Salesforce Marketing Cloud: ExactTarget Connector

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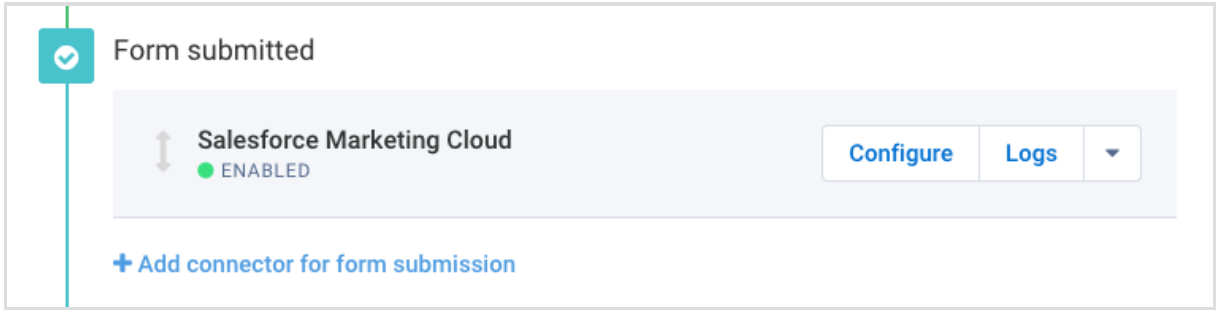
With FormAssembly's Salesforce Marketing Cloud Connector, you can create subscribers, assign subscribers to lists, and send information to your custom data extensions.

Requirements

You must have the FormAssembly Salesforce Add-on enabled for your account.

Add the Connector to Your Form

- Select the form you plan on working with
- Click on the **Connectors** page
- Add the Salesforce Marketing Cloud to the **Form Submitted** or **After Form Submitted** section of the timeline
- Click **Configure**.

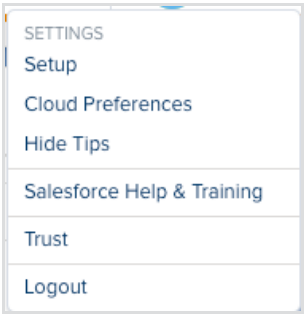


Make sure the connector is **enabled**, and click **Configure** to begin configuration.

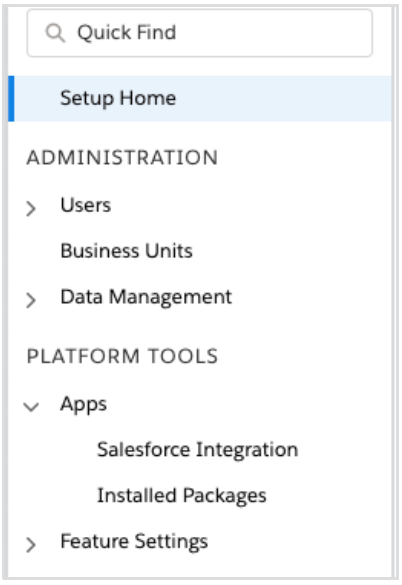
Connecting to Salesforce Marketing Cloud

To manually connect to Salesforce Marketing Cloud, you will need a " **Client ID**", "**Client Secret**", and "**Authentication Base URL**". To acquire these credentials, log in to Salesforce Marketing Cloud.

