SFMC: ExactTarget Prefill Connector

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Overview

The Salesforce Marketing Cloud Prefill Connector allows you to retrieve data from your Salesforce Marketing Cloud records and display that data in a prefilled form for your respondents.

Requirements

You'll need FormAssembly's Premier or Enterprise Plan.

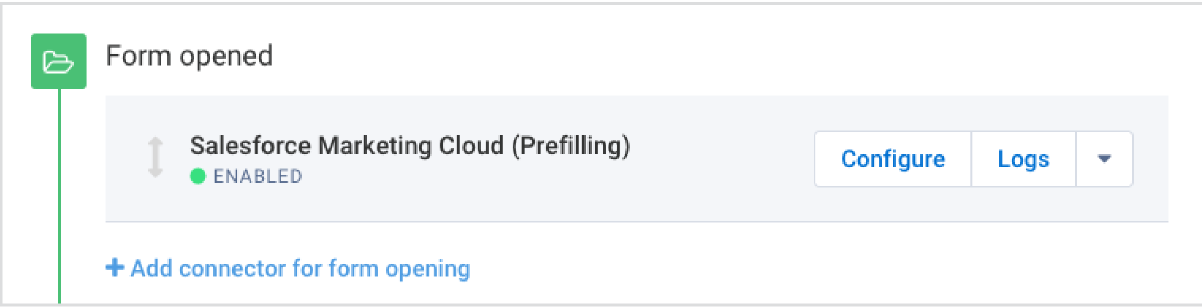
Note: This connector doesn't work with forms published using the copy & paste method.

Recommended Publishing Methods

- REST API
- WordPress
- Hosted by FormAssembly

Connector Timeline

Before beginning, you'll need to select the form you plan on working with, click on the **Connectors** page and add the Salesforce Marketing Cloud Prefill Connector into the **Form Opened** section of the timeline and click **Configure**.



Set Up

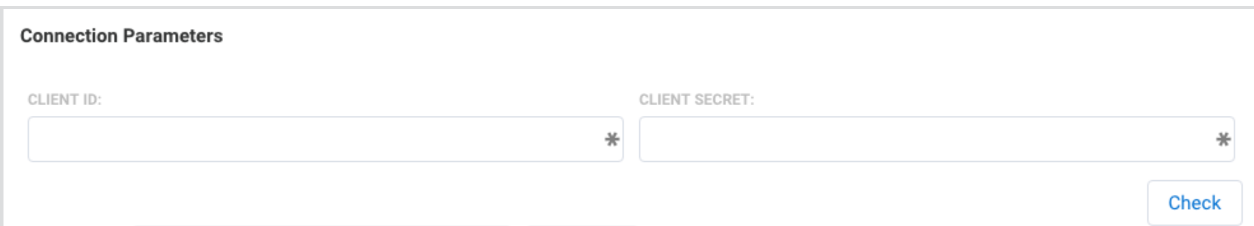
- Lookup Query
- Field Mapping
- Working with Multiple Records

Step 1. Credentials

To connect to Salesforce Marketing Cloud you'll need your **"client ID"** and **"client secret"** credentials. These are available on the **Authentication and Integration** section of your overview page in Salesforce Marketing Cloud.

You can read more about manually connecting to Salesforce Marketing Cloud if you need detailed steps on finding these credentials.

Once you have found your client ID and client secret, you'll need to copy and past them into the **Connections Parameters** box and click **check**.

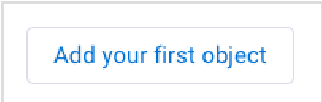


Step 2. Lookup Query

First decide:

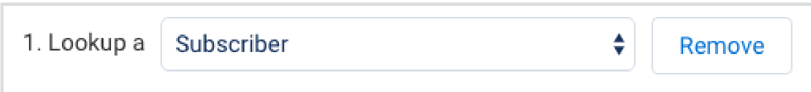
1. Which record do you want to prefill from?
2. Which Salesforce Marketing Cloud field will you use to uniquely identify each record?

Click the Add your first object button to get started.

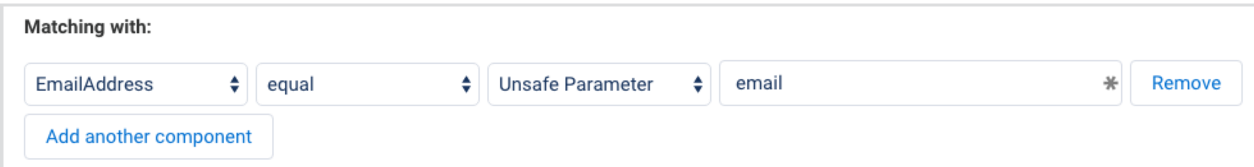


Next, you will need to create your lookup query

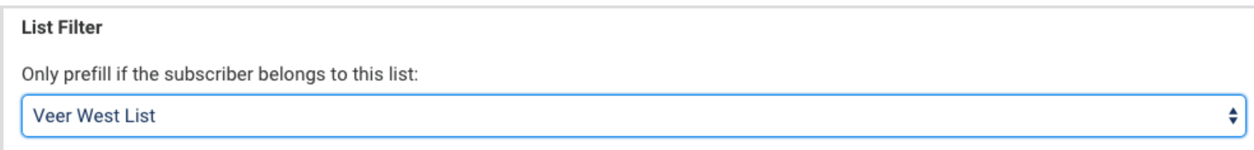
- In the **"Lookup a"** drop-down menu, choose if you would like to look up a subscriber or a custom data extension.



