



Salsa & Salesforce

Part 2: Tips to a Successful Integration

Wednesday, August 26 - 1:00 PM ET

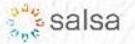
SPEAKERS



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How is Salesforce Integrated With Salsa?



Install Salsa Engage in Salesforce



Integrate Salsa with Salesforce



Map Standard and Custom Fields

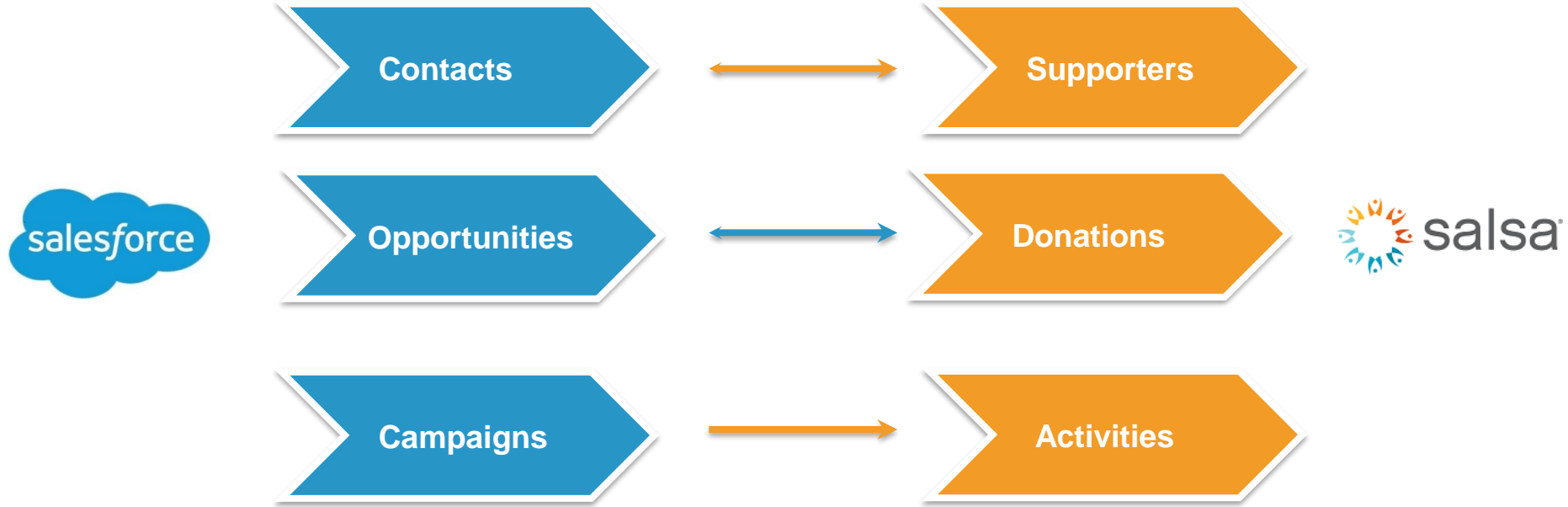


Synchronize data into Standard and Custom Fields

