

COPERNICA - SALESFORCE APP

INTEGRATION APP, V1.0 (Beta)



CONFIGURATION & USER MANUAL

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DEVELOPED BY
TAUROS MEDIA NEDERLAND B.V., WWW.TAUROSMEDIA.COM
INFO@TAUROSMEDIA.COM

1. INDEX

1	Index	2
2	Introduction	3
3	Package	4
4	Requirements	4
5	App subscription process	4
6	App configuration	7
7	Copernica configuration	8
8	Salesforce configuration	10
	Campaigns	14
	Contacts	14
	Reports	15
9	Change log	16
10	FAQ	16
11	Contact	16

2. INTRODUCTION

Copernica Marketing Software is a solution that helps its users create their own advanced marketing campaigns, manage their target groups, compose their own emails and web pages or create their own marketing campaign for mobile, social or print.

Read more about Copernica at: <https://www.copernica.com>

Salesforce.com is an enterprise cloud computing company. Their social and mobile cloud technologies—including their flagship sales and CRM applications—help companies connect with customers, partners, and employees in new and creative ways. They do it all on the cloud and hence manage to keep the costs very low.

Read more about Salesforce at: <http://www.salesforce.com>

Salesforce and Copernica are two highly acclaimed and established platforms in their own domains. The idea was to integrate these 2 successful platforms so as to get more out of each of them. The result of that idea is Salesforce - Copernica integration app.

Tauros Media's Copernica - Salesforce integration app is developed for businesses which use both Copernica and Salesforce platforms for their marketing and CRM needs.

This app enables a connection between your stored data in Salesforce and your database in Copernica. It gives you the possibility to directly create marketing campaigns based on data in Salesforce. With the integration between Salesforce and Copernica you can easily automate and personalize your own marketing campaigns. The integration seamlessly connects Salesforce CRM to Copernica marketing system.

- All contacts from Salesforce will automatically be exported and stored in your Copernica database and vice-versa. The integration will always keep your Salesforce CRM contacts and Copernica database in a merged state i.e. changes made in CRM will be shown in Copernica and changes made in Copernica will be shown in CRM.
- Create new database in Copernica from Salesforce CRM or edit existing ones. You can also delete database or contacts from Salesforce and these changes would be reflected in Copernica.
- You can manage Copernica Emailings directly from Salesforce CRM interface.
- User can choose whether to have a one way data transmission or two way integration. You can choose to send Copernica data to Salesforce, Salesforce data to Copernica or both ways.
- There is provision to record & view error reports in CRM. If anything goes wrong during any operation related to this integration, it creates easy to access and understand bug reports inside the Salesforce CRM interface.
- The app adheres to highest standards of development practises. The plugin itself is very easy to configure and use.

Once you start using this app you will not have to spend your time managing the same contacts & campaigns multiple times in both Copernica and Salesforce platforms.

3. PACKAGE

The package contains:

3.1. Copernica - Salesforce app subscription.

3.2. One time configuration (if all necessary access is provided) and first data sync (first data sync has to be done by Tauros only).

3.2. App configuration and user manual.

4. REQUIREMENTS

4.1. Salesforce Enterprise or Unlimited subscription*.

If you do not already have it then you can subscribe from here:

<http://www.salesforce.com/in/sales-cloud/pricing/?d=70130000000tS1N&internal=true>

* Note that this app will not work for Contact manager, Group or Professional Salesforce subscriptions. These levels of accounts do not have access to Salesforce webservices API and no integration will work without that.

4.2. Copernica marketing software account.

4.3. Working knowledge of Copernica and Salesforce user interface.

5. APP SUBSCRIPTION PROCESS

5.1. Write a mail to info@taurosmedia.com mentioning that you want to subscribe to Copernica - Salesforce integration app. The mail should contain at least the following details:

- Name and contact details of the person who will handle it.
- Username (email id) which is to be used for app subscription.

5.2. Our Sales department will contact you with further instructions.

5.3. Once all administrative steps are completed our technical department will send you a confirmation email with your app access details.

5.4. You can then further send us all necessary access details and request initial configuration by our team.

Or if you do not want to share your confidential access details then feel free to follow this manual and configure everything yourself.

