How To:

Review of Salesforce Integration Settings

Learn how to set up your Salesforce account and sync your data between Salesforce and SharpSpring to optimize your sales efforts.

You'll Learn:
- How to set up a Salesforce integration.
- Functionalities of the Salesforce integration.
- What types of data pass between the two systems.
- Other tips to remember when synced with Salesforce

Why It's Helpful:
- Minimize sales team disruption.
- Maintain data integrity across platforms.
- Automate communication while managing opportunities outside of the application.

Watch And Learn:
This example was part of a SpringBoard Live how-to session. View on-demand video.

The Situation
Having captured customer data in a .csv file, the vet's office uploads this data to SharpSpring so that they can use it to better serve their customers and organize their database.

Through SharpSpring, the vet can set up automated appointment reminders, track the progress of its clients' pets' recovery, send out notifications of new grooming services, or even send out targeted flea prevention and treatment medications to specific clients who could use them.

How To Do It:
Ensure your Salesforce account is configured to communicate properly with SharpSpring.

In order to do this, you must first ensure that the password to your admin account is set to "never expire."

1. Log in to Salesforce and click Setup. Once you've reached the Setup page, select Password Policies under the Security Controls options.

2. Where it says "user passwords expire in," set it to "never expire."
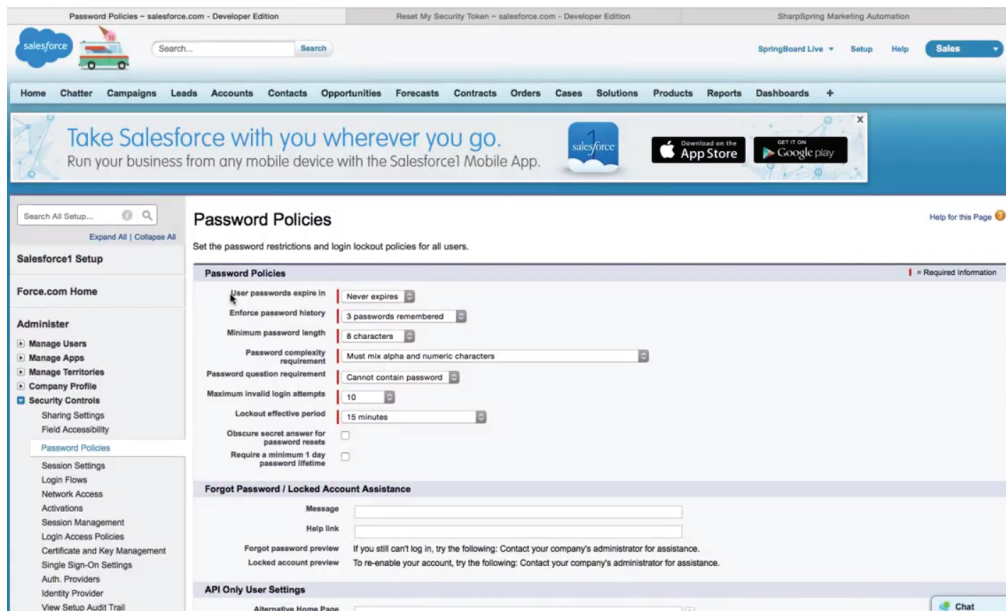
SharpTip 1: *A security token is tied to a specific user account and password. If it expires, you will need to reset your token and reconfigure the integration between the two platforms.*

To obtain the token to connect the two platforms, click on your username at the top right of the page and select My Settings. On the far left of the page, under the Personal options, select Reset My Security Token.

4. Once you've reset it, you'll receive an email with your new token. You can then go back in to SharpSpring and connect your two systems.

Sync your data with Salesforce.

