Pinpointe Salesforce.com Connector

Updated August, 2022

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Overview – Functionality

Pinpoint SalesforceSync is a Force.com application that allows you to maintain real-time synchronization between Salesforce.com contacts and Salesforce.com Campaign members, and a configured database in Pinpointe. Changes you make in salesforce.com will be synchronized to your Pinpointe account in real time so your data will remain in sync.

Campaign members in Pinpointe are 'tagged' with the campaign name - ie a List is created in Pinpointe and all Campaign members will be added to the List. The list name will be the Campaign name in Salesforce. Just like in Salesforce, any contact can be in multiple campaigns at the same time. In Pinpointe a contact will be in multiple lists. We also maintain 3 custom fields called CRM-ID, CRM-Lead and CRM-Contact so you can always determine which records are Leads and/or which are Contacts.

Installation Requirements

Connecting Salesforce.com to Pinpointe takes about 15-20 minutes. To set up the Pinpointe App, you will need the following:

- An active Salesforce.com account
- Access to your salesforce.com account administrator to install and configure the Pinpointe App for your Salesforce.com Org.
- Your Pinpointe API key (request from help@pinpointe.com or via chat)
- A database in Pinpointe to sync contacts into. Prior to starting we recommend that you create any additional custom fields (Resources -> Custom Fields) you want to sync in Pinpointe.

Installation Overview

Installing the Pinpointe to Salesforce.com sync is done in these steps:

- Enable your Pinpointe account to support the Salesforce.com connector
- Install the Pinpointe package to your Salesforce Org.
    - Add Pinpointe Visualforce Page to some of your Salesforce.com Page Layouts (again for the **Leads, Contact**s and **Campaigns** objects)
    - Setup Remote Site Settings
- Activate workflows
- Finally, the Pinpointe Sync / Setup.

Getting Started: Confirm Pinpointe Configuration

Before starting the setup, request API Access for your Pinpointe account so that Pinpointe.com can sync with Salesforce.com.

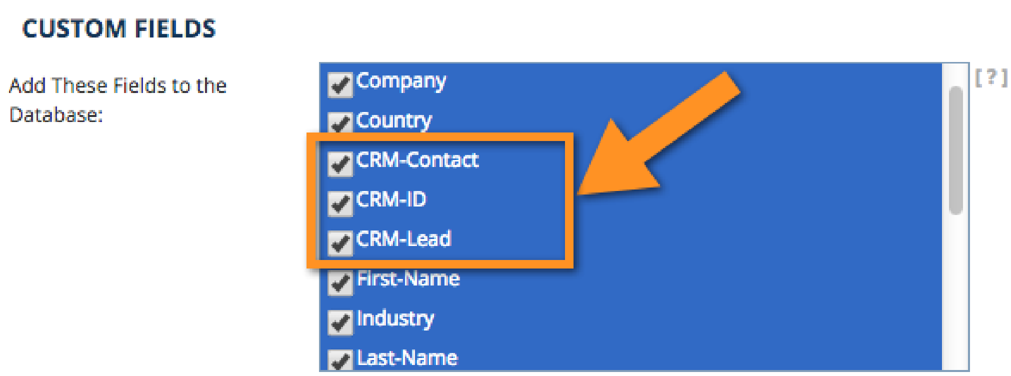
Send a request to support@pinpointe.com:

'Please enable API Access for my account {loginID}, so we can enable the salesforce.com connector.' Be sure to include your LoginID so our support team knows which account to authorize.

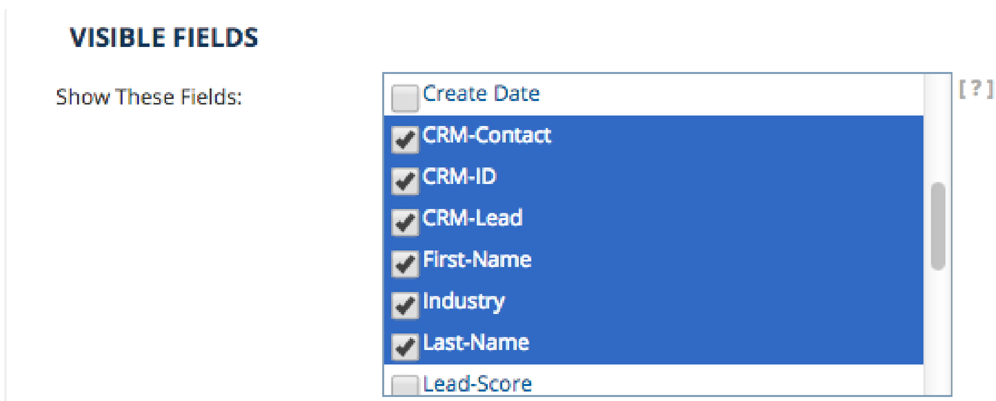
Next, make sure you have a database in Pinpointe already created and configured. You do not need a dedicated database in Pinpointe for your Salesforce.com contacts – you can connect to any database or a 'Master Database' of contacts in your Pinpointe account.

Check to be sure these fields are enabled for the Pinpointe database.

Go to **Contacts -> Manage Databases,** and select 'Edit' to edit the database you will be using, and ensure the fields CRM-Contact, CRM-ID, and CRM-Lead are enabled:



You may also want to make these fields visible so the field values display in Pinpointe Contact search screens:



Installing the Pinpointe App On your Salesforce.com Org

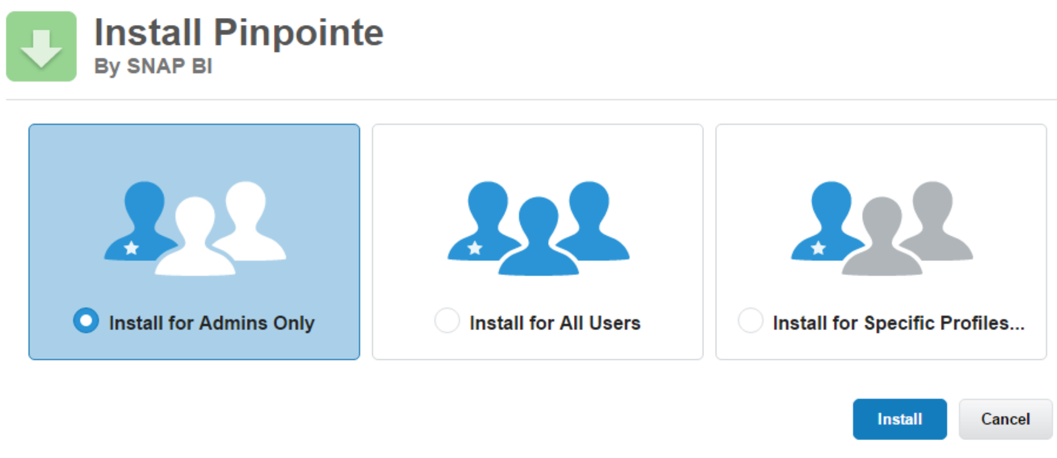
The package can be installed in your Salesforce sandbox org, Salesforce Production Org or Developer org.

To install it in production org, click this link:

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5b000001yxeL

Login with the account with which you want to install the package. Once you login, you will see the following screen where you have to choose the option that fits for your organization.

Select the option, then click "**Install**" button.



Click "**Done**" button in the confirmation page.

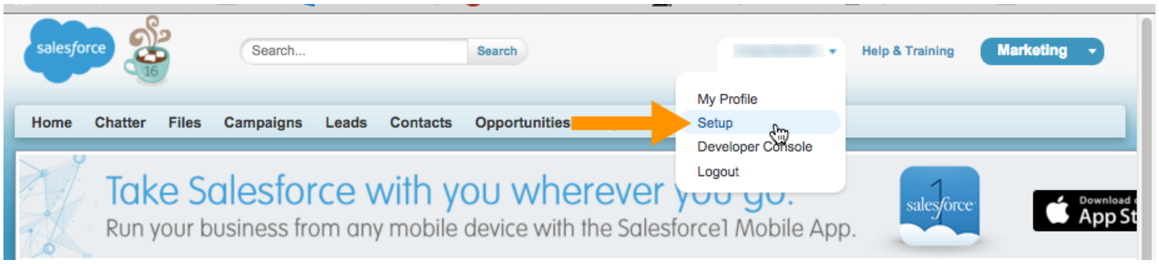
If you installed the package for all users, you can bypass the step Setting/Confirm Page Security in your salesforce.com setup.

Now that you have installed the package you will need to setup Salesforce.com and Pinpointe.

