Sitecore Connect^{TM} for Salesforce Marketing Cloud 6.0 - Content Exchange Installation Guide

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1. Introduction

You use Sitecore Connect for Salesforce Marketing Cloud - Content Exchange to push Sitecore media item structures to corresponding asset structures in Salesforce. The connector synchronizes media items and assets in one direction: when you modify media items in Sitecore, Salesforce is updated as well.

With Content Exchange, the assets and categories are created as read-only. Only Salesforce users with admin rights can bypass the connector and delete the structure created in Salesforce.

The connector marks the assets it pushes to Salesforce with the Sitecore tag.

1.1. Requirements

Before you install Sitecore Connect software for Salesforce Marketing Cloud - Content Exchange, you must have the following:

- Sitecore Experience Platform or Sitecore Experience Manager, version 10.1.

- An SFMC account where you can create an installed package with appropriate access rights.

2. Installation and configuration

You must install the connector on all Sitecore instances that have the *Standalone* or *ContentManagement* roles.

To install Sitecore Connect software for Salesforce Marketing Cloud - Content Exchange:

1. Download the Sitecore Connect for Salesforce Marketing Cloud - Content Exchange 6.0 installation package from the Sitecore download page.

2. On the Sitecore Launchpad, click **Control Panel**.

3. In the **Control Panel**, in the **Administration** section, click **Install a package** to open the **Installation Wizard**.

4. Click **Upload package** and follow the steps to upload the module package to Sitecore.

5. Click **Next** and follow the steps to install the package.

6. Before you close the wizard, select **Restart the Sitecore Client**.

7. Add an API integration package to your SFMC installation.

8. Add an SFMC connection string to Sitecore.

The configuration file of the module is available as `\App_Config\Modules\Connector.Sfmc\Sitecore.Connector.Sfmc.config` after the installation.

2.1. Add an API integration package to your SFMC installation

To add an API integration package to your Salesforce Marketing Cloud (SFMC) installation:

1. Follow the steps in the *Marketing Cloud Package Development* documentation for Salesforce, in the *Create and Install Packages* section.

2. Select the *Server-to-Server* integration type for the API Integration package.

3. Add the following required rights for your connection:

Table 1. API integration package required rights

Category	Type	Rights
Assets	Documents and images	• Read
		• Write
Assets	Saved content	• Read
		• Write
Hub	Tags	• Write

2.2. Add an SFMC connection string to your Sitecore installation

To add a Salesforce Marketing Cloud (SFMC) connection string to your Sitecore installation:

1. In Salesforce, in the **Components** area of the component you created, make a note of the following values:

    - Client Id

    - Client Secret

    - Authentication Base URI

    - REST Base URI

    - SOAP Base URI

2. Use the values to construct a connection string with this format:

    ```
    <add name="sfmc" connectionString="client id=<Client Id>;
                                       client secret=<Client Secret>;
                                       auth endpoint=<Authentication Base URI>;
                                       rest endpoint=<REST Base URI>;
                                       soap endpoint=<SOAP Base URI>" />
    ```

3. Add the connection string to the `App_config\connectionstrings.config` file on your Sitecore instance.

3. Upgrading

This section describes how to upgrade from Sitecore Connect for Salesforce Marketing Cloud - Content Exchange (SFMC-CE) 5.0 to 6.0.

You must update the SFMC-CE connector on all your Sitecore instances with the *Standalone* or *Content Management* role.

To upgrade SFMC-CE:

1. Download the Sitecore Connect for Salesforce Marketing Cloud - Content Exchange 6.0 update package.

2. In Sitecore, use the Sitecore Update Installation Wizard (http://<your-sitecore>/sitecore/admin/UpdateInstallationWizard.aspx) to install the update package.

4. Configure Media folders

To specify media folders to push to Salesforce:

1. In Sitecore, open the **Content Editor** with *master* as the content database.

2. Navigate to `/sitecore/system/Settings/SFMC Connector/Configuration` in the content tree. On the Folder tab, click *SFMC Configuration* to create a new item.

3. In the **Media Root** field of the item you created, select a media folder that has a subtree that you want to push to the Salesforce Marketing Cloud.

Repeat steps 1-3 for any media folder that you want to push.

> **NOTE**
> Only users with the *Developer* role or administrators can create a new SFMC Configuration item.

For information on how to trigger data synchronization, please refer to the developer documentation on the Sitecore documentation site.