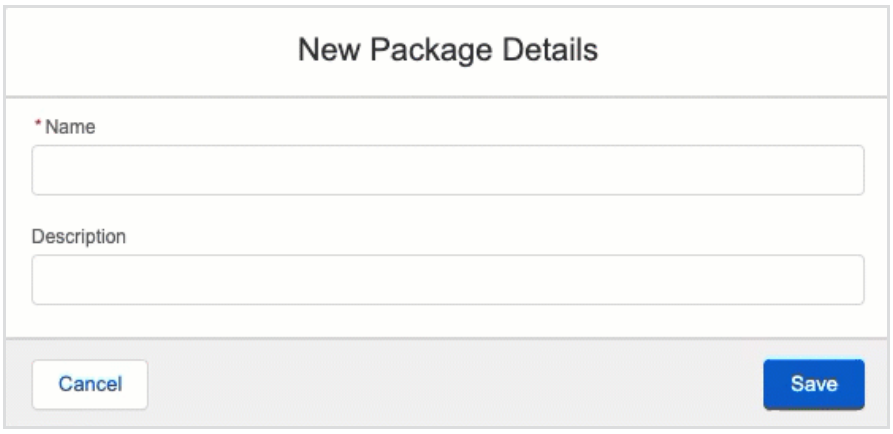
1. Once you have logged in to the Dashboard, navigate to **Settings > Setup**
    - (The Settings menu is in the upper-right dropdown next to the logged-in user)



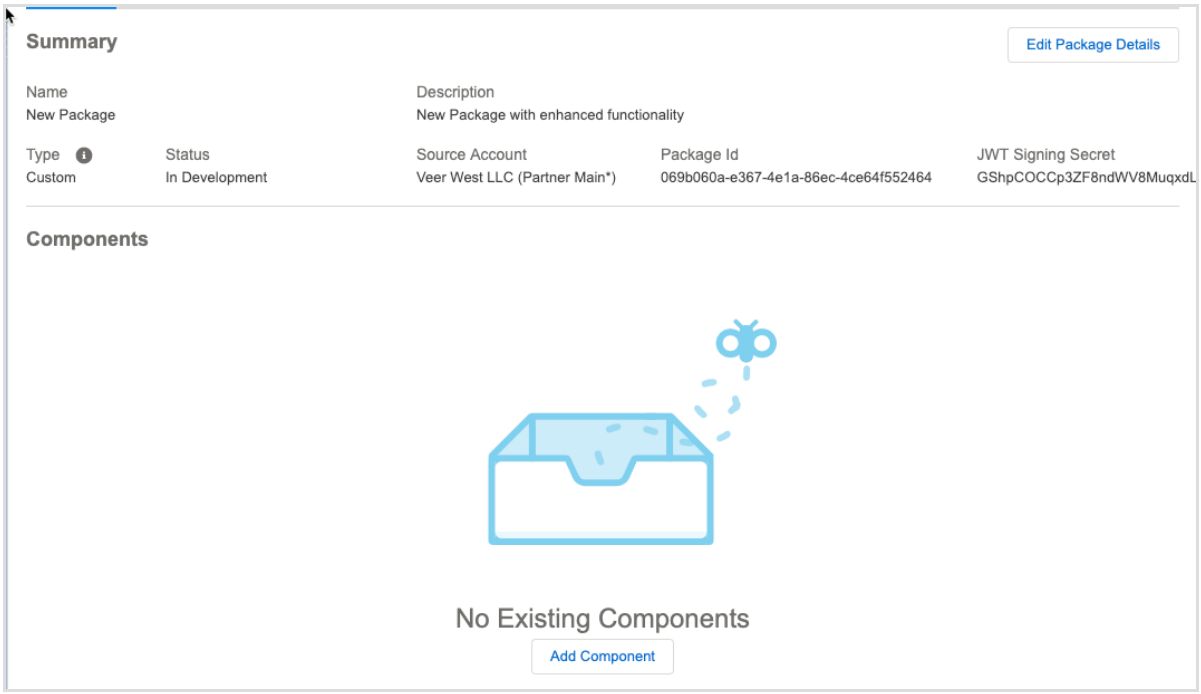
2. On the left menu under **PLATFORM TOOLS | Apps**,
    - Click **Installed Packages**
    - Click the **New** button in the upper-right