1. In the gray profile on the far left of the page, click on Settings. In your left panel menu, scroll down to Third Party Settings and click on Salesforce. Next to "Connection," you will see a gray button that indicates you are not connected.
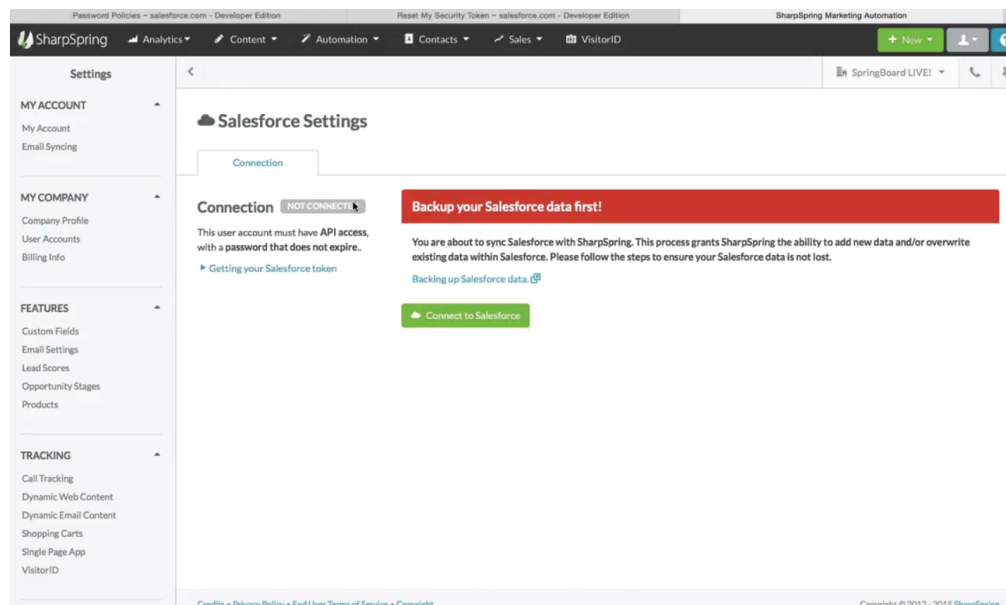
Here you will find a few bits of information. You can watch a video on how to get your token, and you will also see our disclaimer, which advises you to back up your data on a regular basis. This gives SharpSpring the ability to add new data and overwrite existing data within Salesforce. You will also find a link to an article that explains how to back up your data.

