Sitecore Connect for Salesforce 2.0 Installation Guide

Sitecore Experience Platform 9.0

How to install and configure Sitecore Connect for Salesforce

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Chapter 1

Installation

This section covers how to install Sitecore Connect for Salesforce.

1.1 Prerequisites

Before you install Sitecore Connect for Salesforce, you must have the following:

Sitecore Experience Platform

This product requires Sitecore Experience Platform 9.0 (or greater).

Salesforce

This product requires access to a Salesforce CRM instance.

A user account on Salesforce is also required. At a minimum, this account must have rights to read data from Salesforce. In order for this product to write data to Salesforce, the account must also have rights to write data to Salesforce.

Network Connectivity

This product must be installed on a Sitecore server that has network connectivity to your Salesforce instance. This may require firewall configuration, based on your network setup.

1.2 Sitecore Installation Packages

This product consists of a number of Sitecore installation packages.

Note
While the installation process may more complicated than necessary - why wouldn't Sitecore provide a single package? - there is a good reason for providing separate packages. This allows us to update individual components more easily.

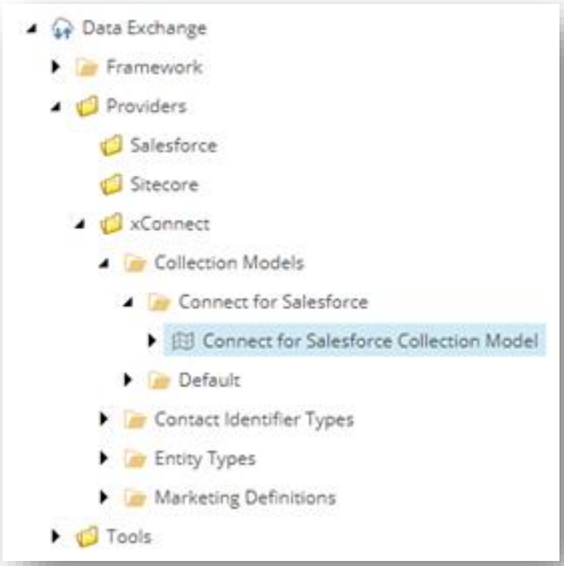
1. Download the following installation packages:
    a. Data Exchange Framework 2.0.0
    b. Sitecore Provider for Data Exchange Framework 2.0.0
    c. xConnect Provider for Data Exchange Framework 2.0.0
    d. Salesforce CRM Provider for Data Exchange Framework 2.0.0
    e. Sitecore Connect for Salesforce 2.0.0
2. Install Data Exchange Framework 2.0.0.
3. Install Sitecore Provider for Data Exchange Framework 2.0.0.
4. Install xConnect Provider for Data Exchange Framework 2.0.0.
5. Install Salesforce Provider for Data Exchange Framework 2.0.0.
6. Install Connect for Salesforce 2.0.0.

1.3 Deploy xConnect Collection Model

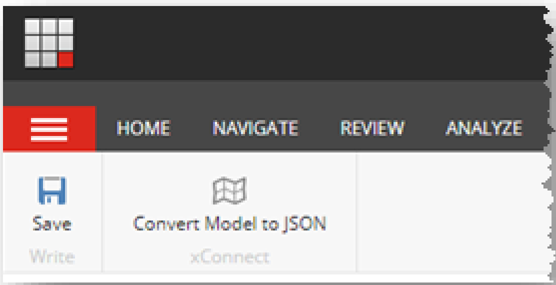
This product adds a new facets to associate information from Salesforce with Sitecore contacts and interactions. A collection model that defines these new facets must be deployed to xConnect.

Note
For more information on how to deploy a custom collection model to xConnect, see the xConnect developer documentation.

1. In Sitecore, open Content Editor.
2. Navigate to *sitecore* > *system* > *Settings* > *Data Exchange* > *Providers* > *xConnect* > *Collection Models* > *Connect for Salesforce* > *Connect for Salesforce Collection Model*



3. In the ribbon, click *Convert Model to JSON*



4. Your browser will download a JSON file. Save this file to your local machine.
5. Deploy the JSON file to your xConnect server.
6. Deploy the JSON file to your xConnect indexing server.

