Salesforce Marketing Cloud: ExactTarget Connector

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

Requirements

You must have a Premier, Enterprise, or Compliance Cloud plan.

Connector Timeline

To begin using the connector, select the form you would like to use, go to the **connectors page** and select the Salesforce Marketing Cloud connector for the **Form Submitted** or **After Form Submitted** section of the timeline:

Next, click on **configure** to begin configuring the connector. You'll also want to make sure the connector is set to **enabled** once you enter the configuration screen.

Manually Connecting to Salesforce Marketing Cloud

In order to manually connect to Salesforce Marketing Cloud you will need a "Client ID", "Client Secret", and "Authentication Base URI." To acquire these credentials, you will need to login to the Salesforce Marketing Cloud.

1. Once you have logged in to the Dashboard, in the upper right drop down arrow next to the logged in user, navigate to Settings -> Setup

2. On the left menu under Apps, click Installed Packages and then click the New button on the upper right.

3. Name and save your package.

4. Click "Add Component" under the No Existing Components message.

5. Choose API Integration for the Component Type and click Next, then choose Server to Server for the Integration Type.

6. On the next screen, you will need to give Read and Write permission to "L**ists and Subscribers"** and A**udiences** (located under Contacts), and D**ata Extensions** and F**ile Locations** (located under Data). Then click Save.

You should now be able to see your Client ID, Client Secret and Authentication Base URI under the API Integration section:

Copy and paste those three values into your Salesforce Marketing Cloud connector parameters in FormAssembly, click Check, make sure the connector is enabled, and you'll be ready to go!

Configuring the Connector

Now that you have made the connection between FormAssembly and ExactTarget, you're ready to begin configuring your connector.
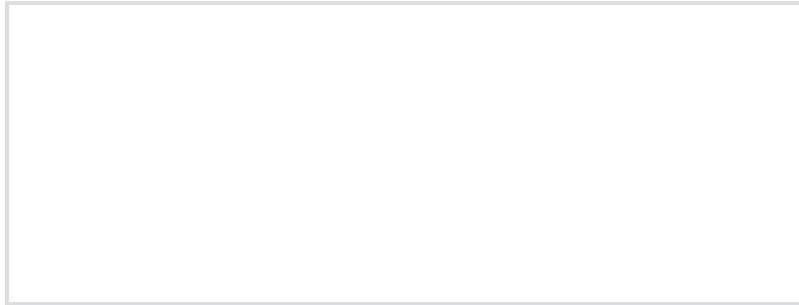
You can start by clicking on **Add your first object** and choosing whether you'll be creating or updating a record in ExactTarget. You can also select if you'll be working with a subscriber or a custom data extension.

Note: If you are not seeing any options after you select create or update, try saving and refreshing the page.
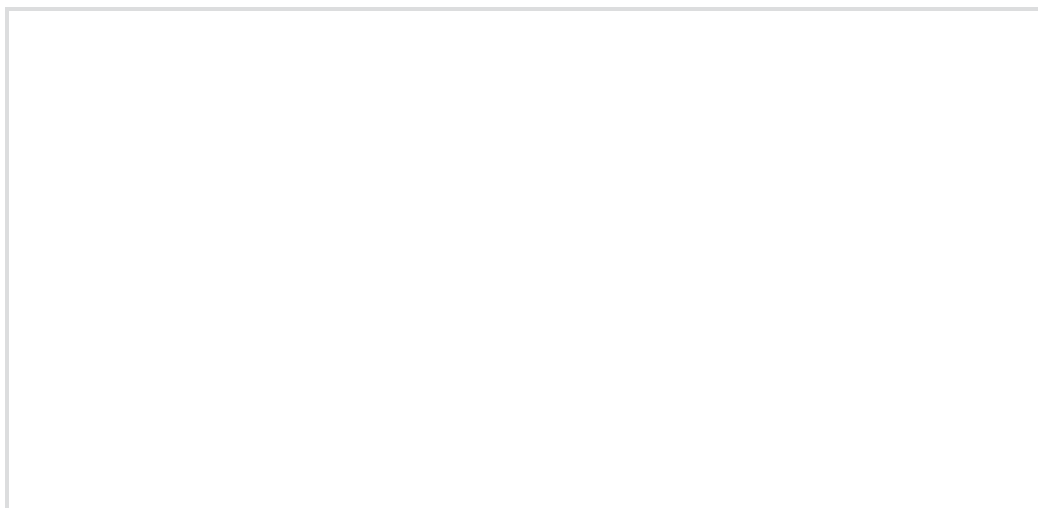
Subscribing and Unsubscribing from Lists

If you're working with a subscriber you can also 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.
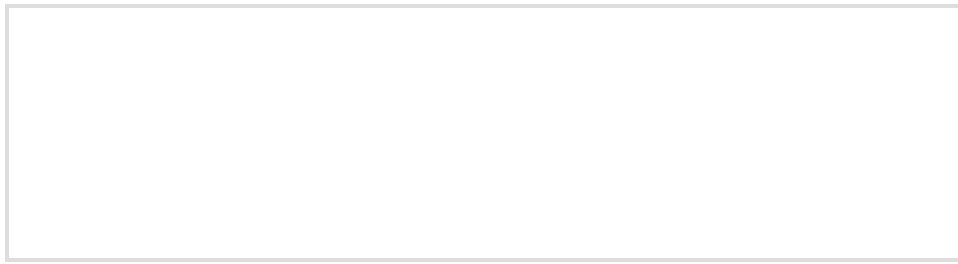
You can choose to subscribe or unsubscribe your respondents to a single or multiple lists, based on their selection in the form, or based on other criteria that you decide.

First, click on "Subscribe to..." or "Unsubscribe from..." depending on which you would like to set up. From there, select the list that you will be subscribing them to or unsubscribing them from, 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 setup subscribers when a particular choice in your form is or is not selected, and you can also use our formula editor to set up more complex subscription rules as well.

To setup multiple subscription or unsubscription rules, simple click the "Subscribe to..." or "Unsubscribe from..." button again, and you can setup as many rules as you would like.

Field Mapping

Finally, you'll need to map your fields from FormAssembly to ExactTarget so that the connector knows what information to send and where to send it. Simply select the FormAssembly fields on the left and the ExactTarget 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 **Update** instead of create.

Once you have selected "Update" you will see that you need to setup how the connector will find your existing record under the "Matching with" section. From here, you can choose what field(s) from ExactTarget will match with fields in your form. It is recommended that you use a field that will be completely unique for each record, such as the email address.

After you have completed setting up your look up, you can also map any additional fields that you would like to.

This is also how you would add a subscriber to additional lists, by selecting which list you would also 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.