



Salesforce Basic
Integration
User Guide

Contents

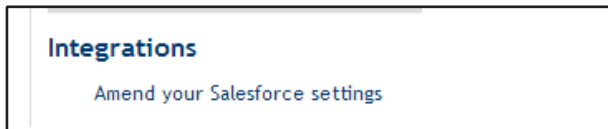
Introduction	3
Select your settings	4
Reporting page	5

Introduction

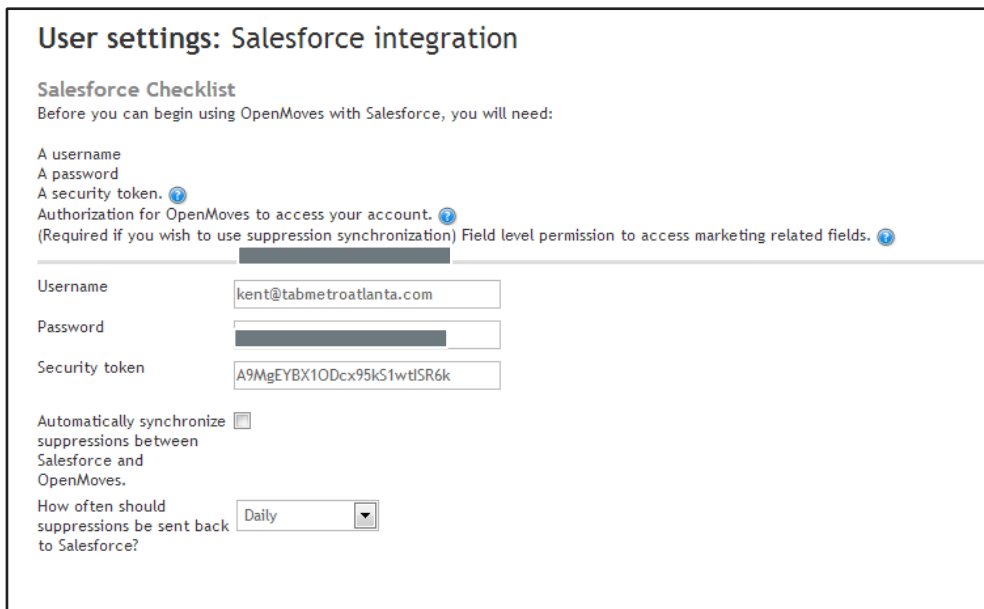
Salesforce Basic

Salesforce Basic integration is free within all OM3 email marketing accounts. We also offer an Salesforce Advanced deep integration that is available for an additional fee. To enable this Salesforce Basic integration you must have a Salesforce license for Salesforce Professional, Enterprise, Unlimited, and Developer. It usually is not available for Group level users. It may be available for users of their nonprofit/charity edition.

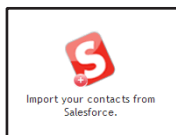
You'll need a Salesforce username/password and also a security token. You will need to be the email account owner (and not a managed user). Go to **My Account** and click to **Amend your Salesforce settings**.



The system will then validate the settings to ensure that you aren't entering the wrong details.

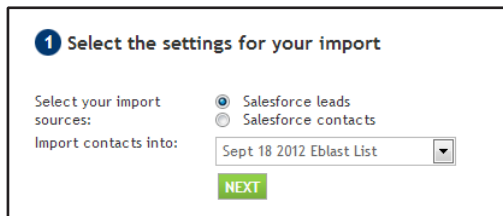
A screenshot of a form titled "User settings: Salesforce integration". It includes a "Salesforce Checklist" section with instructions: "Before you can begin using OpenMoves with Salesforce, you will need: A username, A password, A security token, Authorization for OpenMoves to access your account, and Field level permission to access marketing related fields." Below this are input fields for "Username" (kent@tabmetroatlanta.com), "Password" (blacked out), and "Security token" (A9MgEYBX1ODcx95kS1wtISR6k). There are also checkboxes for "Automatically synchronize suppressions between Salesforce and OpenMoves" and a dropdown menu for "How often should suppressions be sent back to Salesforce?" set to "Daily".

Next time you go to import contacts into your address books, you will be given an option to **Import from Salesforce**.



Select your settings

Clicking on this takes you to the settings for the import. You can import either leads or contacts from Salesforce. Accounts, Opportunity contacts, etc. are currently not supported.



1 Select the settings for your import

Select your import sources:

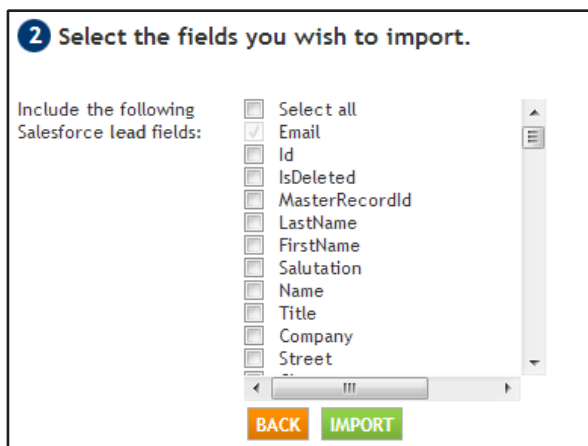
Salesforce leads
 Salesforce contacts

Import contacts into:

NEXT

If you click on the dropdown you can select the address book you would like to import the contacts into.

Once you've clicked on import you will be taken to the standard datafield mapping screen. The only difference being that you can choose how often you bring in the contacts from Salesforce into the email marketing system.



2 Select the fields you wish to import.

Include the following Salesforce lead fields:


- Select all
- Email
- Id
- IsDeleted
- MasterRecordId
- LastName
- FirstName
- Salutation
- Name
- Title
- Company
- Street

BACK **IMPORT**

You can also specify that suppressions are synchronized between Salesforce and our system.

Reporting page

Finally, once a campaign has been sent, you can push the activities back into Salesforce via a button on the reporting page. This will create an activity record in Salesforce against each contact that was sent to, including the personalized campaign version that they received, and a summary of whether they clicked, opened, etc.


 **Sam [redacted]** created this lead.
Yesterday at 15:42 · [Comment](#) · [Like](#)

[Back to List: Leads](#)

[Open Activities \(0\)](#) | [Activity History \(1\)](#) | [Campaign History \(0\)](#) | [HTML Email Status \(0\)](#)

Lead Detail

[Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

Lead Owner	 Sam [redacted] [Change]	Phone	
Name	Sam [redacted]	Mobile	
Company	[redacted]	Fax	
Title		Email	sam [redacted]@yahoo.com
Lead Source		Website	
Industry		Lead Status	Open - Not Contacted
Annual Revenue		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Sam [redacted] 15/09/2011 15:42	Last Modified By	Sam [redacted] 15/09/2011 15:42
Description			

[Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplicates](#)

Open Activities

[New Task](#) [New Event](#) [New Meeting Request](#) [Open Activities Help](#) ?

No records to display

Activity History

[Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity History Help](#) ?

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: @FIRSTNAME@ - some news from [redacted] Web Tech, Manchester [(do not remove) 197641099-844182]	✓	15/09/2011	Sam [redacted]	15/09/2011 16:13

Campaign History

[Add to Campaign](#) [Campaign History Help](#) ?

No records to display

HTML Email Status

[Send An Email](#) [HTML Email Status Help](#) ?