



Sprinklr - Salesforce Lightning Connector

Admin Guide



Sprinklr's certified connector to Salesforce

Provides an integrated social care experience and supports omnichannel case management

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Sprinklr: Salesforce Lightning Connector

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Pre-requisites

Pre-requisites

Sprinklr

- Modern Care must be enabled and configured within the Sprinklr platform
- Salesforce Webhooks must be enabled and configured within the Sprinklr platform

Salesforce

- Service Cloud Unlimited and Enterprise Editions
- Group and Professional Editions not Supported
- “My Domain” must be enabled and configured in Salesforce
- Whitelisted Sprinklr API Addresses





Supported Use-Cases

Supported Use-Cases

1. **Data flowing from Sprinklr to Salesforce:**

- Store social care interactions spanning across all the digital channels supported on Sprinklr as Cases in Salesforce
- Store social profile information as Contact/Account in Salesforce

2. **Data retrieved from Salesforce into Sprinklr:**

- Use CRM data on Case to power Sprinklr's Automation Engine to enrich and prioritize social interactions
- Use Salesforce as the source of truth to subscribe or unsubscribe any customer activities and also assist Agents working on Sprinklr

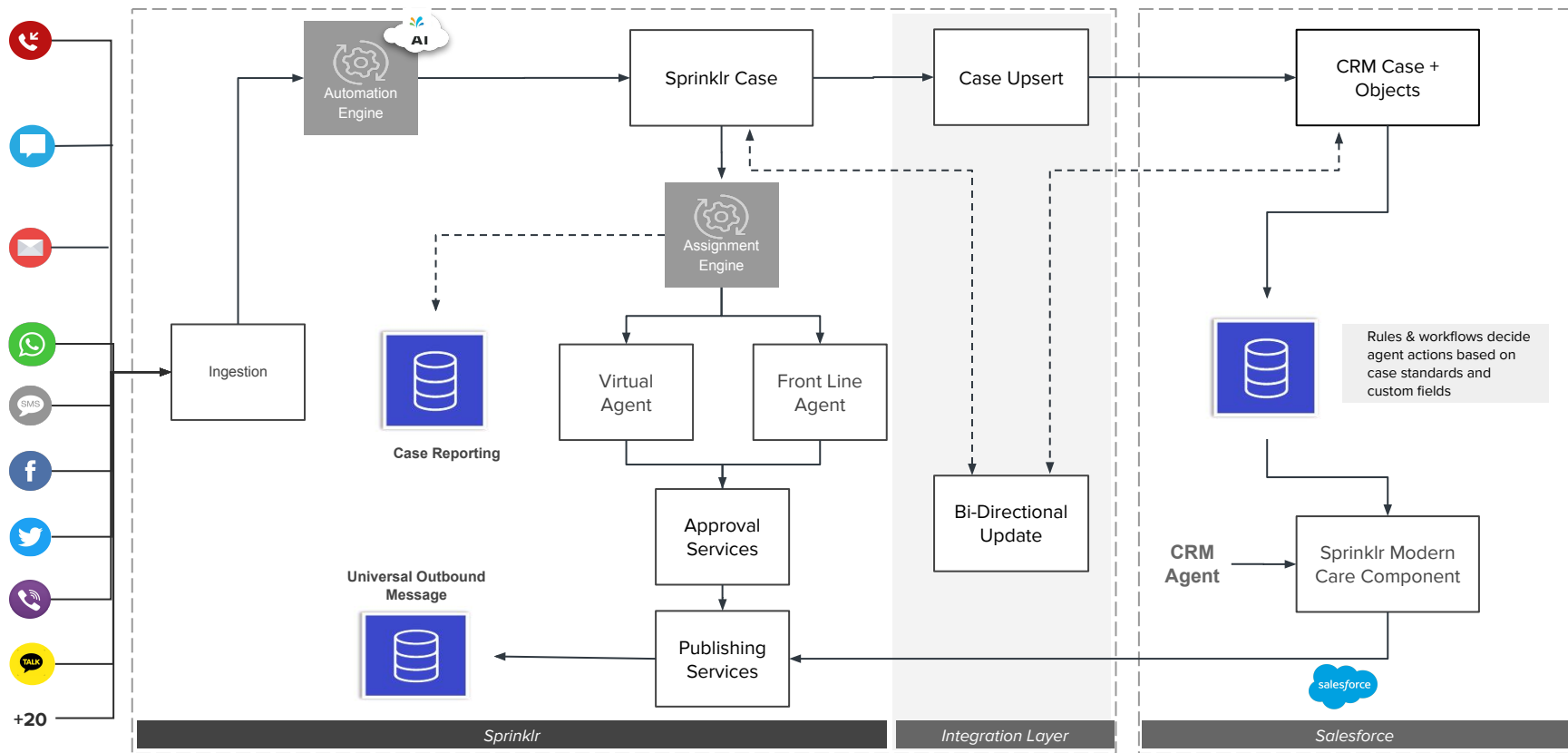
3. **Use the Sprinklr UI component within the Salesforce Service Cloud Agent Console to respond directly to Cases created by Sprinklr**

4. **Agents on either platform can internally collaborate by leveraging Sprinklr Case Notes which synchronizes with Case Comments in Salesforce**





Architecture Diagram



Connector uses two custom objects i.e Sprinklr Social Persona for Social Profile and Sprinklr Social Post for Social message which are **similar to Social Studio's Social Persona and Social Post objects**. Complete field details in these two objects with their description can be found [here](#).





Downloading and Configuring the Sprinklr App

Note: Sprinklr Technical Services will assist you with the setup and installation of the Connector.

Navigate to Salesforce AppExchange and search for “Sprinklr”

The screenshot shows the Salesforce AppExchange search results page for the keyword 'sprinklr'. The browser address bar displays 'appexchange.salesforce.com/appxSearchKeywordResults?keywords=sprinklr'. The page features a search bar at the top with the text 'Search AppExchange'. Below the search bar, a 'Recent Items' dropdown menu is visible, showing 'Sprinklr App - Sprinklr'. The main content area displays a table of search results. The table has columns for 'LISTING', 'LATEST RELEASE', 'RATING', and 'PRICE'. The first result is 'Sprinklr', which is highlighted. Other results include 'Workato: Advanced Integrations for Salesforce*', 'Oracle CPQ (Configure Price Quote)', 'Social25 - Connect WhatsApp, Instagram DM's en Facebook messenger to Salesforce', and 'Spredfast'. The left sidebar contains filters for 'Solution Type', 'Prices', 'Editions', and 'Ratings'.

LISTING	LATEST RELEASE	RATING	PRICE
Sprinklr	11/23/2021	★★★★★ (4)	Free
Workato: Advanced Integrations for Salesforce*		★★★★★ (48)	Paid
Oracle CPQ (Configure Price Quote)	8/15/2019	★★★★★ (564)	Paid
Social25 - Connect WhatsApp, Instagram DM's en Facebook messenger to Salesforce	3/1/2022	★★★★★ (7)	Paid
Spredfast		★★★★★ (1)	Free



Click “Get It Now” to install the connector

appexchange

Search AppExchange

Log In

Home Recommended for You Solutions by Type Product Collections Industry Collections Consultants Ohana

< SEARCH RESULTS | ALL APPS > ENTERPRISE RESOURCE PLANNING

Sprinklr

By Sprinklr

Free

RATING ★★★★★ (1)

LISTED ON 8/7/2017

LATEST RELEASE 7/16/2019

Modern Care on Salesforce Service Cloud
Sprinklr Salesforce Connector provides a native integrated social care experience for Sprinklr users directly in Salesforce, supporting omnichannel case management.

1 of 2 : Create a Salesforce Case from Sprinklr automatically through Rule Engine

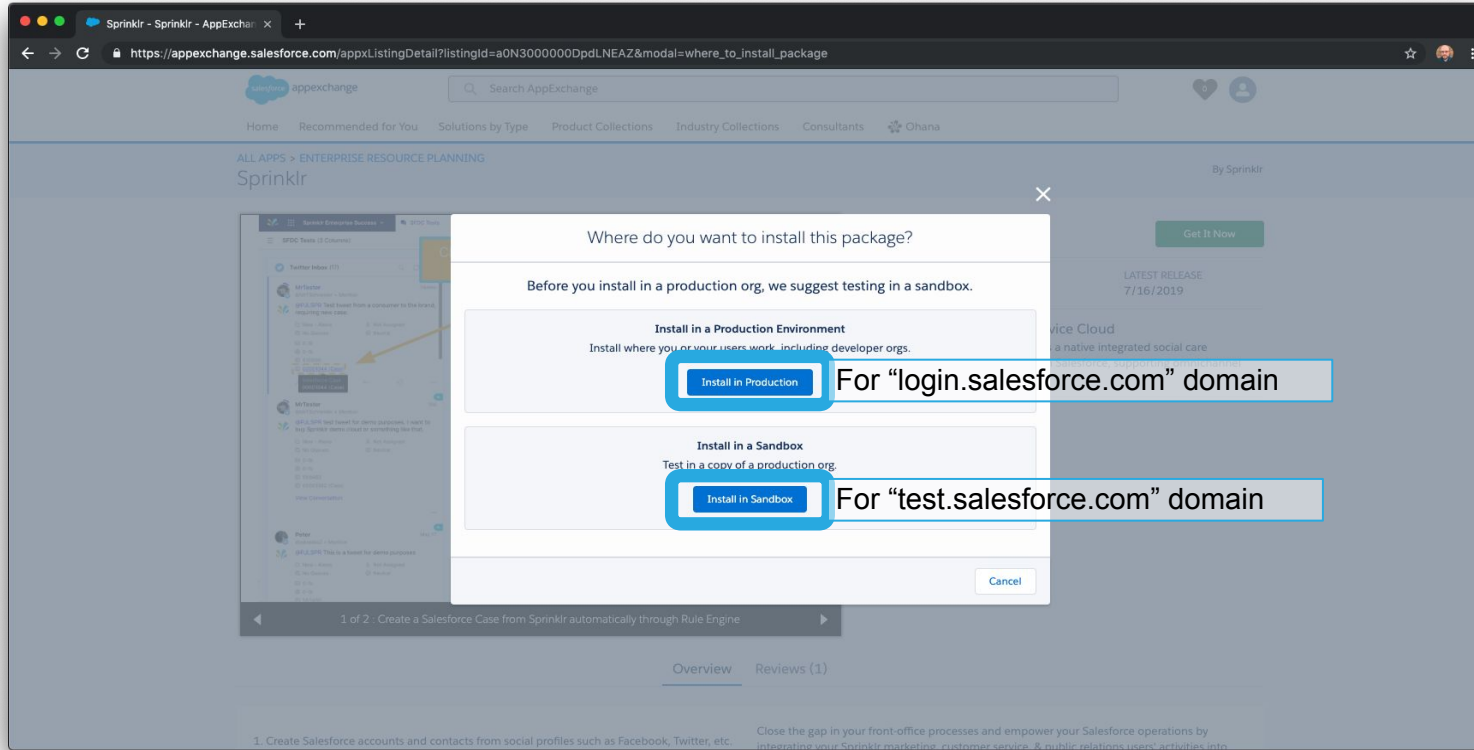
Overview Reviews (1)