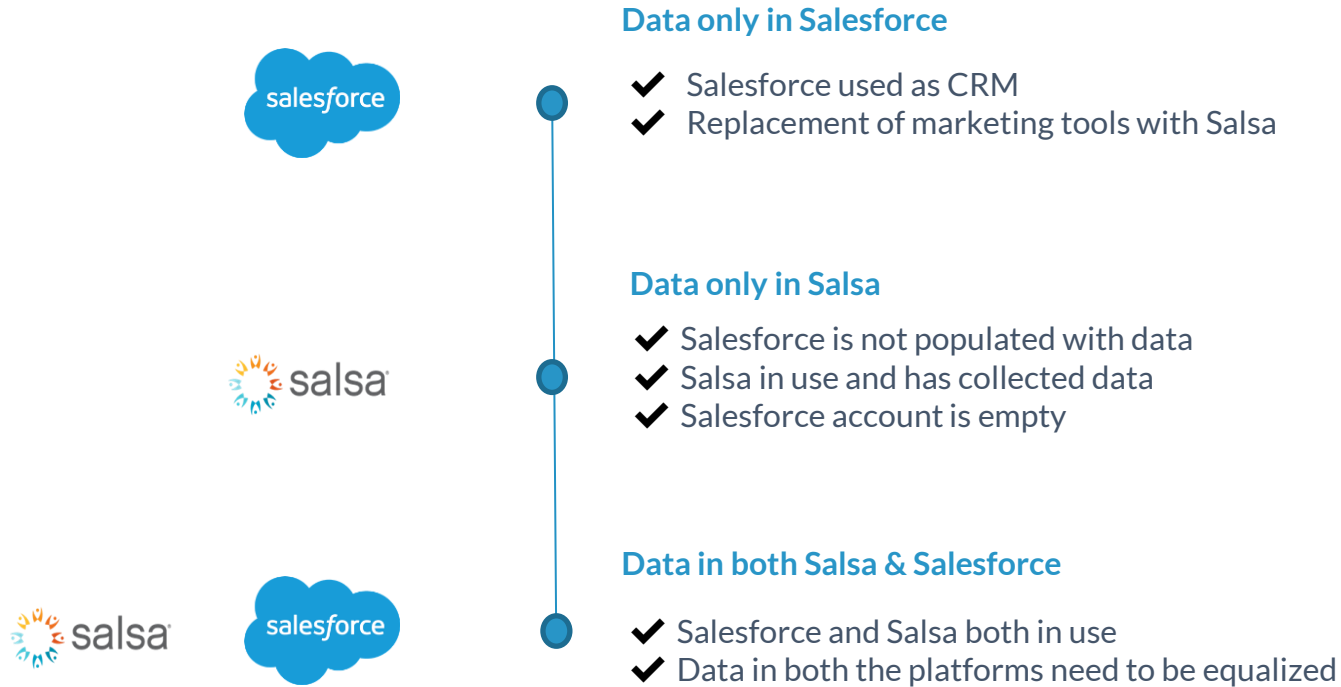


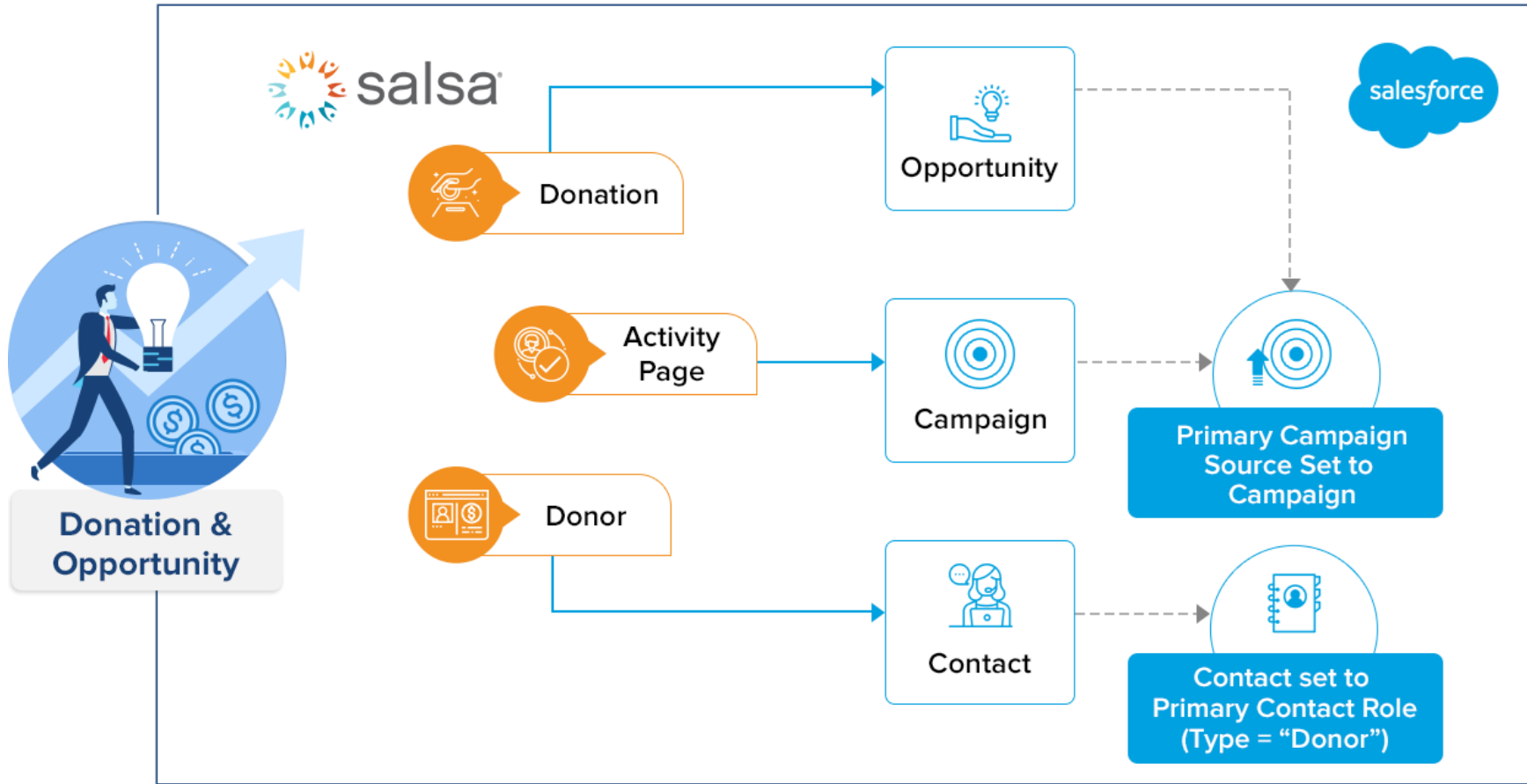
Troubleshooting

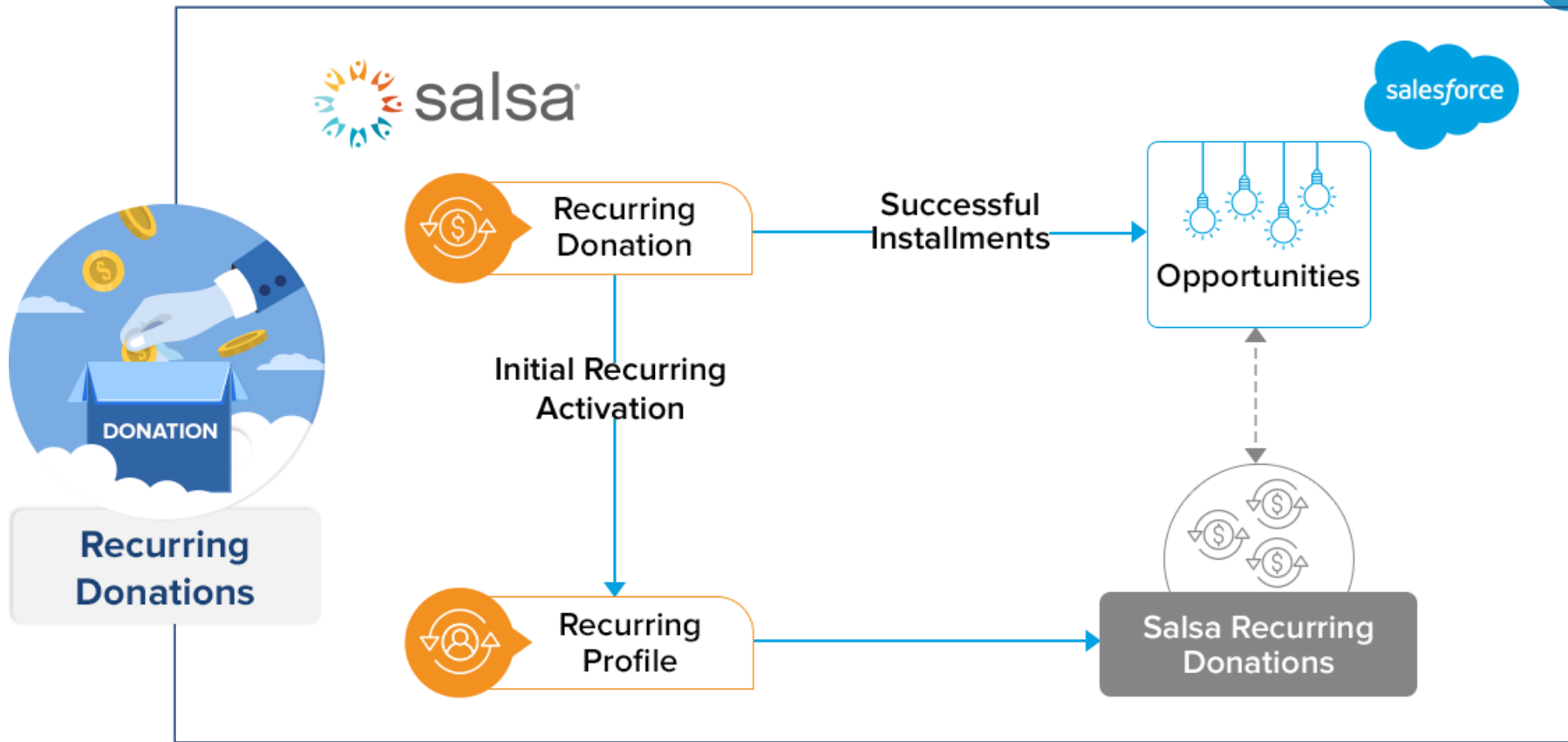
Field Mapping/ Salesforce to Salsa

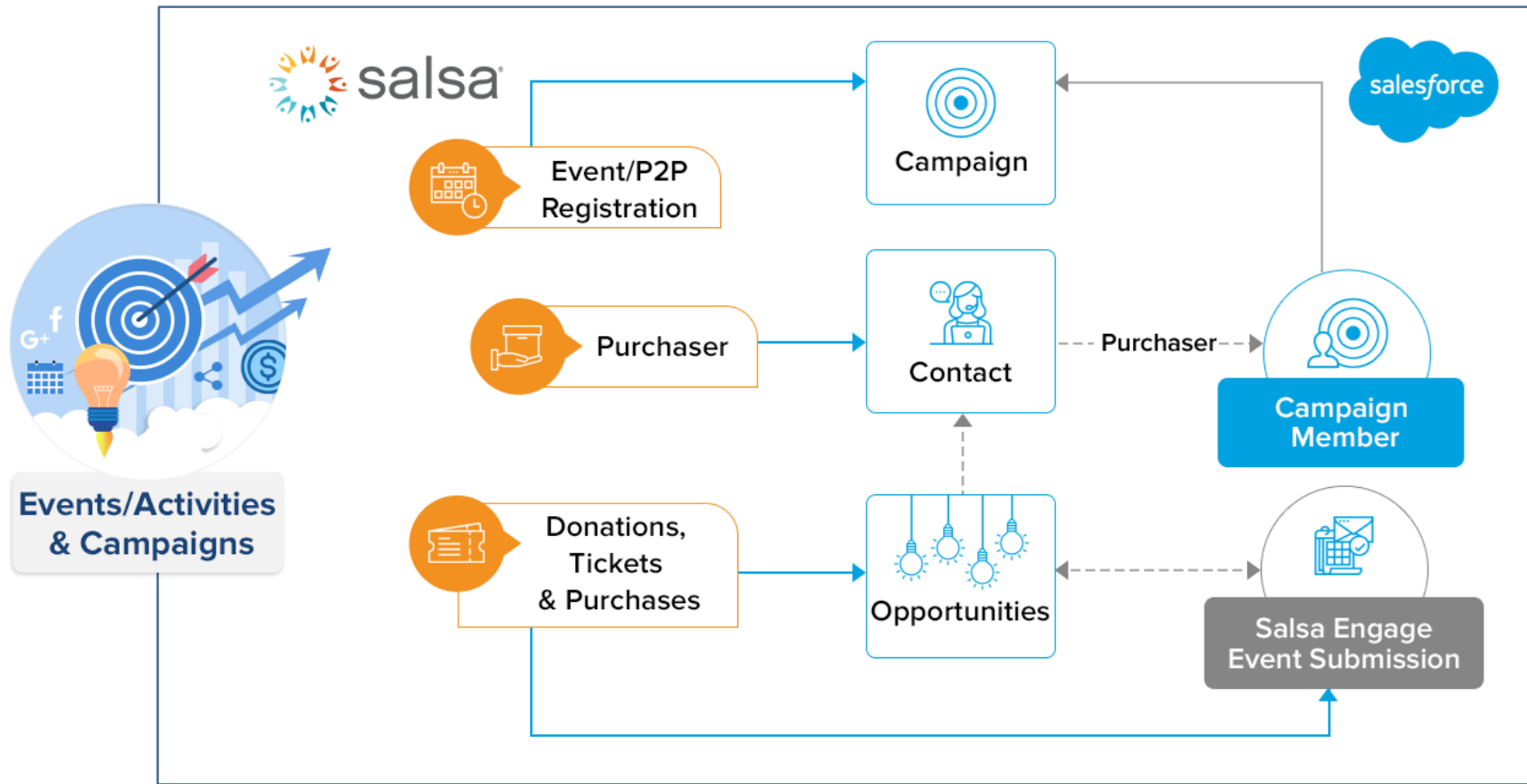


Data Synchronization Scenarios



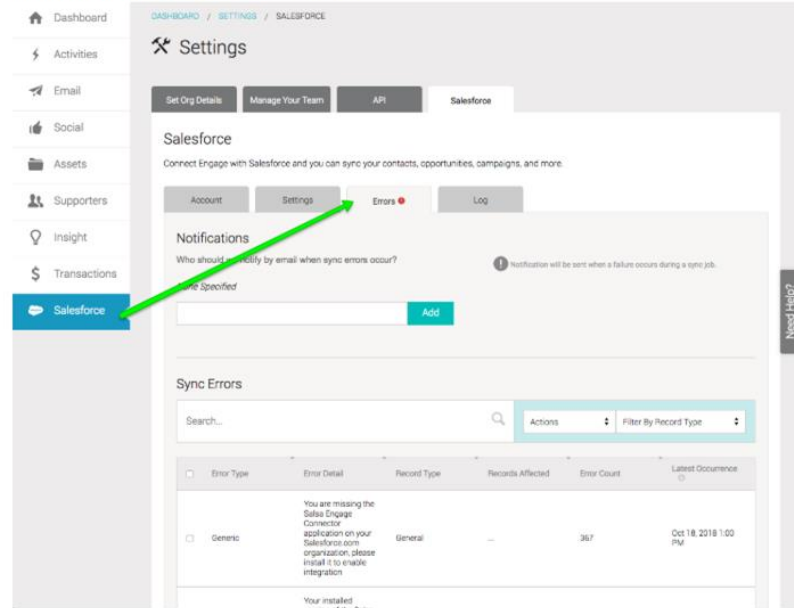






Troubleshooting

1. Select the **Salesforce** menu on the left.
2. Select the **Errors** tab for more information.