Configuring Salesforce.com

Now we'll configure several settings in Salesforce.com. First, access the Setup Menu:

Login to your Salesforce.com setup and in the top right corner – you will see your login ID - click this pull-down menu and select Setup:

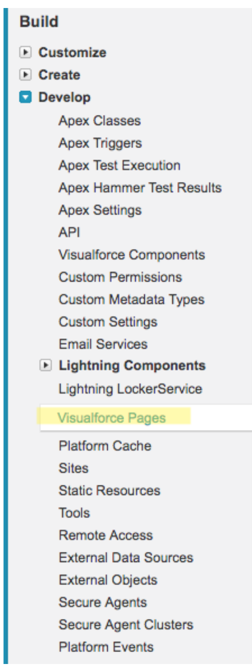


Setting / Confirming Page Security

In this section we will set / confirm the page security for a few Pinpointe pages.

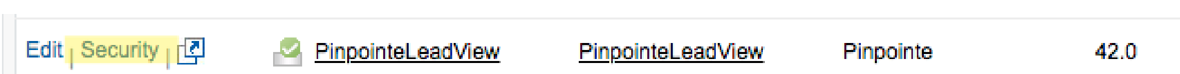
The page security needs to be set for the Pinpointe visualforce.

Along the left side of your Salesforce.com screen, select the following to expand and display the menu option: ***Build -> Develop -> Visualforce Pages:***



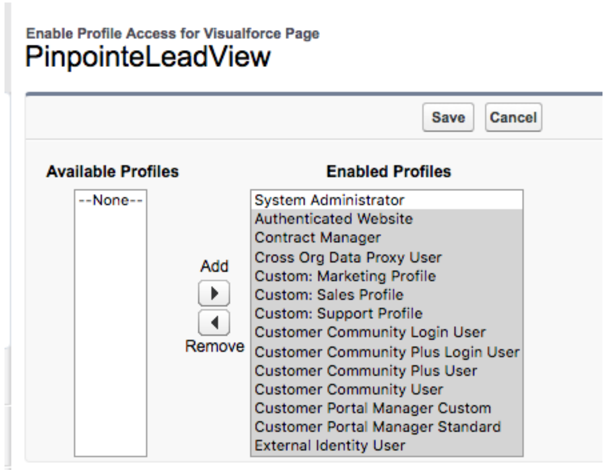
This screen displays all the visualforce pages in your Salesforce.com organization.

Search for the page called **PinpointeLeadView,** and *click on the "Security" link* (not the Edit button but the link next to it) – it should look like this:



This will display the field information and allow you to set the page Security in the next screen.

Add all available profiles to Enabled Profiles and then **Save**:



Once you have saved the above, go back to the screen: ***Build -> Develop -> Visualforce Pages.***

Repeat the above steps for the following 3 additional pages:

- PinpointeLeadActivities
- PinpointeContactView
- PinpointeContactActivities

Adding VF Page to Page Layouts

Now that the fields have been defined and security settings updated, we need to add the Pinpointe section to several pages so they can be viewed / accessed. We will configure:

Lead Object Page: PinpointeLeadView

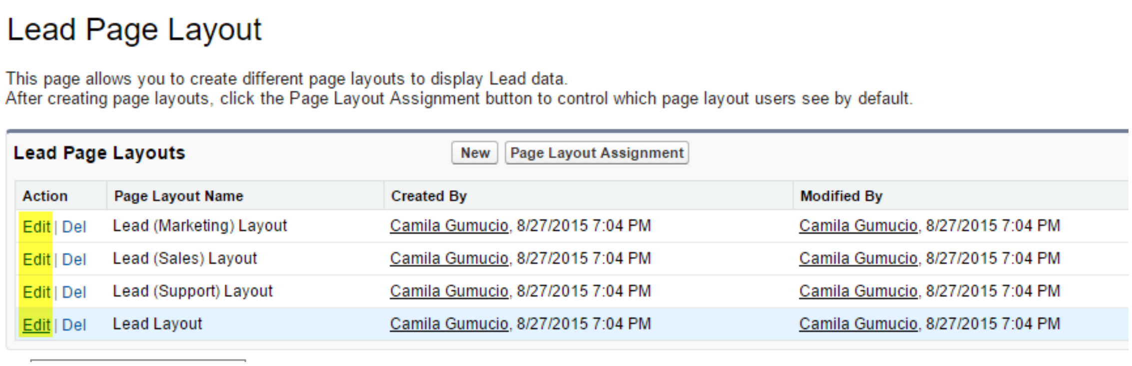
Contact Object Page: PinpointeContactView

Add Fields to the Lead Object Page

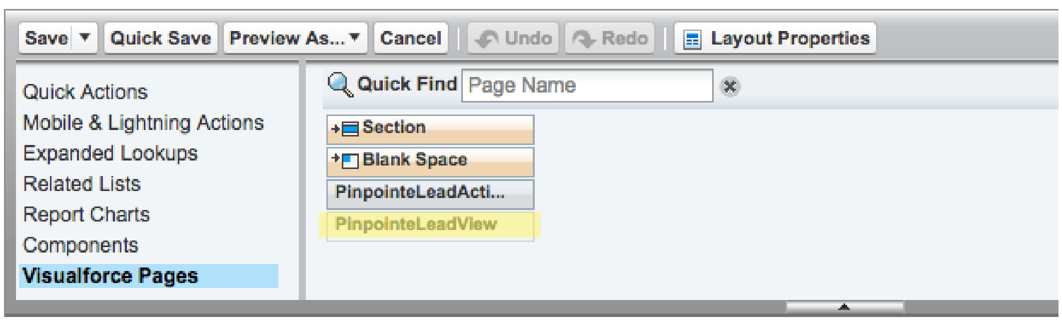
Go to the following menu (starting with 'Setup' from the pull-down menu at the top of your screen):
Setup -> Customize -> Leads -> Page Layout.

You will see your various page layout options – the screen should be similar to this below.

In the Page Layout Page above, select 'Edit' next to the page layout name of the layout where you will add the field.

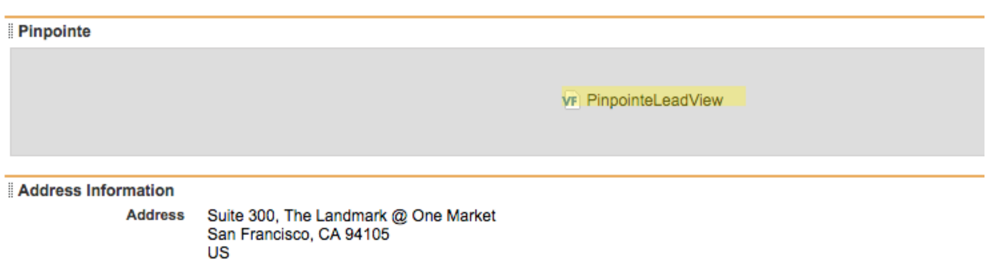


Selecting Edit will display the screen below where you can select the Pinpointe visualforce page and add them to the page layout:



When you find the page, drag it to the page layout under the box, and drop it where you want it to appear.

To make the page look better, we suggest creating a separate section for the VF page so that it looks like this:



Add VF page to the Contact Page Layout(s)

To add the Pinpointe page section to the Contact object, repeat the steps above for the Contact page layouts and save.

Adding Custom Pinpointe Buttons

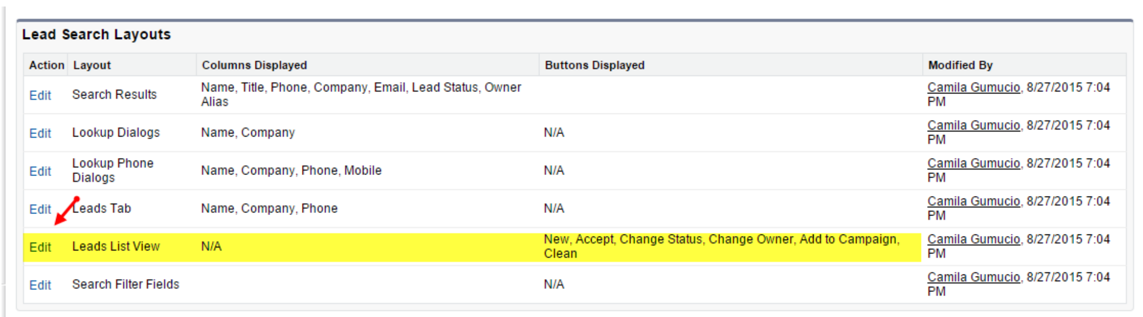
Now we'll add an appropriate 'Sync' button to the various List Views for the **Lead Object and Contact Object**.

NOTE: There are no buttons to add to the Campaigns object – only the Leads and Contacts objects.