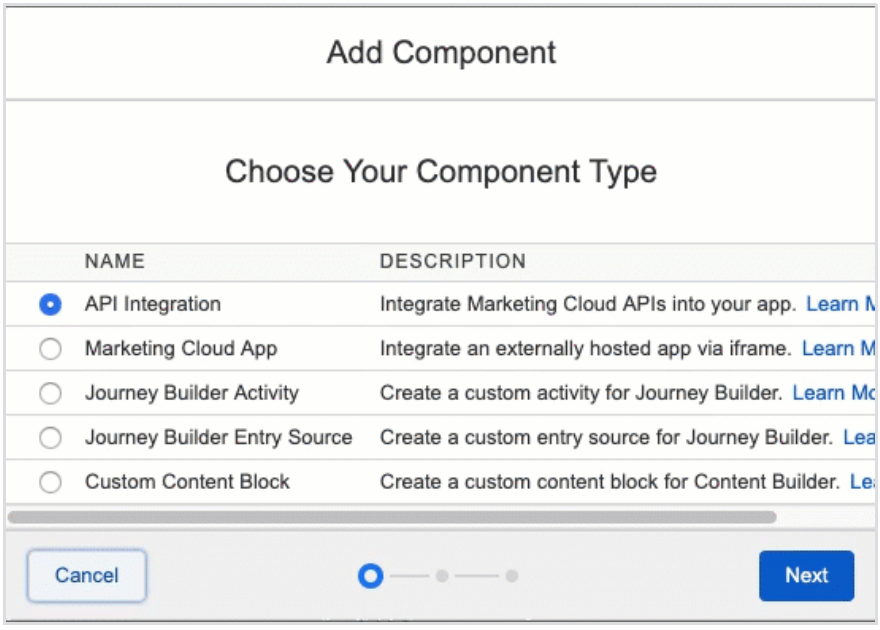
3. Name and save your package



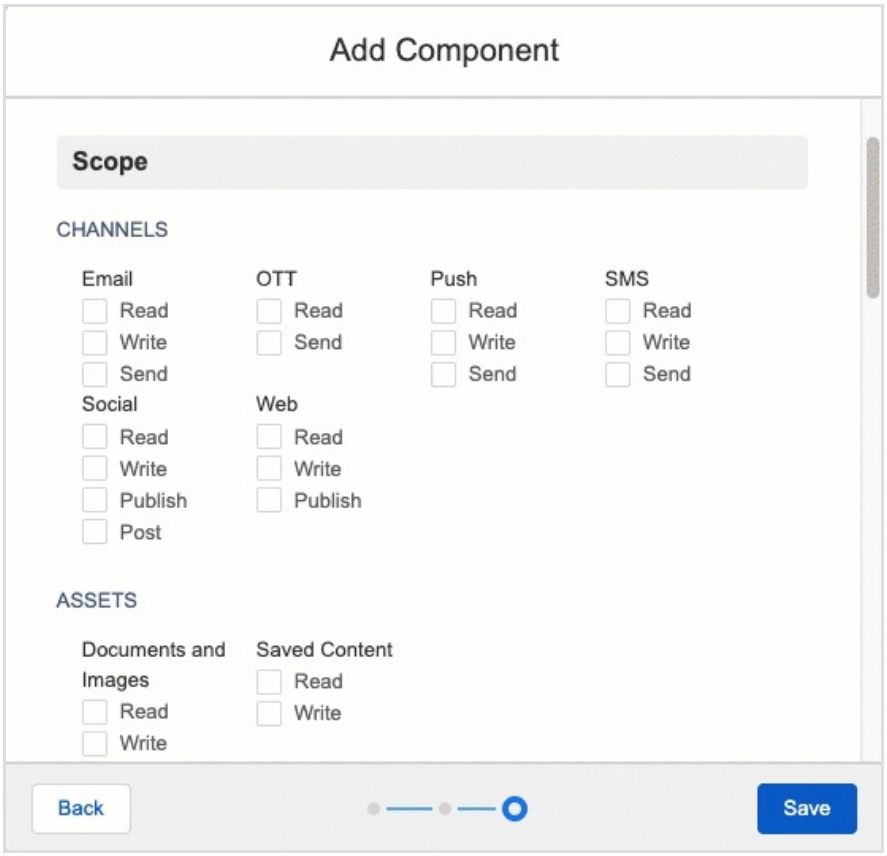
4. Click **Add Component** (under the No Existing Components message)