1. Create Salesforce accounts and contacts from social profiles such as Facebook, Twitter, etc.

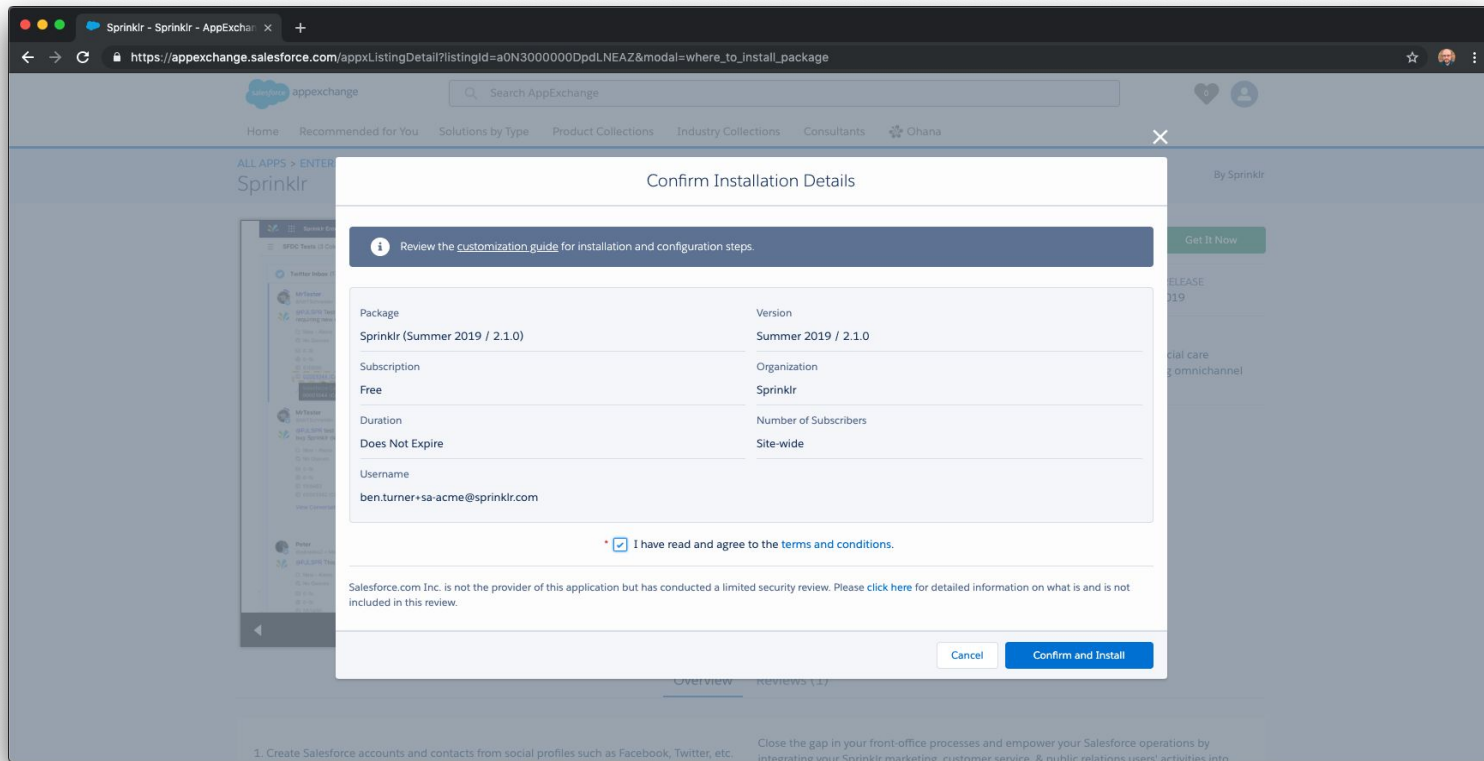
Close the gap in your front-office processes and empower your Salesforce operations by integrating your Sprinklr marketing, customer service, & public relations users' activities into



Select the Salesforce Environment Type



Review components, agree to terms, confirm and install



Install for All Users

Upgrade Sprinklr
By Sprinklr

Information An earlier version is installed. It can be upgraded while preserving the existing data.
Installed: Summer 2019 (2.1) New Version: Summer 2019 (2.1)

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Sprinklr	Sprinklr	Summer 2019	2.1

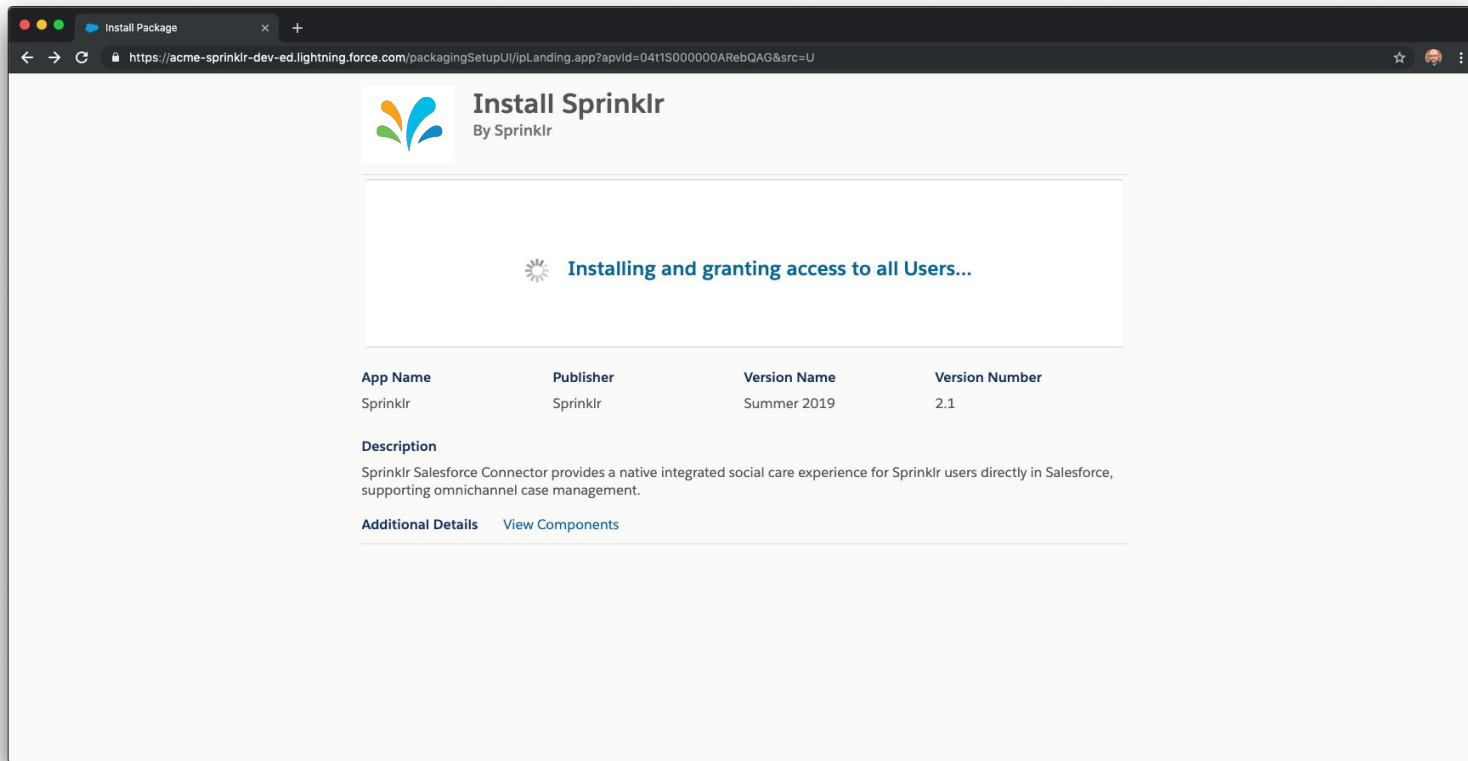
Description
Sprinklr Salesforce Connector provides a native integrated social care experience for Sprinklr users directly in Salesforce, supporting omnichannel case management.

Additional Details [View Components](#)

Unless otherwise required, the Sprinklr Application should be installed for all users.



Application will install and grant access to users



Install Sprinklr
By Sprinklr

Installing and granting access to all Users...

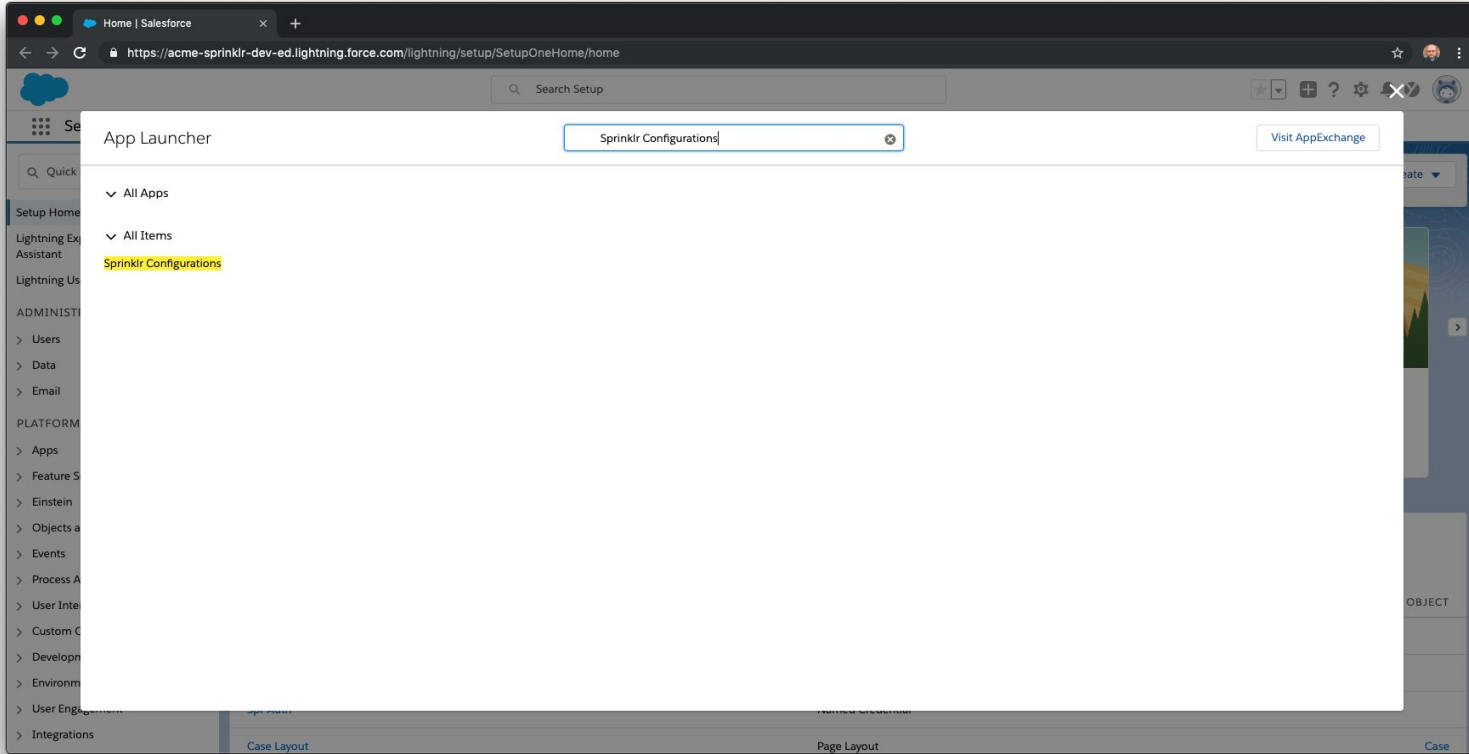
App Name	Publisher	Version Name	Version Number
Sprinklr	Sprinklr	Summer 2019	2.1

Description
Sprinklr Salesforce Connector provides a native integrated social care experience for Sprinklr users directly in Salesforce, supporting omnichannel case management.

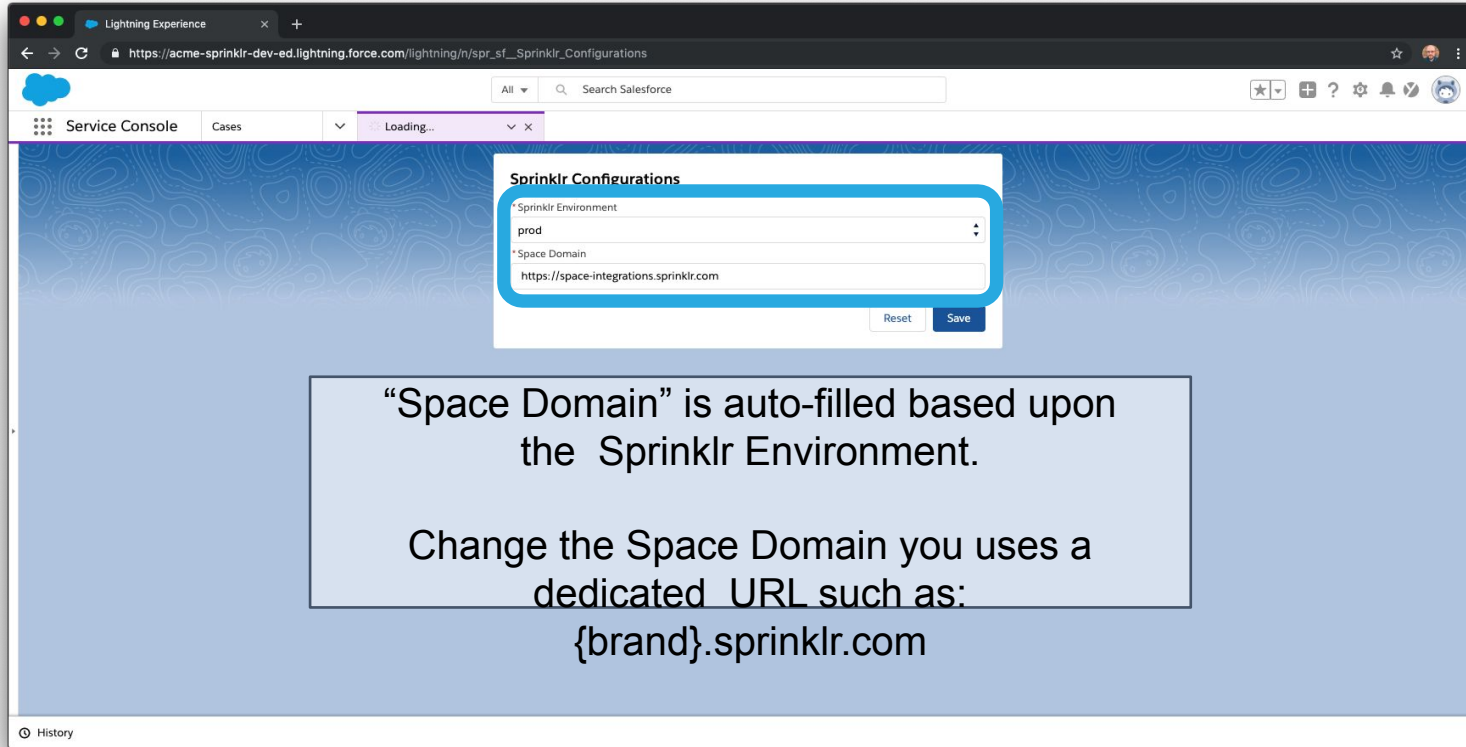
Additional Details [View Components](#)