5.5. Once all configurations are done exactly as per this manual then Tauros will do the first data merge. After this first merge the app server cron will take over and exports will be done automatically.

From this point onwards of this user manual we will assume that you have already subscribed to Salesforce enterprise/unlimited edition and Copernica Marketing services.

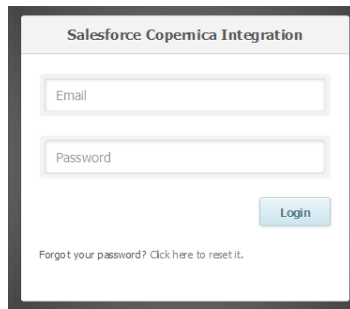
You have admin level or necessary access to make changes in both the platforms.

You have sufficient knowledge/training of their interfaces.

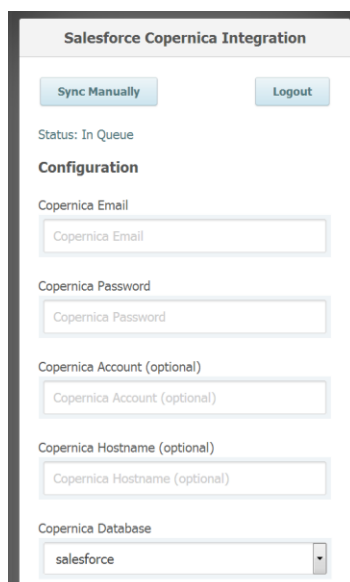
6. APP CONFIGURATION

6.1. Once you have received a confirmation mail that your app subscription has been created, you need to login to the app interface to proceed with further configuration.

<http://salesforce-copernica.taurosmedia.com/>



6.2. Once logged into the app interface you need to fill in all necessary fields.



The fields are self-explanatory but here is a quick explanation:

- **Copernica email:** Fill in the email which you use to login to your Copernica interface in this field.
- **Copernica password:** Fill in your Copernica interface password.
- **Copernica account:** Fill in your Copernica account name here.
- **Copernica Hostname (optional):** This is an optional field and can be left empty. If you have a Copernica hostname then fill it in.
- **Copernica database name:** Fill in your Copernica database name which you want to integrate with your Salesforce. The dropdown will not show anything unless you save Copernica access details first. It will fetch all available database names once it can access your Copernica account.

- **Salesforce username:** Fill in the username which you use to login to your Salesforce account.
- **Salesforce password:** Fill in your Salesforce account password here.

- **Salesforce security token:** Fill in your Salesforce security token in this field. You can get security token from Salesforce interface. Just look into your Salesforce interface or request a new one. You will receive an email with subject: salesforce.com security token confirmation.

A security token is an automatically generated key that you must add to the end of your password in order to log in to Salesforce from an untrusted network. Security tokens are required whether you log in via the API or a desktop client so the app too needs the token to access your Salesforce data.

Read more about it at:

https://help.salesforce.com/HTViewHelpDoc?id=user_security_token.htm&language=en_US

New security tokens are also automatically sent to you when your salesforce.com password is changed or when you request to reset your security token. So please make sure that the security token saved in app configuration is always up to date & correct. Otherwise this integration will not work since the app will not be able to log into your Salesforce account.

Data sync direction (choose one)

- **Both ways:** This is the recommended setting as it gives full access to all features of the app. In this mode your Salesforce and Copernica contacts will be merged. You can manage (create/edit/delete) Copernica databases from Salesforce UI.

- **Salesforce to Copernica:** When this is selected data from Salesforce is sent to Copernica. You cannot manage Copernica databases or campaigns in this mode. Only Salesforce contacts will be exported as Copernica profiles.

- **Copernica to Salesforce:** When you select this data will be sent from Copernica to Salesforce.

Apply deletes to copernica: Yes/No

Yes: If you delete a contact in Salesforce it will be deleted in Copernica profiles too.

No: It will not delete contacts in Copernica when you delete them in Salesforce.

- Deleting profiles in Copernica has no effects on contacts in Salesforce.
- You can edit a contact in Copernica and those changes will be reflected in your Salesforce contact (if sync direction is set as both or Copernica > Salesforce)

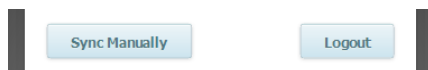
- **Sync data automatically:** Yes or No.