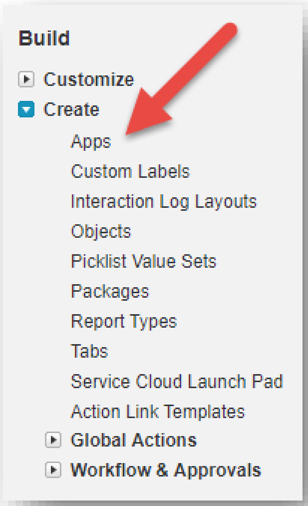
1.4 Salesforce Configuration

In order for Salesforce Connect to communicate with Salesforce, the following configuration is needed:

Note
These instructions assume you are using the Salesforce Classic user interface. The same configuration is available using the Salesforce Lightning user interface. We recommend you switch to the Salesforce Classic user interface temporarily to complete these steps.

1. Log into your Salesforce account.
2. In the top menu, click Setup.

3. In the left menu, click Create > Apps.



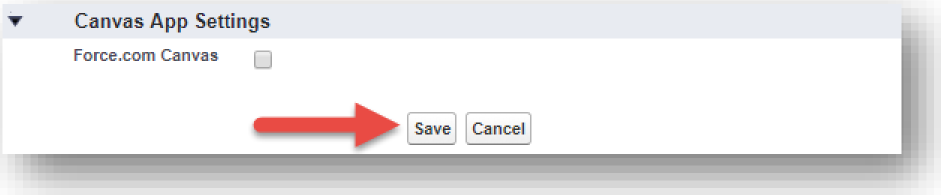
4. In the Connected Apps section, click New.

5. Enter the following values:

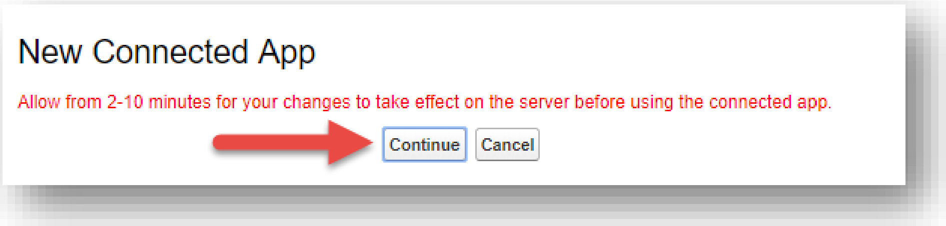
Field name	Value	Notes
Connected App Name	Sitecore Data Exchange App	The specific value does not matter.

API Name	Sitecore_Data_Exchange_App	Salesforce generates this value based on the app name. It is recommended that this value not be changed.
Contact Email	[your email address]	The specific value does not matter.
Enable OAuth Settings	Checked	
Callback URL	http://localhost	This value is not used, so the value you enter does not matter.
Selected OAuth Scopes	Access and manage your data (api)	
Require Secret for Web Server Flow	Checked	

6. At the bottom of the screen, click Save.



7. Salesforce will inform you a new connected app was created. Click Continue.



Chapter 2

Configuration

This section covers basic configuration options for Sitecore Connect for Salesforce.

2.1 Get Connection String Values from Salesforce

Before you can configure the connection string, there are several values you must collect from Salesforce:

User ID

This is the user ID that Sitecore will use to call the Salesforce API.

This user ID does not have to have administrator rights, but it must have sufficient rights to perform the activities you expect to be able to from Sitecore. For example:

- In order to have Salesforce contacts created in Sitecore, the user must have read-access on contacts and campaigns.
- In order to push contact data from Sitecore into Salesforce, the user must have write-access on contacts.

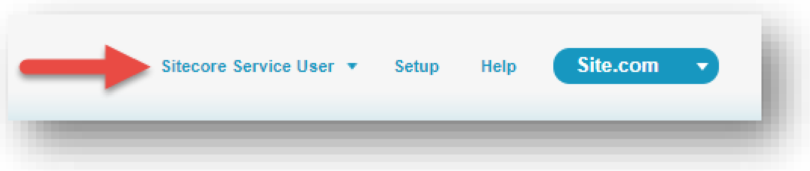
Password

This is the password for the Salesforce user that Sitecore will use to call the Salesforce API.

