

[!DNL Salesforce CRM] connection

Overview {#overview}

[Salesforce CRM](#) is a popular Customer Relationship Management (CRM) platform.

This [!DNL Adobe Experience Platform] [destination](#) leverages the [Salesforce REST API](#), which allows you to add Accounts and create Contacts after activating them within a new Salesforce segment for your business needs.

Salesforce CRM uses [OAuth 2 with Password Grant](#) as an authentication mechanism to communicate with the Salesforce REST API.

Use cases {#use-cases}

To help you better understand how and when you should use the Salesforce CRM destination, here are sample use cases that Adobe Experience Platform customers can solve by using this destination.

Use case

Marketing teams can add new customer contacts into CRM through Adobe Experience Platform, build segments from their own offline data, and send these segments to Salesforce CRM. Once contacts are added they can be used in various ways. For example sending emails for marketing campaigns or to display ads in their social media feeds.

Prerequisites {#prerequisites}

Before activating data to the Salesforce CRM destination, you must have a [schema](#), a [dataset](#), and [segments](#) created in [!DNL Experience Platform].

The following items are required before you start configuring the destination.

1. You need to have a Salesforce account.
 - Go to the Salesforce [trial](#) page to register and create a Salesforce account, if you do not have one already.
2. Note down your [Salesforce domain](#).
3. Create a [connected app](#), enable its [OAuth Settings](#) and once created successfully note down its *Consumer Key* and *Consumer Secret*. Refer to the [Salesforce documentation](#) if you need additional guidance.
4. Select the following [scopes](#) for the connected app in the Salesforce user interface:
 - chatter_api
 - lightning
 - visualforce
 - content
 - openid
 - full
 - api
 - web
 - refresh_token

- offline_access

Supported identities {#supported-identities}

Salesforce CRM supports the activation of identities described in the table below. Learn more about [identities](#).

Target Identity	Description	Considerations
state	State	
country	Country	
number	Mobile Phone	
firstName	First Name	
postalCode	Mailing Postal Code	
city	Mailing City	
lastName	Last Name	
email	Salesforce Email ID	Note that <i>Salesforce CRM</i> does not support hashed email addresses, hence only plain text data without transformation is sent to the destination.

Export type and frequency {#export-type-frequency}

Refer to the table below for information about the destination export type and frequency.

Item	Type	Notes
Export type	[!UICONTROL Profile-based]	You are exporting all members of a segment, together with the desired schema fields (for example: email address, phone number, last name), as chosen in the select profile attributes screen of the destination activation workflow .
Export frequency	[!UICONTROL Streaming]	Streaming destinations are "always on" API-based connections. As soon as a profile is updated in Experience Platform based on segment evaluation, the connector sends the update downstream to the destination platform. Read more about streaming destinations .

