



SF CRM in Journey Builder

with Marketing Cloud Connect



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Salesforce Data & Journey Builder






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Salesforce CRM in Journey Builder

Salesforce Data Entry










 Define Entry Source

New Entry Sources

 <p>Salesforce Community Welcome</p> <p>Use this event to power a Welcome Journey when new members get added.</p> <p>CommunityCloudIntegration Last Modified: 12/06/2021 7:06 pm</p>	 <p>Salesforce Campaign</p> <p>Use this event to power a Journey based on your Salesforce Campaigns.</p> <p>SFCCampaignIntegration Last Modified: 12/06/2021 7:06 pm</p>	 <p>Salesforce Data</p> <p>Use this event to power a Journey based on your Salesforce data.</p> <p>SalesforceDataIntegration Last Modified: 12/06/2021 7:06 pm</p>
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Salesforce Activities

▼ Sales & Service Cloud

 <p>Account</p>	 <p>Campaign Member</p>	 <p>Case</p>
 <p>Contact</p>	 <p>Convert Lead</p>	 <p>Lead</p>
 <p>Object Activity</p>	 <p>Opportunity</p>	 <p>Task</p>

Thank you?

Let's Connect



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Journey Builder **Salesforce Data Entry**

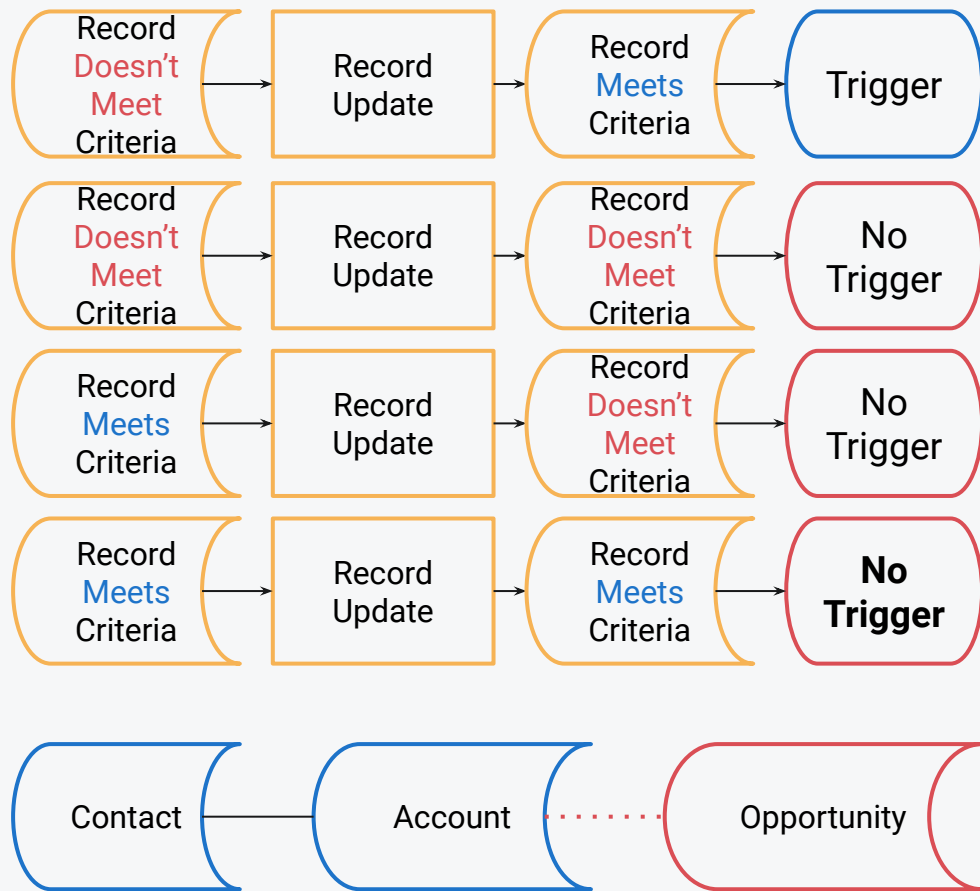


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Salesforce Data Entry 101

Salesforce Data Entry

- Real-time
- Access to all objects (not limited to MCC synchronized)
- Injects Contact, Lead, PersonAccount or User
- Triggers on Create or Update
- Filters (within one relationship)
- Customizable Journey data (within one relationship)



