We've got them talking!

The Sitecore® for Salesforce® connector unifies the world's best .NET CMS and the world's most popular marketing tool

sitecore®

Salesforce

Now you can have the best of both worlds – the versatility and reliability of Sitecore, the world leading content management software (CMS) combined with the power of Salesforce the world's most effective cloud-based customer relationship management solution (CRM).

Sitecore for Salesforce (S4S) makes these leading systems work together, intuitively, in a way that has never been seen before. S4S unifies these contrasting technologies so they act as one to deliver a suite of incredibly powerful marketing tools.

Be it using your CRM to control your website access and content, analysing email responses from Salesforce campaigns or simply showing Salesforce documents in your CRM, S4S makes it happen instantly without fuss or fanfare.

Making Intelligent Connections

Read the amazing ways to use S4S

and seamlessly join two world's together

Sitecore CMS	Salesforce CRM
Drive your CMS from Salesforce CRM	Drive your CRM from Sitecore CMS

Salesforce Contacts

- Let Salesforce contacts login to your website with a username and password created and stored in a Salesforce contact record.
- After logging in the contact lands on a web page selected in their Salesforce contact record, ideal for showing showcasing products.
- While navigating the website the contact is delivered custom content determined by settings in the Salesforce contact record. The entire web experience of this contact can be different to the next visitor – all determined from Salesforce.

Salesforce Documents and Content

- Search and view Salesforce documents or other objects from the website in real time.
- Selectively show Salesforce reports to anonymous or logged in website users.

Sitecore Role Management

- Use Salesforce accounts to control group access to the website.
- Control the visibility of individual web pages based on the account the contact belongs to.
- Alternatively, don't use Salesforce accounts. Assign one or more Sitecore roles from the Salesforce contact record to control visibility.

Salesforce Leads

- Monitor visitor behaviour even before they submit a lead form. Later, as leads, track their responses to email campaigns.

Sitecore Digital Marketing System

- Capture Sitecore web behaviour goals and engagement metrics, graphs and reports in Salesforce.
- Against each In Salesforce contact record, show when the contact last logged in and the pages they visited - powerful feedback for marketers.
- Show if the contact is currently logged into the website.

Sitecore Users

- Create a lead, contact, case or any other Salesforce object when a website visitor completes a web form – maybe a contact us, questionnaire, poll, survey, application, registration or support form.
- Use the Web Form for Marketers (WFFM) wizard in Sitecore to quickly map web form fields to Salesforce leads, contacts and other objects.
- Update contact and lead details in Salesforce from your website. Any native or custom object like cases, campaigns, opportunities, or products can be created or edited in real time.
- Show the Sitecore user profile in the Salesforce contact record so your sales team know exactly who they are dealing.

Sitecore Email Campaign Manager

- In Salesforce, use the "Send to Sitecore" wizard to move email campaigns to Sitecore taking advantage of Sitecore's superior delivery, testing, automation, and tracking mechanisms.
- Against individual leads and contacts, view the website goals, engagement values and page visit history of individual campaign members.

Tell us what you want and let us demonstrate it to you

Powerful Features

How it works in the Sitecore Demo Site

Log in using Salesforce

Fred Smith is a Salesforce contact who belongs to an account that has been enabled for website access.

Fred's username and password have been saved in his Salesforce contact record by a Salesforce user. Fred can now login to the Nicam demo.

If Fred wants to change his password he can do this on the website. His Salesforce contact record is always up to date because this is the only place the details are kept.
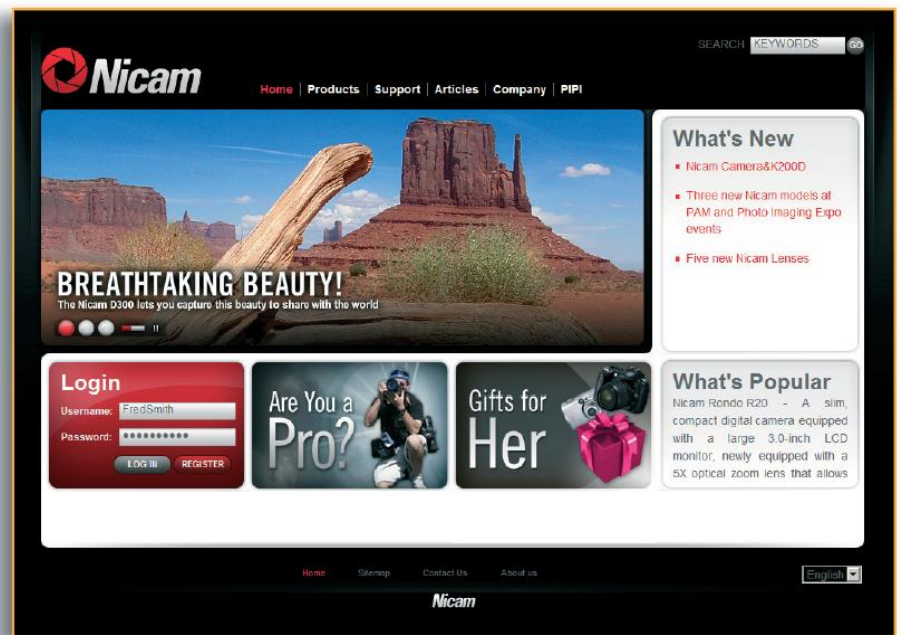
## Web experience controlled from Salesforce

Fred's landing page was chosen in his Salesforce contact record. It may be the web page of a product he expressed an interest in.