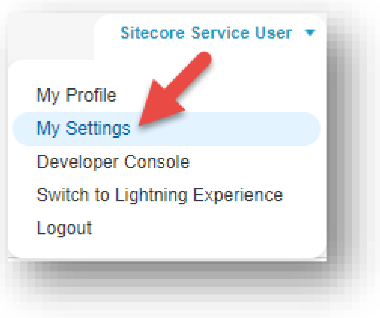
Note
Your password cannot contain the ; character (semicolon).

Security token

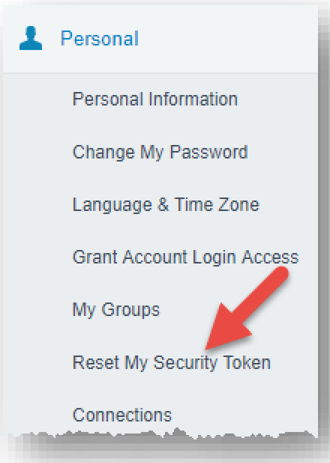
1. This value come from the Salesforce user whose connected app. To find this value, do the following:
2. In Salesforce, log in with the user ID you plan to use in the connection string.
3. In the top menu, click the user name.



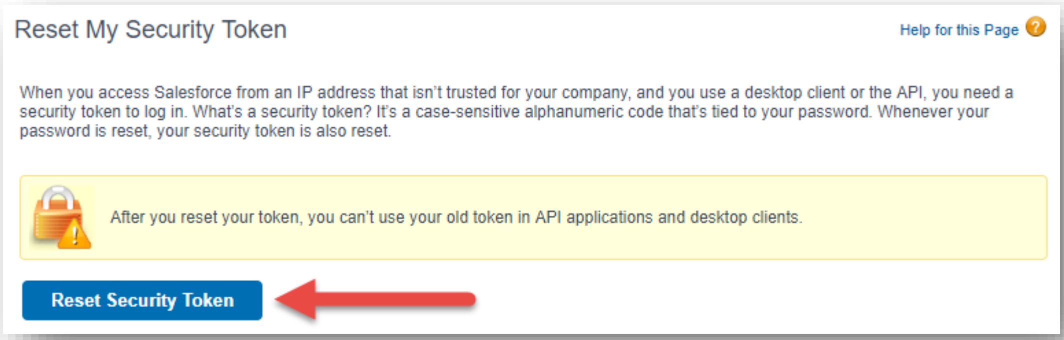
4. Click My Settings.



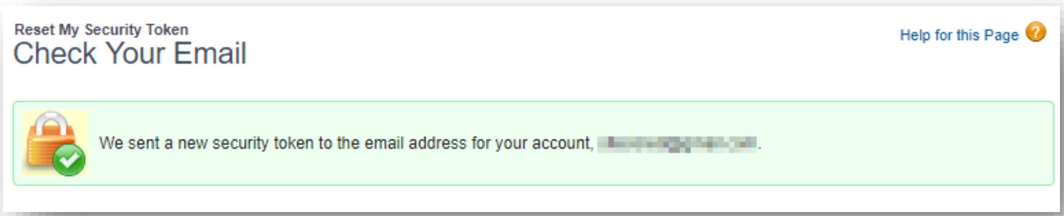
5. In the left menu, click Personal > Reset My Security Token.



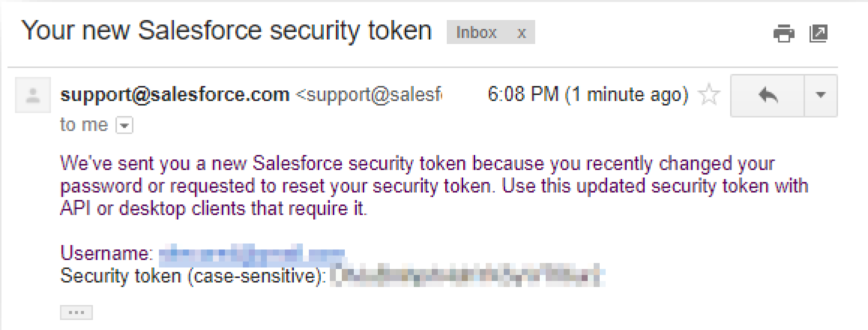
6. Read the warning on the screen carefully. If you are OK with the change that will be made, click Reset Security Token.