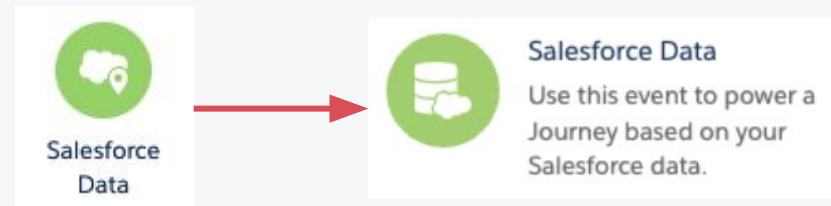
Salesforce Data Entry Pros & Cons

Pros

- Real-time
- Drag & Drop UI
- No impact on Automation Execution Limits
- Reusable

Cons

- SF CRM Data Model Knowledge
- Limited Entry Data scope
- Fragile against MCC issues



Salesforce Data Entry Gotchas

Gotchas

- Entry Data total length must be under 60,000 characters (payload limit)
- Values in DateTime fields are converted into UTC timezone
- Records not yet in MobileConnect will receive SMS only if their phone numbers are formatted as +[country code][phone number]
- Records with Email Opt Out or Email that fails List Detective (including NULL) won't enter the Journey (sic!)

Recommendations

- If you are using PersonAccounts, always use PersonContact ID as Who
- Always create detailed documentation of the Entry configuration
- Leverage Entry filters for test Journeys (f.e. Domain based)
- TEST (despite it being hard for SF Data Entry Journeys)
- Triple Check after SF ORG refresh/reconnection

Salesforce Data Bindings for Journey Data

The Why

- Salesforce Data Entry is creating the Data Extension automatically with special field naming convention of Object:Object:Field (f.e. Contact:Individual:Salutation)
- Standard Personalization Strings won't work for Journey Data
- Data Binding String lets you use Salesforce Data Entry data for personalization and decisioning

The What

- Data Bindings are special strings that allow you to leverage Salesforce Data Entry information in the Journey

The How

1. Add Object Activity
2. Go to Map Fields step
3. Select field with Text data type for mapping
4. Select field from Journey Data to see the data binding string on the left side



Salesforce Data Bindings for Journey Data

Object Activity

SELECT OBJECT SELECT ACTION MAP FIELDS SUMMARY

Select fields to update.

Sales and Service Cloud Field

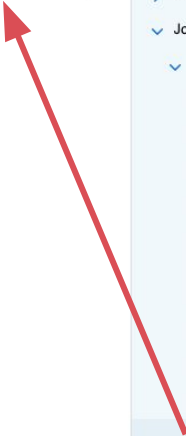
Description Text Area (long)

`{{Event."SalesforceObjdab824ab587d1dfdcf2xxxx63614a112"."Contact:Individual:Salutation"}}` Or

Marketing Cloud Attributes

Filter Attributes

- > Contact Data
- ▼ Journey Data
 - ▼ Entry: New Journey - September 8 2024 at 9:59 PM
 - Contact:AccountId (Text)
 - Contact:Birthdate (Date)
 - Contact:Id (Text)
 - Contact:Email (EmailAddress)
 - Contact:HasOptedOutOfEmail (Boolean)
 - Contact:LastName (Text)
 - Contact:Title (Text)
 - Contact:Individual:HasOptedOutSolicit (Boolean)
 - Contact:Individual:Id (Text)
 - Contact:Individual:HasOptedOutTracking (Boolean)
 - Contact:Individual:Salutation (Text)





Journey Builder

Other **Salesforce** Data Sources



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Synchronized Data Extensions in Journey Builder

Synchronized Data Extensions

- Copy of selected Objects with selected fields
- Synchronized even every 15 minutes
- Can be used in Decision Splits
- Can be used in Goals/Exit Criteria
- Can be used to create a standard Data Extension Entry segment through Automation
- Values in DateTime fields are converted into CST timezone

Pros

- Selectable through multiple levels of relationships*
- Flexible relationships and data transformations available with Query Activities

Cons

- You can't use those directly for Entry
- *You can't control the Data Designer relationships between objects
- Fragile against MCC issues
- Not real-time