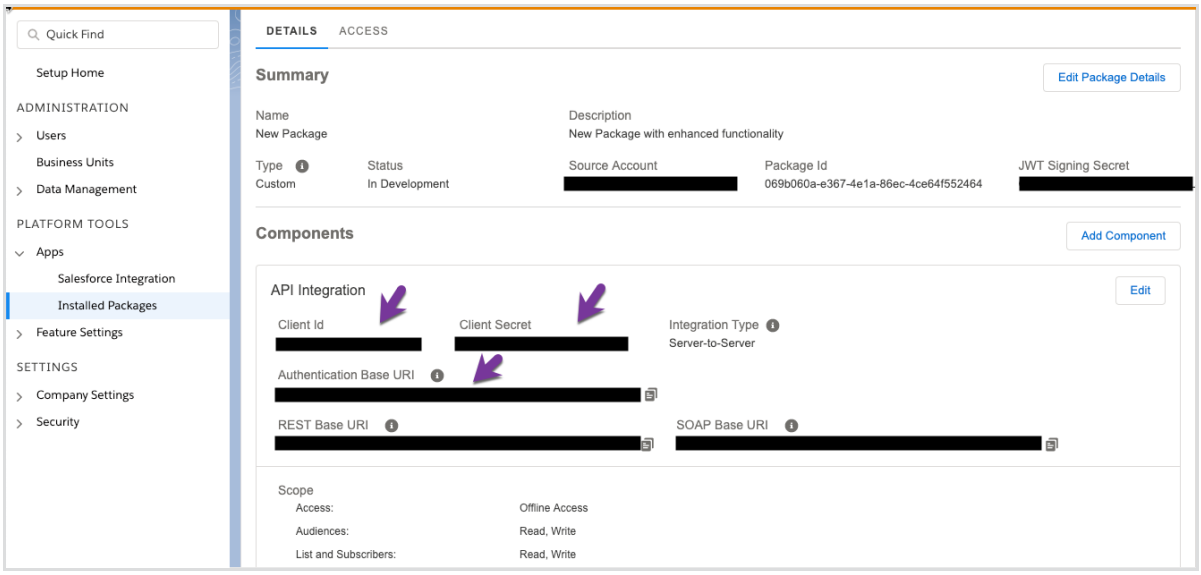
5. Choose the Component Type: **API Integration**, click **Next**, and choose Integration Type: **Server to Server**.