You can choose to merge data automatically or manually.

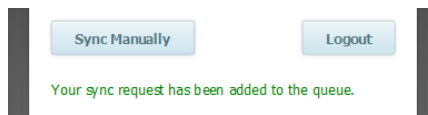
Yes: Data merge will take place automatically as per our server cron.

It will run once every hour for contacts and campaign/reporting cron will run once every day.

No: Then you will have to manually add the data to cron using the 'Sync manually' button.



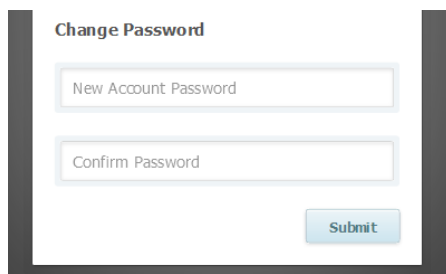
It will show a message when it has successfully added your request to the queue.



The status bar shows the current status of your request.

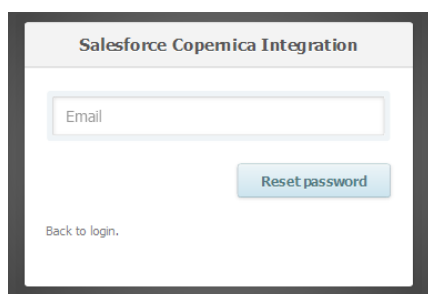


6.3. You can change your app password from the last section.



You can use logout button to logout from app interface.

Also, from login page you can request a password reset if you do not remember it.



7. COPERNICA CONFIGURATION

7.1. Login to your Copernica account: <http://www.copernica.com/nl/login>

Login of meld je aan

Inloggen of [gratis registreren](#)

Het gedeelte van de website dat je probeert te bezoeken is alleen beschikbaar voor ingelogde gebruikers. Log in om verder te gaan.

E-mailadres

Wachtwoord

☒ Ik wil ingelogd blijven

[Wachtwoord vergeten?](#)

LOG IN

Inloggen met je social media account

Gebruik je social media account om direct in te loggen in Copernica.






7.2. Once logged in click on your account. Note that it can have multiple accounts depending on your Copernica settings. Open the one which you want to integrate with Salesforce. For example in this image 'taurosmedia' was our account that had to be integrated with Salesforce.

Accounts

Kies een account om verder te gaan	
taurosmedia	Settings Naar account!

Je hebt nog geen toegang tot de marketing software. Maak snel een gratis account aan en krijg toegang tot alle functionaliteiten.

7.3. Once inside the account load the database that has to be integrated with Salesforce.

The app will need following to merge data between both platforms:

- A Copernica database (existing or new).

If you don't have an existing database and don't know how to create one then you can learn it from here: <https://www.copernica.com/en/support/video-tutorials/profiles-creating-a-database>

- Database fields of your Copernica database should be compatible with Salesforce fields.

If you don't know how to create/edit database fields in Copernica you can learn it from here: <https://www.copernica.com/en/support/video-tutorials/profiles-adding-database-fields>

For contacts merge to work properly you can only use following Database field names while creating database fields in Copernica:

Id
 IsDeleted
 MasterRecordId
 AccountId
 LastName
 FirstName
 Salutation
 Name
 MailingStreet

MailingCity
 MailingState
 MailingPostalCode
 MailingCountry
 OtherStreet
 OtherCity
 OtherState
 OtherPostalCode
 OtherCountry
 Phone
 Fax
 MobilePhone
 HomePhone
 OtherPhone
 AssistantPhone
 ReportsTold
 Email
 Title
 Department
 AssistantName
 LeadSource
 Birthdate
 Description
 OwnerId
 CreatedDate
 CreatedById
 LastModifiedDate
 LastModifiedById
 SystemModstamp
 LastActivityDate
 LastCURequestDate
 LastCUUpdateDate
 EmailBouncedReason
 EmailBouncedDate
 Level__c
 Languages__c

These are the field names used in Salesforce contacts section. You can skip the ones that you do not want to merge with Copernica profiles.