Adding Pinpointe Buttons for Leads

Starting with 'Setup' from the pull-down menu at the top of your screen, navigate to:

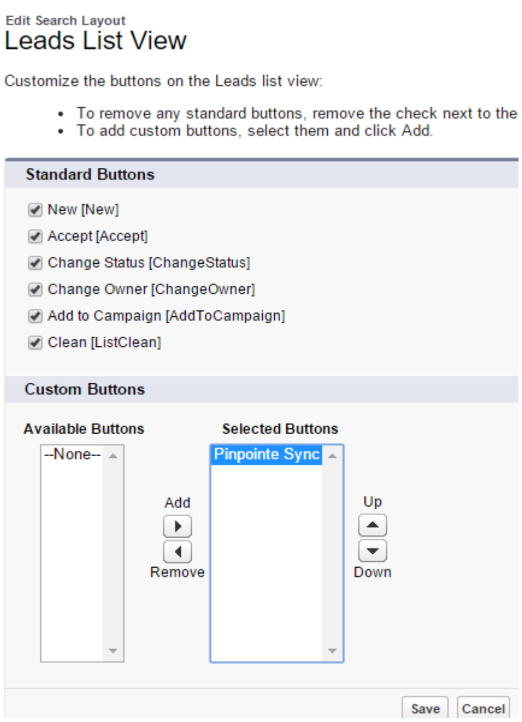
Setup -> Customize -> Leads -> Search Layouts and then select 'Lead List View:



Lead Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Title, Phone, Company, Email, Lead Status, Owner Alias		Camila Gumucio, 8/27/2015 7:04 PM
Edit	Lookup Dialogs	Name, Company	N/A	Camila Gumucio, 8/27/2015 7:04 PM
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A	Camila Gumucio, 8/27/2015 7:04 PM
Edit	Leads Tab	Name, Company, Phone	N/A	Camila Gumucio, 8/27/2015 7:04 PM
Edit	Leads List View	N/A	New, Accept, Change Status, Change Owner, Add to Campaign, Clean	Camila Gumucio, 8/27/2015 7:04 PM
Edit	Search Filter Fields		N/A	Camila Gumucio, 8/27/2015 7:04 PM

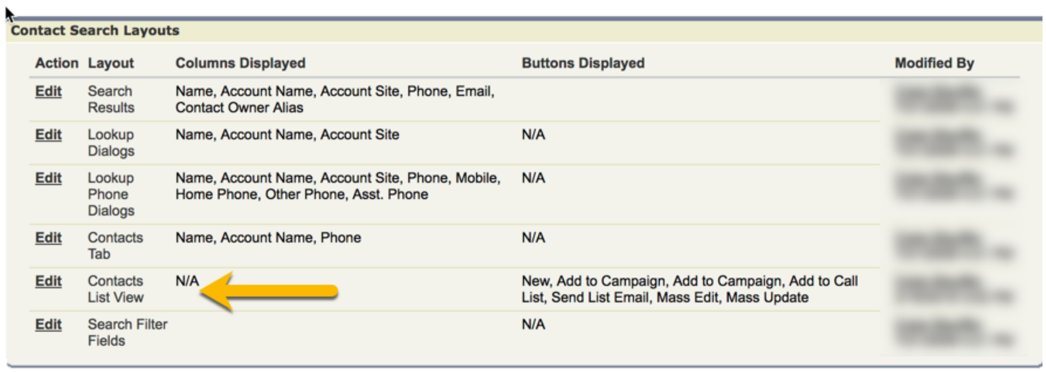
Select 'Edit' to edit the Lead List View' and then move the Pinpointe Sync button from the "Available Buttons" box to the "Selected Buttons" box using the ***Add > button***.



Adding Pinpointe Buttons for Contacts

To add the Pinpointe buttons to the 'List Contacts' view, go to:

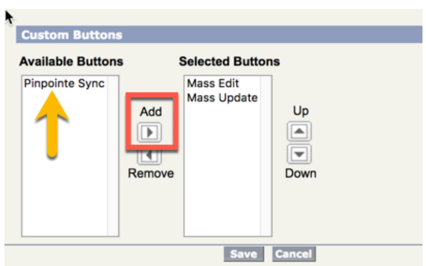
Setup -> Customize -> Contacts -> Search Layouts and then select 'Contact List View:

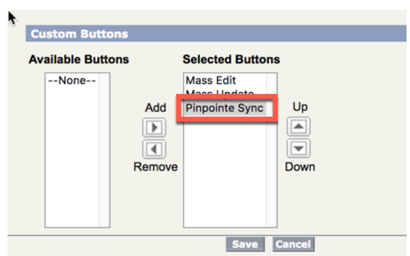


Contact Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Account Name, Account Site, Phone, Email, Contact Owner Alias		
Edit	Lookup Dialogs	Name, Account Name, Account Site	N/A	
Edit	Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone	N/A	
Edit	Contacts Tab	Name, Account Name, Phone	N/A	
Edit	Contacts List View	N/A	New, Add to Campaign, Add to Campaign, Add to Call List, Send List Email, Mass Edit, Mass Update	
Edit	Search Filter Fields		N/A	

Now add the button:





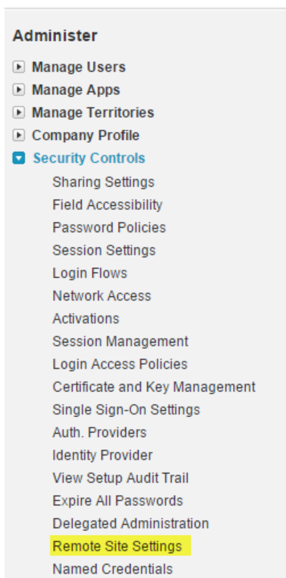
Connect Salesforce.com to Pinpointe

Now that the various Pinpointe custom fields and buttons have been added to your Salesforce instance, we'll connect Salesforce to a specific database in your Pinpointe account.

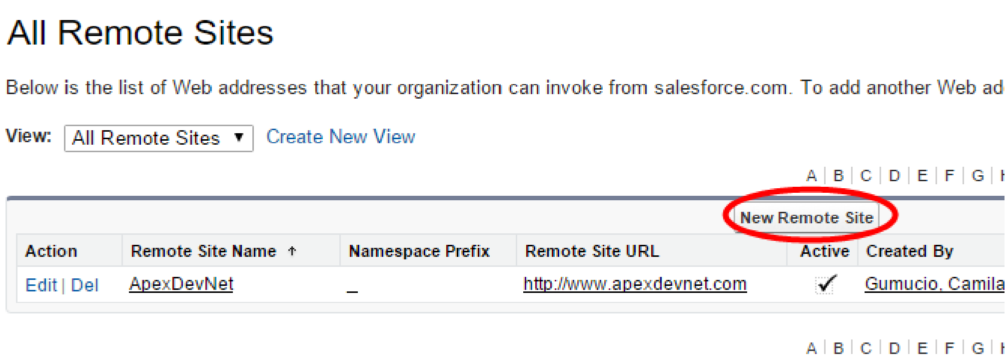
Add 'Remote Site' Settings

Start from 'Setup' (top right corner of your screen when logged in) and navigate to:

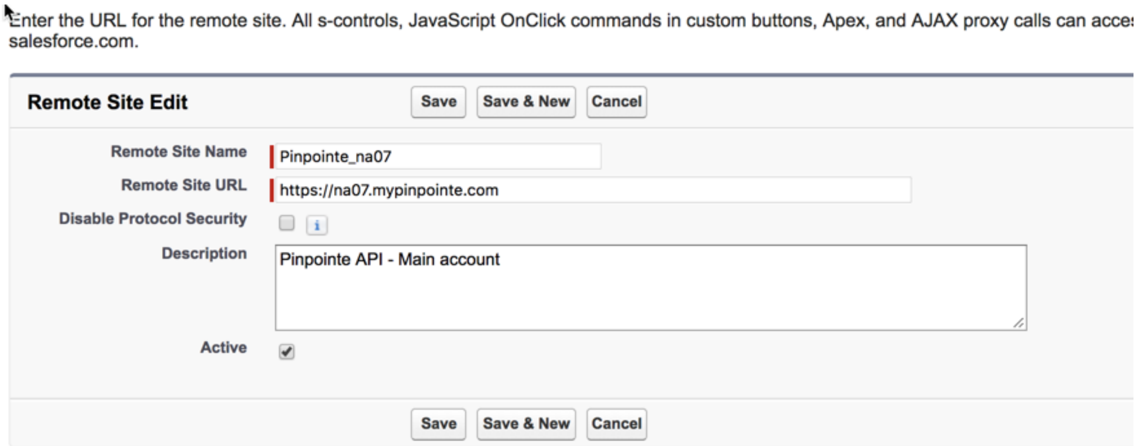
Setup -> Administration -> Security Controls and select the 'Remote Site Settings:



Next, **select "New Remote Site."**



Here is the page that will display with example settings -- fill in the fields as follows:



Remove Site Name: Provide salesforce.com with a name you can refer to. The name should have characters numbers and underbars only – no spaces or other characters – for example **"Pinpointe Account".**

Remote Site URL: This is the URL where you login to Pinpointe, and should include the https:// -- For example: https://na07.mypinpointe.com (Enter *your* URL)

Disable Protocol Security: This should remain UNCHECKED *(ie, https:// is required)*

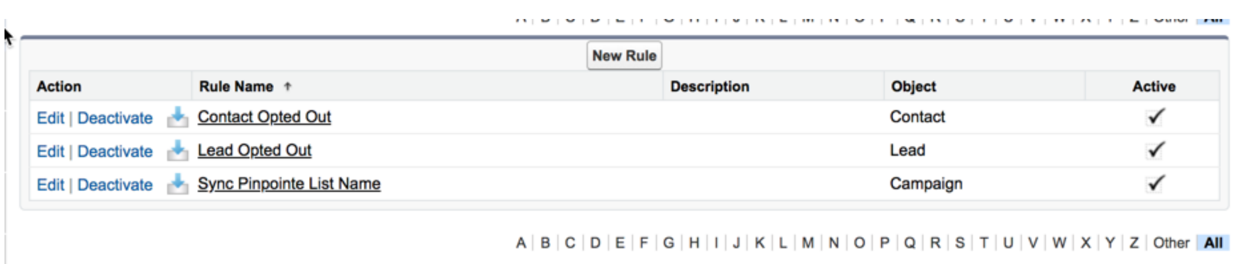
Description: Optional – A note for your own reference.

