act on the underlying raw data in a variety of ways.
- Sync Postgres data into Data Cloud (Marketing, Platform, Tableau, and other Editions) Data Streams/DLOs
- Sync data into Postgres for reporting & AI/ML services
- Sync data into Marketing Cloud for marketing campaigns
- Create consumer services and marketing or data-driven applications.
- Sync data into an AWS Redshift data warehouse, Google Big Query engine and others

Using Data Cloud connector does not require any additional programming. Just configure connectors and sync.

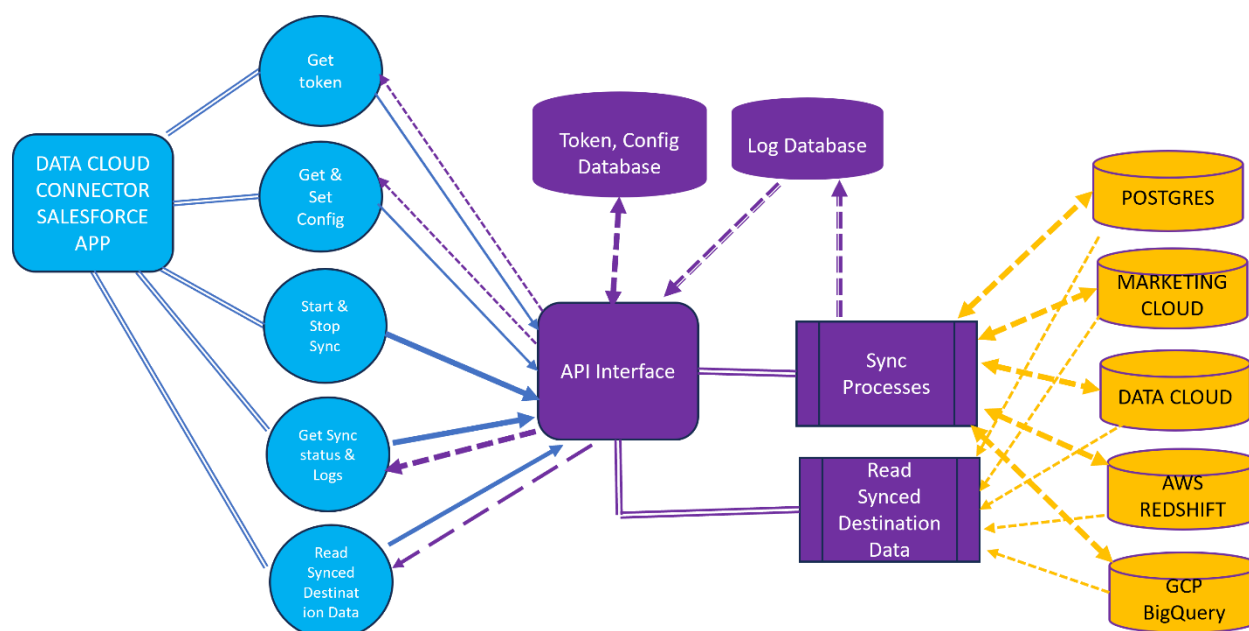
Solution Architecture

Picture below shows the architecture of Data Cloud connector solution.

- Softtrends App running on Salesforce platform.
- Middleware running on Heroku platform.
- And the various Customer data sources to sync data.



Data Flow



How to use Data Cloud connector

Using Data cloud connector is simple and straight forward and involves the following steps:

STEP 1: Allow API access.

During provisioning, all the App to access external URL displayed on screen. This is the API data cloud connector used to sync data.



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
dc-apex-service-737b88fd8e63.herokuapp.com	☒

☒ Yes, grant access to these third-party web sites

[Continue](#) [Cancel](#)

STEP 2: Create Data source configurations.

Initially there will be no data source configurations available.

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12

Data Cloud Connec...

Connectors

Data Explorers

Settings

Reports

Settings

Database Config

Marketing Config

Data Cloud Config

Google BigQuery Config

AWS Redshift Config

Heroku Postgres

Add New

Config Name	Sync Default DatabaseUrl	Connector Count
No records to display		

Select the data sources you intend to use one by one and create the configurations with credentials for the App to access your source and destination data e.g. Data cloud, marketing cloud, Google Big Query, Redshift, Postgres database etc.

