



Aprimo - Salesforce Sales Cloud Campaign Sync Guide

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Contents

1. Introduction	3
2. Sending Activities to Salesforce	4
3. Metadata Fields	5
Required Fields	5
Metadata Sync.....	6
4. Customer Setup	6
5. Additional Notes	7

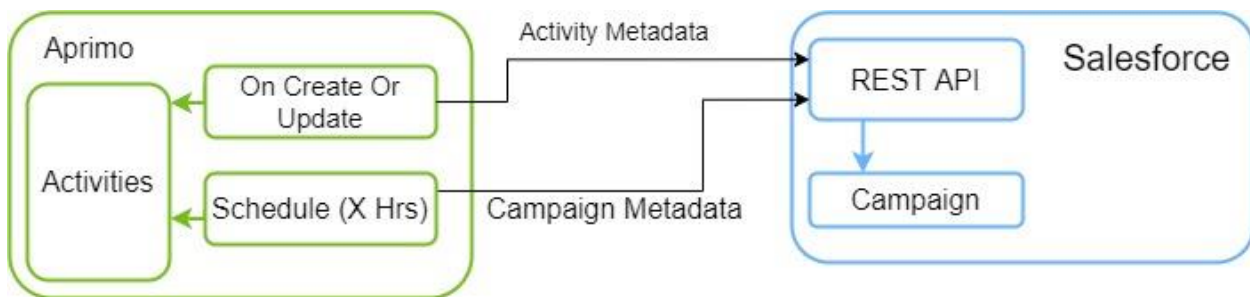
1. Introduction

The Aprimo-Salesforce Sales Cloud Campaign Sync allows customers to connect their Aprimo Plan and Spend or Productivity modules to Salesforce Sales Cloud to push Aprimo Activities over to Salesforce as a Campaign.

Features:

- **Create or Update Salesforce Campaigns** via automatic process.
- **Retrieves Metadata** on a schedule from Salesforce and update metadata in Aprimo with it.
- **Flexible Field Mapping** allows you to map Aprimo metadata to either base fields or custom fields in Salesforce.
- **Link to Salesforce** allows navigation into Salesforce UI for deeper information on the campaign.

Interface Diagram:



2. Sending Activities to Salesforce

Automated Process: Aprimo sends Activities to Salesforce automatically. This is true for both the initial **create** process and **update** process. Some examples of the conditions include:

- When an activity is created.
- When an activity of a certain activity type is created.
- When an activity is updated.
- When an activity is updated and specific metadata conditions are true.

3. Metadata Fields

Required Fields

Aprimo Extended Attributes

There are a few fields that are required by Campaign Sync for functionality. The following fields need to be configured as extended attributes on activities.

Salesforce Status (Text) will be set to one of the following values:

- **Completed** – The create or update process has been completed successfully, and your activity has been created as a campaign in Salesforce or updated an existing one.
- **Errors** – Salesforce Status will be used to expose errors if they occur during a create or update of a Salesforce campaign. If this occurs, then the Status field will display that error. Reach out to your Aprimo contact for help in solving this.

Salesforce Last Updated (DateTime) will display the last time that the integration updated this activity.

Salesforce Deep Link (URL) will display a URL that will redirect the user directly to the Salesforce Campaign that is associated to the activity.

Salesforce ID (Text) will display the unique ID of the Salesforce Campaign that this activity is tied to.

Salesforce Campaign Type (Picklist) will be used during Activity creation, or before sending it to Salesforce, to determine which type of campaign it will be created as. This must be an activity EA picklist field and must be configured to contain a list of all configured Campaign types in your Salesforce instance. This list is not automatically updated so if new types are added to Salesforce they will not be displayed in this list unless Campaign Sync is configured for the type. Once this field is set and a campaign is created in Salesforce, this field can't be changed.

Salesforce Custom Campaign Fields

There is one field that is required on the Salesforce side for Campaign Sync's functionality.

Aprimo Activity ID(Text) will be a text field on all Salesforce Campaigns and contain the unique Activity ID of the Aprimo activity associated to it.

Metadata Sync

Aprimo to Salesforce: Campaign Sync supports mappings text, date, and numeric base activity fields as well as text, date, and numeric extended attributes to Salesforce campaign base fields and single value custom metadata fields.

Salesforce to Aprimo: supports mapping both Salesforce campaign base fields and Salesforce single value custom metadata fields to Aprimo activity base fields and single value extended attributes. The Salesforce to Aprimo mapping occurs on a configured schedule. This is configured during the initial setup. Some examples of the schedule follow:

- Midnight every day.
- Noon every Sunday.
- Every 12 hours.

The primary types of fields intended to be synchronized back to Aprimo are the campaign id, status updates about the campaign as well as metric details. Only text, date, and numeric custom fields can be synchronized back to Aprimo. If your fields being returned fall outside the scope of this, additional activation effort will be required.

4. Customer Setup

- Create a user in Salesforce. Record the username, password, and security token for the Campaign Sync configuration.
- Create a connected App in Salesforce with **Full Access** and **Perform requests on your behalf at any time(refresh_token, offline_access)**
 - Go to the Salesforce Lightning Setup page and navigate to Apps > App Manager and select New Connected App
 - If your instance of Salesforce requires a “Callback URL” set it to www.aprimo.com. The actual value is not required by Campaign Sync but may be required by Salesforce.


SETUP

Manage Connected Apps

Basic Information

Connected App Name
 API Name
 Contact Email
 Contact Phone
 Logo Image URL
 Icon URL
 Info URL
 Description

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Add
Remove

Selected OAuth Scopes

- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)

Require Secret for Web Server Flow ☒

Introspect All Tokens ☐

Configure ID Token ☐

Enable Asset Tokens ☐

5. Additional Notes

- Only Activity object integration is supported.
- An activity can only have a single Campaign in Salesforce.
- Deleting activities in Aprimo will have no effect on campaigns in Salesforce.
- Picklist or multiselect value mapping is possible but will require additional activation effort.
- Salesforce Enterprise or Unlimited editions required.
- No package is deployed into Salesforce – all integration relies on the Salesforce APIs.