For example: In the following image we had already created a database named 'salesforce'. We had also added only 3 fields to the database: **FirstName**, **LastName** and **Email**.



Profiles
E-mailings
Websites
Mobile
PDF
Content
Style
Admin
Log out

Current view
Profile
Database management
Search: Email
Enter your search query...
Search

Databases and selections

Magento
Relations
salesforce

We want to integrate this database with Salesforce. We have created it in advance and it contains some profiles too as you can see on right

Profiles
Statistics
Follow-ups

Database salesforce :: 3 profiles

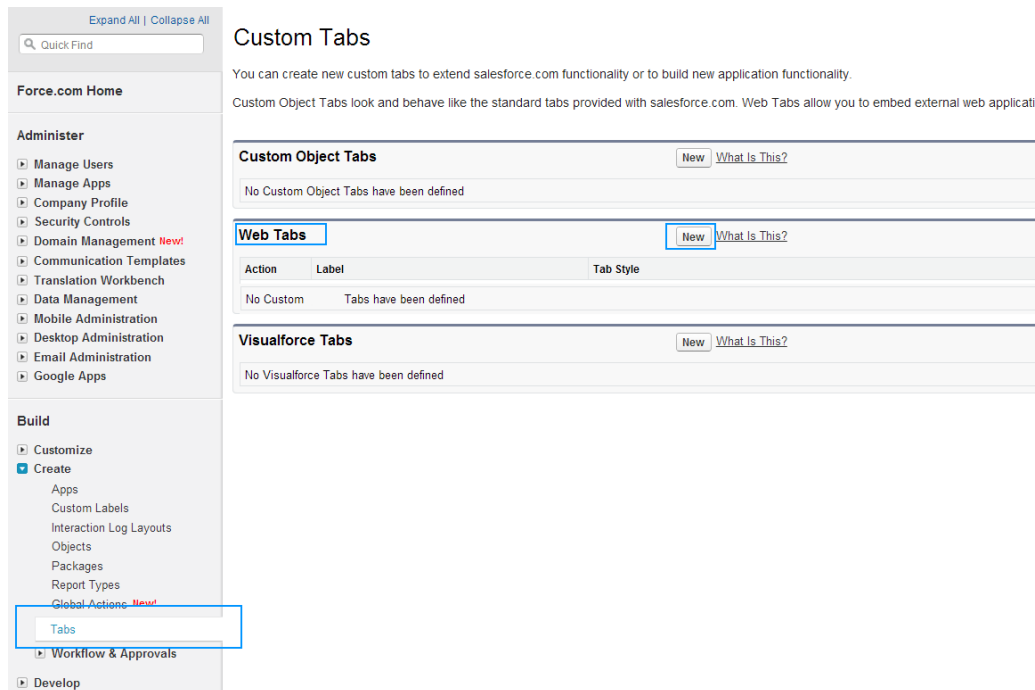
ID	FirstName	LastName	Email
69	Eamcef	Sequeira	eamcef@taurosmedia.com
68	Guido	Lassally	guido@taurosmedia.com
67	Satya	Singh	satya@taurosmedia.com

8. SALESFORCE CONFIGURATION

8.1. Hope you have already requested a Salesforce security token as explained in page 6 of this manual and used it in configuration of app interface by now.