Select “Sprinklr Configurations” from App Launcher



Select appropriate “Sprinklr Environment”



The screenshot shows the Salesforce Lightning Experience interface. The browser address bar displays the URL: `https://acme-sprinklr-dev-ed.lightning.force.com/lightning/n/spr_sf__Sprinklr_Configurations`. The Salesforce navigation bar includes the Service Console, Cases, and a Loading... tab. The main content area features a modal titled "Sprinklr Configurations" with the following fields:

- * Sprinklr Environment: `prod`
- * Space Domain: `https://space-integrations.sprinklr.com`

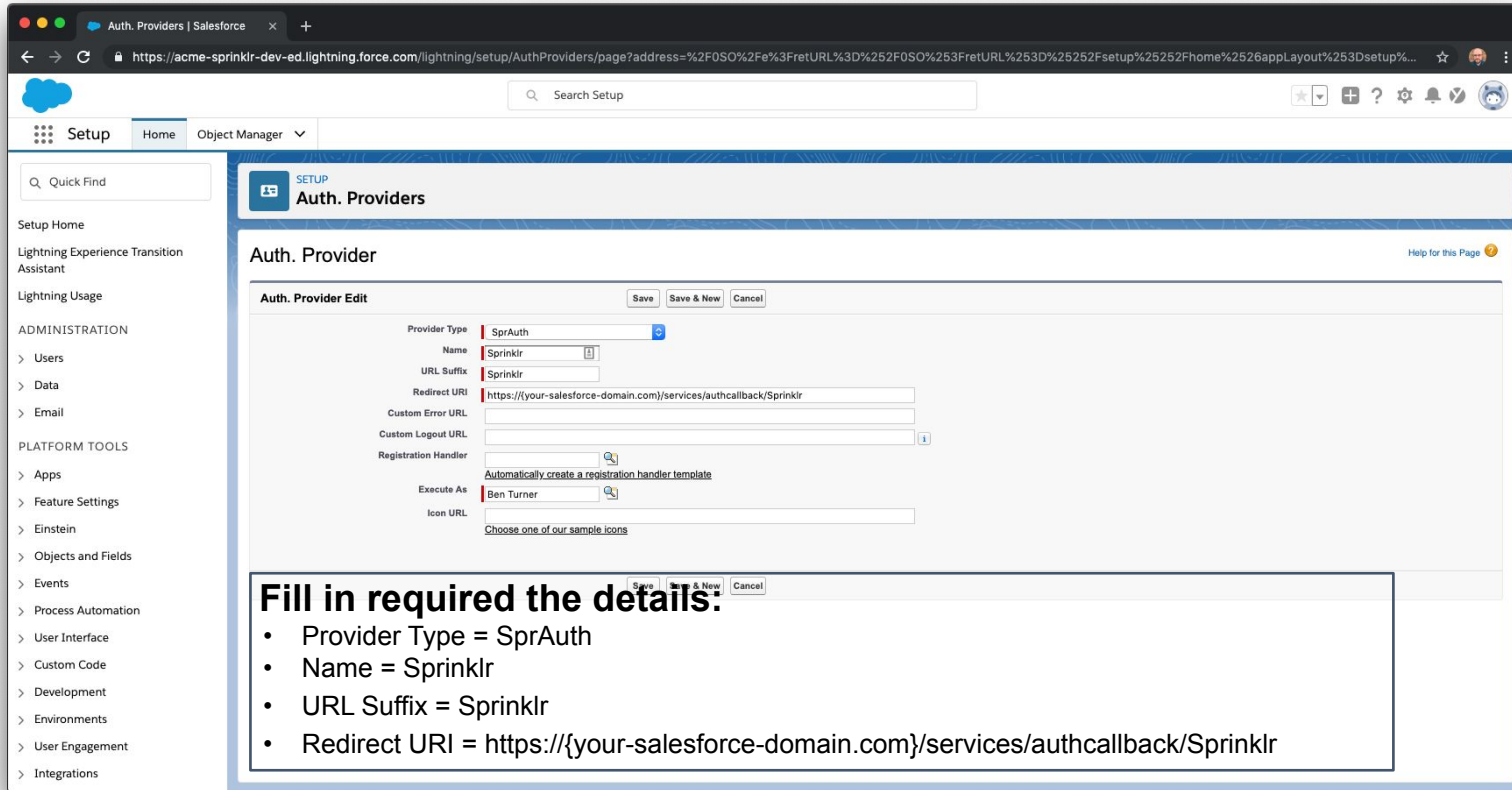
Buttons for "Reset" and "Save" are located at the bottom right of the modal.

“Space Domain” is auto-filled based upon the Sprinklr Environment.

Change the Space Domain you uses a dedicated URL such as:
`{brand}.sprinklr.com`



Navigate to and Configure “Auth. Providers” from Setup



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, Feature Settings, Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code, Development, Environments, User Engagement, Integrations). The main content area is titled "Auth. Providers" and shows the "Auth. Provider Edit" form. The form fields are: Provider Type (SprAuth), Name (Sprinklr), URL Suffix (Sprinklr), Redirect URI (https://{your-salesforce-domain.com}/services/authcallback/Sprinklr), Custom Error URL, Custom Logout URL, Registration Handler (with a link to "Automatically create a registration handler template"), Execute As (Ben Turner), and Icon URL (with a link to "Choose one of our sample icons").

Auth. Provider

Auth. Provider Edit [Save] [Save & New] [Cancel]

Provider Type: SprAuth

Name: Sprinklr

URL Suffix: Sprinklr

Redirect URI: https://{your-salesforce-domain.com}/services/authcallback/Sprinklr

Custom Error URL:

Custom Logout URL:

Registration Handler: [Automatically create a registration handler template](#)

Execute As: Ben Turner

Icon URL: [Choose one of our sample icons](#)

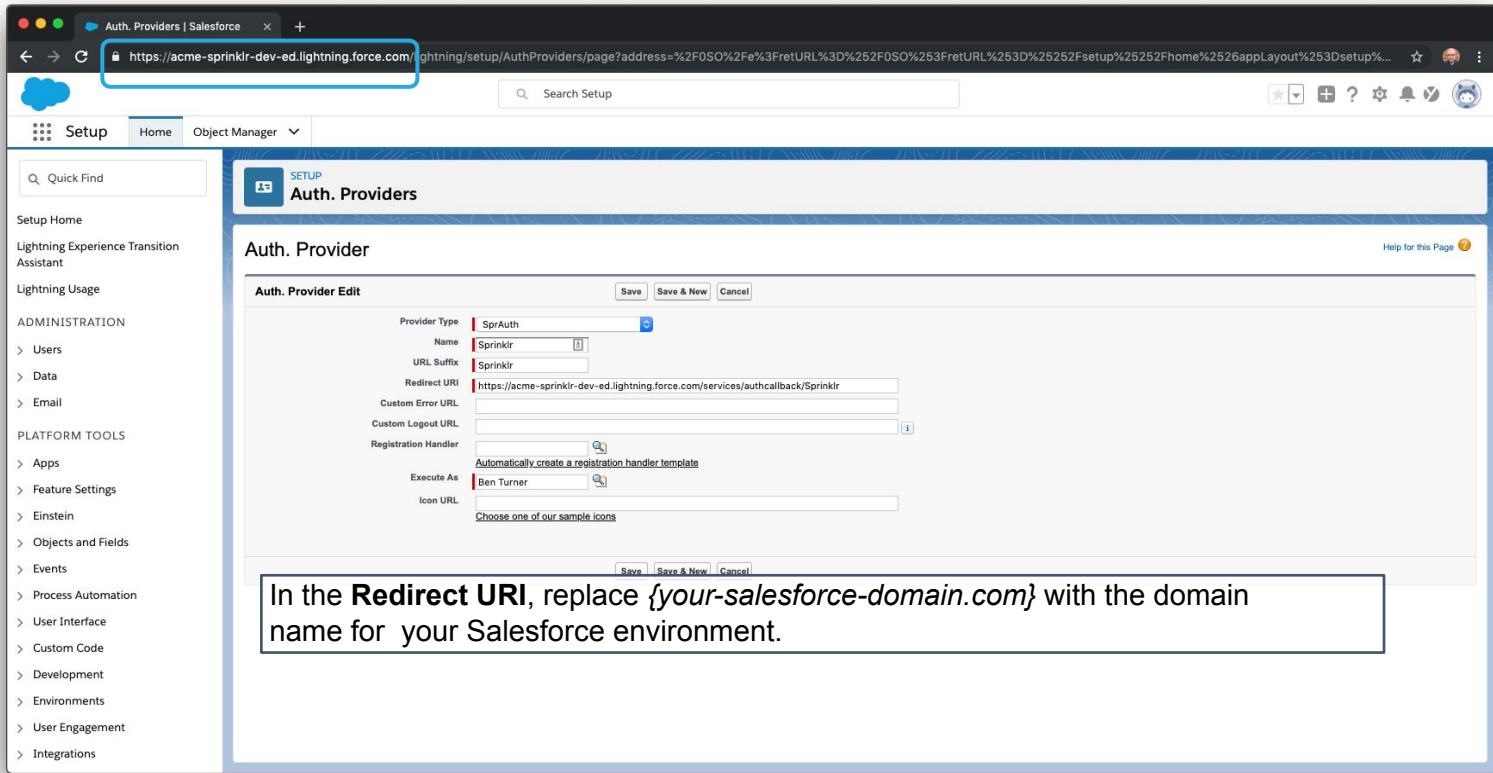
[Save] [Save & New] [Cancel]

Fill in required the details:

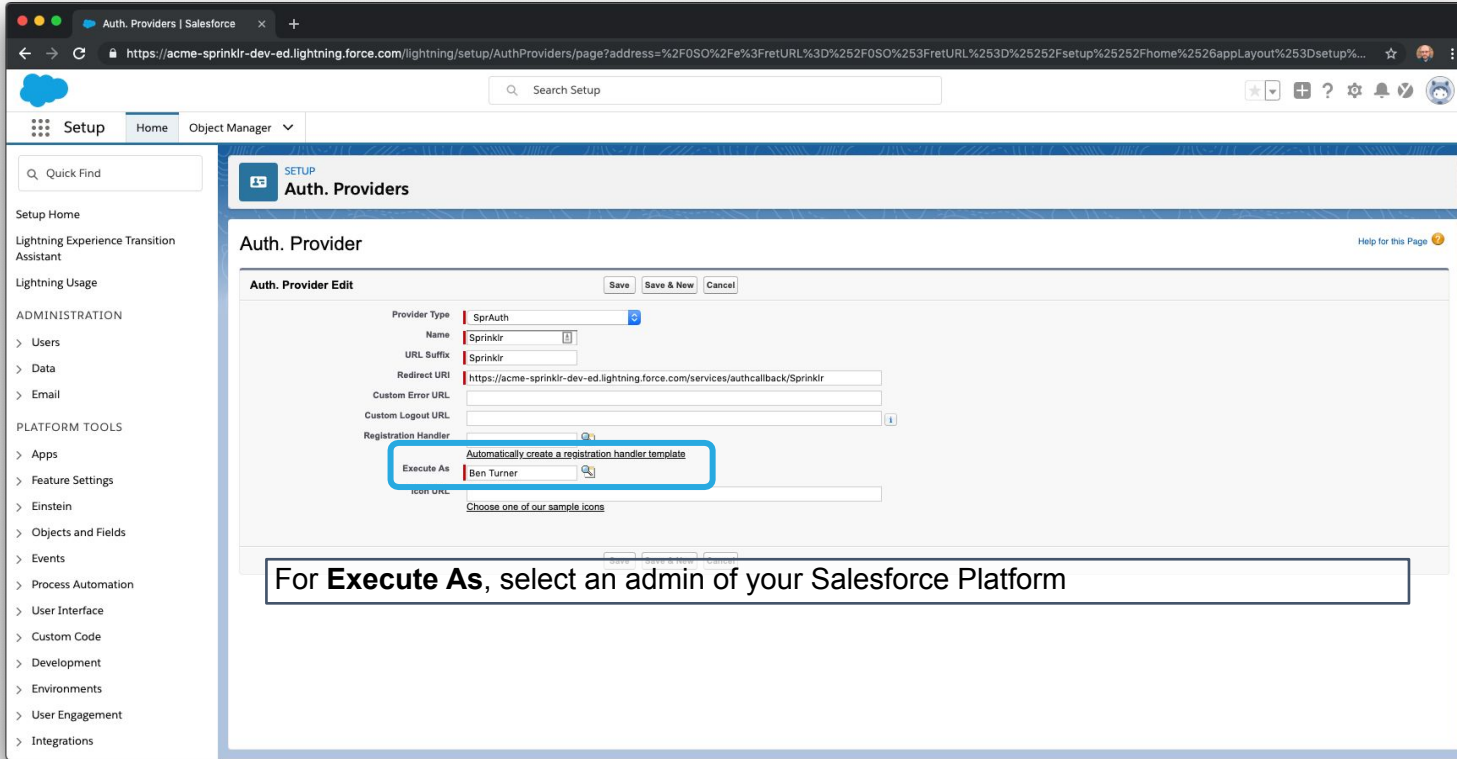
- Provider Type = SprAuth
- Name = Sprinklr
- URL Suffix = Sprinklr
- Redirect URI = https://{your-salesforce-domain.com}/services/authcallback/Sprinklr



Navigate to and Configure “Auth. Providers” from Setup



Navigate to and Configure “Auth. Providers” from Setup



The screenshot shows the Salesforce Setup interface for configuring an authentication provider. The left sidebar contains navigation links for Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, Feature Settings, Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code, Development, Environments, User Engagement, Integrations). The main content area is titled "Auth. Providers" and "Auth. Provider". The "Auth. Provider Edit" form includes fields for Provider Type (SprAuth), Name (Sprinklr), URL Suffix (Sprinklr), Redirect URI (https://acme-sprinklr-dev-ed.lightning.force.com/services/authcallback/Sprinklr), Custom Error URL, Custom Logout URL, Registration Handler (with a link to "Automatically create a registration handler template"), Execute As (Ben Turner), and Icon URL (with a link to "Choose one of our sample icons"). A blue box highlights the "Execute As" field, and a text box at the bottom states: "For Execute As, select an admin of your Salesforce Platform".

Auth. Provider

Auth. Provider Edit

Provider Type: SprAuth

Name: Sprinklr

URL Suffix: Sprinklr

Redirect URI: https://acme-sprinklr-dev-ed.lightning.force.com/services/authcallback/Sprinklr

Custom Error URL

Custom Logout URL

Registration Handler: [Automatically create a registration handler template](#)

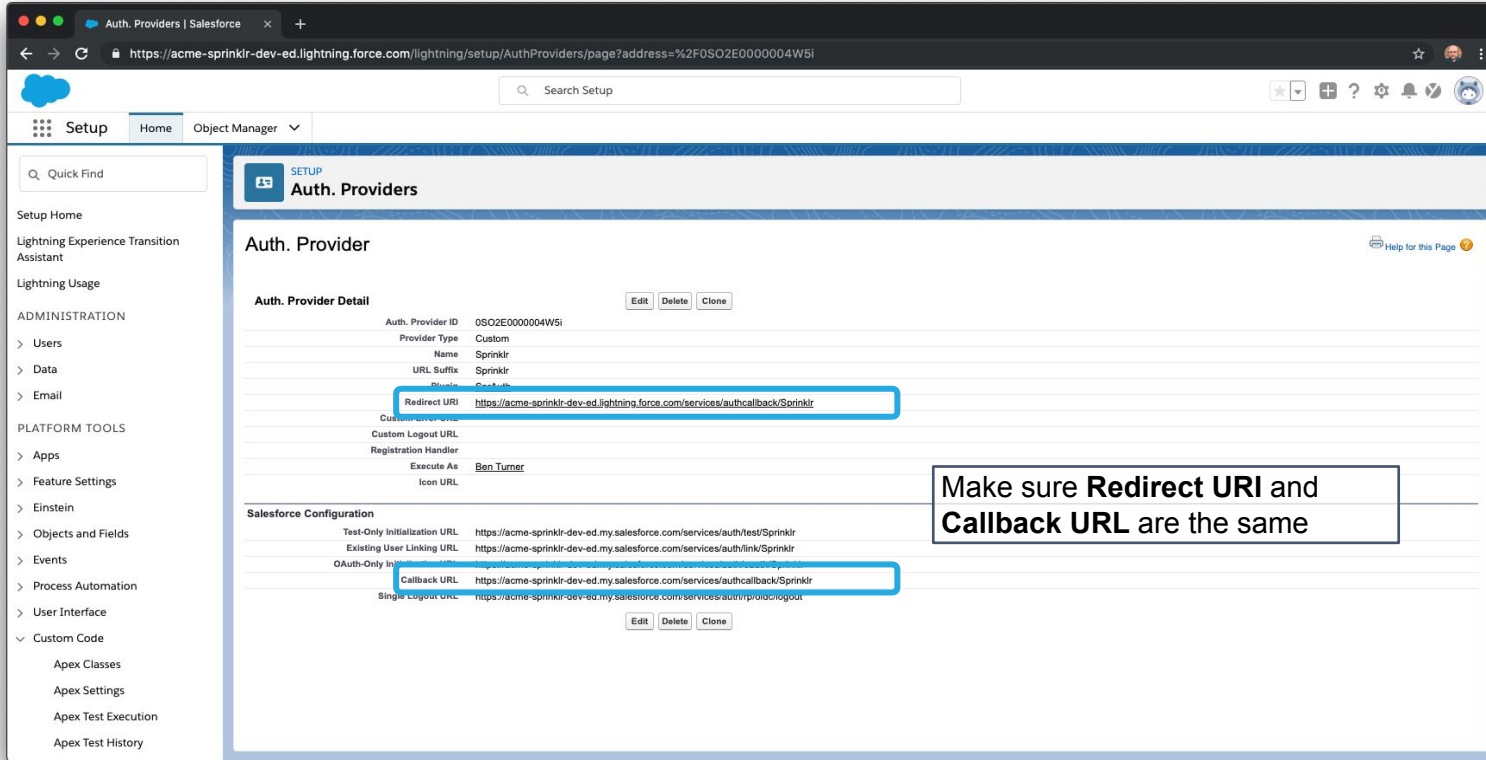
Execute As: Ben Turner

Icon URL: [Choose one of our sample icons](#)

For **Execute As**, select an admin of your Salesforce Platform



Navigate to and Configure “Auth. Providers” from Setup



The screenshot shows the Salesforce Setup interface for configuring an Auth. Provider. The left sidebar contains navigation links for Setup, Home, Object Manager, and various administrative and platform tools. The main content area displays the 'Auth. Provider' configuration page for a custom provider named 'Sprinklr'.

Auth. Provider Detail

Auth. Provider ID	0SOZE000004W5I
Provider Type	Custom
Name	Sprinklr
URL Suffix	Sprinklr
Redirect URI	https://acme-sprinklr-dev-ed.lightning.force.com/services/authcallback/Sprinklr
Custom Cover URL	
Custom Logout URL	
Registration Handler	
Execute As	Ben Turner
Icon URL	

Salesforce Configuration

Test-Only Initialization URL	https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/test/Sprinklr
Existing User Linking URL	https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/link/Sprinklr
OAuth-Only Initialization URL	https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/initialize/Sprinklr
Callback URL	https://acme-sprinklr-dev-ed.my.salesforce.com/services/authcallback/Sprinklr
Single Logout URL	https://acme-sprinklr-dev-ed.my.salesforce.com/services/auth/protocol/logout

Make sure Redirect URI and Callback URL are the same



Navigate to and Configure “Named Credentials” from Setup

The screenshot shows the Salesforce Setup interface for Named Credentials. The browser address bar displays the URL: `https://acme-sprinklr-dev-ed.lightning.force.com/lightning/setup/NamedCredential/home`. The top navigation bar includes the Setup icon, a search bar with "Named Credentials", and various utility icons. The left sidebar shows the Setup menu with "Named Credentials" selected. The main content area is titled "Named Credentials" and includes a description: "A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials." Below this, there is a "View:" dropdown set to "All" and a "Create New View" link. A table lists the named credentials, with one entry visible:

Action	Label	URL	Username
Edit	Ser Auth	<code>https://api2.sprinklr.com</code>	



Navigate to and Configure “Named Credentials” from Setup

The screenshot shows the Salesforce Setup interface for editing a Named Credential. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Named Credential Edit: Spr Auth" and includes a description: "Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system." The form fields are as follows:

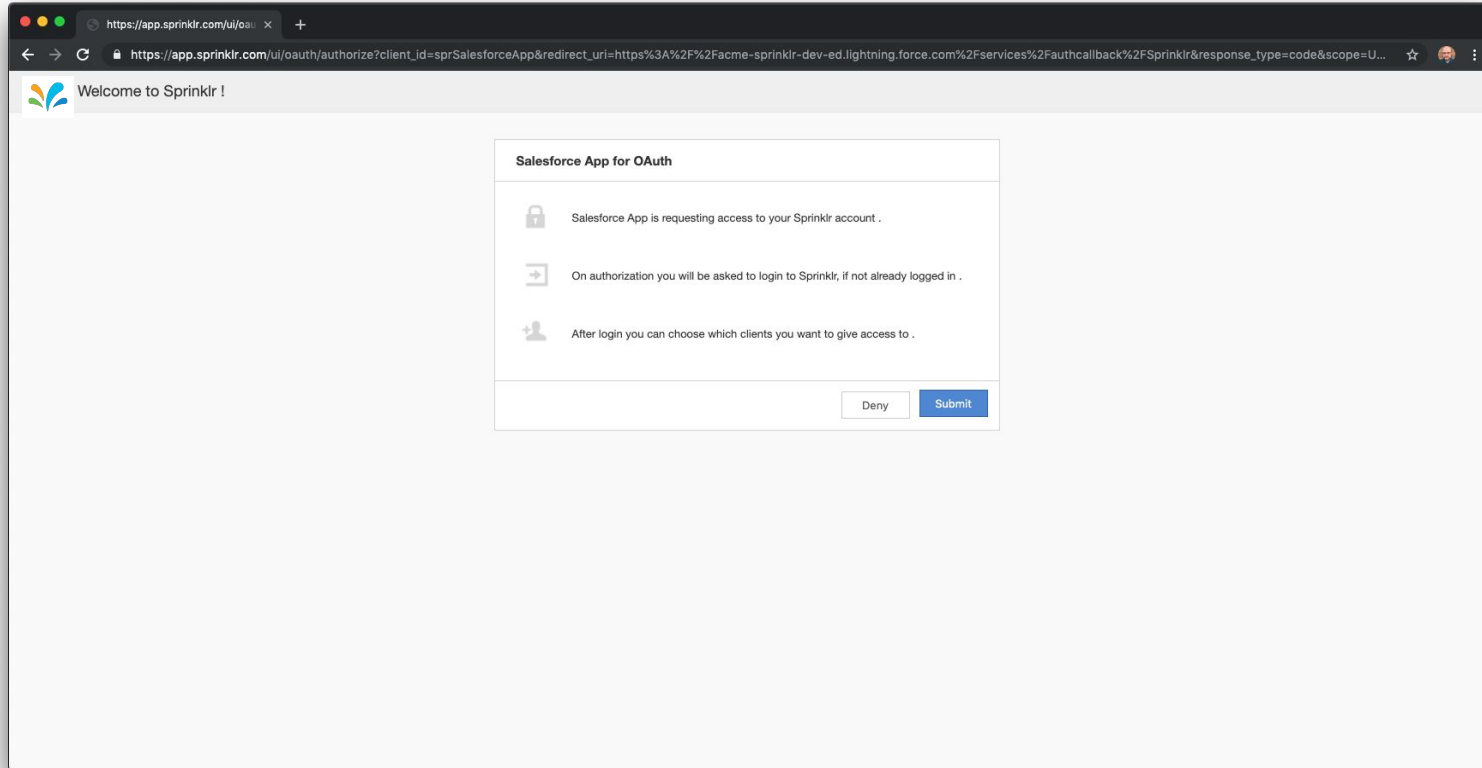
- Label: Spr Auth
- Name: Spr_Auth
- URL: https://api2.sprinklr.com
- Authentication Section:
 - Certificate: (empty)
 - Identity Type: Named Principal
 - Authentication Protocol: OAuth 2.0
 - Authentication Provider: Sprinklr
 - Scope: (empty)
 - Authentication Status: Authenticated as Sprinklr
 - Start Authentication Flow on Save** (checked)
- Callout Options Section:
 - Generate Authorization Header: (checked)
 - Allow Merge Fields in HTTP Header: (checked)
 - Allow Merge Fields in HTTP Body: (unchecked)