Some examples of defining data sources are provided below for reference.



e.g. Creating Postgres data source config

The screenshot shows the 'Add New Database Config' dialog box. The 'Database Type' is set to 'Heroku Postgres'. The 'Config Name' is 'Default'. The 'Sync Database Url' field is empty. The 'Cancel' and 'Save' buttons are at the bottom.

Database Type	* Config Name	* Sync Database Url
Heroku Postgres	Default	

The screenshot shows the 'Database Config' section. The 'Database Type' is 'Heroku Postgres'. The 'Config Name' is 'Default'. The 'Connector Count' is 9. The 'Add New' button is visible.

Database Config	Marketing Config	Data Cloud Config	Google BigQuery Config	AWS Redshift Config
Heroku Postgres				

Config Name	Connector Count	Not Editable	View Config
Default	9		

e.g. Creating Data cloud data source config



Data Cloud Connect | Connectors | Data Explorers | **Settings** | Reports

Search...

Add New Data Cloud Config

* Data Cloud API Configuration Name:

* Consumer Key:

* Consumer Secret:

* User Id:

* Password:

Data Cloud Connect | Connectors | Data Explorers | **Settings** | Reports

Search...

Settings

Database Config | Marketing Config | **Data Cloud Config** | Google BigQuery Config | AWS Redshift Config

Search...

Config Name	Consumer Key	User Id	Connector Count	
Default	3MVG9ux34lg8G5epUffiyexwND03RT3ka73M...	cdpdev@softtrends.com	9	
demo config	3MVG9ux34lg8G5erEwPDYfgOzTWDWWrje3M...	david@data.cloud	0	Not Editable View Config



e.g. Creating Marketing Cloud data source config

Add New Marketing Cloud Config

*Marketing Cloud API Configuration Name:

*Client ID:

*Secret Key:

*Soap Endpoint URL:

*Rest Endpoint URL:

☐ It is a Child Business Unit

Marketing Config

Config Name	Client Id	Business Units Name	Business Units MID	Connector Count	
Default	8c7jd7l0sz6azduer1umfbc	Test2	5ewftrwqt361631yrw	8	Not Editable
legacy config	butloih74za2ksefj4zvfqj5			2	View Config

Once the configurations are created, they are listed in the respective config screens in the App, and they are ready to be used in creating connectors.



STEP 3: Create Connector.

Create the connectors using the desired source and destination configurations created in step 2. For example, syncing data from Heroku Postgres to Data Cloud, source will be Heroku Postgres, and destination will be Data Cloud.

Some examples of creating a connector is provided below.

e.g. Creating a connector that synchronized Postgres data with Marketing Cloud

Connector name and source

The screenshot shows the 'Add Connector' dialog box in the Data Cloud interface. The dialog is titled 'Add Connector' and contains the following fields:

- Connector Name:** Postgres to Marketing Cloud
- Data Source:** Heroku Postgres
- Config Name:** Default
- Database Schema:** public
- Database Connection String:** postgres://rbptlgznzdsfto:b3605b97a65628216cb:fd29@ec2-54-152-28-9.compute-1.amazonaws.com:5432/def87nn6io1ihm
- Data Source Object to Sync:** new_orders

At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Source fields to Sync



Add Connector

Column to sync ☒ Select All

*** Data Source Object's Columns**

☒ created_at	☒ id	☒ is_fulfilled
☒ order_status	☒ payment_method	☒ payment_status
☒ product_id	☒ quantity	☒ shipping_address
☒ shipping_city	☒ shipping_country	☒ shipping_state
☒ total	☒ updated_at	☒ user_id

Destination Information

*** Destination**

Please select Destination

Destination

Add Connector

Destination Information

*** Destination**

Salesforce Marketing Cloud

*** Marketing Cloud API Configuration name**

Default

Client ID

31zpz...7yb1o

Secret Key

kO...6hdKmp

Soap Endpoint URL

https://mccgs33-8wk...oap.m

Rest Endpoint URL

https://mccgs33...sy5pl4.rest.mar

*** Data Extension Folder (Destination)**



Add Connector

* Data Extension Folder (Destination)
Data Extensions

* Data Extension Table (Destination)
new_orders

Use Default

☐ Mark as Sendable

Sync Process

Data Field to check Date-time of New record insertion to Data source with Timezone
(If specified, only new records will be copied, else, all records will be copied)

Cancel Save

Filters and Sync Schedule

Add Connector

Data Field to check Date-time of New record insertion to Data source with Timezone
(If specified, only new records will be copied, else, all records will be copied)

