

Marketing Cloud Journeys for Salesforce

The most up-to-date version of this guide is available [here](#).

What is it?

This Lightning Component allows you to view which Marketing Cloud journeys a Contact, Lead, Case or Account is on, directly within Salesforce. You can also choose to eject them from any of those journeys if appropriate.



Setup Instructions

With the following steps, we will set up an integration between Marketing Cloud and Salesforce, and configure the Marketing Cloud Journeys component.

Prerequisites

- ☐ You must be a Salesforce Administrator
- ☐ You must be a Marketing Cloud Administrator
- ☐ You must have a field on your Contact, Lead, Case, Account records (whichever ones you want to use) which contains the Contact Key

Install Package in Salesforce

- ☐ Open the package AppExchange listing: <https://appexchange.salesforce.com/appxListingDetail?listingId=aON3A00000FZBJRUAX>, click on Get it now and install it for **all users**.

Create Package in Marketing Cloud

- ☐ Ensure you're in the **Business Unit** that you'd like the component to display journeys from. This component displays journeys from a **single** Business Unit.
- ☐ Inside Marketing Cloud, open **Setup**, expand Apps and choose **Installed Packages**. Then click on **New**
- ☐ Give the package a name, such as **Marketing Cloud Journeys for Salesforce**, then click **Save**
- ☐ Click on **Add Component**, select **API Integration**, and click on **Next**, then choose **Web App**, click **Next**, and finally in the permissions panel, you must tick the following options:
 - ☐ Offline Access
 - ☐ Journeys - Read and Execute
 - ☐ List and Subscribers - Read
 - ☐ Data Extensions - Read
- ☐ At the top, set the **URI** field to any URL you can think of – we'll change it later –, for example <https://google.com>, and then click **Save**

Configure Auth Provider

- ☐ Now let's go back into Salesforce! Open **Setup**, search for Auth in the Quick Find box and choose **Auth. Providers**. Then click on **New**, choose Type **Open ID Connect** and complete the form with the following options:
- ☐ Name: **SFMC Journeys**
- ☐ URL Suffix: **SFMC_Journeys**
- ☐ Consumer Key: **Paste the Client Id from the Marketing Cloud package we just created**
- ☐ Consumer Secret: **Paste the Client Secret from the Marketing Cloud package we just created**
- ☐ Authorize Endpoint URL: **Paste the Authentication Base URI from the Marketing Cloud package we just created, and add v2/authorize at the end** (e.g. <https://xxxxxxxxx.auth.marketingcloudapis.com/v2/authorize>)
- ☐ Token Endpoint URL: **Paste the Authentication Base URI from the Marketing Cloud package we just created, and add v2/token at the end** (e.g. <https://xxxxxxxxx.auth.marketingcloudapis.com/v2/token>)
- ☐ Then click **Save**.
- ☐ Now, at the bottom of the page you'll find a **Callback URL**, copy it.
- ☐ Go back into the **Marketing Cloud package** configuration page, click on **Edit** inside the API integration box, and replace the dummy URI you had entered at the top (<https://google.com>) with the one you just copied. Click **Save**

Configure Named Credential

- ☐ Let's go back into Salesforce. Open **Setup** again, search for Named in the Quick Find box and choose **Named Credentials**. Then click on **New**, and complete the form with the following options:
- ☐ Label: **Salesforce Marketing Cloud**
- ☐ Name: **Salesforce_Marketing_Cloud** (it's important that it's spelt exactly this way)
- ☐ URL: **Paste the REST Base URI from the Marketing Cloud package we just created, removing the final slash at the end** (e.g. <https://xxxxxxxxxxx.rest.marketingcloudapis.com>)
- ☐ Identity Type: **Named Principal**
- ☐ Authentication Protocol: **OAuth 2.0**
- ☐ Authentication Provider: **Marketing Cloud** (select the one you created above)
- ☐ Start Authentication Flow on Save: ☒
- ☐ Generate Authorization Header: ☒
- ☐ Then click **Save**. Salesforce will now integrate your account with Marketing Cloud, and you should see **Authentication Status: Authenticated** if it all went well.

Add Lightning Component to Record Pages

- ☐ Open any Contact, Lead, Case or Account, then open the Setup menu at the top right and choose **Edit Page**
- ☐ Drag and drop the **Marketing Cloud Journeys** custom component anywhere on the page, and select the field which contains the **Contact Key** on the right hand side. From here, you can also decide whether to allow users to eject customers from journeys using this component
- ☐ **Save** the page, and activate it if necessary. Go back and... ☹️!

Add Support for Multiple Business Units

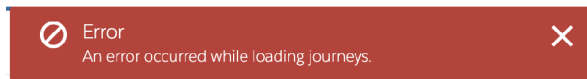
If you wish to add support to more than one business unit, follow these instructions once for every business unit you'd like to add.

- ☐ In Marketing Cloud, open the package you created, click on the **Access** tab and grant access to yourself (or the Marketing Cloud admin) in the business unit you'd like to add, then click **Save**
- ☐ In Marketing Cloud, switch to the business unit you'd like to add
- ☐ In the same browser, now go to Salesforce Setup → Named Credentials and create a new Named Credential
- ☐ Follow the same steps outlined in the [🔗Configure Named Credential](#) section, but change the Label and Name as follows:
 - ☐ Label: **Salesforce Marketing Cloud <<MID>>**
 - ☐ Name: **Salesforce_Marketing_Cloud_<<MID>>**

That's it! All your components will now search for journeys in all business units you have configured

Troubleshooting

Issue: An error occurred while loading journeys



If you see the above error, to try and resolve this, head to your Named Credentials in Setup.

- ☐ Ensure you are logged in to Marketing Cloud and you are in the Business Unit connected to the Named Credential
- ☐ Click on **Edit**
- ☐ Ensure the **Start Authentication Flow on Save** button is selected
- ☐ Click **Save**
- ☐ Now go back and check the component, the error should no longer appear