Two callout boxes provide additional instructions:

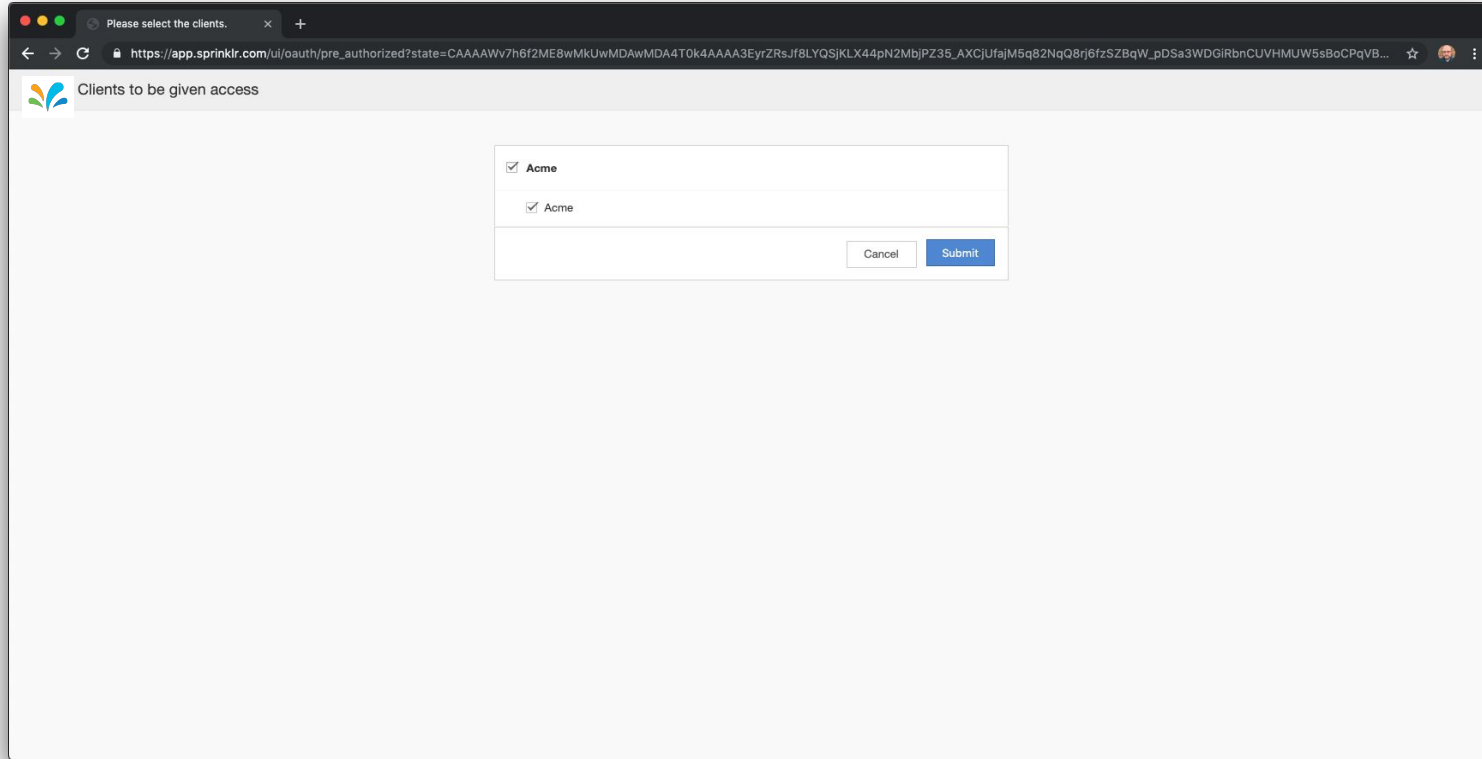
- Fill in the required details:**
 - Authentication Protocol = OAuth 2.0
 - Authentication Provider = Sprinklr
- Select “Start Authentication Flow on Save”**



Navigate to and Configure “Named Credentials” from Setup



Navigate to and Configure “Named Credentials” from Setup



Navigate to Setup window by clicking on gear icon

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with sections: Setup Home, ADMINISTRATION, and PLATFORM TOOLS. The main content area has a header with 'SETUP Home' and three cards: 'Mobile Publisher', 'Go Mobile', and 'Visit AppExchange'. A blue box highlights the 'gear' icon in the top right corner, with a callout that says 'Go to setup by clicking on "gear" icon'. Another blue box highlights the 'Setup' button in the top right corner, with a callout that says 'Setup'. Below the cards is a 'Most Recently Used' section with a table.

Go to setup by clicking on "gear" icon

Setup

Service Setup

Developer Console

Mobile Publisher

Go Mobile

Visit AppExchange

Most Recently Used

1 items

NAME	TYPE	OBJECT
lalith test	User	



Search for "Change data capture" and select from search results

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows the 'Case' object selected under 'Object Manager'. The main content area displays a search bar with the text 'change data capture'. Below the search bar, a dropdown menu shows search results: 'change data capture' in Setup, 'change data capture' in Objects, and 'Change Data Capture Object - Integrations'. A blue arrow points from the search bar to the dropdown menu. A yellow callout box with the text 'Search for change data capture and select' points to the search results. The 'Change Data Capture Object - Integrations' result is highlighted with a blue box. Below the search results, the 'Lightning Record Pages' section is visible, showing a table with one item: 'Lightning Record page'.

Setup Home Object Manager

Case

change data capture

Search for change data capture and select

Change Data Capture Object - Integrations

Lightning Record Pages

1 Items, Sorted by Label

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMENTS	MODIFIED BY
Lightning Record page	Desktop			lalith test, 8/1/2019, 9:50 PM



Select the Entities (For e.g. Case) for which you want to capture change events

Q Quick Find

Setup Home

Lightning Experience Transition Assistant

Lightning Usage

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps
- > Features
- > Einstein
- > Object Manager
- > Picklist Value Sets
- > Schema Builder
- > Events
- > Process Automation
- > User Interface
- > Custom Code
- > Development

SETUP

Change Data Capture

Select the entities that generate change event notifications. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

- Campaign member (CampaignMember)
- Campaign Member Status (CampaignMemberStatus)
- Case (Case)**
- Contact (Contact)
- Contract (Contract)
- Event (Event)
- Event Relation (EventRelation)
- Lead (Lead)
- List Email (ListEmail)
- Opportunity (Opportunity)

Selected Entities

No entity selected

Select the entities for which you want to capture change event



Click the arrow button to move into selected entities and click on save.

Q Quick Find

Setup Home

Lightning Experience Transition Assistant

Lightning Usage

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps
- > Feature Settings
- > Einstein
- ▼ Objects and Fields
 - Object Manager
 - Picklist Value Sets
 - Schema Builder
- > Events
- > Process Automation
- > User Interface
- > Custom Code
- > Development

SETUP

Change Data Capture

Select the entities that generate change event notifications. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

- Campaign member (CampaignMember)
- Campaign Member Status (CampaignMemberStatus)
- Case (Case)
- Contact (Contact)
- Contract (Contract)
- Event (Event)
- Event Relation (EventRelation)
- Lead (Lead)
- List Email (ListEmail)
- Opportunity (Opportunity)

Selected Entities

No entity selected

Click on this icon to move into selected entities and click on save

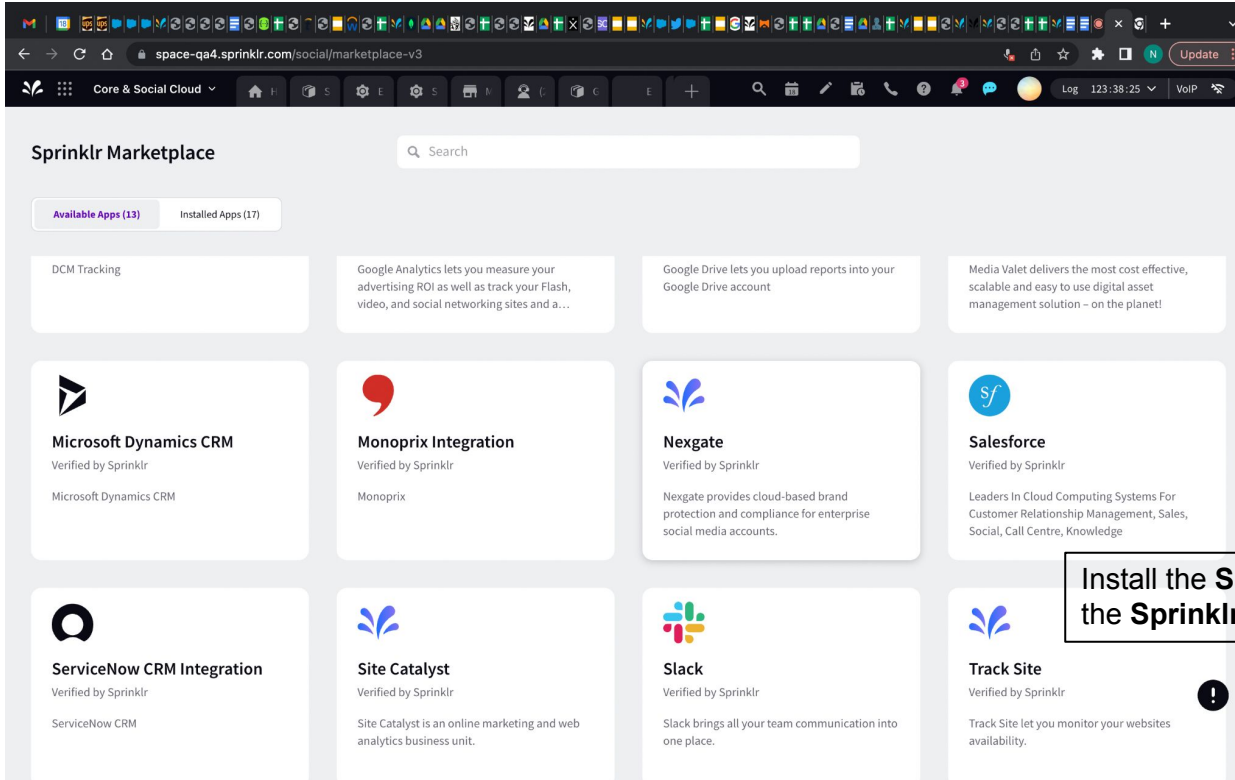
Cancel Save





Installing the Sprinklr Salesforce App

Install Salesforce from Sprinklr Marketplace



The screenshot shows the Sprinklr Marketplace interface within a web browser. The browser's address bar displays the URL `space-qa4.sprinklr.com/social/marketplace-v3`. The interface features a top navigation bar with a search bar and a sidebar with navigation options. The main content area is titled "Sprinklr Marketplace" and displays a grid of app cards. The cards are organized into two tabs: "Available Apps (13)" and "Installed Apps (17)". The visible apps include DCM Tracking, Google Analytics, Google Drive, Media Valet, Microsoft Dynamics CRM, Monoprix Integration, Nexgate, Salesforce, ServiceNow CRM Integration, Site Catalyst, Slack, and Track Site. Each card displays the app's logo, name, and a brief description. The Salesforce card is highlighted with a blue border and a blue icon.

Sprinklr Marketplace

Search

Available Apps (13) Installed Apps (17)

DCM Tracking

Google Analytics lets you measure your advertising ROI as well as track your Flash, video, and social networking sites and a...

Google Drive lets you upload reports into your Google Drive account

Media Valet delivers the most cost effective, scalable and easy to use digital asset management solution - on the planet!