2. Click the Connect to Salesforce button, enter your username and password, add in your user token, and type "SYNC."
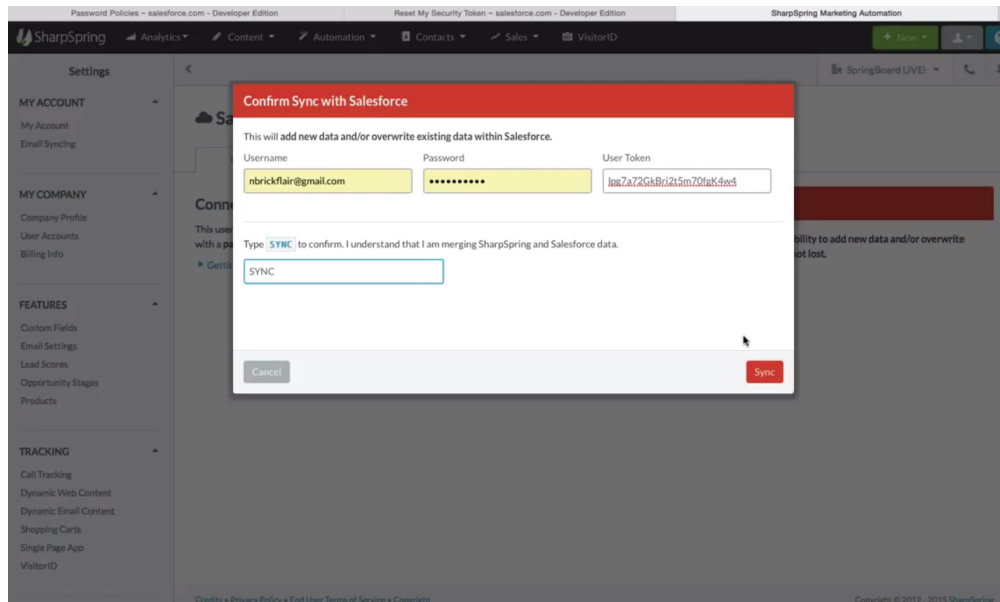
3. Once the connection is complete, a green button that says "Enabled" displays next to Connection. You can end this connection by clicking on the Disable Syncing button on the right side of the page.
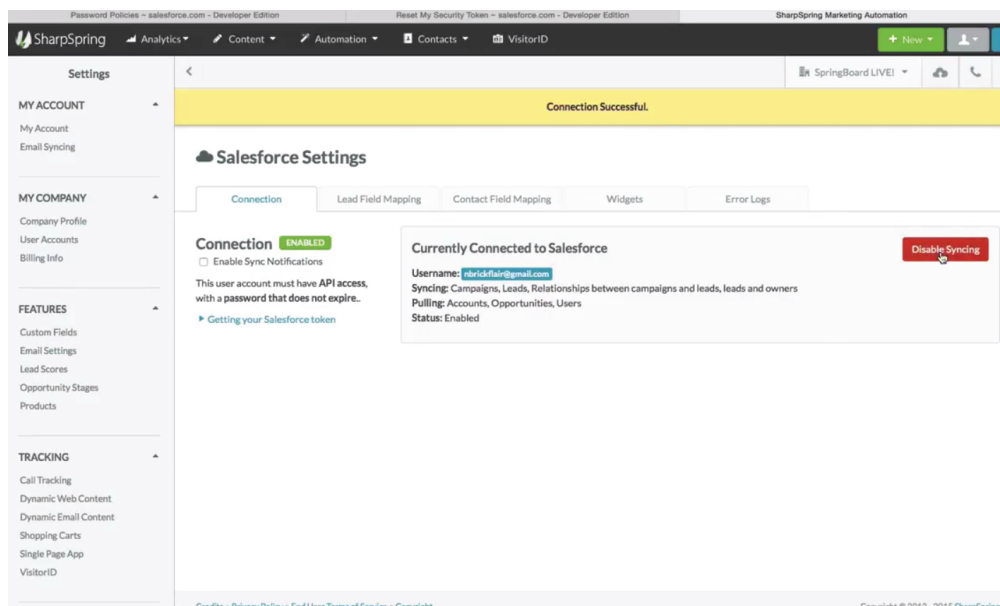
SharpTip 3: **There is an option called Enable Sync Notifications, which opens up sync notifications in the SharpSpring platform and displays a popup notification at the top of the page whenever any syncs are occurring.**