7. Salesforce will inform you that the new security token will be emailed to you.



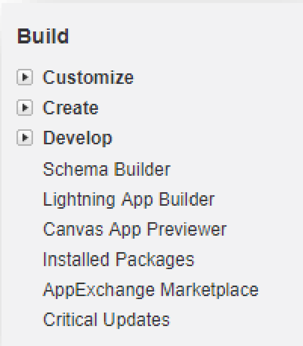
8. In your email you will find the new security token value.



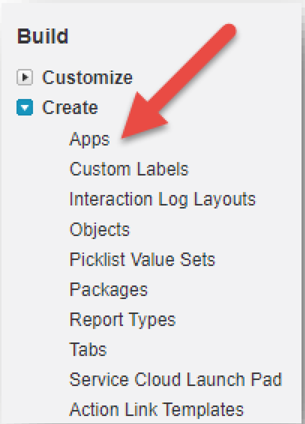
Client ID and Secret Key

These values come from the Salesforce connected app. To find these values, do the following:

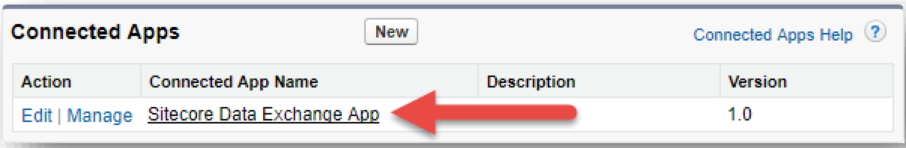
1. In Salesforce, on the left menu, scroll down to the section Build.



2. Navigate to Create > Apps.



3. In the section Connected Apps, click the name of the connected app you created.



4. In the section API (Enable OAuth Settings), you will see the values for Consumer Key and Consumer Secret. Copy these values.

Note
In the connection string, the consumer key value is called the client id, and the consumer secret value is called the secret key.

2.2 Add the Connection String to Sitecore

Add the following connection string to the ConnectionStrings.config file on your Sitecore server. Be sure to replace the values in brackets with the values you collected from Salesforce:

```
        <add name="mysf" connectionString="user id=[user id];password=[password];client
id=[client id];secret key=[secret key];security token=[security token]" />
```

The following is an example of what the connection string will look like after you have replaced the values in brackets:

```
        <add name="mysf" connectionString="user id=someone@email.com;password=b;client
id=GEH9zlTNB8o8BA45pAeDtC8W.DIqrAzuky2uffEEOwtHxIEhLzkmPwjz8KF_vzWY8dNIfurWHpfbZPGdtc3b;secret
key=5468568999798354123;security token=g3ygFuNzGgm33YTfsM3WKG3AA" />
```

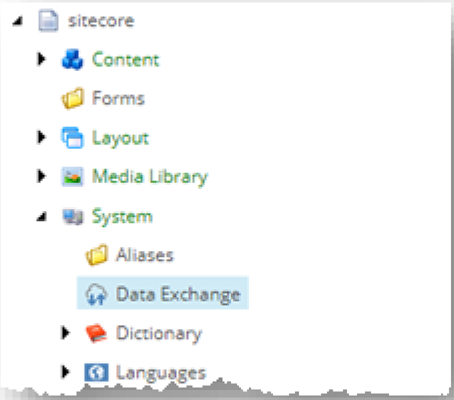
Note
If you connect to a Salesforce sandbox, you must add the parameter `sandbox=true` to the connection string.