Microsoft Dynamics CRM
Verified by Sprinklr
Microsoft Dynamics CRM

Monoprix Integration
Verified by Sprinklr
Monoprix

Nexgate
Verified by Sprinklr
Nexgate provides cloud-based brand protection and compliance for enterprise social media accounts.

Salesforce
Verified by Sprinklr
Leaders In Cloud Computing Systems For Customer Relationship Management, Sales, Social, Call Centre, Knowledge

ServiceNow CRM Integration
Verified by Sprinklr
ServiceNow CRM

Site Catalyst
Verified by Sprinklr
Site Catalyst is an online marketing and web analytics business unit.

Slack
Verified by Sprinklr
Slack brings all your team communication into one place.

Track Site
Verified by Sprinklr
Track Site let you monitor your websites availability.

Install the **Salesforce** app from within the **Sprinklr New Marketplace**

Install Salesforce from Sprinklr Marketplace

Install Salesforce
Start by adding the Salesforce account user and then map the users

Salesforce Details ⓘ ▾

Configuration Name *
 Fill in the **Name for the Salesforce app**

Salesforce Environment Settings ⓘ ▾

Workspace

Environment Type
☒ Production Environment ☐ Test Environment

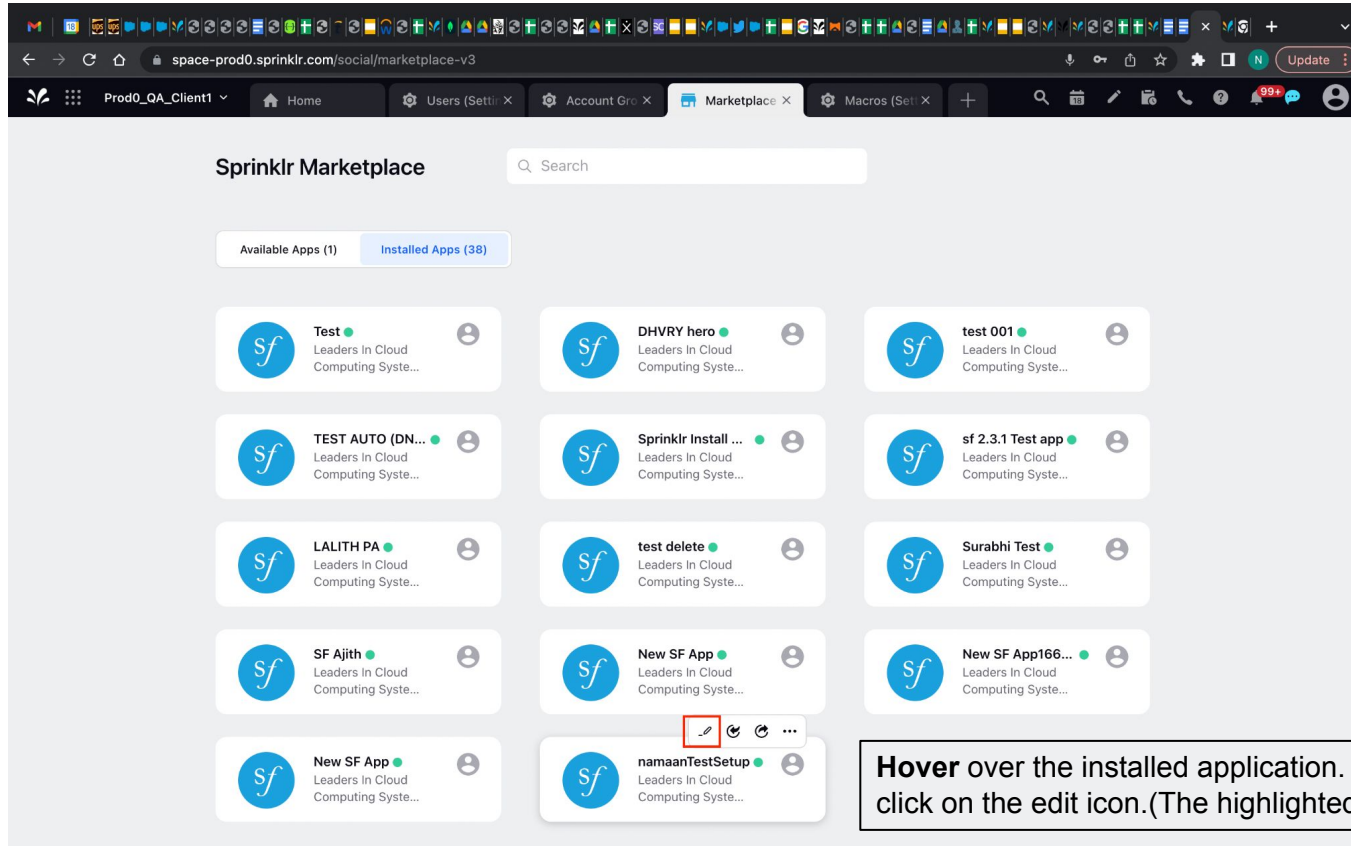
NOTE: This can not be changed once the app is created

Clicking on save will redirect you to Salesforce instance to add a user.



Authenticate Users

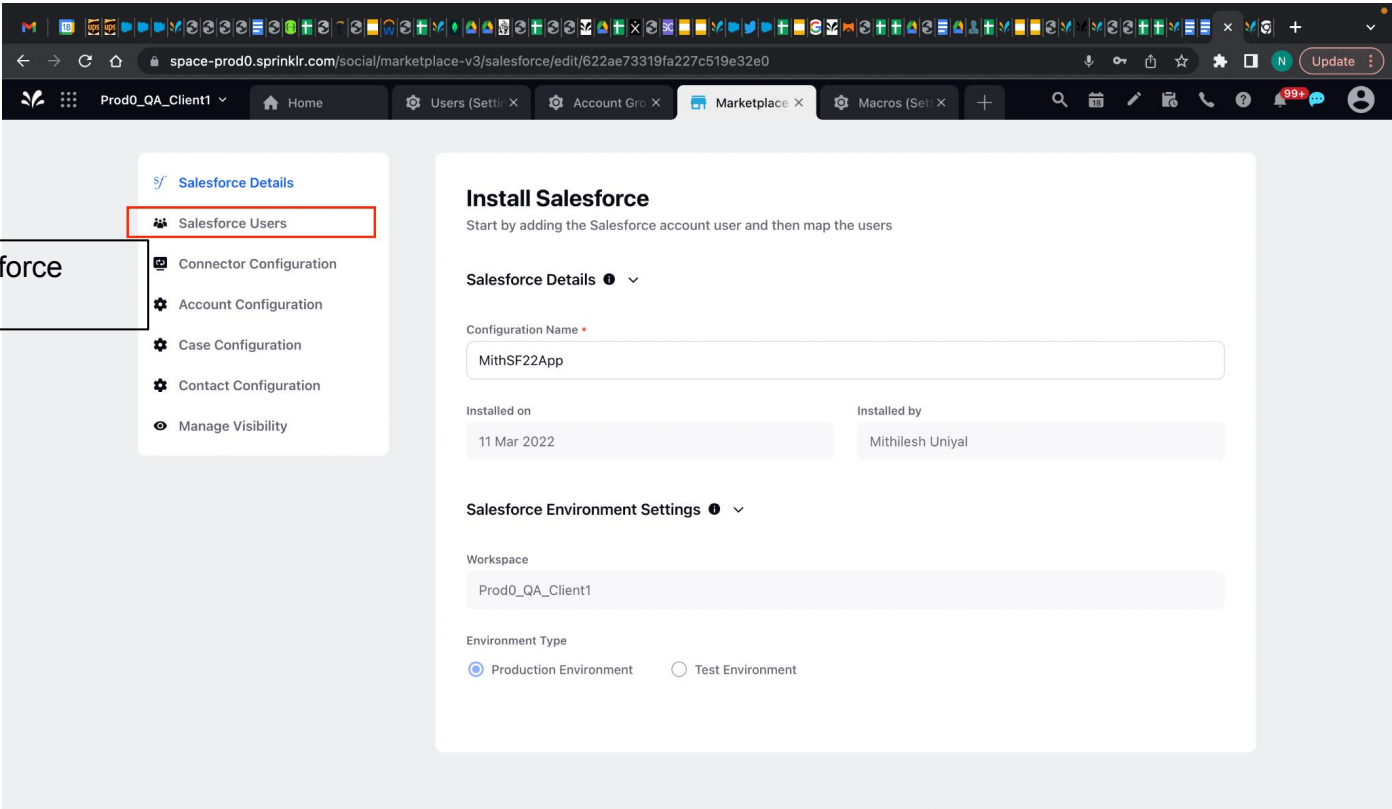
Authenticating Users



Hover over the installed application. you will find 4 icons. click on the edit icon.(The highlighted one)

Authenticating Users

Click on Salesforce Users.



The screenshot shows the 'Install Salesforce' configuration page. The left sidebar contains the following menu items:

- Salesforce Details
- Salesforce Users**
- Connector Configuration
- Account Configuration
- Case Configuration
- Contact Configuration
- Manage Visibility

The main content area is titled 'Install Salesforce' and includes the following information:

- Install Salesforce**
Start by adding the Salesforce account user and then map the users
- Salesforce Details** (expanded)
 - Configuration Name: MithSF22App
 - Installed on: 11 Mar 2022
 - Installed by: Mithlesh Uniyal
- Salesforce Environment Settings** (expanded)
 - Workspace: Prod0_QA_Client1
 - Environment Type: ☒ Production Environment ☐ Test Environment

Buttons at the bottom right: Cancel, Save

Authenticating Users

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/622ae73319fa227c519e32e0`. The browser's address bar and tabs are visible at the top. The main content area is titled "Salesforce Users" and includes a sidebar on the left with navigation links: "Salesforce Details", "Salesforce Users" (highlighted), "Connector Configuration", "Account Configuration", "Case Configuration", "Contact Configuration", and "Manage Visibility". The main panel has a sub-header "Add Salesforce Users" and a list of users. One user, "MITHILESH UNİYAL" with email "mithst22app@sprinklr.com", is listed. A red box highlights the "+ Add Salesforce User" button. Below the user list, there is a "Default Salesforce User" dropdown menu currently showing "MITHILESH UNİYAL".

Add and authenticate Salesforce user. It will show the user added while app installation.

NOTE: A Salesforce Admin User must be authenticated for app to be fully installed.

It is mandatory to define a Default Salesforce User. It is filled by default with the first user added.

Cancel

Save



Connector Configuration

Connector Configuration

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c

Prod0_QA_Client1

Home

Users (Settings)

Account Gro

Marketplace

Macros (Sett

Update

Salesforce Details

Salesforce Users

Connector Configuration

Account Configuration

Case Configuration

Contact Configuration

Manage Visibility

Connector Configuration

Configure required properties for connector

Notification Types

Email

Enter email addresses

mahitha.dalmieda@sprinklr.com

Default Origin

Enter value

Case Record Type

Select Case Record Type

☐ Proxy Enabled

☒ Contact Creation

☒ Contact Association

☒ Default Sync

☐ Push Message Media as Attachment in case

Cancel

Save

Connector Configuration is a **DP enabled** feature allowing the user to edit the connector related attributes which were earlier possible only from backen

Add notification type as Email and Email address on which you want to receive webhook failure notifications.

Connector Configuration

Connector Configuration
Configure required properties for connector

Notification Types
Email

Enter email addresses

mahitha.dalmieda@sprinklr.com

Default Origin
Enter value

Case Record Type
Select Case Record Type

☐ Proxy Enabled

☒ Contact Creation

☒ Contact Association

☒ Default Sync

☐ Push Message Media as Attachment in case

Cancel Save

Default origin and **Case record type** are required fields to create case in Salesforce. While Default origin is a text field, Case record type dropdown options are fetched from Salesforce instance.

It is possible to configure the connector via toggling the options such as Proxy enabled, Default Sync etc. from UI now.



Mapping of Objects

Mapping Object Fields

The screenshot shows the Sprinklr Salesforce configuration interface. The browser address bar displays the URL: `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c`. The interface includes a sidebar with navigation options: Salesforce Details, Salesforce Users, Connector Configuration, Account Configuration (highlighted), Case Configuration, Contact Configuration, and Manage Visibility. The main content area is titled "Account Details" and contains a "Define Field Mapping" section. This section is highlighted with a red border and shows three mappings: "Name" to "Account Name", "Phone Number" to "Account Phone", and "Social Network Profile Id" to "Social Network Profile Id". Below the mapping section, there are sections for "Searchable Fields" (containing "Account Name", "Social Network Profil...", and "Social Network") and "Search Result Fields" (containing "Account Name", "Account Phone", and "Account Site"). At the bottom, there is a "Screen Layouts" section with a checkbox for "Hide this Layout" and a link to "Edit Fields". The interface also features a "Cancel" button and a "Save" button.