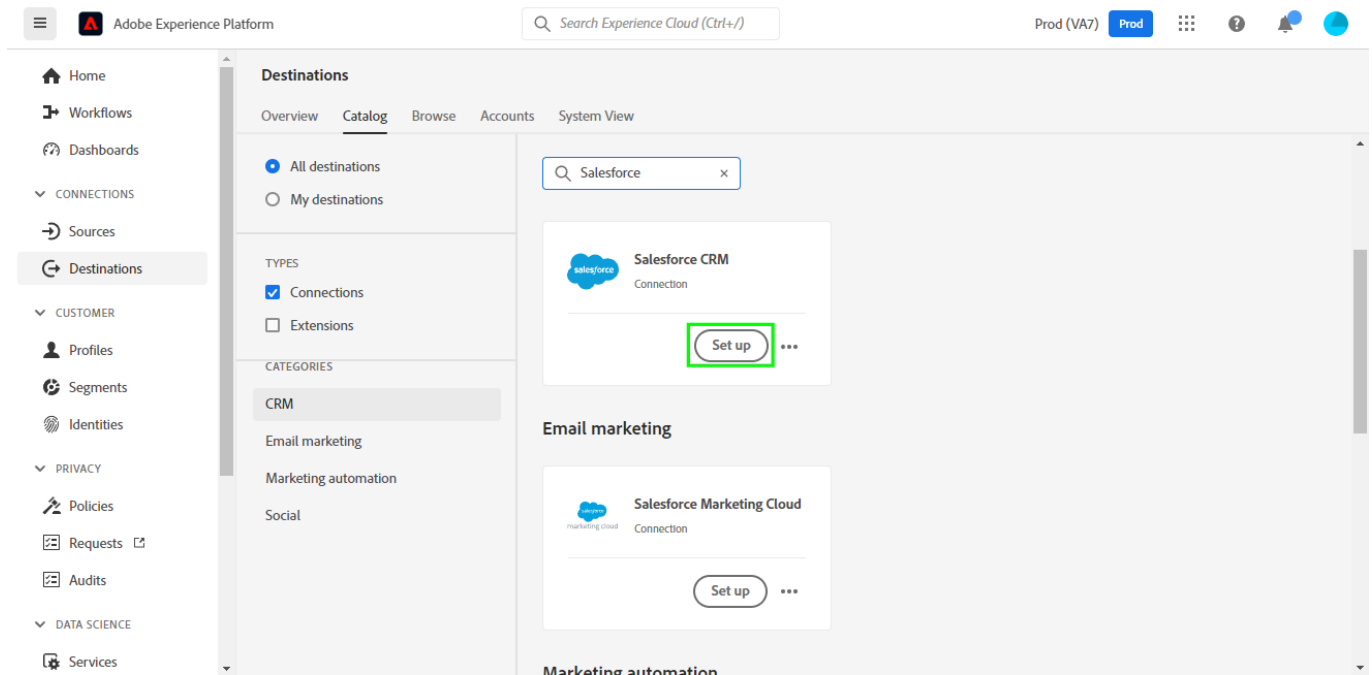
{style="table-layout:auto"}

Connect to the destination {#connect}

[!IMPORTANT]

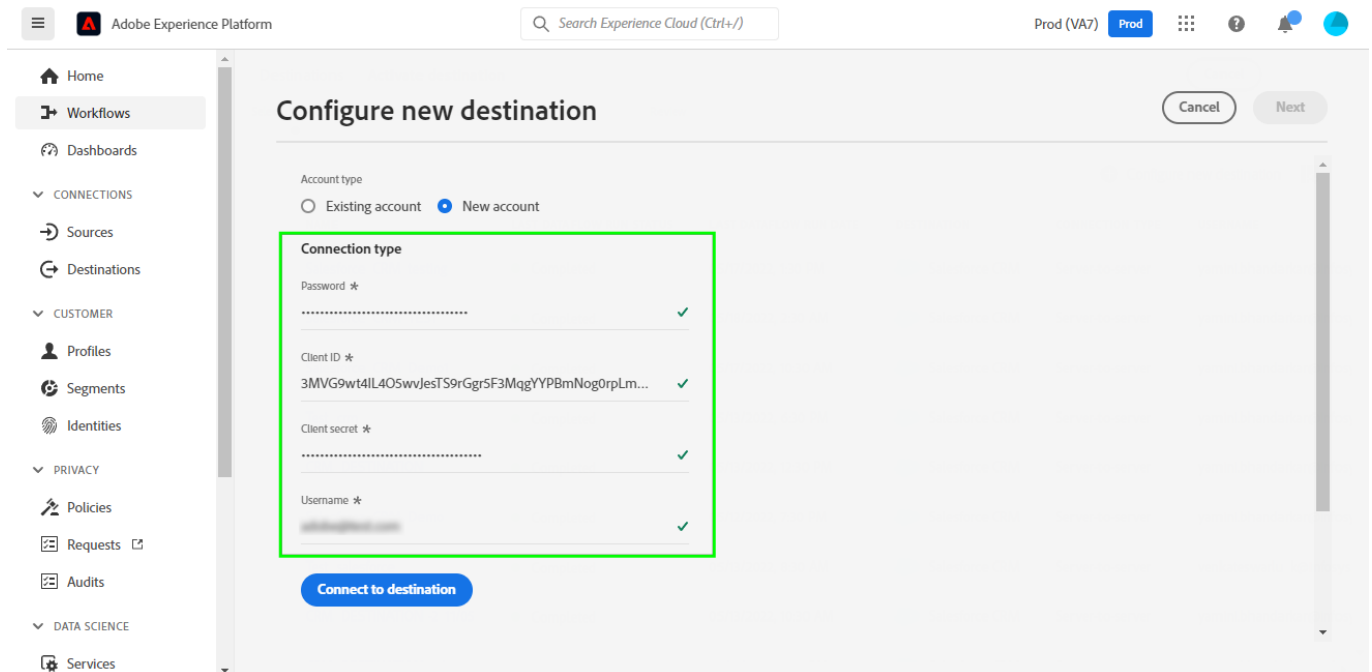
To connect to the destination, you need the **[!UICONTROL Manage Destinations]** [access control permission](#). Read the [access control overview](#) or contact your product administrator to obtain the required permissions.

To connect to this destination, follow the steps described in the [destination configuration tutorial](#). In the configure destination workflow, fill in the fields listed in the two sections below.