Select Date Filter Select TimeZone

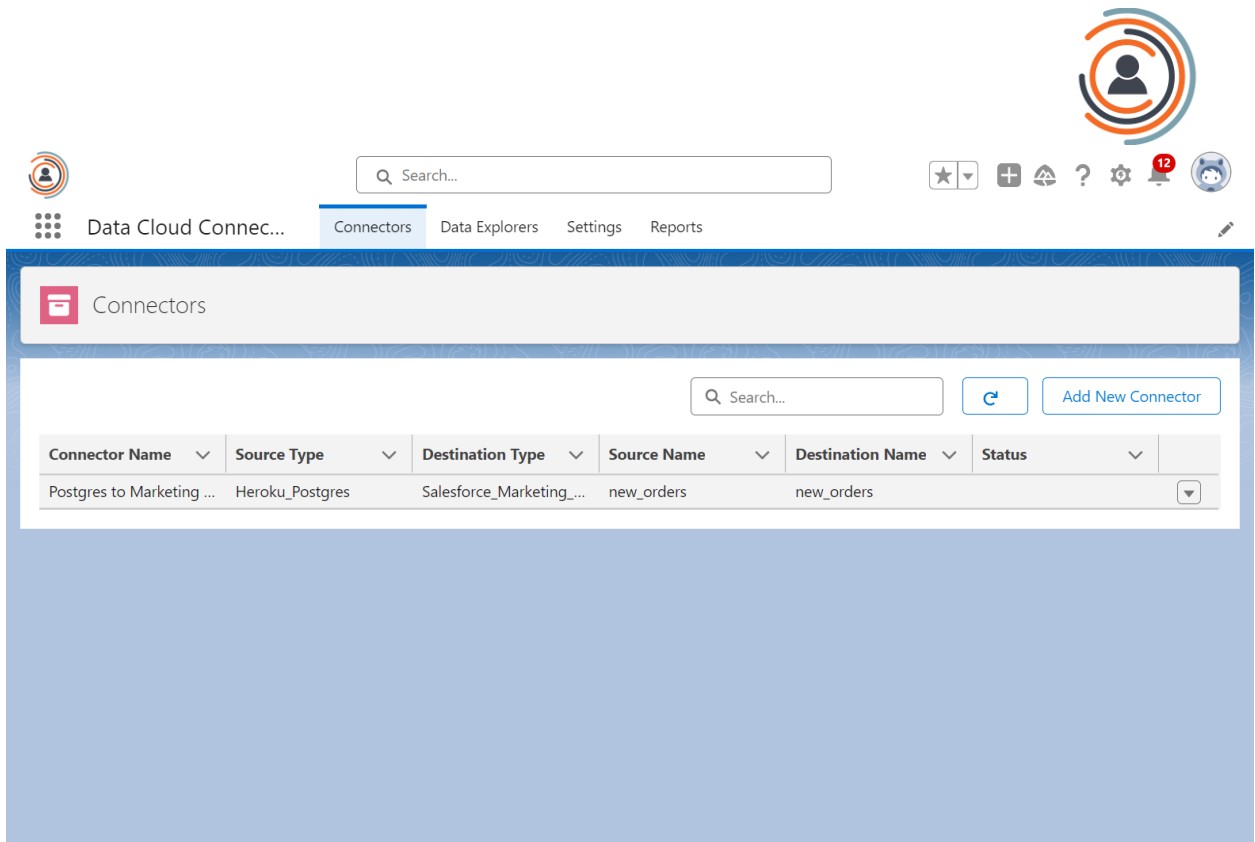
Data Field to check Date-time of Update to existing records in Data source with Timezone
(In specified, records updated in source will get updated in destination If a primary key field is not present, records may be duplicated during update)

Select Date Filter Select TimeZone

Sync Schedule

☐ Every 15 Mins ☐ Once Weekly ☐ Every 60 Mins ☐ Twice Weekly
☐ Once Daily ☒ Manual Sync ☐ Twice Daily ☐ Custom