- In the area labeled **Matching With**, choose the Salesforce Marketing Cloud field which you will query.
- Select the operator in the middle drop-down, i.e., **Equals**.
- Select **an unsafe query parameter,** which is a parameter uniquely defines your query.
- Enter a value to represent the parameter. This is very flexible, and it's up to you. In this case, the value is `email`, as we will be querying an email address.



- Add additional parameters and a list filter if needed.



Step 3. Field Mapping

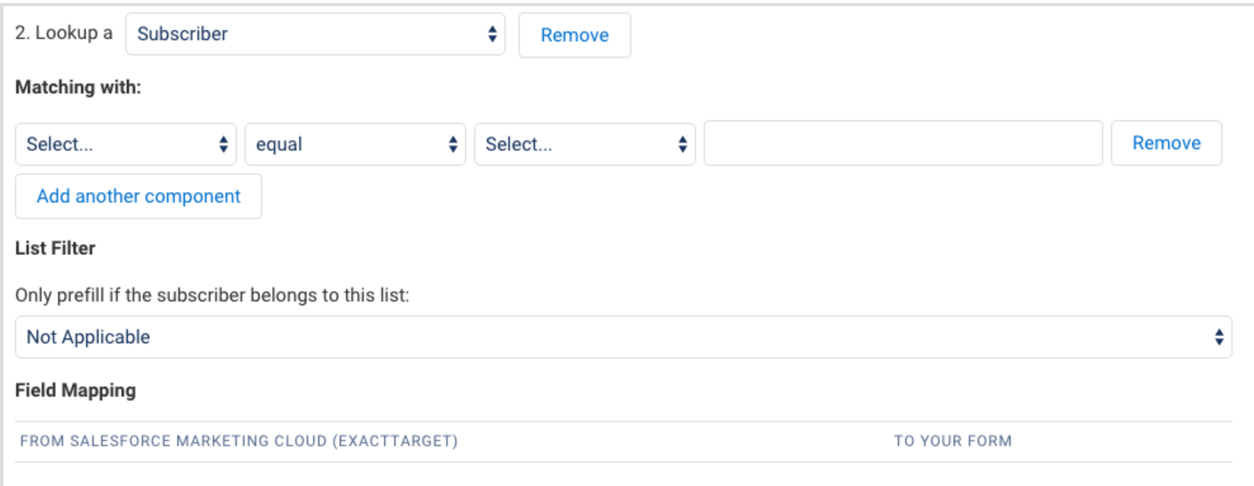
Next, map the fields you would like to prefill in the form.

Select a field from Salesforce Marketing Cloud on the left and select the matching field in your form on the right.

Click **Map Another Field** for each field you want to prefill in your form.

Step 4. Working with Multiple Records

If you need to retrieve data from more than one record to prefill your form, click **Add another object** to set up another query and field mapping set.



Direct Your Respondents to a Prefilled Form

The two most common options:

Send a Prefilled Link

Send a custom link in an email containing an identifying value.

Use Two Forms

The respondent enters an identifying value into Form 1.

After clicking submit, the respondent is directed to a prefilled Form 2.

Note: You must build a prefilling link for either option.

To build your prefill link, you'll need:

The form's address (URL)

Go to the **Publish** tab and copy the public address under **Your form is publicly available at this address**. If you've published the form on your own website, you can also use that URL.

The parameter name you want to fill

This is the name you gave the parameter in the connector. In this example from above, it would be `email`.

Build Your Link

You can use a basic text editor to build your link, like Notepad or TextEdit. Here's a form link from the Publish tab, where `283230` is the form ID.

```
http://enterprisedemo.formassembly.com/283230
```

Now, copy your form URL from the **Publish** tab, and place a question mark after it.

Here's what our example link looks like:

```
http://enterprisedemo.formassembly.com/283230?
```

Next, you'll want to add the unsecure query parameter that you created earlier. In this example we're using "`email`."

Add an equals sign after the parameter name.

```
http://enterprisedemo.formassembly.com/283230?email=
```

After the equals sign, you'll want to enter the data that will prefill the form field.

```
http://enterprisedemo.formassembly.com/283230?acctnum=help@formassembly.com
```

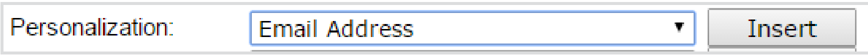
Learn more about building a link to prefill forms.

Send a Prefilling Link

After you've built the link, you can place it in an email as is, or you can make it dynamic by using a merge field from the Salesforce Marketing Cloud email system.

Here's an example of Salesforce Marketing Cloud merge fields:

```
http://enterprisedemo.formassembly.com/283230?email=%%emailaddr%%
```



Use Two Forms

In this setup, the respondent would initiate the prefilling of Form 2 by submitting Form 1 after entering their uniquely identifying value into the form field.

In the **Notifications** page of Form 1, the redirect field would need a URL similar to:

```
http://enterprisedemo.formassembly.com/283230?email=%%tfa_1%%
```

The field alias `%%tfa_1%%` will be filled by the value entered into the field on Form 1.

On the **Publish** page for your form, you'll find a link at the bottom of the page: **Show how to prefill form data dynamically**. Click this link to find the field alias(es) you'd like to prefill with.

Prefill Repeatable Fields and Sections

At the bottom of each lookup, you will see the option for **Multiple Records Settings**. As with the Salesforce Connector, this is where you'll be able to choose which repeatable section in your form you would like to be prefilled.

The data sections are sorted by the first field, by creation date.