Authenticate to destination {#authenticate}

To authenticate to the destination, fill in the required fields and select **[!UICONTROL Connect to destination]**.



- **[!UICONTROL Password]**: Your Salesforce account password.
- **[!UICONTROL Client ID]**: Your Salesforce connected app Consumer Key.
- **[!UICONTROL Client Secret]**: Your Salesforce connected app Consumer Secret.
- **[!UICONTROL Username]**: Your Salesforce account username.

1. If the details provided are valid, the UI displays a **Connected** status with a green check mark, you can then proceed to the next step.

Fill in destination details {#destination-details}

To configure details for the destination, fill in the required fields and select **[!UICONTROL Next]**.

The screenshot shows the 'Configure new destination' page in Adobe Experience Platform. The left sidebar contains navigation links for Home, Workflows, Dashboards, CONNECTIONS (Sources, Destinations), CUSTOMER (Profiles, Segments, Identities), PRIVACY (Policies, Requests, Audits), and DATA SCIENCE (Services). The main content area is titled 'Configure new destination' and includes a 'Cancel' button and a 'Next' button. A green box highlights the 'Destination details' section, which contains the following fields:

- Connected:** A green checkmark indicating the destination is connected.
- Sign in with different credentials:** A link to sign in with different credentials.
- Destination details:**
 - Name:** 'test' (required field, marked with an asterisk and a green checkmark).
 - Description:** 'Test'.
 - Custom Domain:** 'https://...-dev-ed.my.salesforce.com' (required field, marked with an asterisk and a green checkmark).
- Alerts:** A section with an information icon and a checkbox for 'Activation Skipped Rate Exceed'.

- **[!UICONTROL Name]:** A name by which you will recognize this destination in the future.
- **[!UICONTROL Description]:** A description that will help you identify this destination in the future.
- **[!UICONTROL Custom Domain]:** Your Salesforce domain.

Activate segments to this destination {#activate}

[!IMPORTANT]

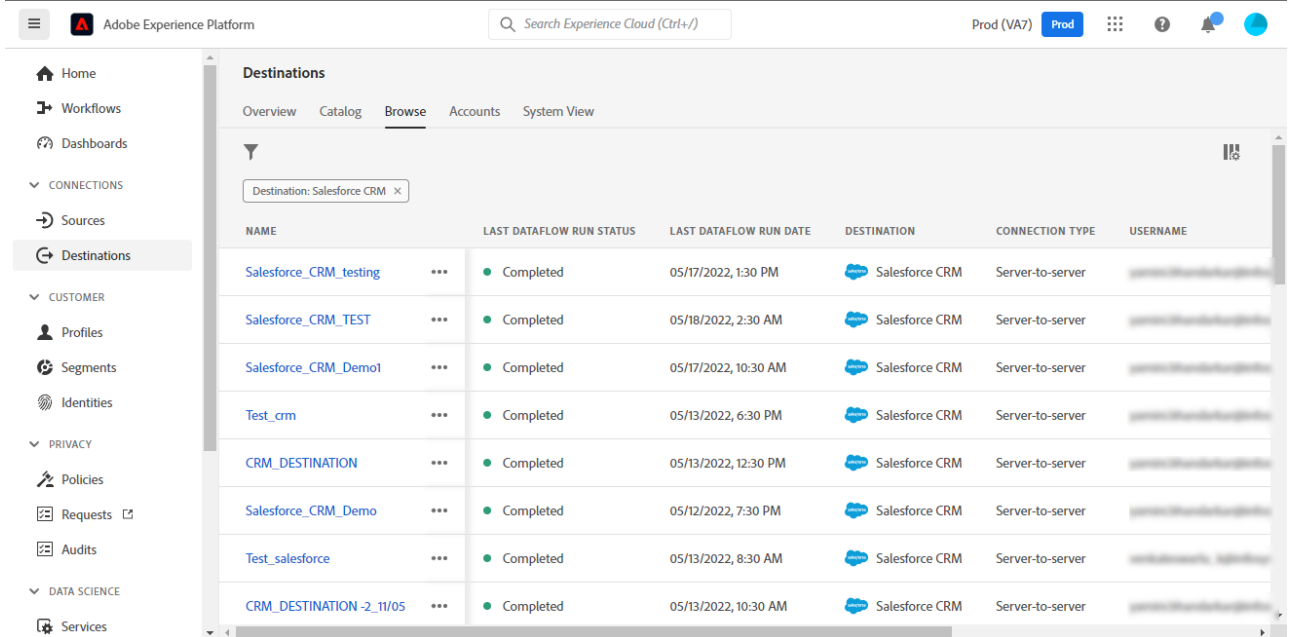
To activate data, you need the **[!UICONTROL Manage Destinations]**, **[!UICONTROL Activate Destinations]**, **[!UICONTROL View Profiles]**, and **[!UICONTROL View Segments]** [access control permissions](#). Read the [access control overview](#) or contact your product administrator to obtain the required permissions.

