

How Marketing Cloud and Sales Cloud work together

Sales Cloud and Marketing Cloud work together via Marketing Cloud Connect, which is an installed package in Salesforce. This connector eliminates what used to be an API integration, and does not consume the Salesforce API limits.

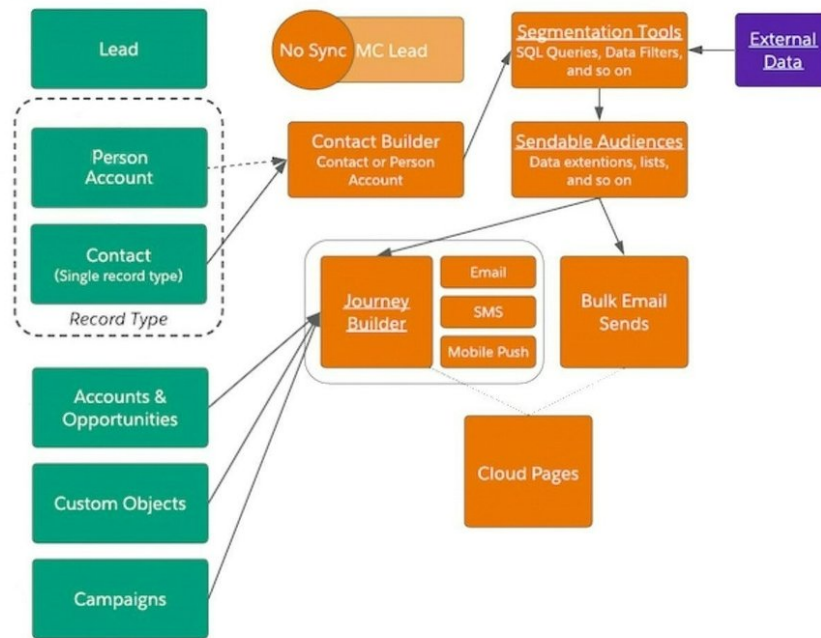
Sales Cloud → Marketing Cloud

1. Every single Object in Salesforce can sync one way to Marketing Cloud. The object and fields that are synced to Marketing Cloud are chosen in Contact Builder. Both standard and custom fields can be chosen to sync. This is a one-directional sync that occurs as often as every 15 minutes (you can choose to make it slower). This synchronization lands data in Synchronized Data Extensions.
 - a. NOTE: Data Extensions are just Relational Tables
2. Reports in Sales Cloud can be sent to Marketing Cloud in 2 ways:
 - a. Reports can be Imported into Marketing Cloud via an Import Activity. This eliminates the need to export an .csv from Salesforce only to import that .csv into Marketing Cloud. The import pulls directly from Sales Cloud into a Marketing Cloud Data Extension.
 - b. Reports can be Sent To in Marketing Cloud. This automates the Import Activity and generates an automatic import at send time.
3. Campaigns in Sales Cloud can be sent to Marketing Cloud in several ways:
 - a. Campaigns can be Imported or Sent To just like Reports.
 - b. New Campaign Members can be injected directly into a Journey in Marketing Cloud
 - i. NOTE: This automatically generates a Flow and Apex handlers in Sales Cloud.
 - c. Campaign Members can be queried from the previously referenced Synchronized Data Extension. The result of this query can be used in Journeys or one-off sends.

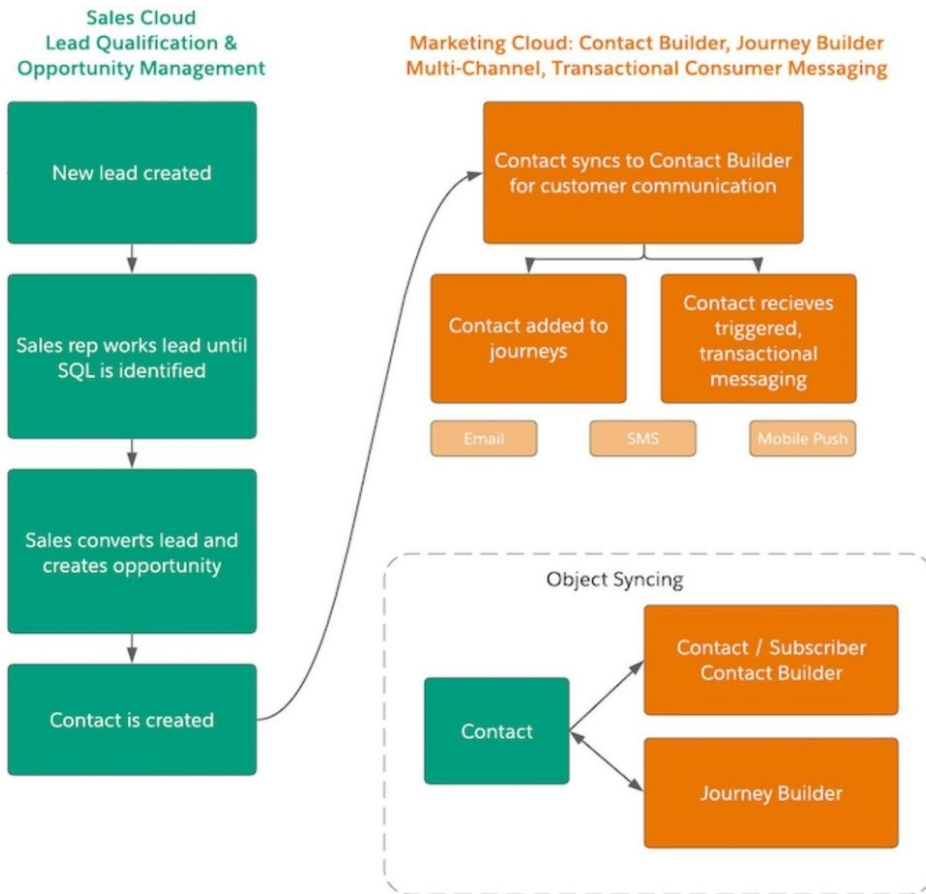
Understand the Flow of Data

Sales Cloud or Consumer Goods
Cloud Lead Qualification &
Opportunity Management

Marketing Cloud: Contact Builder, Journey Builder
Multi-Channel, Transactional Consumer Messaging



Single Contact Record Type



Marketing Cloud → Sales Cloud

- Email Sends, Open, and Click data is sent back to Sales Cloud from Marketing Cloud if emails are sent via 2 methods:
 - Journeys
 - Salesforce Sends (the data extension being sent to is in the Salesforce Send folder)
- Any record in Sales Cloud can be created or updated with the use of AMPScript. For example, form handlers in Marketing Cloud can use AMPScript to create new Leads or Contacts, and update fields on existing Leads or Contacts. The sky is the limit as to what can be updated with code.
- Any record in Sales Cloud can be created or updated with the use of Record Activities in Journey Builder. This is the declarative method for updating records in Salesforce that avoid the use of AMPScript.