NOTE: Make sure the "Active" checkbox is checked and click "Save" button
.

Activate Workflows

There are three workflows installed with the package - we need to confirm they are activated. Navigate to:

Setup -> Create -> Workflow & Approvals -> Workflow Rules to find them:

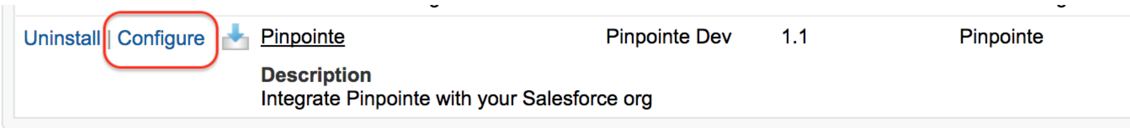


Ensure each one is ACTIVATED so that when a lead/contact is marked as "Unsubscribed" in Pinpointe, their status will reflect to the Email OptedOut field on Lead and Contact. Otherwise the status will be saved to the Pinpointe Email Status picklist field.

Configure Field Mappings and Sync Options

To enter the setup information for the Pinpointe sync application, you'll need to sync it into your Salesforce.com account. Login and access your Pinpointe App setup within Salesforce:

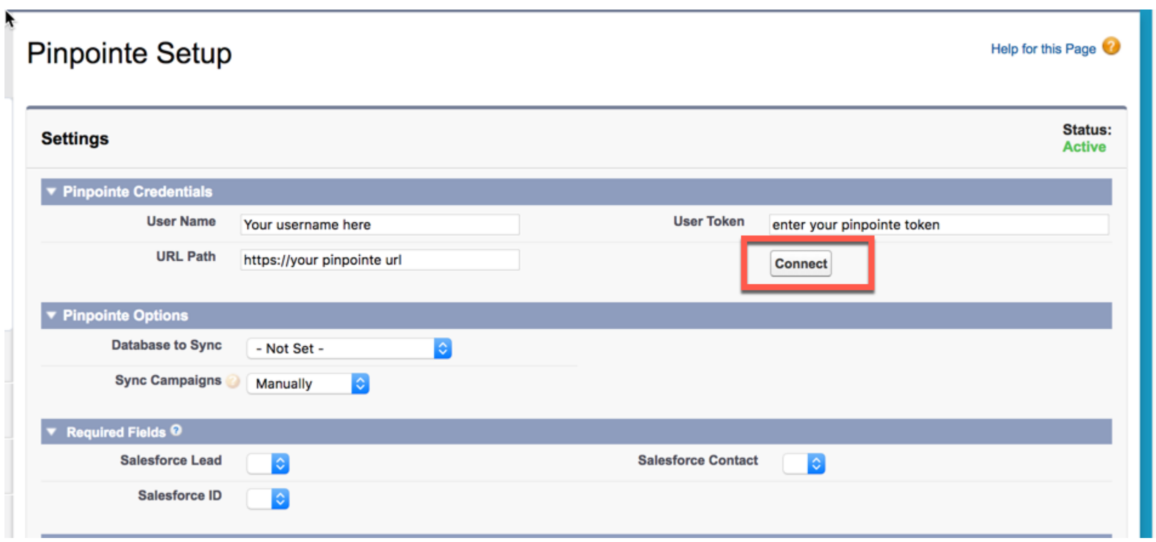
Setup -> App Setup -> Installed Packages -> Click "Configure" by the Pinpointe package



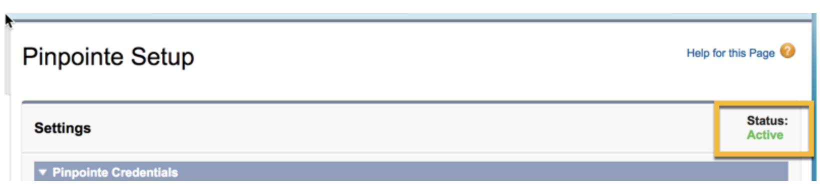
Enter / Confirm API Credentials

Get the required API credentials from your Pinpointe support person for Pinpointe.

Once you enter the Pinpointe User name, Pinpointe URL and Pinpointe token, use the 'Connect' button to connect to Pinpointe.



If you have entered the credentials correctly, then the Status will display as 'Active':



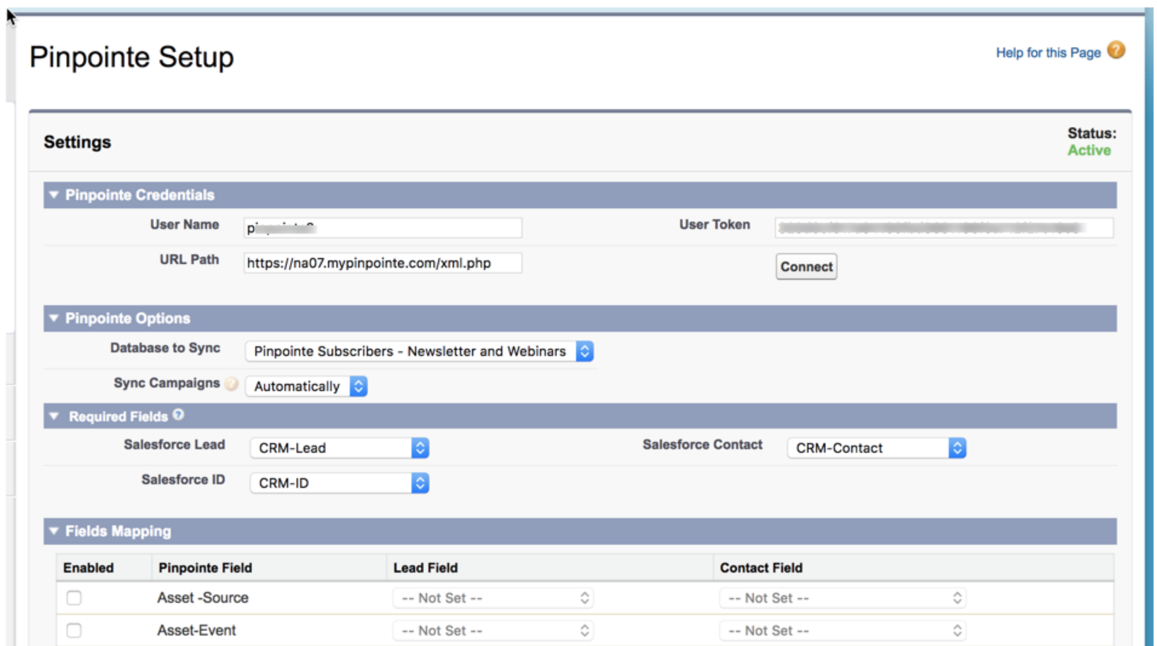
Select Pinpointe Database to Connect

Next we'll select which database to connect, and decide whether to synchronize campaigns automatically or manually.   You should see the 3 mandatory fields below should be pre-selected and mapped:

Salesforce Lead = CRM-ID
Salesforce ID = CRM-ID
Salesforce Contact = CRM-Contact

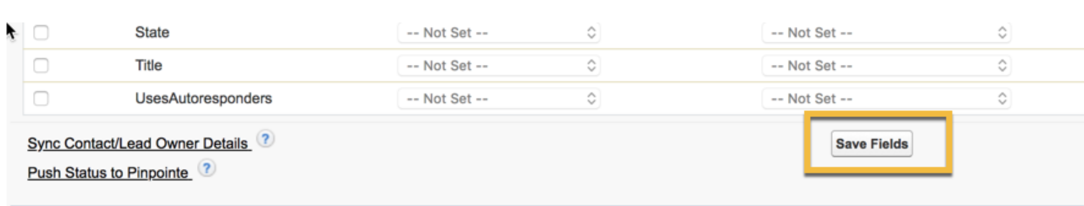
Sync Campaigns. (Automatic / Manual) This option determines how Salesforce synchronizes Salesforce Campaigns to Pinpointe Lists. If you choose Automatically, on every campaign creation, Campaign members will synch to Pinpointe automatically. If you choose Manually, then Salesforce Campaign members will not be automatically updated. They will only be manually updated if you click the "Is Pinpointe List" checkbox on the specific campaigns.