As Fred navigates the website his entirely experience is controlled by profile settings made in his Salesforce contact record.

When Fred changes his user details in Sitecore they update in Salesforce instantly. When a marketer updates Salesforce the changes also instantly appear in Sitecore.

This exchange between Sitecore and Salesforce can happen between any objects that easily map to each other.
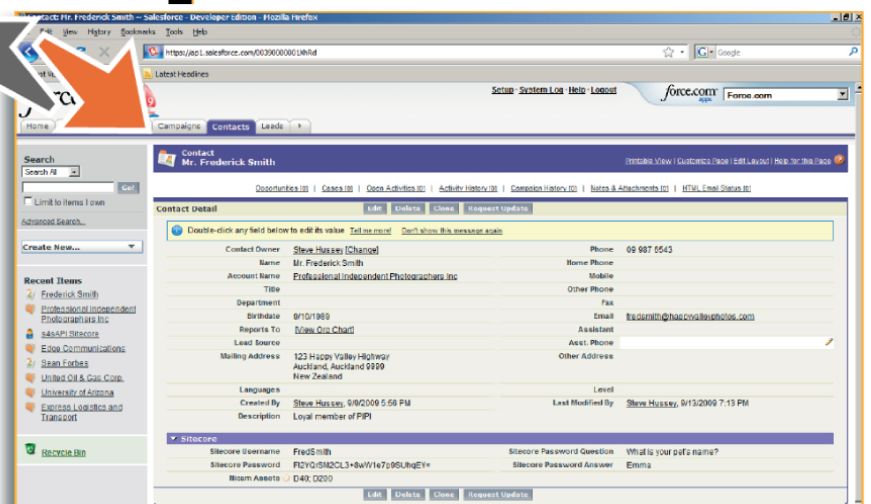
Huge benefits for administrators, marketers and users

Production Proven

Connection at 6 Levels

Data Connection

This connector instantly moves data to and from Salesforce and is the engine room for all other S4S functionality. Often we need to save data from public facing websites to Salesforce. Examples include lead and case capture, responses to marketing campaigns, event registration and job application forms. Sitecore administrators can use the data connector functionality to create Web Forms for Marketers forms to push web data into a range of Salesforce objects. Alternatively Sitecore developers can build forms pre-populated with data from Salesforce.

Security Connection

This connector lets Salesforce users flag individual contacts and accounts and make them available in the Sitecore website as roles and users. Website login credentials and other profile related information can be stored in the contact record. The connector is bidirectional so if an authenticated user in Sitecore who is connected to a Salesforce contact updates their own information; the changes are replicated back to Salesforce. New users added in Sitecore under a role name that matches an account in the Salesforce will create a new related contact in Salesforce. S4S does not duplicate records so synchronisation is never required.

Email Campaign Manager

Create campaigns in Salesforce and move them and their email templates effortlessly into Sitecore. In Sitecore, the campaigns and their associated target audiences appear exactly as if they were created in Sitecore itself. Salesforce campaigns are mapped to Sitecore roles and Salesforce campaign members to Sitecore target audiences. Sitecore ECM overcomes several constraints Salesforce has around email delivery:

- Only 1000 emails per day can be sent
- Response status of emails cannot be tracked
- There is no "effectiveness" reporting available

Engagement Connection

With a connection to Sitecore's powerful Digital Marketing Suite (DMS) Salesforce marketers can examine the effectiveness of recent campaigns. Marketers can see the individual behaviour of contacts and leads (if the lead responded to a campaign email) as they navigate the company website. To indicate the level of engagement of individual leads and contacts, the tracking includes the pages visited and accumulated goal and engagement values. It is even possible to show in each Salesforce lead record the behaviour of the anonymous prospect as they browsed the website before submitting a web-to-lead form.

Document Connection

Selectively expose Salesforce documents or content files on your Sitecore website. To locate the Salesforce files, use the data connector to build search facilities in Sitecore so you download the right file the first time. Conversely, let authenticated website users push files into Salesforce from web forms. S4S works just as well with Sitecore Intranet Portal so you could easily share selected internal documents or content beyond your local network to remote offices or other Salesforce users.

Report Connection

Salesforce includes powerful tools to create reports but these are only accessible to authenticated users. The report connector can be used to display the data from Salesforce reports inside Sitecore websites. Report data can be made accessible to everyone or only to those website users who have a Sitecore role with the required permissions. Conversely, if you need to see Sitecore website reports in Salesforce, it's easy to let marketers determine the effectiveness of recent campaigns by viewing the many graphical reports available from Sitecore analytics.

Save your critical data in Salesforce and control public access with Sitecore and S4S

Highly Configurable

FuseIT ® CONNECTED SOLUTIONS

Better technology to connect your business to

Clients

Teams

Business processes

World class vendor with all the ideas, methodologies and skills

Innovative Solutions

- Corporate websites made for marketing teams
- Client relationship management software
- Platforms for personalized direct marketing
- Solutions to better connect your business to your customers
- World class vendor

Compelling Services

- Strategy development
- Product selection
- Implementation
- Integration services
- Deployment
- Ongoing maintenance and operation
- Service and support

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