2.3 Create Tenant

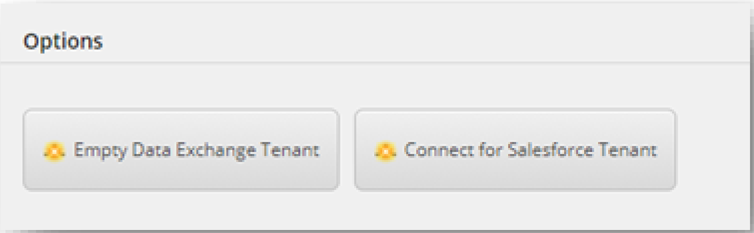
A tenant is the basic unit of configuration in this product. All of the settings that determine how data between Salesforce and Sitecore is synchronized are contained in the tenant.

Note
Usually, a tenant represents a specific Salesforce instance. You may configure multiple tenants if you have multiple Salesforce instances you want to connect. It is also possible to configure a single tenant to connect to multiple Salesforce instances. However, that configuration is not covered in this guide.

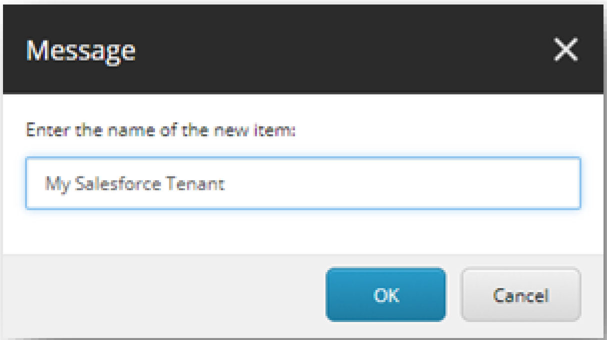
1. In Sitecore, open Content Editor.
2. Navigate to *sitecore* > *system* > *Data Exchange*



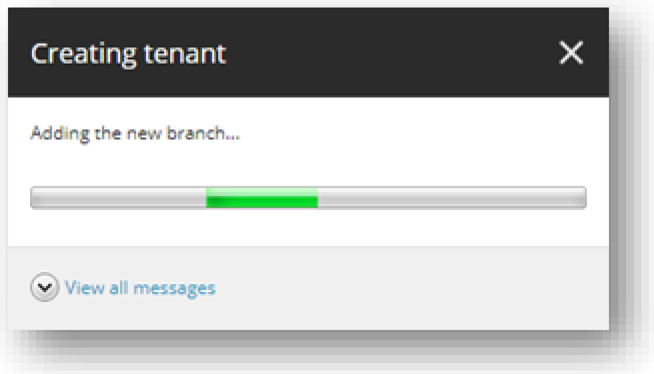
3. Add a new item using the option *Connect for Salesforce Tenant*

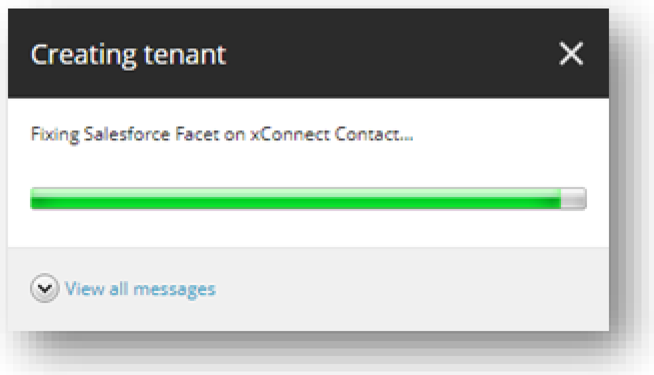


4. Enter a name for the tenant and click *OK*

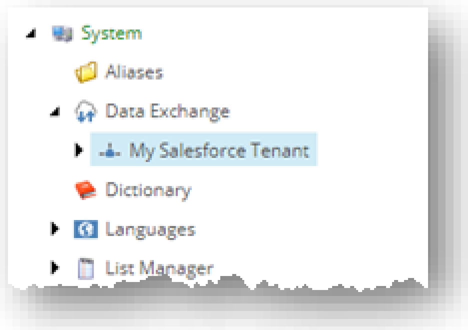


5. Creating the tenant will take some time. As it is created, a progress box appears.





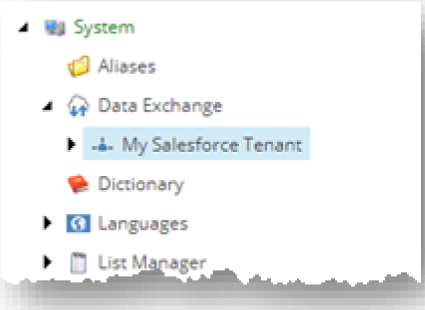
6. After the tenant is created it will appear under *sitecore* > *System* > *Data Exchange*