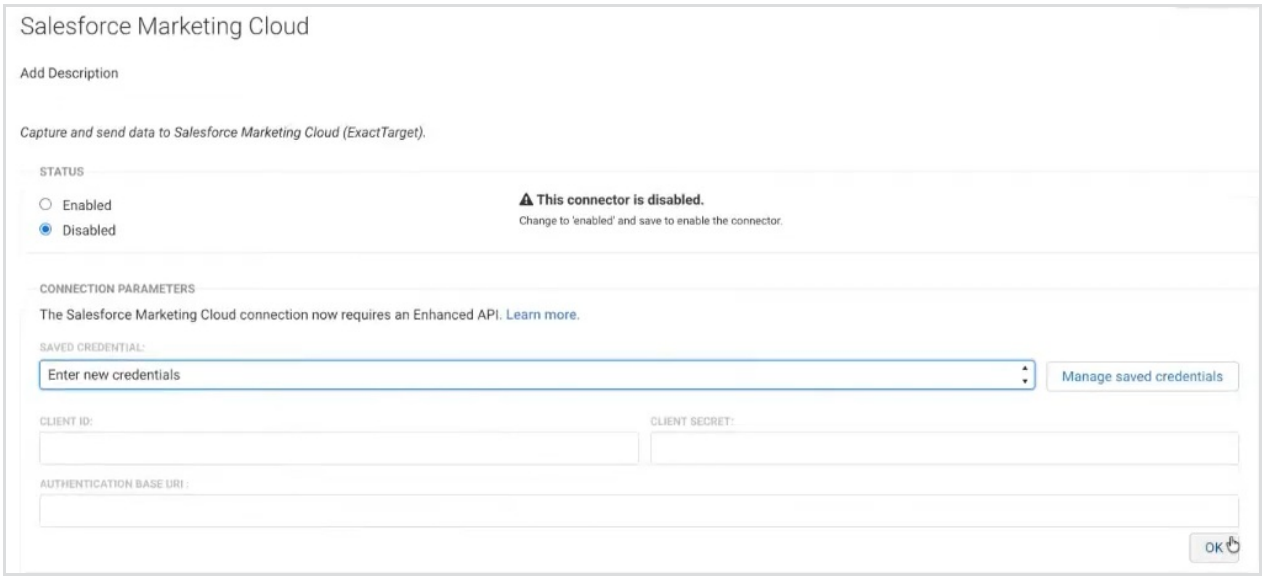
6. Give **Read** and **Write** permissions to the following sections:
    - Under CONTACTS,
        - **Audiences**
        - **Lists and Subscribers**
    - Under DATA,
        - **Data Extensions**
        - **File Locations**



7. Click **Save**
8. You should now be able to see your **Client ID**, **Client Secret**, and **Authentication Base URL** under the API Integration section.



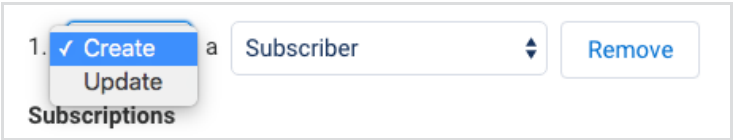
   - Copy and paste these three values into your Salesforce Marketing Cloud connector parameters in FormAssembly
   - Click **OK**
   - Make sure the connector is **enabled**, and you'll be ready to go!



Configuring the Connector

Now that you have connected FormAssembly and Salesforce Marketing Cloud, you're ready to begin configuring your connector.

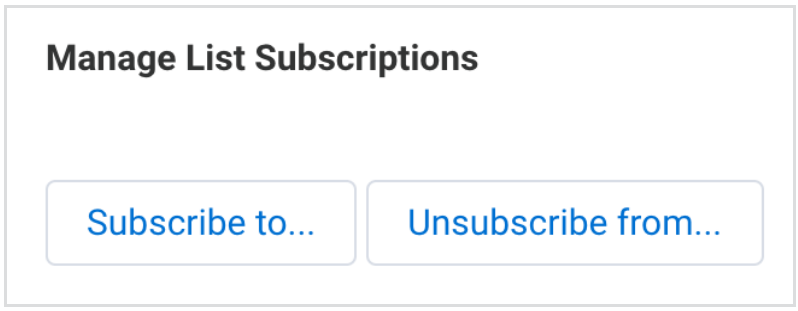
Start by clicking **Add your first object** and choose whether to **Create** or **Update** a record. Then select whether you'll be working with a **Subscriber** or a **Custom Data Extension**.



Note: If you do not see any options after you select **Create** or **Update**, try saving and refreshing the page.