Read [Activate profiles and segments to streaming segment export destinations](#) for instructions on activating audience segments to this destination.

Exported data / Validate data export {#exported-data}

To validate that you have correctly set up the destination, follow the steps below:

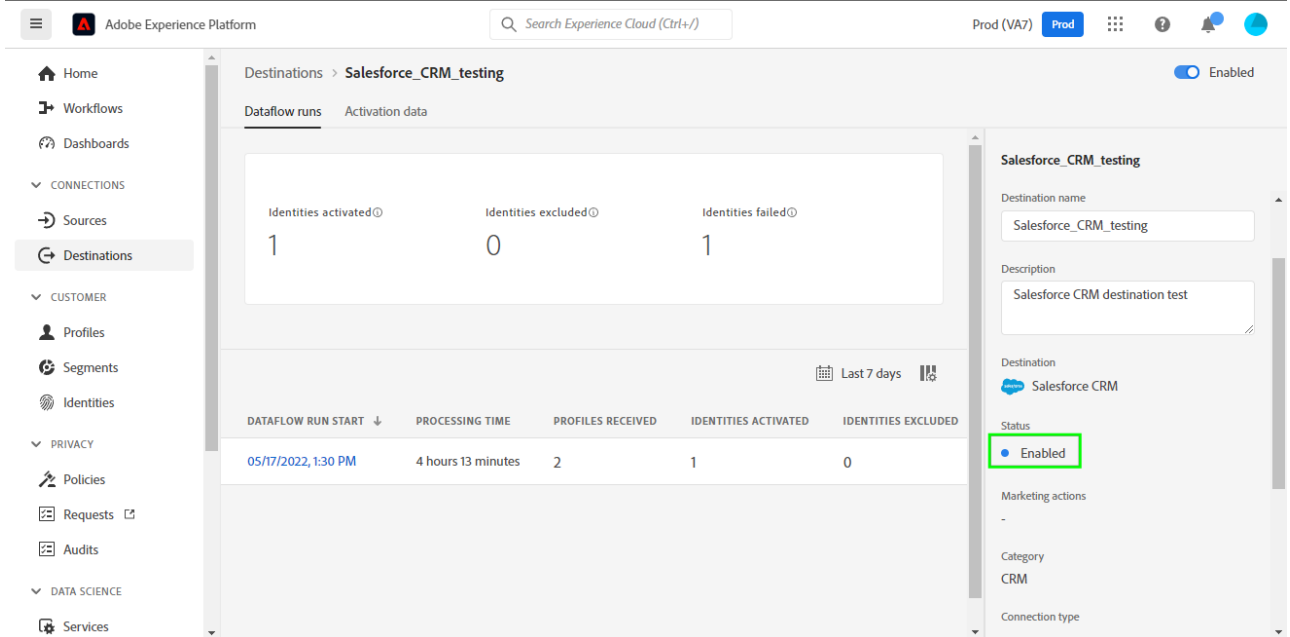
1. Select **[!UICONTROL Destinations]** > **[!UICONTROL Browse]** to navigate to the list of destinations.



The screenshot shows the Adobe Experience Platform interface. The left sidebar contains navigation options: Home, Workflows, Dashboards, CONNECTIONS, Sources, Destinations (selected), CUSTOMER, Profiles, Segments, Identities, PRIVACY, Policies, Requests, Audits, DATA SCIENCE, and Services. The main content area is titled 'Destinations' and has tabs for Overview, Catalog, Browse (selected), Accounts, and System View. A search bar at the top of the main area contains 'Destination: Salesforce CRM'. Below the search bar is a table listing destinations.