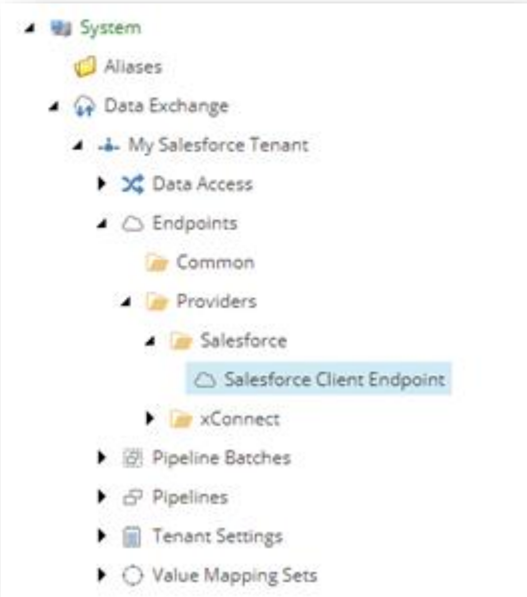
2.4 Configure Endpoints

Endpoints are used to identify the source of data that is read and the target of data that is written. Sitecore Connect for Salesforce uses endpoints to represent Sitecore and a Salesforce instance.

1. In Content Editor, select your tenant.

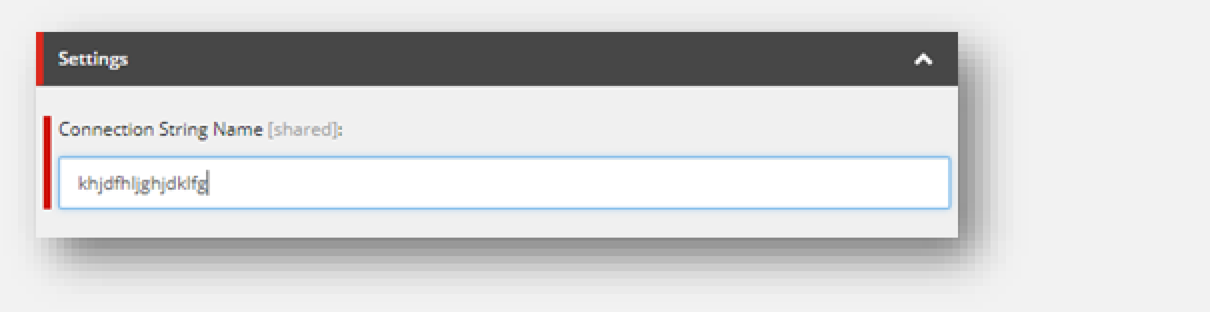


2. Navigate to *Endpoints > Providers > Salesforce > Salesforce Client Endpoint*

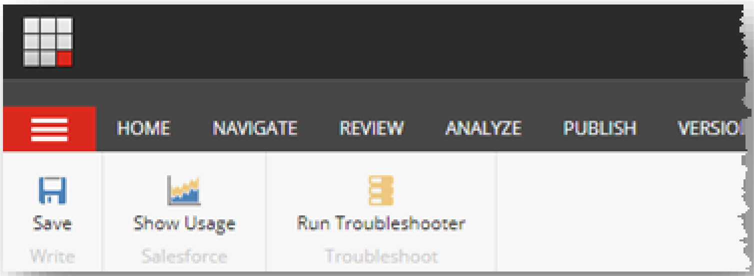


3. In the field *Connection String Name*, enter the name of the connection string you added in section **Error! Reference source not found.**.