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c

Prod0_QA_Client1

Home

Users (Sett...

Account Gro...

Marketplace

Macros (Sett...

Update

Salesforce Details

Salesforce Users

Connector Configuration

Account Configuration

Case Configuration

Contact Configuration

Manage Visibility

Account Details

Configure your Salesforce account within Sprinklr

Define Field Mapping

Sprinklr fields mapped to Salesforce fields

Name	→	Account Name
Phone Number	→	Account Phone
Social Network Profile Id	→	Social Network Profile Id

Searchable Fields

Account Name x Social Network Profil... x Social Network x

Search Result Fields

Account Name x Account Phone x Account Site x

Screen Layouts

Account

☐ Hide this Layout

Edit Fields

Cancel Save

Map **Account** Object Fields.

Mapping Object Fields

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c`. The browser's address bar and tabs are visible. The page content is titled "Account Details" with the subtitle "Configure your Salesforce account within Sprinklr". A sidebar on the left contains navigation links: "Salesforce Details", "Salesforce Users", "Connector Configuration", "Account Configuration" (highlighted), "Case Configuration", "Contact Configuration", and "Manage Visibility". The main content area is titled "Define Field Mapping" and shows a table of mapped fields. The table has two columns: "Sprinklr fields mapped to Salesforce fields". The rows are: "Name" mapped to "Account Name", "Phone Number" mapped to "Account Phone", "Social Network Profile Id" mapped to "Social Network Profile Id", and "Sprinklr Field" mapped to "Salesforce Field". A dropdown menu is open for the "Sprinklr Field" row, showing options: "Name", "First Name", "Last Name", "Social Profile Network Type", "Social Network Username", and "Email". A red box highlights the dropdown menu. A text box on the right contains the instructions: "Map Sprinklr Custom fields to Salesforce custom Fields" and "Add additional fields with the '+' icon Remove fields with the 'x' icon". At the bottom right, there are "Cancel" and "Save" buttons.

space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/5e21c957b805f91ab44c3f0c

Prod0_QA_Client1

Home

Users (Sett...

Account Gro...

Marketplace

Macros (Sett...

Update

Salesforce Details

Salesforce Users

Connector Configuration

Account Configuration

Case Configuration

Contact Configuration

Manage Visibility

Account Details

Configure your Salesforce account within Sprinklr

Define Field Mapping

Sprinklr fields mapped to Salesforce fields

Name	→	Account Name	×
Phone Number	→	Account Phone	×
Social Network Profile Id	→	Social Network Profile Id	×
Sprinklr Field	→	Salesforce Field	×

Name

First Name

Last Name

Social Profile Network Type

Social Network Username

Email

Map Sprinklr Custom fields to Salesforce custom Fields

Add additional fields with the '+' icon
Remove fields with the 'x' icon

Cancel

Save

Mapping Object Fields

The screenshot shows the 'Case Details' configuration page in the Sprinklr interface. The left sidebar contains a navigation menu with options: Salesforce Details, Salesforce Users, Connector Configuration, Account Configuration, Case Configuration (highlighted), Contact Configuration, and Manage Visibility. The main content area is titled 'Case Details' with the subtitle 'Configure your Salesforce case within Sprinklr'. Under the 'Define Field Mapping' section, there is a table mapping Sprinklr fields to Salesforce fields:

Sprinklr fields mapped to Salesforce fields		
Message	→	Description
Status	→	Status
Case Type	→	Case Type
Priority	→	Priority
Case Date Cf	→	Created Date

Below the mapping table, there are sections for 'Screen Layouts' and 'Default Record Type'. The 'Screen Layouts' section has two entries, both labeled 'Case', each with a 'Hide this Layout' checkbox and an 'Edit Fields' link. The 'Default Record Type' section has a dropdown menu currently showing 'Default Record type while case creation' and a checkbox labeled 'Is Customer Mandatory for Case Creation?' which is currently unchecked. At the bottom right, there are 'Cancel' and 'Save' buttons.

Like Account, **Case** Object Fields can be mapped.

Customer can be made mandatory while case creation using the checkbox.

Select Default Record Type while case creation using the dropdown.

Mapping Object Fields

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/615d33665f359945fcd2f1ff`. The browser's address bar and tabs are visible at the top. The main interface has a left sidebar with a menu containing: Salesforce Details, Salesforce Users, Connector Configuration, Account Configuration, Case Configuration, **Contact Configuration** (highlighted in blue), and Manage Visibility. The main content area is titled 'Marketplace' and contains a mapping table for fields. The table has two columns: 'Source' and 'Target'. The 'Source' column contains 'Phone Number' (repeated five times) and 'Email' (once). The 'Target' column contains 'Business Phone', 'Mobile Phone', 'Home Phone', 'Other Phone', 'Asst. Phone', and 'Email'. Each row has a small 'x' icon to its right. Below the mapping table, there are two sections: 'Searchable Fields' and 'Search Result Fields'. 'Searchable Fields' contains a list of fields: 'Last Name', 'First Name', 'Full Name', 'Email', and 'SF_CONTACT_BOOL...'. 'Search Result Fields' contains a list of fields: 'Full Name', 'Business Phone', 'Email', and 'SF_CONTACT_BOOL...'. Below these sections, there is a 'Screen Layouts' section with a 'Contact' layout. Under 'Contact', there is a checkbox labeled 'Is Account Mandatory for Contact Creation?'. At the bottom right of the interface, there are 'Cancel' and 'Save' buttons.

Source	Target
Phone Number	Business Phone
Phone Number	Mobile Phone
Phone Number	Home Phone
Phone Number	Other Phone
Phone Number	Asst. Phone
Email	Email

Searchable Fields

Last Name First Name Full Name Email SF_CONTACT_BOOL...

Search Result Fields

Full Name Business Phone Email SF_CONTACT_BOOL...

Screen Layouts

Contact

☐ Is Account Mandatory for Contact Creation?

Cancel Save

There is a separate option now to map contact fields, from contact configuration.

Additionally, the account can now be made mandatory while case creation using the checkbox from UI.



Configuring Layouts

Edit Screen Layouts

Define Field Mapping

Sprinklr fields mapped to Salesforce fields

Name	→	Account Name	✕
Phone Number	→	Account Phone	✕
Social Network Profile Id	→	Social Network Profile Id	✕ +

Searchable Fields

Account Name ✕ Social Network Profil... ✕ Social Network ✕

Search Result Fields

Account Name ✕ Account Phone ✕ Account Site ✕

Screen Layouts

Account

☐ Hide this Layout [Edit Fields](#)

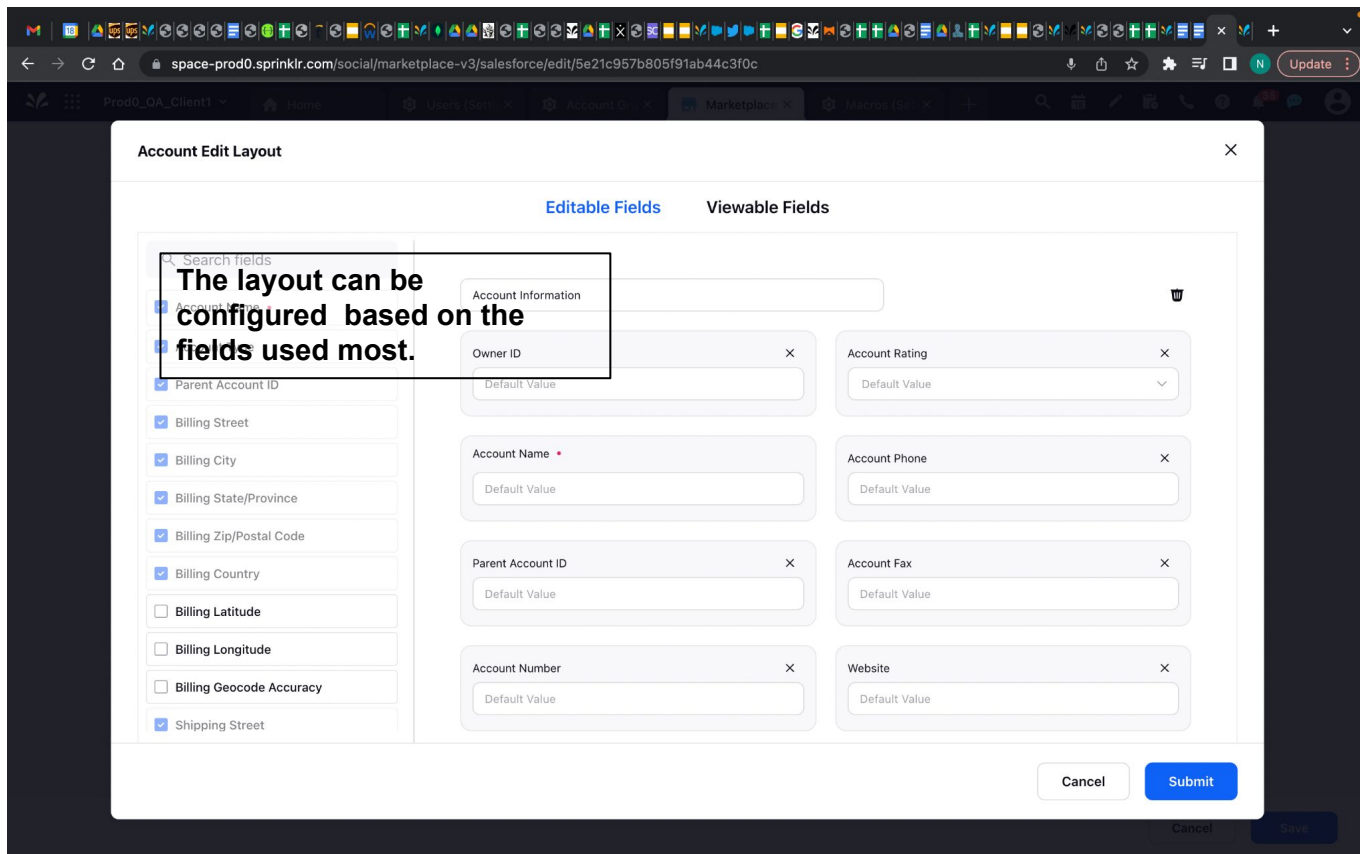
Account

☐ Hide this Layout [Edit Fields](#)

Cancel Save

Screen Layouts are used when **Searching For, Linking To, or Viewing** Salesforce Customer Records

Edit Screen Layouts





Governance

Manage Visibility

The screenshot shows a web browser window with the URL `space-prod0.sprinklr.com/social/marketplace-v3/salesforce/edit/615d33665f359945fcd2f1ff`. The browser's address bar and tabs are visible at the top. The page content is divided into a sidebar on the left and a main configuration area on the right.

Sidebar:

- Salesforce Details
- Salesforce Users
- Connector Configuration
- Account Configuration
- Case Configuration
- Contact Configuration
- Manage Visibility** (highlighted with a blue icon)

Main Configuration Area:

Manage Visibility

Configure visibility to other workspaces, users, and/or groups

☐ Visible in all workspaces

Workspaces

Select Workspaces / Workspace Groups

☐ Visible to all users

Users / Users Groups

Select Users / User Groups

At the bottom right of the page, there are two buttons: **Cancel** and **Save**.

Unlike the older version of Marketplace, the newer version has an option to manage which **work spaces and user groups** will be able to see the Salesforce app.