8.2. Now you need to create a new custom tab in Salesforce UI and dedicate it to Copernica.

8.2.1 To create a new custom tab go to Salesforce CRM > Setup > Create > Tabs > Web tabs > New

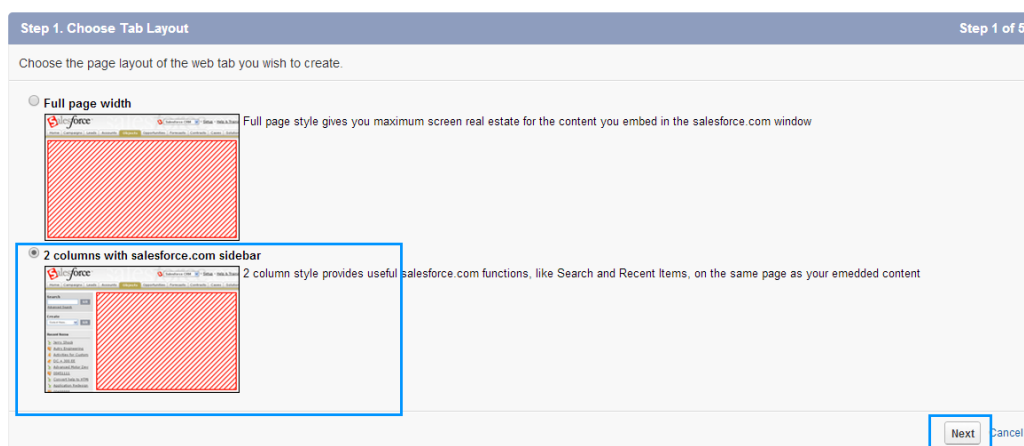


8.2.2 Step 1. Choose Tab Layout

It will take you to next page where you will be asked to select a tab layout. '2 columns with Salesforce.com sidebar' is recommended.

New Web Tab

[Help for this Page](#)



8.2.3 Step 2. Define Content and Display Properties

Next you need to fill in Tab label, name, style, content frame height, If mobile ready and description. You can fill in any text you want in these fields.

Step 2. Define Content and Display Properties
Step 2 of 3

Fill in information about the web tab.

Display Properties


Tab Label Copernica 1

Tab Name Copernica i

Tab Style Apple 2

Content Frame Height (pixels) 600 3

Mobile Ready ☒ [What Is This?](#)



Splash Page

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Description

This tab will be dedicated to Copernica-Salesforce integration app.

Previous Next Cancel

Click on 'Next' button to continue once all details are filled in.

8.2.4 Step 3: Enter the URL details

Here you can fill in the following URL into the 'Button or link URL' field
[//salesforce-copernica.taurosmedia.com/sfcp](https://salesforce-copernica.taurosmedia.com/sfcp)

Step 3. Enter the URL Details
Step 3 of 3

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser address bar, or you can use one or more merge fields to insert organization-specific data from salesforce.com into URL parameters.

Examples:

Simple http://www.google.com

With Merge Field http://www.google.com/search?q={!Org_Name}

Available Merge Fields

Available Merge Fields

Select Field Type

Organization Fields ▼

Select Field

Copy Merge Field Value

Copy and paste the merge field value into your template below.

Button or Link URL

! = Required Information

[//salesforce-copernica.taurosmedia.com/sfcp](https://salesforce-copernica.taurosmedia.com/sfcp)

Preview Web Tab

Encoding Unicode (UTF-8)

Previous Save Cancel

Click on save button to go to the next step of the process.

8.2.5 Step 4. Add to Profiles

Let it be default selection and click on 'Next' button.

New Web Tab

[Help for this Page](#)

Step 4. Add to Profiles Step 4 of 5

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles: Default On
☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Authenticated Website	Default On
Contract Manager	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
Marketing User	Default On
Partner App Subscription	Default On
Read Only	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

[Previous](#) [Next](#) [Cancel](#)

8.2.6 Step 5. Add to Custom Apps

Select all the apps you want to add or let it be default selection

Step 5. Add to Custom Apps Step 5 of 5

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform	<input checked="" type="checkbox"/>
Sales	<input checked="" type="checkbox"/>
Call Center	<input checked="" type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>
Sample Console	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Community	<input checked="" type="checkbox"/>
Site.com	<input checked="" type="checkbox"/>
Salesforce Chatter	<input checked="" type="checkbox"/>
Content	<input checked="" type="checkbox"/>

☒ Append tab to users' existing personal customizations

[Previous](#) [Save](#) [Cancel](#)

Click on 'Save' button and your custom Copernica tab will be ready.

It will show up under the Web tabs section as shown below.

Custom Tabs

[Help for this Page](#)


You can create new custom tabs to extend salesforce.com functionality or to build new application functionality.

Custom Object Tabs look and behave like the standard tabs provided with salesforce.com. Web Tabs allow you to embed external web applications and content within the salesforce.com window. Visualforce Tabs allow you to embed Visualforce Pages.