The screenshot shows the Salesforce integration settings page. The left sidebar has the 'Salesforce' menu item highlighted in blue. A green arrow points from this menu item to the 'Errors' tab in the 'Salesforce' sub-section. The 'Errors' tab is also highlighted in blue. Below the tabs, there is a 'Notifications' section with a text input field and an 'Add' button. Below that is a 'Sync Errors' section with a search bar and a table of error records.

<input type="checkbox"/>	Error Type	Error Detail	Record Type	Records Affected	Error Count	Latest Occurrence
<input type="checkbox"/>	Generic	You are missing the Sales Engage Connector application on your Salesforce.com organization, please install it to enable integration	General	—	367	Oct 18, 2018 1:00 PM

Sync Error Notification

Possible Errors During Integration & Solutions

- Engage records not sent to Salesforce
 - ✓ Manually resolve the error in Engage
 - ✓ Resynchronize the records
- Data sent to wrong field
 - ✓ Standardization of values in the field is required in both Salsa and Engage
- Expected duplicacy error in Salsa/ Salesforce record not sent
 - ✓ Merge the duplicate records
 - ✓ Set contacts to 'Do not sync to Salsa Engage'
- 'Last Name' error in Engage
 - ✓ Disable the suffix and middle name field in contact field mapping in Engage

Contact Us

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