Once selected, your setup screen will look similar to this:



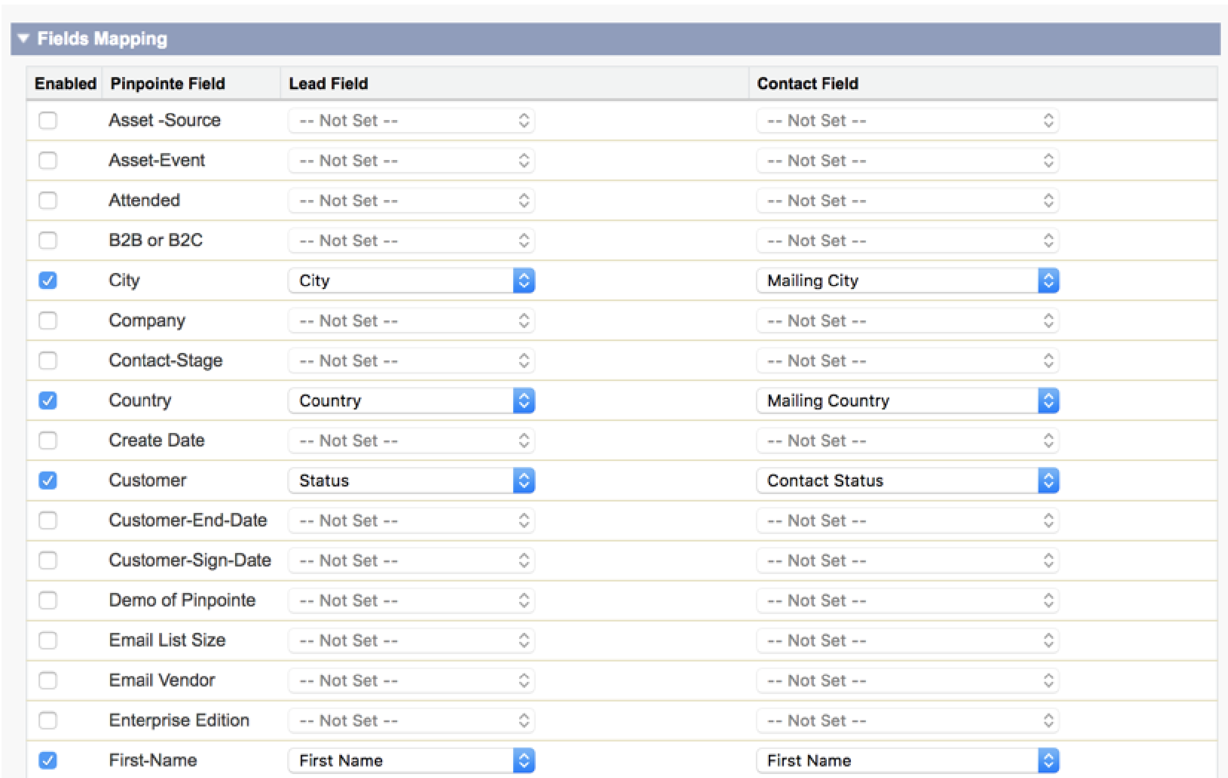
Select SAVE Settings

This extra step will be eliminated in the future - for now please select the 'Save Fields' button before proceeding.



Mapping Additional Custom Fields

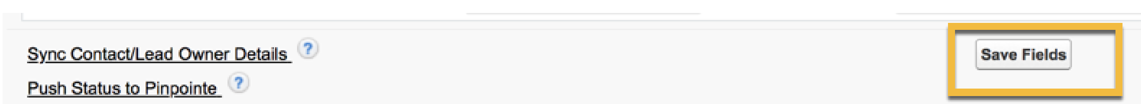
Now onto 'Field Mapping' section where we map Salesforce fields to Pinpointe fields. Select each Pinpointe field you want to synchronize and then select the corresponding Lead / Contact field to connect to. Here is an example screen mapping some of our Pinpointe fields:



Fields Mapping

Enabled	Pinpointe Field	Lead Field	Contact Field
☐	Asset -Source	-- Not Set --	-- Not Set --
☐	Asset-Event	-- Not Set --	-- Not Set --
☐	Attended	-- Not Set --	-- Not Set --
☐	B2B or B2C	-- Not Set --	-- Not Set --
☑	City	City	Mailing City
☐	Company	-- Not Set --	-- Not Set --
☐	Contact-Stage	-- Not Set --	-- Not Set --
☑	Country	Country	Mailing Country
☐	Create Date	-- Not Set --	-- Not Set --
☑	Customer	Status	Contact Status
☐	Customer-End-Date	-- Not Set --	-- Not Set --
☐	Customer-Sign-Date	-- Not Set --	-- Not Set --
☐	Demo of Pinpointe	-- Not Set --	-- Not Set --
☐	Email List Size	-- Not Set --	-- Not Set --
☐	Email Vendor	-- Not Set --	-- Not Set --
☐	Enterprise Edition	-- Not Set --	-- Not Set --
☑	First-Name	First Name	First Name

When done - scroll to the bottom of the config page and select 'Save Fields'



Recommendations:

We recommend NOT mapping the Country field directly to the Pinpointe.Country field, because the Salesforce.com internal field values differ from Pinpointe. Instead, create a new custom TEXT field in Pinpointe and map to this field. See the FAQ below if you want to sync a Country field.

[Advanced] Synch Contact/Lead Owner Details

In Pinpointe, you may wish to have each individual contact record in Pinpointe directly associated with their Salesforce Account / Contact owner. This can come in handy if you are scheduling campaigns in Pinpointe, and want *each individual recipient to appear to receive their emails from their Salesforce Account manager.*

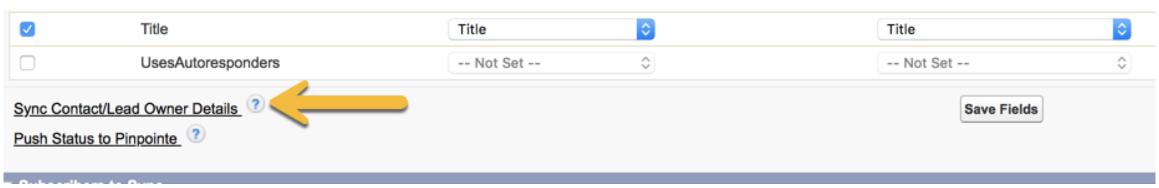
Each contact in Pinpointe has 3 custom fields. If a given contact record has values for these fields then the campaign send-from setting is overridden and these values are used as the send-from values for that contact record:

Send-From
Send-Text
Reply-To

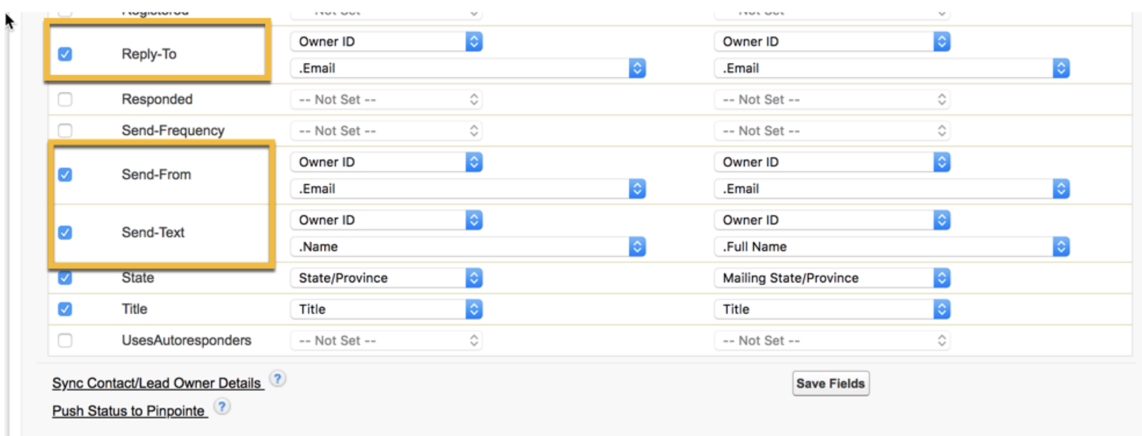
If **"Synch Contact/Lead Owner Details"** is enabled, then the respective Salesforce Lead/Contact record owner value is also synch'd along with each contact record.