Subscribing and Unsubscribing from Lists

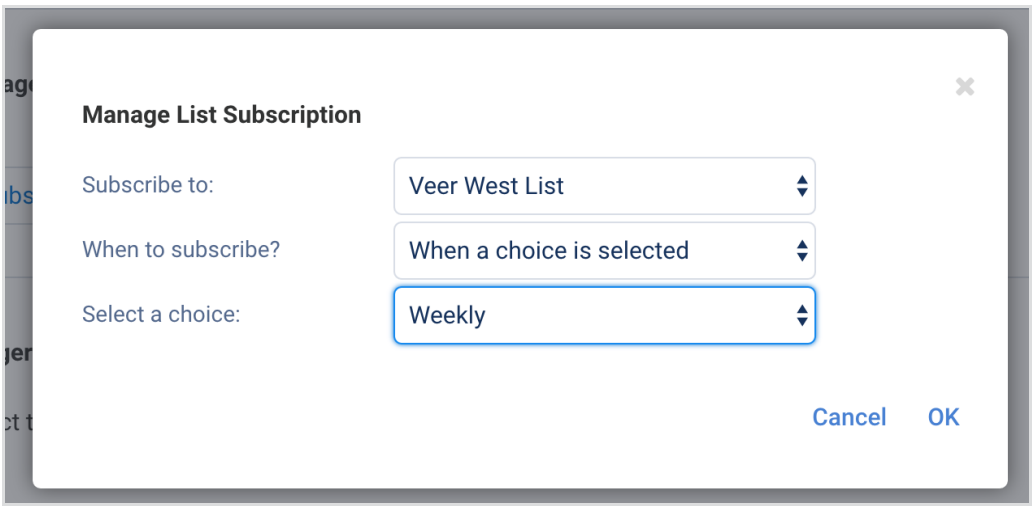
If you're working with a subscriber, you can choose which (if any) list you would like to subscribe them to or unsubscribe them from. It is important to note that lists are only available for subscribers, and not for data extensions.



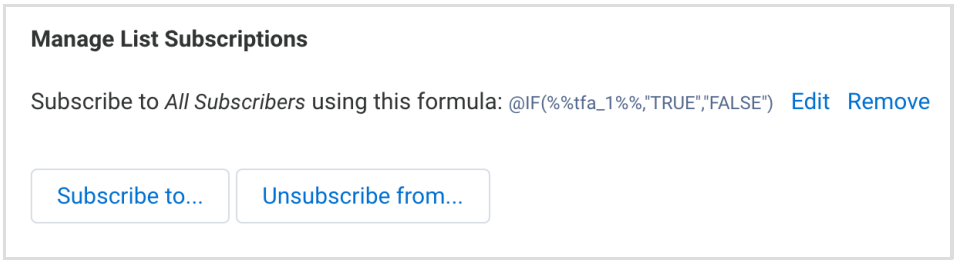
Subscribe or unsubscribe your respondents to a single list or multiple lists based on their selection in the form, or based on other criteria that you decide.

- Click on "**Subscribe to...**" or "**Unsubscribe from...**", depending on which you would like to set up.
- Select the list and determine what criteria should be used to trigger that event.

In the example below, the user would be subscribed to the "Veer West List" when "Weekly" is selected in a radio button field:



You can choose to set up subscribers when a particular choice in your form is or is not selected, or use our formula editor to set up more complex subscription rules.



To set up multiple rules, click the "**Subscribe to...**" or "**Unsubscribe from...**" button again, and set up as many rules as you would like.

Field Mapping

Finally, you'll need to map your fields from FormAssembly to Salesforce Marketing Cloud so the connector knows what information to send and where to send it. Select the FormAssembly fields on the left and the Salesforce Marketing Cloud fields on the right. You can also insert text and formulas here if you would like to.

