Feature retired in Kentico 11

Salesforce integration in Kentico 11 uses Salesforce SOAP API version 23.0, which is deprecated and will be retired in 2023. For more information, see the Salesforce Platform API Versions 21.0 through 30.0 Retirement article.

If you wish to use Salesforce integration, you need to upgrade to Kentico Xperience 13.

The following example demonstrates how the system replicates a sample contact into a Salesforce lead.

Important: The sites must be authorized for Salesforce access.

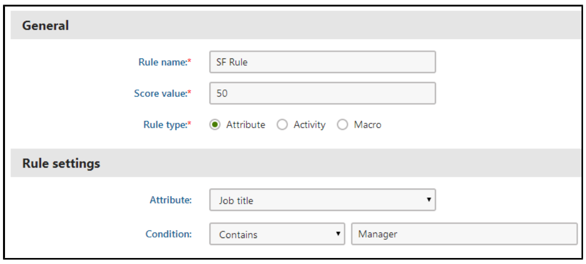
Creating the replication score

First you need to define a score to determine which contacts the system will replicate.

1. Open the **Scoring** application.
2. Click **New score**.
3. Type *SF Score* as the score's **Display name** and click **Save**.
4. Switch to the **Rules** tab of the new score and click **New rule**.
5. Set the following properties for the rule:

    - **Rule name**: SF Rule
    - **Score value**: 50
    - **Rule type**: Attribute

    - **Attribute**: Job title
    - **Condition**: *Contains* - Manager



6. Click **Save**.

This *SF Score* grants 50 points to all contacts who have the word *Manager* in their job title.

Creating a new contact

Now you need to create a contact that fulfills the rule of the previously defined score. On live deployments, the system automatically creates and maintains contacts for the website visitors, but you can add a contact manually to try out the Salesforce replication.

1. Open the **Contact management** application on the **Contacts** tab.
2. Click **New contact** and fill in the following attributes:

    - **First name**: Kenny
    - **Last name**: Weathers

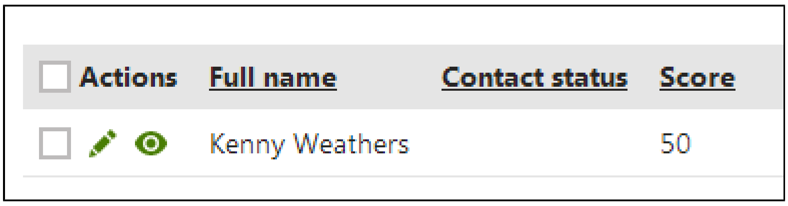
    - **Job title**: OMF Manager

    - **Address1**: N 14th St
    - **City**: Cottonwood

- **Country:** USA
- **State**: Arizona
- **Business phone**: 1-575-123-456
- **Email address**: kenny@cottonwood.local

3. Click **Save**.
4. Go back to the **Scoring** application.
5. **Edit** ( ) the *SF score*.

On the **Contacts** tab, you can see that your new contact has 50 points in the replication score. The system awarded the points because the contact contains the word *Manager* in the **Job title** field.



Replicating the contact to Salesforce

You now need to configure the Salesforce replication settings.

1. Go to **Settings -> Integration -> Salesforce**.
2. Make sure that the field mapping settings match your requirements.
3. Specify the replication score requirements through the following settings:

   - **Score**: Select your replication score (*SF Score*)
   - **Minimum number of points for replication**: 50

4. **Save** the settings.

You now have a contact that fulfills the replication criteria. By default, the system replicates contacts once every hour. You can however run the replication manually at any time.

Starting the replication process manually

1. Open the **Scheduled tasks** application.
2. Select *(global)* in the **Site** selector.
3. Click **Execute** ( ) next to the **Salesforce replication** task.

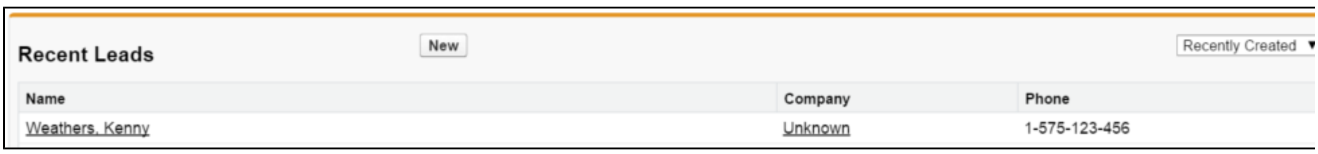
Result

After a couple of minutes at most, your contact should appear as a lead in Salesforce.

To check whether the replication was successful:

1. Log in to Salesforce using your account.
2. Navigate to the **Leads** tab.
3. Select **Recently Created** in the drop-down list of the **Recent Leads** section.

You should see the lead replicated from the Kentico contact. You can now work with the lead as with any other Salesforce lead.



You can also check the replication status of the contact in Kentico:

1. Open the **Contact management** application on the Contacts tab.
2. Click **Advanced search**.
3. Select **Replicated into Salesforce leads** in the second **Search** options.
4. Click **Search**.

The list now shows only contacts that have been successfully replicated to Salesforce.