To enable this synch feature:

Select **"Synch Contact/Lead Owner Details**"



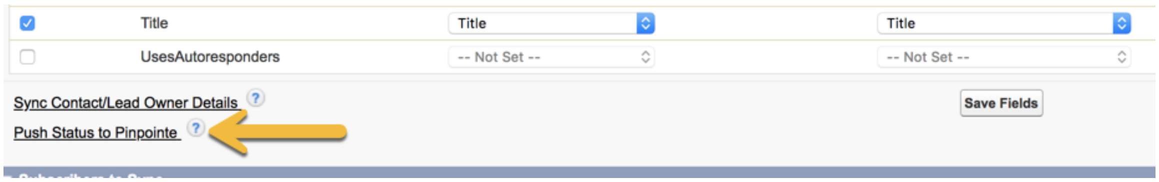
This will automatically map the Pinpointe fields: Send-From, Send-Text and Reply-To - see below:



Once updated, select **'Save Fields'.**

[Advanced] Sync Bounce + Unsubscribe Status From Salesforce TO Pinpointe

If you send emails through Salesforce and a contact unsubscribes or bounces, you may wish to have Salesforce update the Pinpointe Contact Bounce/Unsubscribe status. By default this status is not synced to Pinpointe.

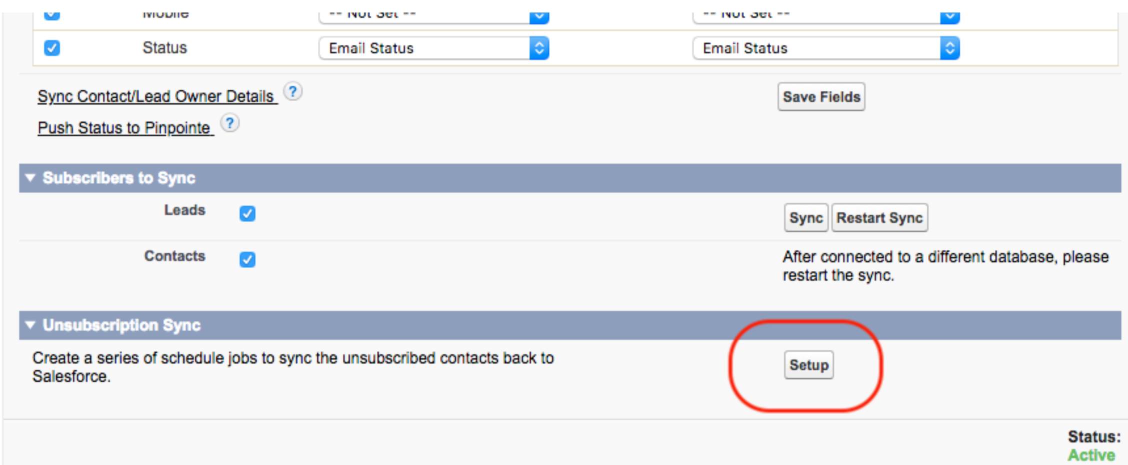


To enable this, click "Push Status to Pinpointe" link. Once mapped, the status (Unsubscribed or Bounced) is automatically pushed to Pinpointe.

[Advanced] Automatically Sync Contact Status From Pinpointe to Salesforce

To have Pinpointe automatically push back the unsubscribed/bounced leads/contacts back to Salesforce, on the setup page, click "Setup" button in the "Unsubscription Sync" section.

A schedule job will be setup and runs every a few hours during the day.



Synchronizing Contacts to Pinpointe

Now that your Salesforce.com Org is connected to your Pinpointe account, synchronizing contacts to your Pinpointe account is simple and flexible.

We have 4 different ways for you to automatically synchronize contacts into Pinpointe.

Option #1: Create a New Salesforce Campaign and Pinpointe-Enable it

You can create multiple campaigns in Salesforce and Pinpointe-enable them. To avoid the possibility of a massive accidental sync, only newly created campaigns can be synchronized.

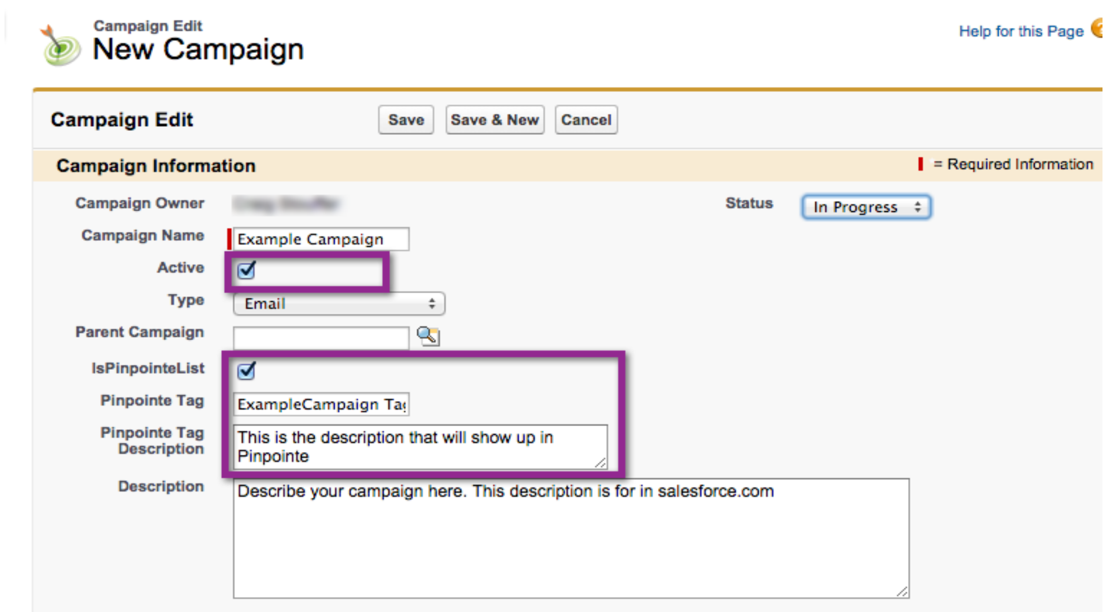
1) In Salesforce.com navigate to Campaigns and create a new campaign.

2) Make the campaign Active

3) Enable 'IsPinpointe'

4) Enter a value for the Pinpointe Tag and Pinpointe Tag Description. All contacts synchronized to Pinpointe will be tagged with this tag for easy selection in Pinpointe. You can optionally enter a description.

5) Save the campaign.



Add Members to Your Salesforce Campaign

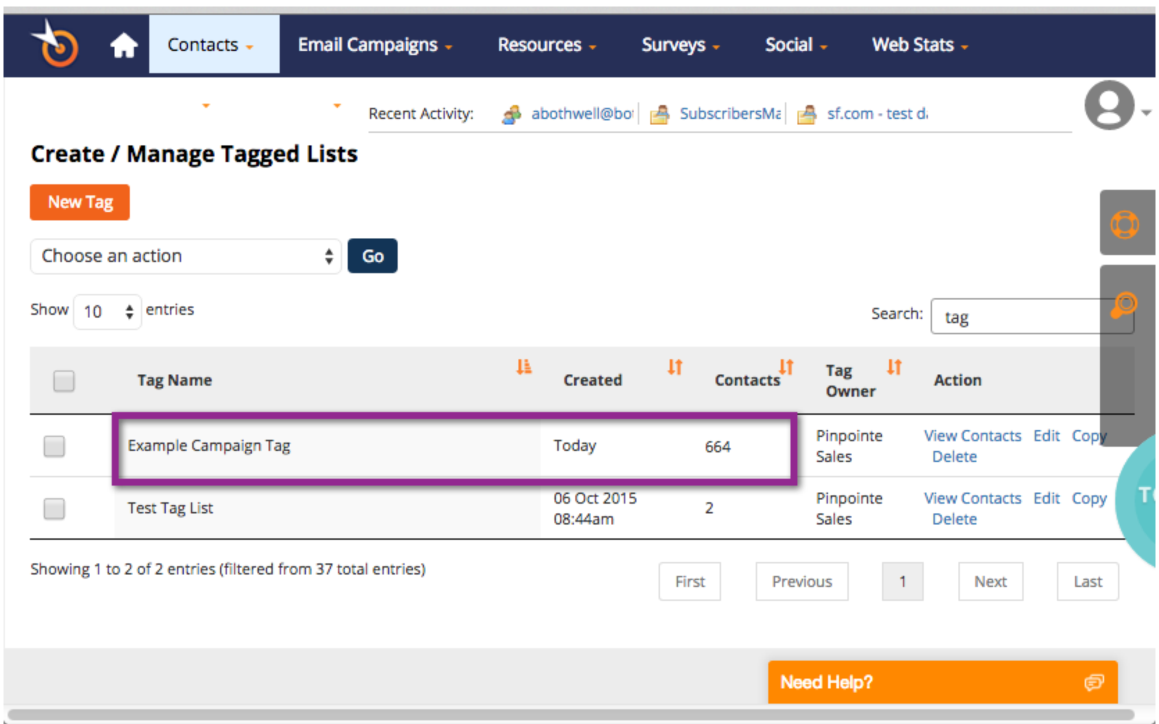
In Salesforce.com – just add members to this campaign in whatever way you normally would do so. For example you can navigate **to Campaigns -> Edit a Campaign** the Add Members.