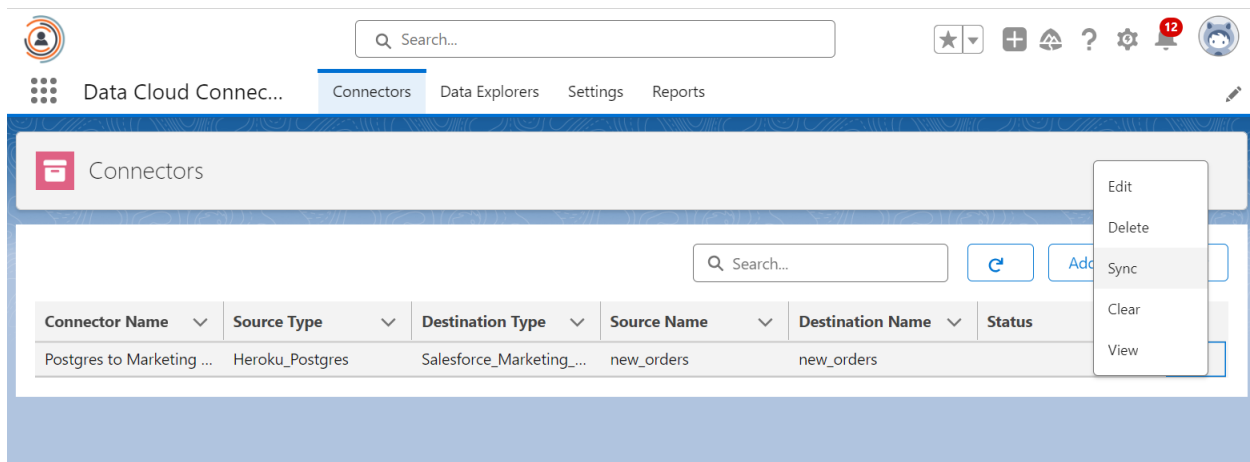
Cancel Save



STEP 4: Synchronize the connector.

Connectors can be synchronized using a schedule or manually.

Manual Sync



Scheduled sync

Scheduled sync is controlled by the Schedule configuration you select when creating a connector. If a connector is already created, you can edit it and change the schedule option.



Add Connector

Data Field to check Date-time of New record insertion to Data source with Timezone
(If specified, only new records will be copied, else, all records will be copied)

Select Date Filter ▼ Select TimeZone ▼

Data Field to check Date-time of Update to existing records in Data source with Timezone
(In specified, records updated in source will get updated in destination If a primary key field is not present, records may be duplicated during update)

Select Date Filter ▼ Select TimeZone ▼

Sync Schedule

☐ Every 15 Mins ☐ Once Weekly ☐ Every 60 Mins ☐ Twice Weekly
☐ Once Daily ☒ Manual Sync ☐ Twice Daily ☐ Custom

Cancel Save

STEP 5: Check status of all connectors.

Reports

Connector Logs Connector Log History Scheduler & Timers

Connector Name ↑	Sync Started	Sync Ended	Sync Count	Sync Status
Postgres to Marketing Cloud	2024-01-18T18:26:08	2024-01-18T18:26:19	10000	Completed
No errors logged				



STEP 6: View to verify synchronized data.

The screenshot shows the 'Data Explorers' section of the Data Cloud Connectors interface. The 'Marketing Cloud Explorer' tab is active, displaying a table of data from the 'new_orders (Postgres to Marketing Cloud)' connector. The table has 9 columns: created_at, id, is_fulfilled, order_status, payment_method, payment_status, and product_id. The data shows 9 records with various timestamps, IDs, fulfillment statuses, and order/payment details.

created_at	id	is_fulfilled	order_status	payment_method	payment_status	product_id
5/29/2023 10:49:31 AM	1	False	Order Status 1	Payment Method 1	Payment Status 1	28
1/1/2023 9:47:29 PM	2	False	Order Status 2	Payment Method 2	Payment Status 2	8
9/2/2022 2:28:22 PM	3	True	Order Status 3	Payment Method 3	Payment Status 3	80
11/25/2022 10:57:25 PM	4	False	Order Status 4	Payment Method 4	Payment Status 4	83
2/27/2023 1:09:06 PM	5	True	Order Status 5	Payment Method 5	Payment Status 5	3
1/3/2023 11:11:11 AM	6	False	Order Status 6	Payment Method 6	Payment Status 6	72
4/7/2023 6:28:21 PM	7	True	Order Status 7	Payment Method 7	Payment Status 7	58
9/1/2022 11:44:05 PM	8	False	Order Status 8	Payment Method 8	Payment Status 8	32
10/18/2022 6:32:49 AM	9	False	Order Status 9	Payment Method 9	Payment Status 9	38

Support

Submit all support and runtime inquiries for Softtrends Data Cloud & Marketing Connector via the Heroku Support portal. Direct non-support-related topics or product feedback to salesforce@softtrends.com