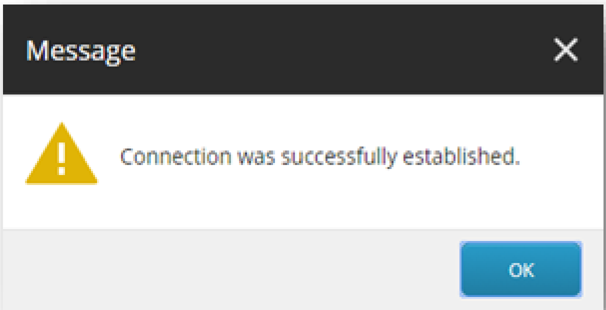
Note
If you enter a connection string that is not defined on your Sitecore server, a validation error will be displayed.



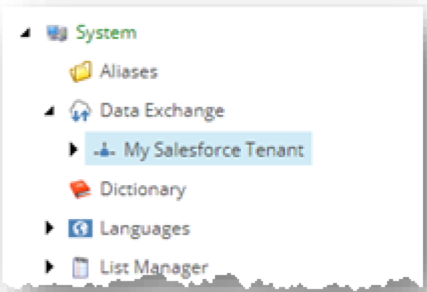
4. Save the item.
5. In the ribbon, click *Run Troubleshooter*



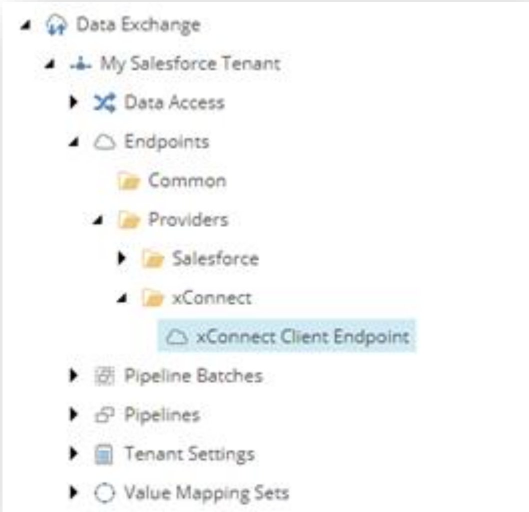
6. A message will appear to indicate if a connection could be established to your Salesforce instance. Click *OK*



7. Select your tenant.



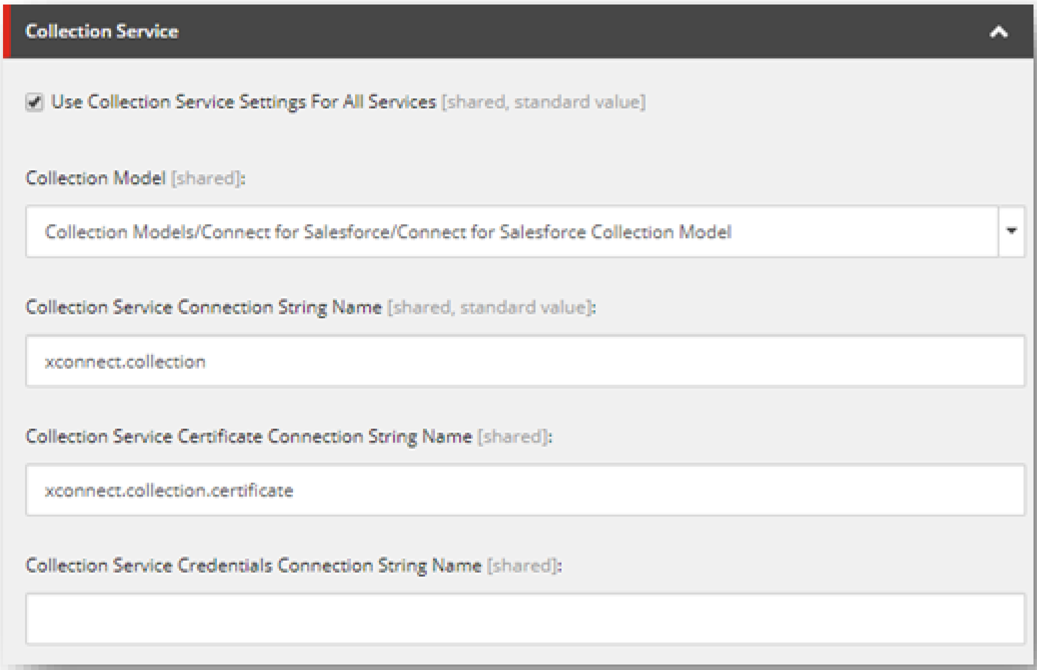
8. Navigate to *Endpoints* > *Providers* > *xConnect* > *xConnect Client Endpoint*