Custom Object Tabs [New](#) [What Is This?](#)

No Custom Object Tabs have been defined

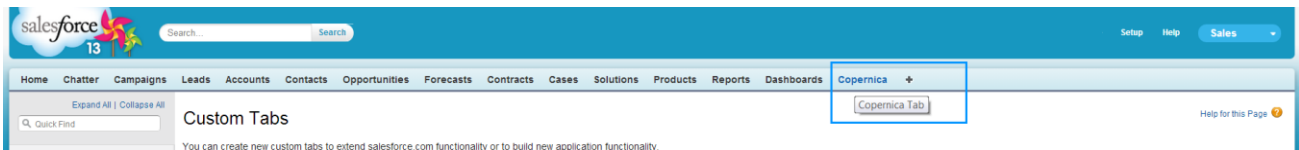
Web Tabs [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Copernica	 Apple	

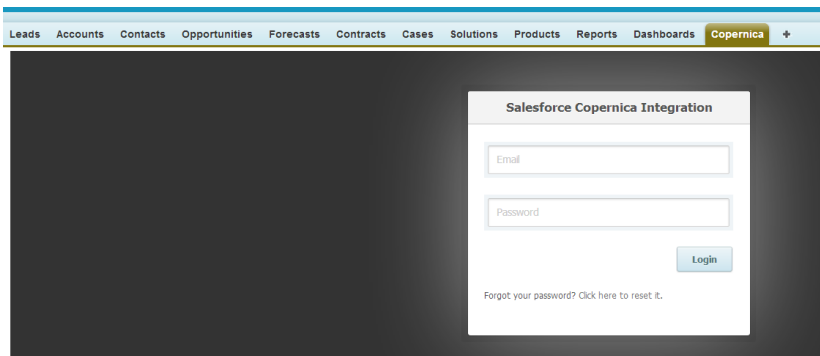
Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

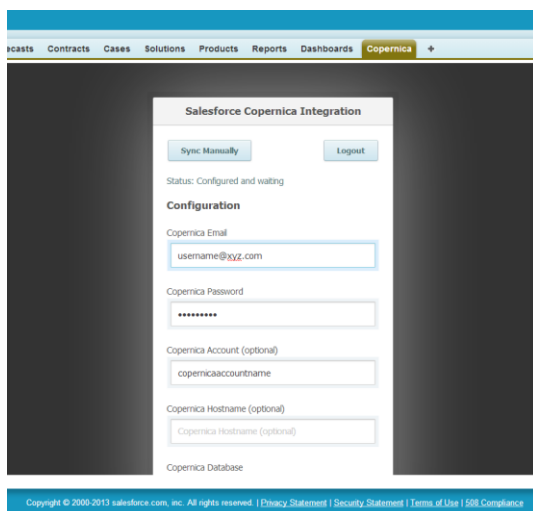
The custom tab will also be displayed in top menu of your Salesforce interface for your easy access.



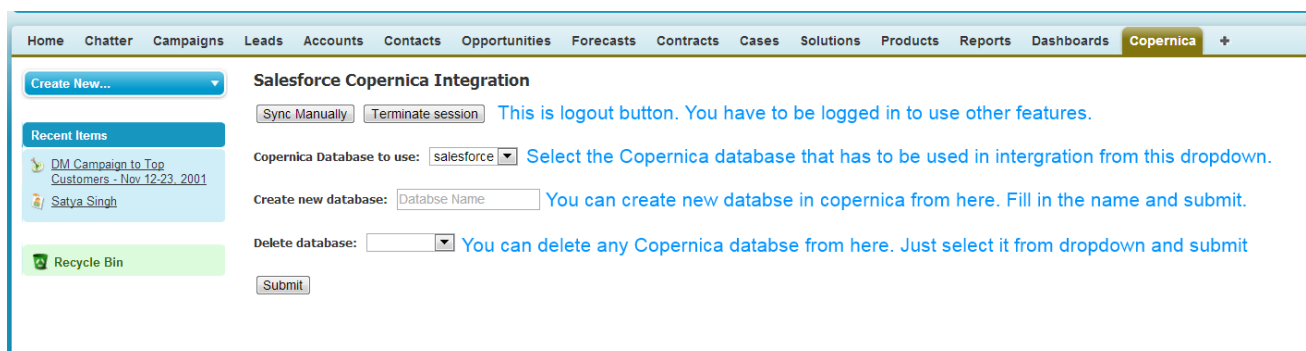
8.2.7 Click on 'Copernica' tab to initiate the connection. It will show the app login page on first load. Login with the app login details provided to you by Tauros technical team.