As members are added to the campaign, they are automatically added to the corresponding Pinpointe List in real-time.

View the Contacts in Pinpointe

In your Pinpointe account you can navigate to: **Contacts -> Manage Lists**

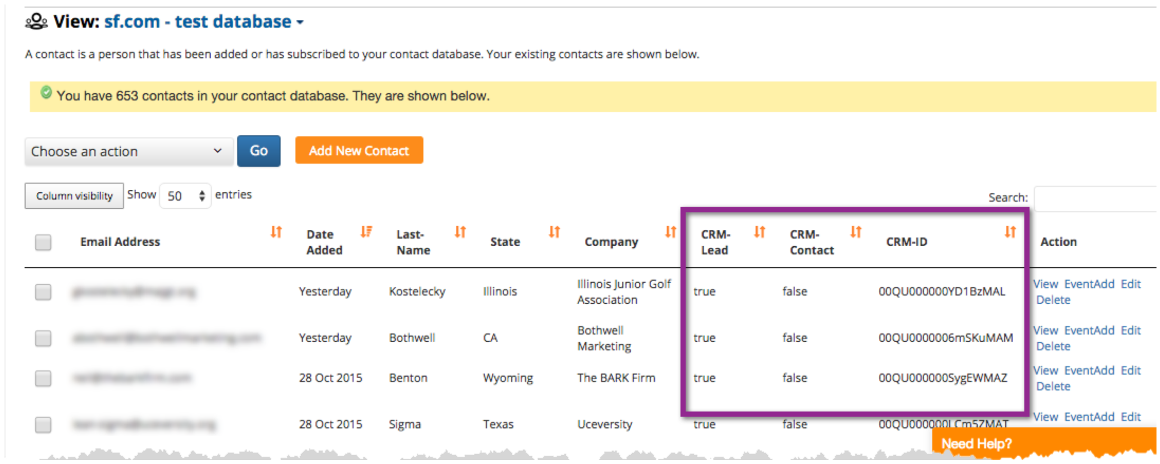
Once you've added contacts to the campaign in Salesforce, they'll show up in Pinpointe:



If you view the contact records in your Pinpointe List, you'll see that the contacts and all associated custom fields you've set up are added to Pinpointe.

We've also added the CRM-ID (Salesforce's unique record identifier), and the custom fields CRM-LEAD and CRM-Contact have been updated to reflect the contact's status in Salesforce:

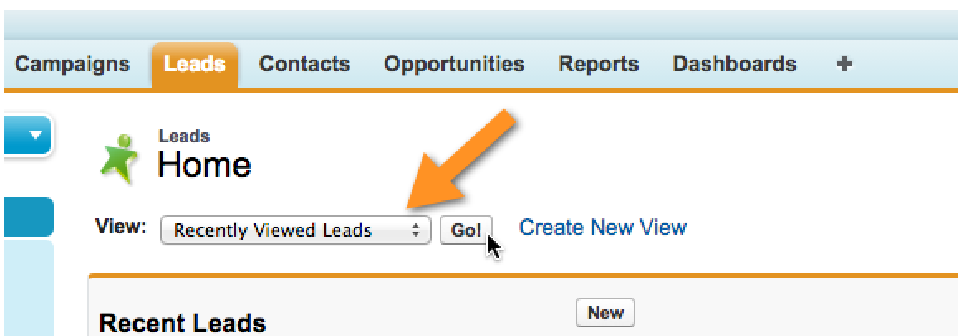
[See image on next page]



Option #2: Select Contacts / Leads from A List View

Contacts from a Lead View or Contact View can be selected and sync'd to Pinpointe.

In Salesforce.com navigate to: **Leads [Or Contacts] -> Select a View and Go.**



Matching records will be displayed. You can then select contacts (up to 200 at a time – based on your salesforce.com limits).

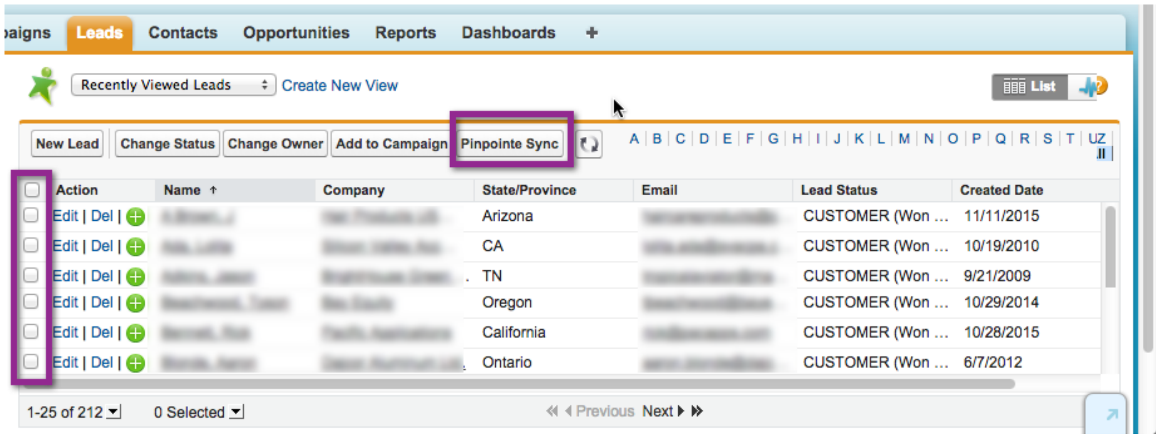
Once selected, press 'Pinpointe Sync' and these contacts will be added / updated in your Pinpointe database.

NOTE: Optionally you can select and add contacts to a currently defined Pinpointe-enabled campaign and the contacts will appear in a corresponding Pinpointe List with the associated Campaign ID tag.

Otherwise if you just select 'Pinpointe Sync' there will not be a new Pinpointe List Name added to the records (ie they will not be added to a Pinpointe List

Contacts already in Pinpointe will be updated.

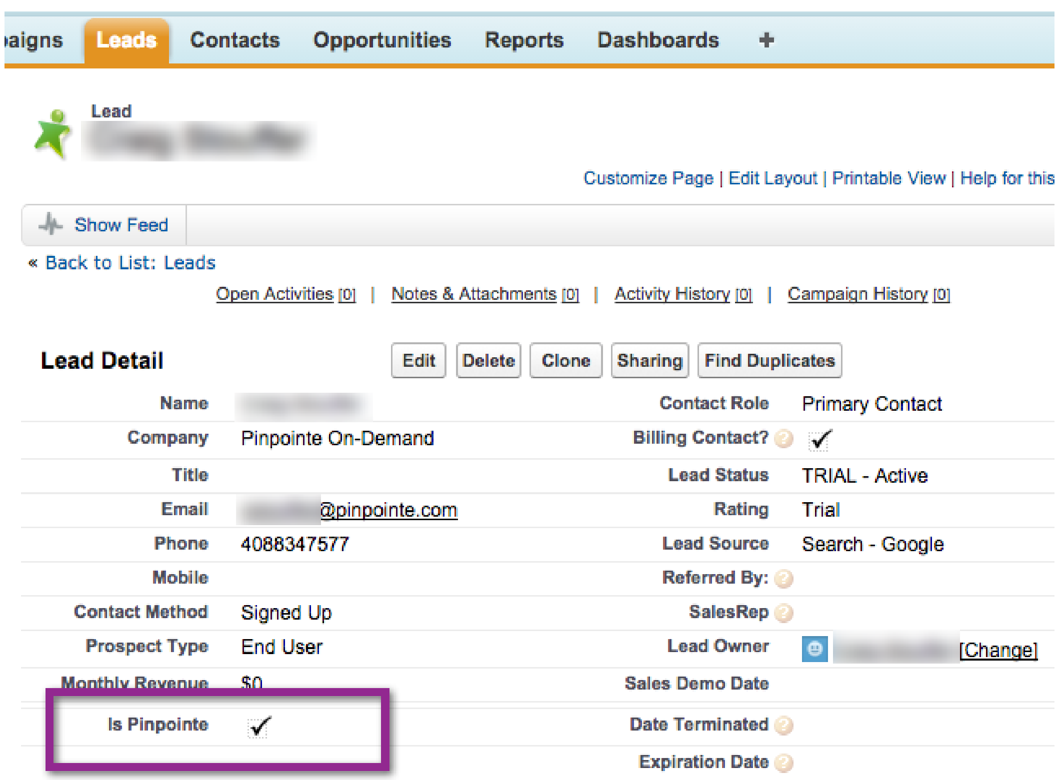
The corresponding CRM-Lead and CRM-Contact field will be updated for each record in Pinpointe in real-time.