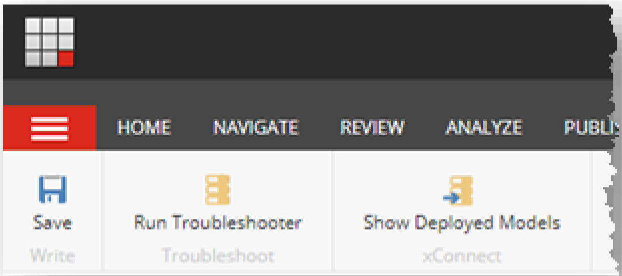
9. In the Collection Service section, enter values for the following fields:

Note
All of these values are connection string names from the ConnectionStrings.config file on your Sitecore server:

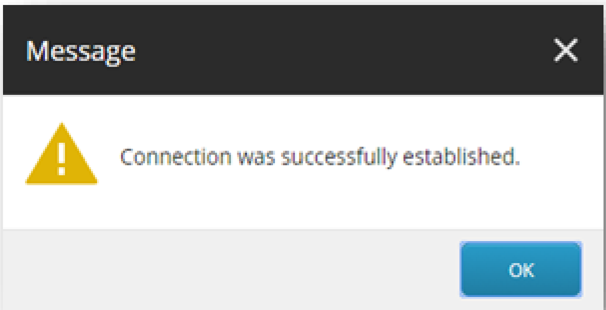
Field name	When required	Description
Collection Service Connection String Name	Always required.	Connection string that identifies the xConnect collection service. By default the value is *xconnect.collection*.
Collection Service Certificate Connection String Name	Required if SSL is enabled on the xConnect server.	Connection string that identifies the certificate to use when establishing a secure connection to the xConnect server. By default the value is *xconnect.collection.certificate*.
Collection Service Credentials Connection String Name	Required if authentication is enabled on the xConnect server.	Connection string that specifies the credentials to use to connect to an xConnect server with authentication enabled. Authentication is not enabled on the xConnect server by default. For more information on supported formats for this connection string, see the Data Exchange Framework developer documentation.



10. Save the item.
11. In the ribbon, click *Run Troubleshooter*



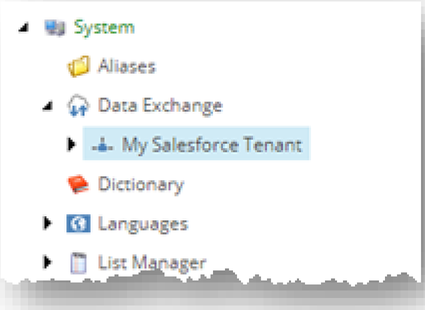
12. A message will appear to indicate if a connection could be established to your xConnect server. Click *OK*



2.5 Enable Tenant

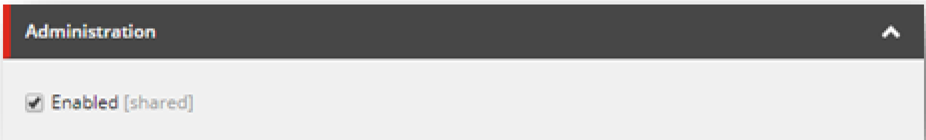
By default, the tenant is disabled. This is to ensure that no synchronization process is run until an administrator makes a conscious decision to enable the tenant.

1. In Content Editor, select your tenant.



2. Navigate to the *Content* tab.

3. In the *Administration* section, tick the box *Enabled*.



4. Save the item.