8.2.8 You can configure the app fields from here as well if you haven't already.



8.2.9 Click on 'Copernica' tab again and it will reload the following page.



You can manage your app sessions & Copernica databases as shown in above image from here.

- Sync manually button can be used to add your data to export queue.
- Terminate session is to logout of the app from Salesforce UI. We suggest you keep it logged-in.
- Create new database: You can use this field to create a new Copernica database from here. Just fill in the database name you want in the field and click on submit button. This will create a new database with entered name in your Copernica account.
- Delete database: You can use this field to delete any Copernica database in your account. Simply select the database you want to delete from the available names in the drop down and submit button. Note that this will delete that database and all its profiles and selections from Copernica.

8.3. CAMPAIGNS

Now you can also use your Copernica Emailings from Salesforce tab.

You just need to select the correct emailing from the dropdown and click on 'Send emailing' button. This will make sure that all profiles under that E-mailing will be sent the mails configured in Copernica.

Note that for this to work you will need to have valid E-mailings, profiles, selections, documents and templates in your Copernica database. You can manage/create all these from your Copernica account interface.

For example in the following shot we wanted to use 'Magento: Abandoned cart email' documents (which was already created in Copernica) so we selected it and clicked on 'Send emailing'.

Salesforce Copernica Integration

Copernica Database to use:
Always keep the correct database selected here while performing any action.

Create new database:

Delete database:

Emailing

It will show your Copernica emailings in a dropdown here.

Copernica Email Document to use:

Magento: Abandoned cart email

Magento: Abandoned cart email

Magento_newsletter: Demonstration

Magento_newsletter: Test

Salesforce test: document Salesforce test

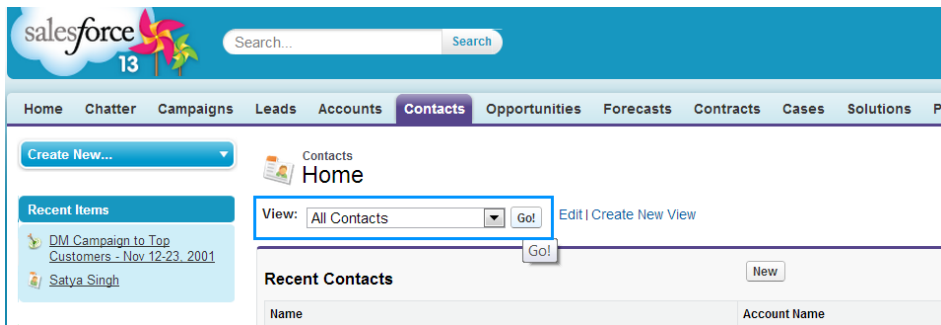
Salesforce test: Example

This completes all Salesforce configurations. Now you can start using the app and its features to merge your Salesforce and Copernica data.

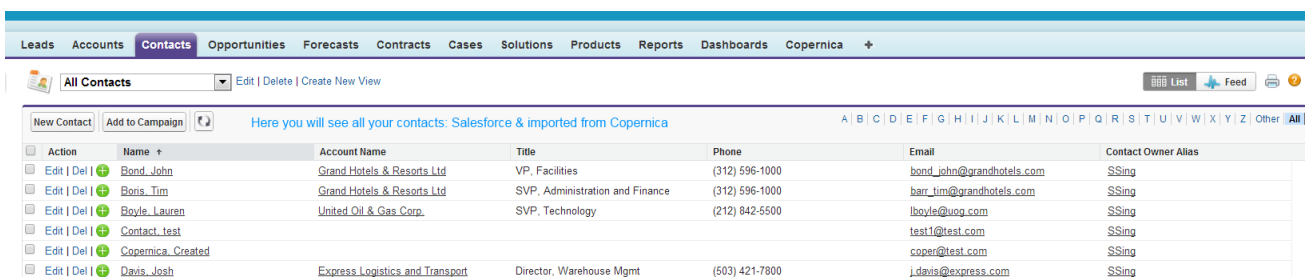
8.4 CONTACTS IN SALESFORCE

After configuring it all, the first thing you would want to do is merge Salesforce and Copernica contacts/profiles. You can manage all merged contacts from 'Contacts' tab in Salesforce.