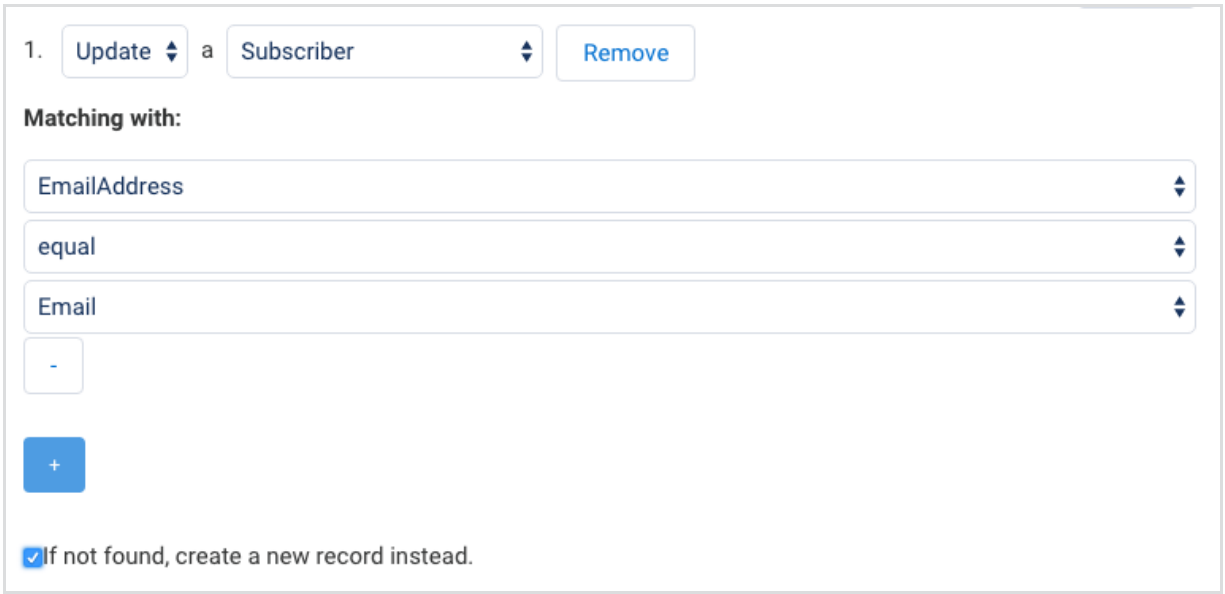


When you've finished mapping all your fields, click **Save,** and you're ready to begin testing!

Updating a Record

If you want to update a subscriber or custom data extension, or add a subscriber to a second list, you will choose the **Update** option**.**

Once you have selected **Update**, you will see that you need to set up how the connector will find your existing record under the "**Matching with**" section. Choose which field(s) from Salesforce Marketing Cloud will match with fields in your form. It is recommended that you use a field that will be unique for each record, such as the email address.



After setting up your lookup, map any additional fields you would like to.

This is also how you would add a subscriber to additional lists by selecting which list you would like them to be on. Adding a new list in an update will not change any lists they are currently on; it will only add them to the new list.

Managing and Rotating Saved Credentials

Salesforce enforces that client secrets expire automatically after 180 days. The following instructions explain how to update, or "rotate", expired or expiring credentials in FormAssembly.

- Navigate to the Salesforce Marketing Cloud connector saved credentials:
  - From the forms list, click **Configure** form
  - Click **Edit** connectors
  - Click **Configure** Salesforce Marketing Cloud connector
  - Select **Manage Saved Credentials**

Salesforce Marketing Cloud Credentials page displays a credentials table with the following columns:

- Label
- Client ID
- API Version (Enhanced/Legacy)
- Used by (# forms)
- Last Updated (date)
- Actions (**Rotate** and **Revoke** buttons)
  - Use the **Rotate** button to update the Client Secret for the saved credentials.
  - Use **Revoke** to remove the saved credentials.

Rotating Credentials

- Locate the credentials you want to update from the table, and click **Rotate**.
- The Rotate Credentials modal displays the following information:
  - Label
  - New Client Secret
  - API Version
  - Authentication Base URL
- Update the **New Client Secret** with your new value from Salesforce Marketing Cloud
- Click **Save**
