HCLSoftware

Unica Link V12.1.8 Salesforce Connector User Guide

Contents

Chapter 1. Introduction to Salesforce

Salesforce (CRM) saves and updates details about users.

Salesforce supports two operations, 'Create' and 'Update', as well as two objects 'Lead' and 'Contact'. Also supported are two objects, 'Lead' and 'Contact'.

Chapter 2. Prerequisites

In order to use Salesforce, you must first obtain a Salesforce account.

After your account is created, you will receive these details:

- Username
- Password
- Client ID/Consumer Key
- Client Secret/Consumer Secret
- Security Token

These details are further user to generate an instance URL and access token.

Chapter 3. Configuration

If you want to use a Salesforce connector, contact a Unica administrator. The administrator will configure a connection for you.

To configure a connection, the Unica administrator must have a few connection properties. The connection properties are listed in the following table:

Connection Property	Description
`Instance URL`	The domain on which Salesforce REST service resides.
`Access Token`	The authorization token granting access to a particular REST endpoint. This field will auto-populate as it is read only.
`Version`	Salesforce REST API version.
`Access Token Expiry Action`	The action to be taken when the access token expires.
`Token URL`	The URL used to obtain the authorization token. This is an advanced property.
`Username`	Username for the authentication of the REST connection. This field will be enabled if the Access Token Expiry Action is set to `Password`.
`Password`	Password for the authentication of the REST connection This field will be enabled if the `Access Token Expiry Action` is set to `Password`.
`Consumer Key`	The consumer key for the salesforce connector. Used by the consumer to identify itself to the Service Provider. This field will be enabled if the `Access Token Expiry Action` is set to either `Password` or `Refresh Token`.
`Consumer Secret`	The consumer secret for the salesforce connector. Establishes ownership of the Consumer Key. This field will be enabled if the `Access Token Expiry Action` is set to either `Password` or `Refresh Token`.
`Security Token`	Optional token appended to the Password. This will be enabled if the `Access Token Expiry Action` is set to `Password`.
`Refresh Token`	A token that is used to obtain a new access token. This field will be enabled if the chosen `Access Token Expiry Action` is set to `Refresh Token`.

Connection Property	Description
`Issuer`	The consumer key used by the consumer to identify itself to the service provider. This field will be enabled if the `Access Token Expiry Action` is set to the `JWT Token`.
`Audience`	Identifies the authorization server as an intended audience. Use the authorization server URL as the audience value, such as `https://login.salesforce.com`, `https://test.salesforce.com`, or `https://site.force.com/customers` when implementing an experience cloud site. This field will be enabled if the `Access Token Expiry Action` is set to the `JWT Token`.
`Subject`	Contains the username by which you connect to Salesforce. This field will be enabled if the `Access Token Expiry Action` is the `JWT Token`.
`JWT Token Expiry`	Expiry time in days for JWT Token. This field will be enabled if the `Access Token Expiry Action` is the `JWT Token`.
`Generate JWT Token`	Button to generate the JWT token. This field will be enabled if the the `Access Token Expiry Action` is the `JWT Token`.
`JWT token`	Token to generate the Access Token. This field will be enabled if the `Access Token Expiry Action` is the `JWT Token`.

Generate a Refresh Token

1. Go to the authorization URL, replace the following placeholders with your details:

   ```
   https://<YOUR_INSTANCE>.salesforce.com/services/oauth2/authorize?
   response_type=code&client_id=<CONSUMER_KEY>&redirect_uri=<REDIRECT_URI>&scope=refresh_token
   ```

   where:

`<YOUR_INSTANCE>`	Your Salesforce instance.
`<CONSUMER_KEY>`	The consumer key of the Salesforce connected app.
`<REDIRECT_URI>`	The redirect URI configured in your Salesforce connected app account.

2. Use either curl or Postman or link service UI to generate the access token by utilizing the authorization code received from the preceding step. Replace the following placeholders with your details:

A reference for curl command:

```
curl -X POST https://<YOUR_INSTANCE>.salesforce.com/services/oauth2/token?
grant_type=authorization_code&client_id=<CONSUMER_KEY>&client_secret=<CONSUMER_SECRET>&redirect_uri=https://
login.salesforce.com/&code=<CODE>
```

Where:

`<YOUR_INSTANCE>`	Your Salesforce instance.
`<CONSUMER_KEY>`	The consumer key of the Salesforce connected app.
`<CONSUMER_SECRET>`	The consumer secret of the Salesforce connected app (keep this confidential).
`<CODE>`	The authorization code received from the preceding step.

After these details are entered, click **Fetch** to fetch the available versions from Salesforce.

Chapter 4. Configure a Touchpoint or Process Box

When you configure a Salesforce CRM connector from a Touchpoint in Unica Journey or a Process box in Unica Campaign, you can see the following table:

Properties	Description
`Object Action`	The action you want to perform on Salesforce data: • `Create Object`: This option is selected if you want to create a new record in a Salesforce object. • `Update Object`: This option is selected if you want to update an existing record in a Salesforce object.
`Object Type`	The specific Salesforce object type you want to interact with. It provides a dropdown menu or list containing object types like `Lead`, `Contact`, `Opportunity`, etc.

Chapter 5. Test connection

After you define a connection, press the **Test** button to test the connection.

Pressing the **Test** button invokes a query operation on Salesforce to ensure that the server can be reached and that the connection parameters are valid.

Chapter 6. Event tracking

There are no events in Salesforce.

The following is an example of a typical response from Salesforce showing, **status**, **errormessage**, **timestamp**, and **identity fields**.

If `contact_action` is **Create - Error**

```
error,Required fields are missing: [LastName],2021-07-22T00:42:25,<Identity Fields>
```

If `contact_action` is **Update- Success**

```
true,,2021-07-22T00:47:47,<Identity Fields>
```

If `contact_action` is **Update- Error**

```
error,Key field: LastNameis not present in data,2021-07-22T02:54:59,<Identity Fields>
```