Go to Contacts > View all Contacts and it will list all your contacts

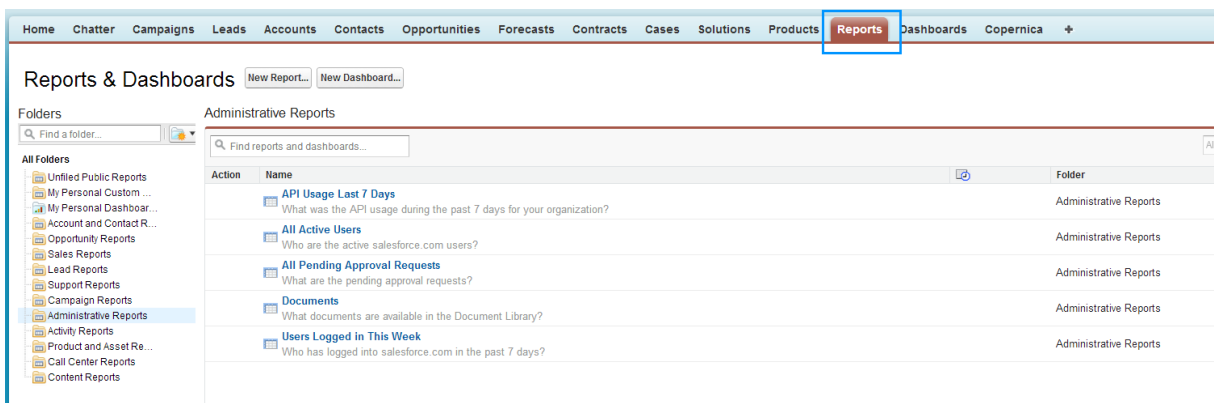


The list view of all contacts will look like this and from here you can manage each contact individually.



8.5 ERROR REPORTS

If anything goes wrong during transfer of data between Copernica & Salesforce it will create an error report in the Reports section of Salesforce interface.



That concludes our user manual for Copernica – Salesforce integration app.

We hope this integration app meets all your CRM-marketing requirements & expectations.

Feel free to contact us with any feedback or queries at satya@taurosmedia.com.

We will be more than glad to assist you in all your business requirements.

9. CHANGE LOG

V 1.0.	* App launched, Manual created.
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10. FAQ

HOW DO I GET A SALESFORCE ENTERPRISE/UNLIMITED ACCOUNT?

You can easily register for a Salesforce Enterprise or Unlimited edition from Salesforce.com

WILL MY DATA BE STORED ON TAUROS APP SERVER?

No, the app does not store any data in its database. It will only store the access credentials that you saved in app UI. All your customer data stays on Copernica and Salesforce servers.

WHERE CAN I CHECK MY COPERNICA CONTACTS IN SALESFORCE INTERFACE?

Refer to section 9.3 of this manual.

IS THERE A USER MANUAL/QUICK GUIDE AVAILABLE FOR COPERNICA BACKOFFICE?

Yes, Copernica back office documentation can be accessed at:

<https://www.copernica.com/en/support/help-documentation>

CAN I USE THE APP IN TEST MODE?

No, there is no test mode as such. If used with correct configurations it will export transfer your data between the 2 platforms.

IS THERE A DEMO-SETUP AVAILABLE WHERE I CAN SEE THE APP IN ACTION?

No, both Copernica and Salesforce are cloud based platforms and are very strict about unauthorised access so we could not establish an open-to-all demo setup for this app.

11. CONTACT

To request a subscription to the app you can contact info@taurosmedia.com and you will get a call back as soon as possible.

For any support related queries write to satya@taurosmedia.com.

Support will only be provided in English unless requested otherwise.