Salesforce Data through API in Journey Builder

API

- Custom REST API call
- Can target:
 - API Entry Event
 - Wait Until Event
 - Data Extension
- Custom triggering moment (f.e. beforeUpdate vs afterUpdate)
- Custom payload driven by any logic (and even external data)

Pros

- Nearly unlimited flexibility of
 - Trigger
 - Payload
 - Target
- Bulk API for big volumes

Cons

- Much more technical
- Eats up API Calls limit



Salesforce AMPScript Functions



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Salesforce AMPScript functions

AMPScript Functions

- CreateSalesforceObject
 - Standard and custom objects
 - Returns created object ID
- UpdateSingleSalesforceObject
 - Triggers record-locking
 - Returns update status (boolean)
- RetrieveSalesforceObjects
 - Returns up to 1000 rows (as of Winter 2025 release)

Considerations

- No licence impact (part of MCC)
- Significant performance impact
- Supports objects not synchronized through MCC
- Can leverage Data Bindings
- Can access special objects - f.e. History on Objects with Field History Tracking enabled



Journey Builder Salesforce Activities

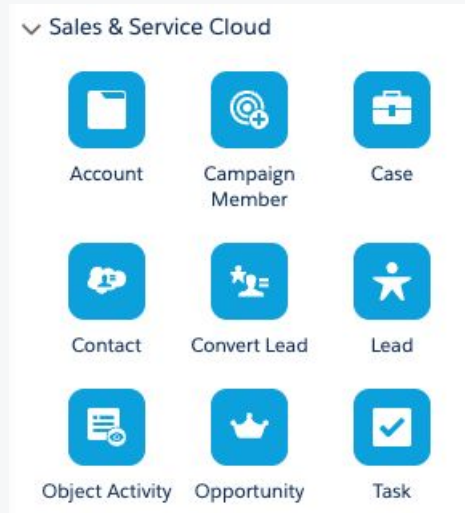


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Salesforce Activities 101

Salesforce Activities

- Create or Update standard/custom Object in Salesforce CRM
- Update record from the Journey or lookup a specific related record
- Push static and dynamic data configured in the activity
- Return created/updated Object ID
- Asynchronous
- Subject to Apex Governor Limits



Recommendations

- Use SF CRM IDs as Contact Keys
- Pass only fields that require update
- Avoid high-volume updates on objects with many related records
- Don't use it for bulk updates

Salesforce Activity Bindings for Journey Builder

☒ Task

SELECT ACTION

MAP FIELDS

SUMMARY

Select fields to update.

Sales and Service Cloud Field

Subject Combobox

{{Interaction.SALESCLLOUDACTIVITY-1.SalesforceObjectID}}

Or

Marketing Cloud Attributes

Filter Attributes

> Contact Data

> Journey Data

> Entry: New Journey - September 8 2024 at 9.59 PM

> Task: Create Task Activity

SalesforceObjectID (Text)

Salesforce Data & Journey Builder Sum Up



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Salesforce CRM in Journey Builder

Sum Up

- Full range from real-time drag & drop to flexible custom code (SF Data Entry, Synced DEs, API)
- Bi-directional with AMPScript and Salesforce Activities
- Workaround for newly enforced SFMC licence limits
- Best option depends on the volume - might require switching to Bulk API
- Fragile and hard to test

Additional Resources

- Salesforce Data Entry
 - Cam Roberts:
<https://www.youtube.com/watch?v=U3sBw4qAq1U>
 - Tim Ziter:
<https://handsonsfmc.com/how-to-create-a-salesforce-data-entry-event/>
- Salesforce Journey Activities:
 - Cam Roberts:
<https://www.youtube.com/watch?v=WyyzA2s508E>
 - Tim Ziter:
<https://handsonsfmc.com/how-to-update-salesforce-object-fields-in-bulk-with-journey-builder/>
- Data Bindings
 - Rafał Wolsztyniak:
<https://sfmc.quest/data-binding-with-the-update-contact-activity/>
- Journey Builder Bootcamp
 - Fundamentals:
https://www.youtube.com/watch?v=EoYBiAoZ8ao&list=PL_o00w2Z5LYHeVbEQQpIRfrrgkDsJe48Z
 - Hands On:
https://www.youtube.com/watch?v=eazrV8_cbBE&list=PL_o0w2Z5LYGK0SNcuAVLtazWWecWRMoe

Q&A

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