NAME	LAST DATAFLOW RUN STATUS	LAST DATAFLOW RUN DATE	DESTINATION	CONNECTION TYPE	USERNAME
Salesforce_CRM_testing	Completed	05/17/2022, 1:30 PM	Salesforce CRM	Server-to-server	
Salesforce_CRM_TEST	Completed	05/18/2022, 2:30 AM	Salesforce CRM	Server-to-server	
Salesforce_CRM_Demo1	Completed	05/17/2022, 10:30 AM	Salesforce CRM	Server-to-server	
Test_crm	Completed	05/13/2022, 6:30 PM	Salesforce CRM	Server-to-server	
CRM_DESTINATION	Completed	05/13/2022, 12:30 PM	Salesforce CRM	Server-to-server	
Salesforce_CRM_Demo	Completed	05/12/2022, 7:30 PM	Salesforce CRM	Server-to-server	
Test_salesforce	Completed	05/13/2022, 8:30 AM	Salesforce CRM	Server-to-server	
CRM_DESTINATION_2_11/05	Completed	05/13/2022, 10:30 AM	Salesforce CRM	Server-to-server	

2. Select the destination and validate that the status is **[!UICONTROL enabled]**.



The screenshot shows the details for the 'Salesforce_CRM_testing' destination. The left sidebar is the same as the previous screenshot. The main content area is titled 'Destinations > Salesforce_CRM_testing' and has tabs for Dataflow runs and Activation data. The 'Dataflow runs' tab is selected. At the top right, there is a toggle switch labeled 'Enabled' which is turned on. Below this, there is a summary box showing 'Identities activated' (1), 'Identities excluded' (0), and 'Identities failed' (1). Below the summary box is a table showing dataflow runs.

DATAFLOW RUN START	PROCESSING TIME	PROFILES RECEIVED	IDENTITIES ACTIVATED	IDENTITIES EXCLUDED
05/17/2022, 1:30 PM	4 hours 13 minutes	2	1	0

On the right side, there is a details panel for 'Salesforce_CRM_testing'. It includes fields for Destination name, Description, Destination, Status (highlighted with a green box and showing 'Enabled'), Marketing actions, Category, and Connection type.

3. Switch to the **[!DNL Activation data]** tab, then select a segment name.

The screenshot shows the Adobe Experience Platform interface. The left sidebar contains navigation options: Home, Workflows, Dashboards, CONNECTIONS (Sources, Destinations), CUSTOMER (Profiles, Segments, Identities), PRIVACY (Policies, Requests, Audits), DATA SCIENCE, and Services. The main content area is titled 'Destinations > Salesforce_CRM_testing' and has an 'Enabled' toggle. Below this, the 'Activation data' tab is selected, showing a table with columns: SEGMENT NAME, START DATE, END DATE, SEGMENT DESCRIPTION, and MAPPING ID. The table contains one row: 'crm_5-2', '05/18/2022', 'No end date', 'testing', and an empty MAPPING ID. The 'crm_5-2' cell is highlighted with a green box. On the right, a configuration panel for 'Salesforce_CRM_testing' includes options to 'Activate segments' and 'Delete', a 'Destination name' field with 'Salesforce_CRM_testing', a 'Description' field with 'Salesforce CRM destination test', a 'Destination' dropdown showing 'Salesforce CRM', a 'Status' toggle set to 'Enabled', and a 'Marketing actions' section.

4. Monitor the segment summary and ensure that the count of profiles corresponds to the count created within the segment.

The screenshot shows the Adobe Experience Platform interface with the 'Segments' section selected in the sidebar. The main content area is titled 'Segments > crm_5-2' and has buttons for 'Activate to destination' and 'Edit segment'. The 'Detail' tab is selected, showing a 'Segment summary' panel with the following information: ID# 935488bd-df77-4386-a674-692b99bb76a6, name 'crm_5-2', description 'testing', and attributes: 'Include First name exists AND Last name exists AND Postal code exists AND Number exists AND City exists AND Country exists AND State exists AND Address equals reshmar95@gmail.com or yaminib345@gmail.com'. The 'Type' is 'Standard segment'. Below the summary is an 'Edit segment' link. To the right, the 'Profiles over time' panel shows 'Total qualified' as 2 and 'New audience updated' as 0 for the last 24 hours. Below this, it states 'No new audiences qualified for this segment in the selected time range'. Further right, the 'Activated destinations' panel shows 'Segment activated to the following destinations' with a list: 'Salesforce_CRM_testing' and 'crm-test-salesforce-02/05'. A 'View all destinations' link is at the bottom.

5. Login to the Salesforce website then navigate to the **[!DNL Apps]** > **[!DNL Contacts]** page and check if the profiles from the segment have been added.

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Data usage and governance {#data-usage-governance}

All [!DNL Adobe Experience Platform] destinations are compliant with data usage policies when handling your data. For detailed information on how [!DNL Adobe Experience Platform] enforces data governance, see the [Data Governance overview](#).

Additional resources {#additional-resources}

Additional useful information from the [Salesforce developer portal](#) is below:

- [Create a Record](#)
- [Custom Recommendation Audiences](#)
- [Using Composite Resources](#)
- [Quick Start](#)