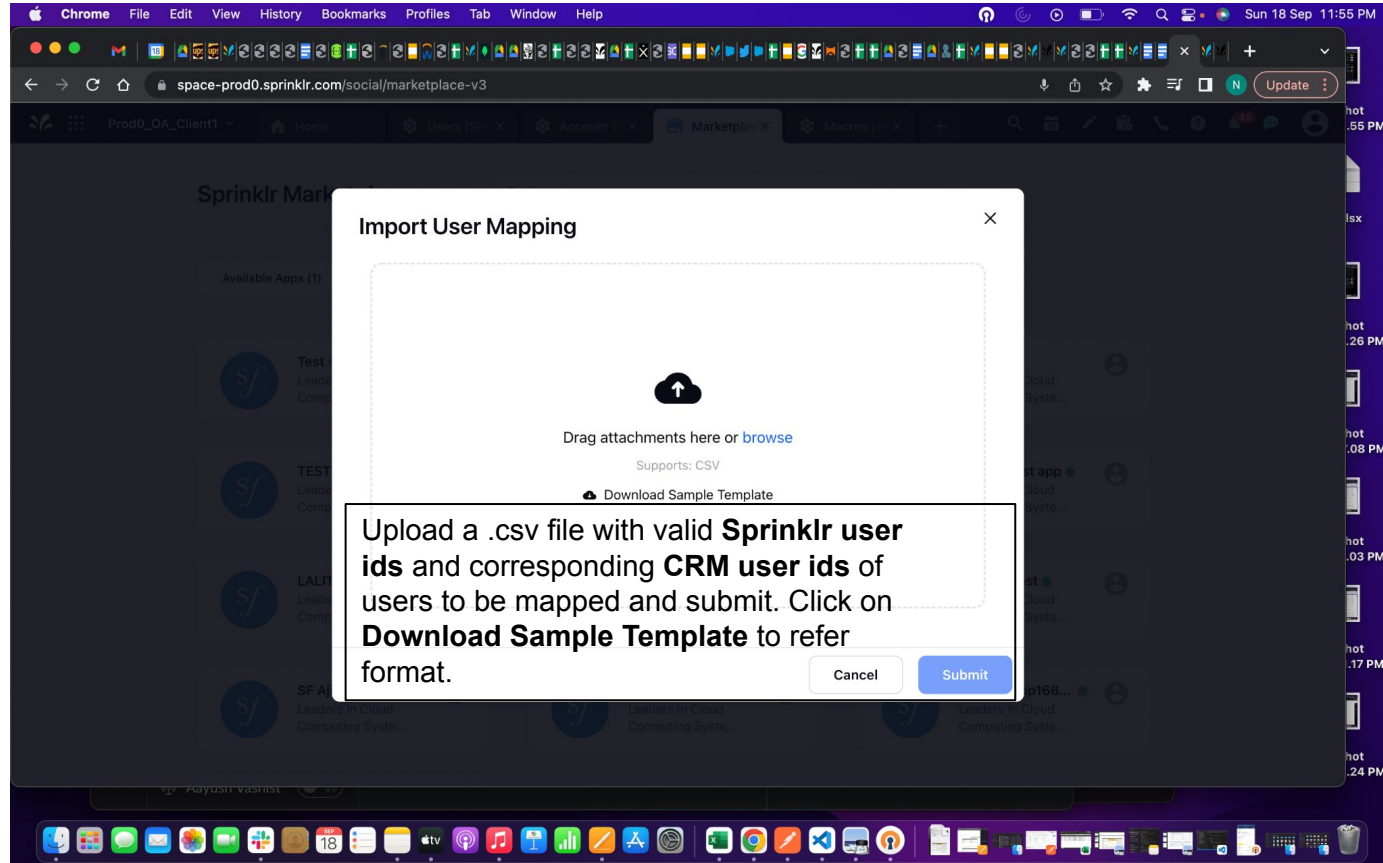
User Mapping

User Mapping

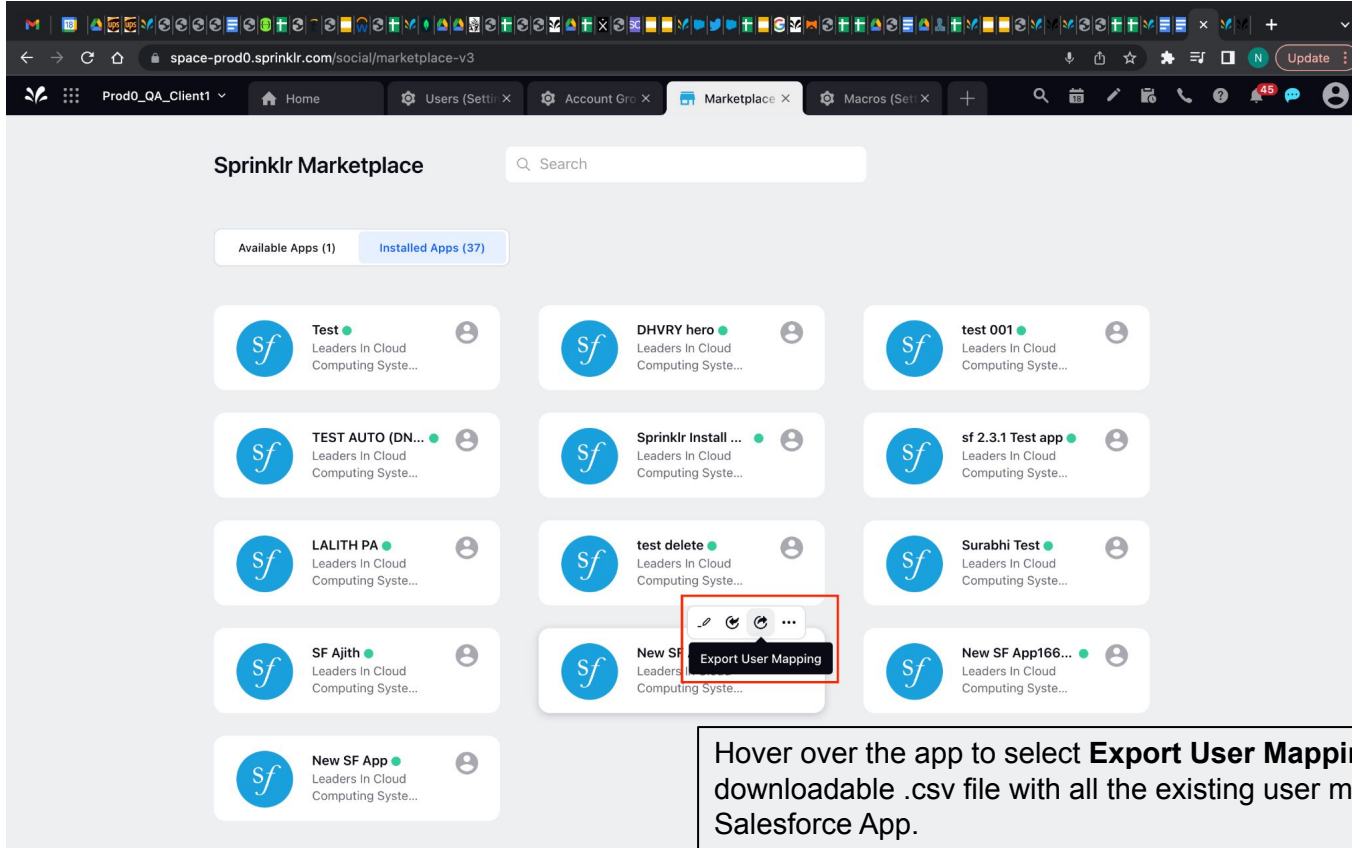
The screenshot shows the Sprinklr Marketplace interface in a web browser. The browser's address bar displays "space-prod0.sprinklr.com/social/marketplace-v3". The page header includes a search bar and tabs for "Available Apps (1)" and "Installed Apps (37)". The main content area displays a grid of installed applications, each with a blue circular icon containing the letters "Sf" and a green status dot. The applications listed include "Test", "DHVRY hero", "test 001", "TEST AUTO (DN...", "Sprinklr Install ...", "sf 2.3.1 Test app", "LALITH PA", "test delete", "Surabhi Test", "SF Ajith", "New SF App166...", and "New SF App". A red rectangular box is drawn around the "test delete" app, which has a context menu open showing three options: "Import User Mapping", "Import User Mapping", and "Import User Mapping".

Hover over the app to select **Import User Mapping.**

User Mapping



User Mapping



The screenshot displays the Sprinklr Marketplace interface. At the top, there's a navigation bar with tabs for 'Prod0_QA_Client1', 'Home', 'Users (Settings)', 'Account Gro...', 'Marketplace', and 'Macros (Settings)'. Below the navigation bar, the 'Sprinklr Marketplace' section is visible, featuring a search bar and two tabs: 'Available Apps (1)' and 'Installed Apps (37)'. The main area shows a grid of app cards, each with a blue 'sf' logo, a title, and a description. A red box highlights the 'Export User Mapping' option in the context menu of the 'New SF App166...' app.

Available Apps (1) Installed Apps (37)

Test Leaders In Cloud Computing Syste...

DHVR hero Leaders In Cloud Computing Syste...

test 001 Leaders In Cloud Computing Syste...

TEST AUTO (DN... Leaders In Cloud Computing Syste...

Sprinklr Install ... Leaders In Cloud Computing Syste...

sf 2.3.1 Test app Leaders In Cloud Computing Syste...

LALITH PA Leaders In Cloud Computing Syste...

test delete Leaders In Cloud Computing Syste...

Surabhi Test Leaders In Cloud Computing Syste...

SF Ajith Leaders In Cloud Computing Syste...

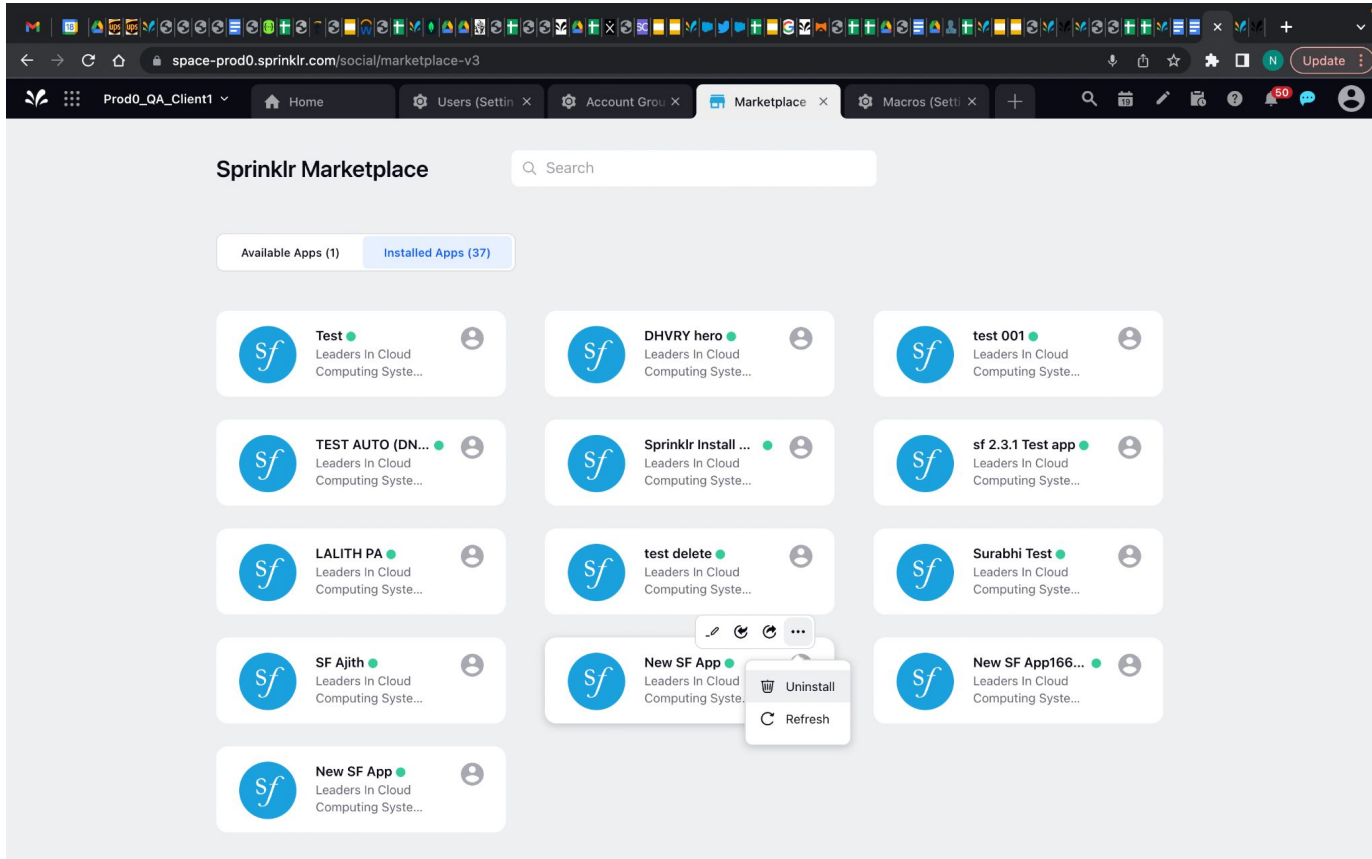
New SF App Leaders In Cloud Computing Syste...

New SF App166... Leaders In Cloud Computing Syste...

Export User Mapping

Hover over the app to select **Export User Mapping**. This will give a downloadable .csv file with all the existing user mappings for this Salesforce App.

Refresh Or Uninstall App



Thank you

For any further queries, you can
reach out to your account team or

support@sprinklr.com