Option #3: Manually Sync Individual Contact(s)

Individual Salesforce.com records (Leads and/or Contacts) can be pushed to Pinpointe or manually updated by navigating to a record in Salesforce, editing the record and enabling the 'IsPinpointe' field.

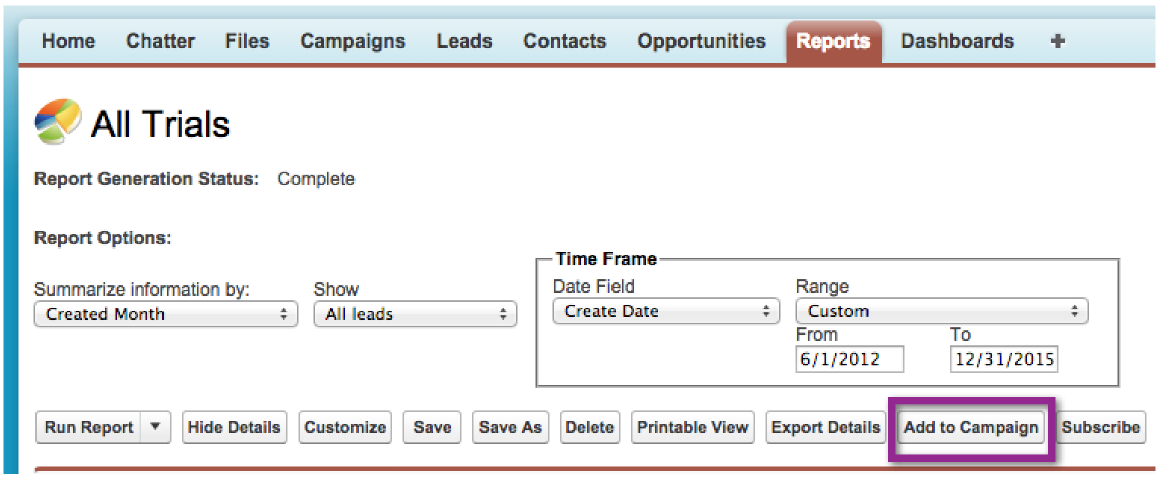
The person will be added to Pinpointe and the corresponding CRM-Lead and CRM-Contact field in Pinpointe will be updated / set.



Option #4: Run A Salesforce Report

You can run a report in Salesforce, see the results and then select 'Add to Campaign'.

NOTE: If the 'Add to Campaign' button is not present in your reports screen, please check with your Salesforce Administrator to ensure proper permissions are enabled for you, and this option is enabled.



The fields that will synchronize to the appropriate records in Pinpointe are whatever fields you configured to synchronize to Pinpointe in the Pinpointe setup screen.

View Pinpointe Contact Activities in Salesforce

Once a given Salesforce Leads and/or Contacts has been mapped to Pinpointe, you can view the Pinpointe email event history (Opens and Clicks) from within Salesforce.

Go to any Contact or Lead detail page, and click the "Pinpointe Activities" button. On the popup form, you will be able to see email histories on the selected contact.

If you don't see see this button on your page layout, please refer to the section "Add Pinpointe Buttons to the List Views and Page Layouts for Leads and Contacts".

Frequently Asked Questions (FAQ)

What version of salesforce.com do I need?
Any version of Salesforce.com from Professional or above. Salesforce Starter edition does not include the Salesforce Campaigns feature.

What Salesforce.com functionality / features must be enabled?
To get maximum benefit, you'll want to have Salesforce.com Campaigns enabled and accessible. Campaigns give you maximum flexibility – simple define one or more campaigns in salesforce.com, add members to each campaign and that's it! All members for each campaign will be updated in your Pinpointe account in real time and automatically. Any changes you make to a contact in salesforce are instantly synchronized to Pinpointe.

Can the installation process be automated?
The setup process takes about 15-20 minutes. Because every customer's salesforce.com account may be configured differently, the one time setup process can't be automated.

What do I need to configure in Pinpointe?
Ask to have the Pinpointe API enabled -- we'll provide you the API key details. You can request via support chat within Pinpointe or by sending a note to support@pinpointe.com

These fields will be available – needs to be assigned to the database(s) you intend to sync with Pinpointe.

I want to Synchronize a Country Field to Pinpointe – How do I sync Country?
The Salesforce.com Country field is not compatible with Pinpointe's built-in Country field. Just define a new field in Pinpointe called, for example SF-Country. Define this as a Text Field.

Mapping Custom Salesforce.com Field Types
If you have defined custom fields in Salesforce.com that are pull-down selectors or checkbox fields, there are 2 ways you can sync these with Pinpointe:

A) Easiest: In Pinpointe, make sure the target field is of type Text. Then it can accept any value.

B) Tricky: In Pinpointe, you can define the corresponding field with the exact same settings and values as you have in Salesforce. For example if you define a field in Salesforce.com as a pull-down selector where you can select "ABC", "DEF" or "GHI", make sure that the corresponding field in Pinpointe is defined as a field of type 'Picklist" or "Radio Button" with possible values of "ABC", "DEF" and "GHI"

Will my contacts in salesforce.com be updated, deleted or modified in any way?
The present implementation synchronizes your contacts in associated campaigns from salesforce.com to Pinpointe.

Can I 'push' or just synchronize some individual contacts from salesforce.com to Pinpointe?
Yes. See instructions above. Just tick the 'IsPinpointe' field on the corresponding contact/lead.

Can I set up multiple campaigns and have each one synchronize to a different Pinpointe database?
No. All campaigns will synchronize to a set Pinpointe Database that you configure.

However – each Salesforce.com Campaign **will** synchronize real-time to its corresponding Tagged List in Pinpointe.

If I modify the setup and change the Pinpointe database that I am synchronizing to, what happens?
All future contact details will be synchronized to the revised Pinpointe database setting.

Salesforce.com allows multiple contacts to have the same email address. What happens when these are synchronized to Pinpointe?
Pinpointe de-duplicates contacts when you synchronize – you can not have duplicate contacts within a give Pinpointe database. Only the most recent salesforce.com record will remain in Pinpointe

I synchronized my salesforce.com campaign to Pinpointe but the number of contacts is different. What happened?
Pinpointe removes duplicate email addresses. Your Salesforce.com campaign includes members who have duplicate emails.

I deleted one or more members from my salesforce.com campaign. Does the corresponding record in Pinpointe get deleted too?
No. In Pinpointe the corresponding campaign Tag is removed but the contact remains in the Pinpointe database.

I created a Salesforce.com report and added contacts to a Salesforce campaign that is Pinpointe Enabled. Which fields will be synchronized to Pinpointe?
The fields that are synchronized will be the fields you set up in the Pinpointe setup tab in Salesforce.com, regardless of which fields are displayed in the report.

In salesforce.com a contact was changed from a Lead to a Contact. What happens to the contact in Pinpointe?
In Pinpointe we maintain two separate custom fields: One called 'SFDC-Contact' and 'SFCD-Lead'.

These fields are set to 'Yes' as appropriate in Pinpointe. The custom field is updated in real time if the status in Salesforce.com changes

How can I send a campaign to / view / export just the Leads (or Contacts) in Pinpointe?
Easy – in Pinpointe set up Segment to search for All Contacts where 'SFDC-Lead' = Yes. Segments are real-time searches so only the records that currently match will be displayed.

How can I add All Leads (Or Contacts) to Pinpointe database?
If you really want to add ALL Leads and/or Contacts to Pinpointe, then do the following:

- Create a Salesforce.com campaign

- Create a report to select the desired set of contacts. Run the report to be sure it includes what you want.

- Select the 'Add to Campaign' button. The contacts will be added to the Salesforce campaign and then sync'd to Pinpointe.

In Pinpointe – How can I find and display all the Salesforce.com records sync'd that were Leads (or Contacts) in Salesforce?
You can directly search by going to Contacts -> Search, and selecting the Lead or Contact field:

CRM-Lead = true or
CRM-Contact = true

You can also create a Segment by navigating to **Manage Saved Searches** and creating a segment with the same logic as above, and you can optionally include additional search criteria.

Release Updates

August 2022:
New version:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5b000001yxeL

1. Fixed an issue in date field sync.
2. Show up warning on checkbox/multi-picklist/date field mapping.
3. Log requests and response in the table Pinpointe_Async_Web_Call_Object__c, record for 7 days by default.
4. Added a new section on the setup page to change the date format and log persistent days.