Map over your lead fields and contact fields.
This is very similar to form mapping or importing data into the platform through our import tool.

1. Click on the Lead Field Mappings tab. You will see the CRM fields, the fields you want to assign those to within SharpSpring, and a column with options for how to handle conflicting data.

2. Scroll through to change any of these that are not matching to the correct field. If you have any custom fields, you'll see all of those fields in the second column so you can select the appropriate field in SharpSpring.

SharpTip 4: **Data conflict handling allows you to choose a primary platform if you have information that differs between the two platforms. To select a master platform, choose between "Always use SharpSpring value" and "Always use CRM value." If there is a data conflict, the master platform will push its data into the other platform. Unless you select a primary platform, the system defaults to whichever platform has been most recently updated.**

SharpTip 5: Salesforce has different mapping structures for lead field and contact field mapping. You can therefore map them independently or you can choose not to map over your contacts (and only map over your leads).

3. Click on the Widgets tab to see the widgets that are available. You can map over a lead score widget, which gives you a visual representation of the lead score from SharpSpring. The widget requires that you map over the lead score as a number in Salesforce, and it gives you a step-by-step once you create the field mapping. You can also create a hyperlink widget which allows to link from Salesforce into SharpSpring.
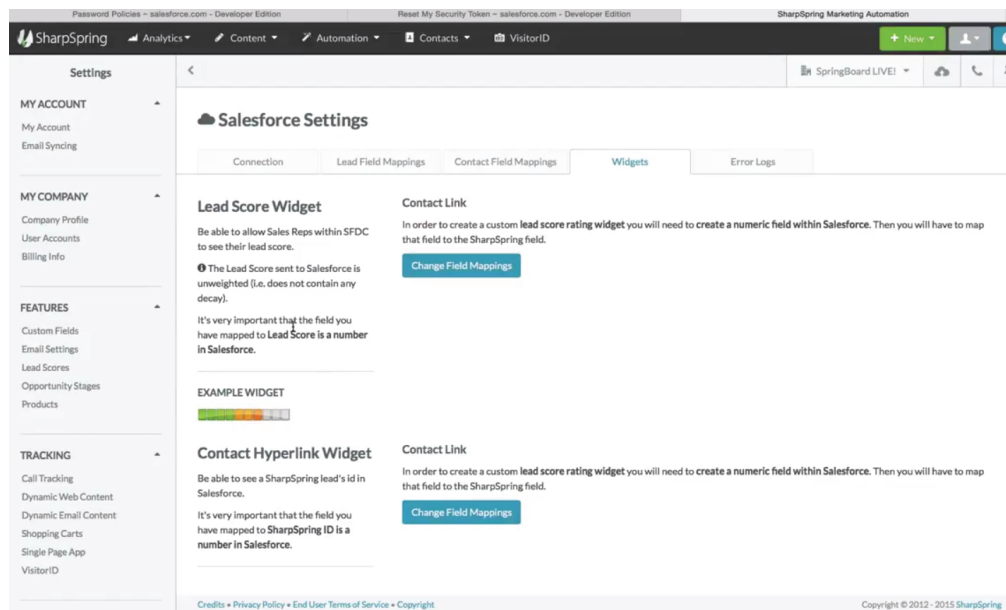
4. Click on the Error Logs tab to see if there are any sync errors.
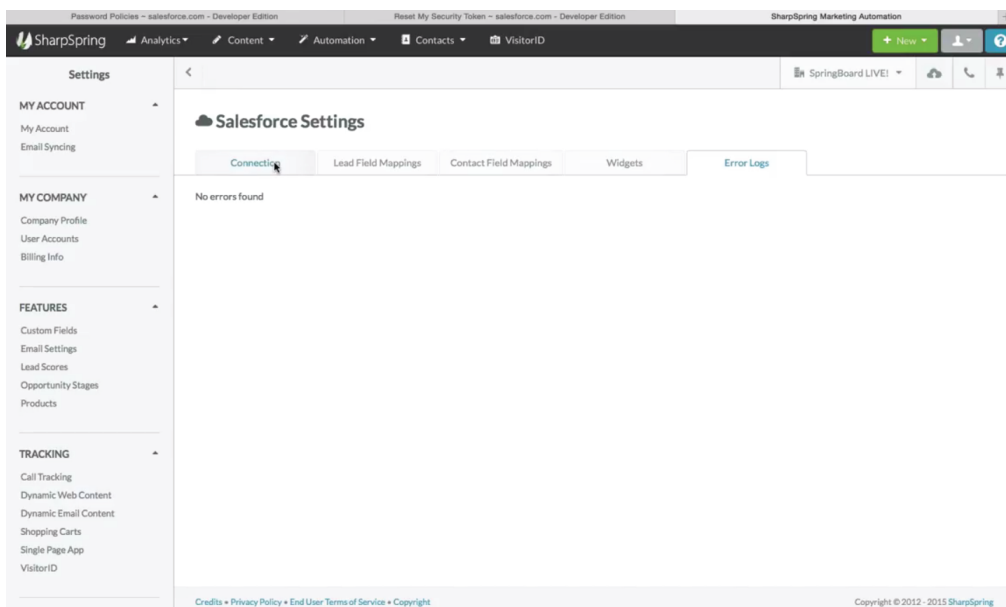
Sync your data between the two platforms.
In this example, we perform a two-way sync as follows:

1. From Salesforce, sync over Accounts, Campaigns, Leads, Lead and Contact Campaign Attribution, Contacts, and Custom Fields.

2. From SharpSpring, sync over Opportunities, Notes, Lead Score and Events (form submissions, page visits, emails and email opens).

SharpTip 6: *You'll notice that in the top menu, we do not have the Sales tab. The reason for this is the expectation that if you connect the two systems, you would manage your sales pipeline in Salesforce rather than in SharpSpring. The information is still recorded in SharpSpring and you are able to track the ROI in the Analytics tab and take advantage of the contacts available through the Contact Manager automation for bulk email sends and once-off email sends.*

SharpTip 7: *In the top right corner, you will also see a new menu icon that looks like a cloud with an arrow. Click that icon and select Change Settings for a shortcut to get back to the Salesforce settings.*