



Informatica® Data Integration - Free & PayGo

# Salesforce Marketing Cloud Connector

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# Preface

Use *Salesforce Marketing Cloud Connector* to learn how to read from Salesforce Marketing Cloud by using Data Integration. Learn to create a Salesforce Marketing Cloud connection in Data Integration.

## Informatica Resources

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### Informatica Intelligent Cloud Services web site

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The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <https://www.informatica.com/services-and-training/support-services/contact-us.html>.

# CHAPTER 1

## Introduction to Salesforce Marketing Cloud Connector

You can use Salesforce Marketing Cloud Connector to read contact data from Salesforce Marketing Cloud. When you read data from Salesforce Marketing Cloud, you can specify the Hosted Agent or the Secure Agent.

The Contact Builder app in the Salesforce Marketing Cloud manages contact data from other Salesforce Marketing Cloud apps and other sources.

**Note:** You cannot use Salesforce Marketing Cloud Connector to connect to Salesforce Marketing sandbox instances.

## Introduction to Salesforce Marketing Cloud

Salesforce Marketing Cloud is a Salesforce platform that you can use to manage marketing. Salesforce Marketing Cloud uses the email, mobile, and social media channels to manage marketing. You can use the Contact Builder application in Salesforce Marketing Cloud to access and manage contact data of customers. The Contact Builder application provides you with a single point view of how customer data is organized and the relationships between data. Related data are grouped as attribute groups.

The following are the categories of the attribute groups:

- System-defined attribute groups
- User-defined attribute groups

### System-Defined Attribute Groups

You can change the system-defined attribute groups.

The following attributes groups are examples of system-defined attribute groups:

**System Data**

Contains contact ID, contact key, and email details.

**MobileConnect**

Contains mobile demographic details, includes first name, last name, and subscription information.

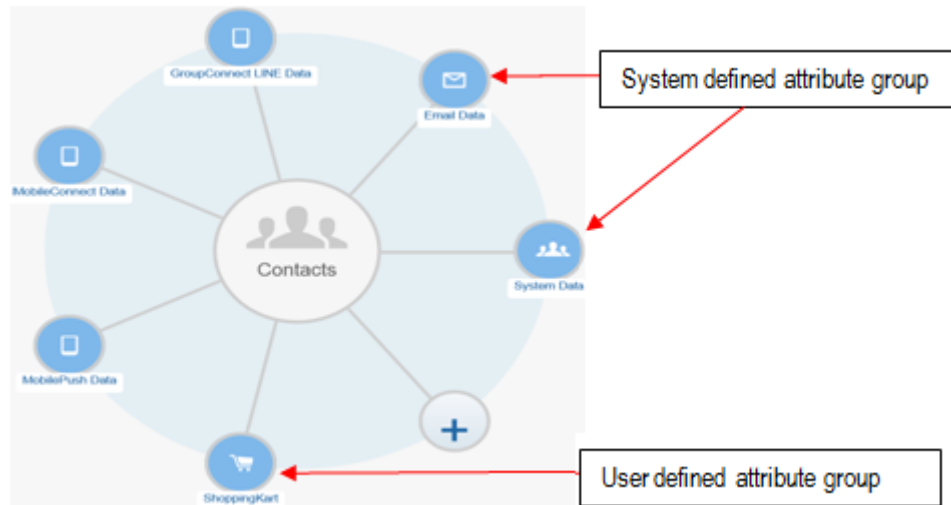
**Mobile Push**

Contains customer mobile device details to which you need to send the data.

For more information about Contact Builder application, see Salesforce Marketing Cloud documentation at the following website: [https://help.exacttarget.com/en/documentation/contact\\_builder/](https://help.exacttarget.com/en/documentation/contact_builder/)

## User-Defined Attribute Groups

You can use Salesforce Marketing Cloud to create user-defined attribute groups. You can create customized data extensions by using user-defined attribute groups. A data extension is a data structure in Salesforce Marketing Cloud, which is similar to a relational database. You can use data extensions to store customer contact data that system-defined attribute groups do not represent.

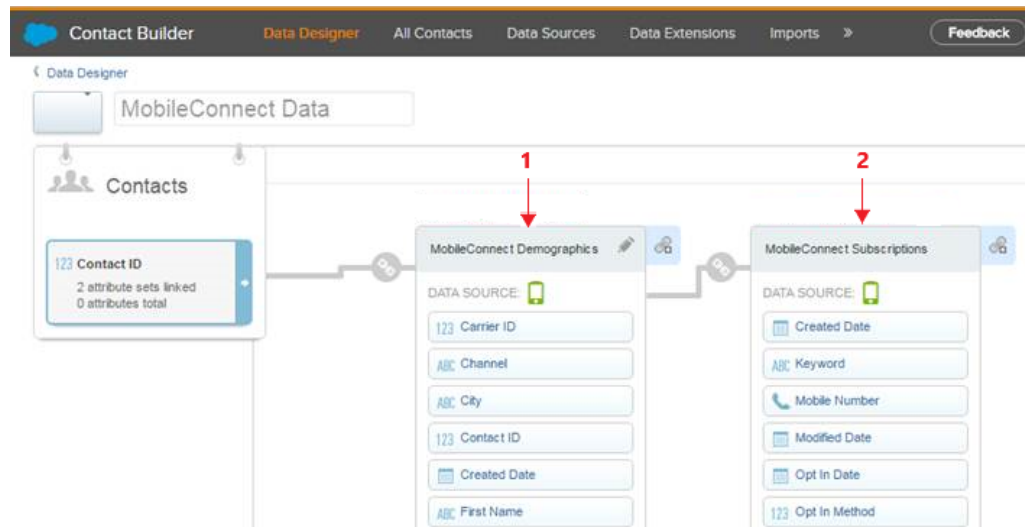


## Data Extensions

Salesforce Marketing Cloud Connector supports the following types of data extensions:

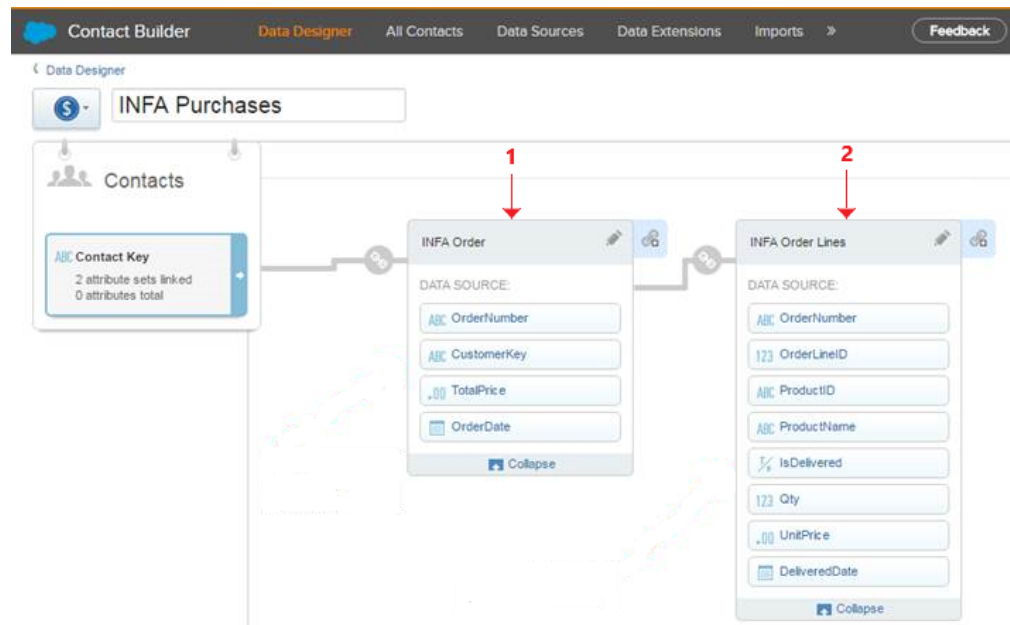
- System Contact Linked Data Extension: The data extension is directly or indirectly linked to the System.Contacts data extensions.
  - Child System Contact Linked Data Extension: The data extension is directly linked to the System.Contacts data extension.
  - Grandchild System Contact Linked Data Extension: The data extension is indirectly linked to the System.Contacts data extension.

The following image shows the **MobileConnect Demographics** and **MobileConnect Subscriptions** page:



- Custom Contact Linked Data Extension: The data extension is directly or indirectly linked to the System.Contacts data extensions.
  - Child Custom Contact Linked Data Extension: The data extension is directly linked to the System.Contacts data extension.
  - Grandchild Custom Contact Linked Data Extension: The data extension is indirectly linked to the System.Contacts data extension.

The following image shows the **INFA Order** and **INFA Order Lines** page:



- Non-Contact Linked Data Extension: The data extension is not linked to the System.Contacts data extensions.



# Salesforce Marketing Cloud objects

Salesforce Marketing Cloud Connector supports all user-defined data extensions in user-defined attribute groups.

Salesforce Marketing Cloud Connector supports the following data extensions:

- System data extension
- System contact linked data extension - child and grandchild
- Custom contact linked data extension - child and grandchild
- Non-contact linked data extension

## Rules and guidelines for Salesforce Marketing Cloud objects

Consider the following rules and guidelines for Salesforce Marketing Cloud objects:

- When you perform an operation on the system data extension, it is mandatory to configure the **Contact.Contact Key** field.
- You cannot have identical data extension names across different business units in Salesforce Marketing Cloud. If you have mappings that uses a data extension with a name that is identical to another data extension in a different business unit, make sure to either modify the data extension name in Salesforce Marketing Cloud to make it unique, or remove the extension for the object you last created that causes the name conflict. If the data extension names are identical in different units, verify that the mapping uses the data from the intended data extension in the correct business unit.

# Administration of Salesforce Marketing Cloud Connector

As a user, you can use Salesforce Marketing Cloud Connector after the organization administrator performs the following tasks:

- When you upload the connector, specify the name of the connector as Salesforce Marketing Cloud.
- Ensure that you have a valid Salesforce Marketing Cloud account and credentials to connect to Salesforce Marketing Cloud.
- Get the client ID and the client secret from Salesforce Marketing Cloud. For more information, see [“Retrieving the client ID and client secret” on page 10](#).
- Enable read and write scopes for the installed packages which is the minimum permission required to access the installed packages.
- Create an API user and assign Administrator role to the user which is the minimum permission required to access the APIs. For more information, see [“Assigning administrator role to users” on page 10](#).
- Disable the Salesforce Marketing Cloud account password expiry date. For more information, see [“Disabling the Salesforce Marketing Cloud account password expiry date ” on page 11](#).

For more information about the Salesforce Marketing Cloud APIs, see the Salesforce Marketing Cloud documentation at the following website:

<https://developer.salesforce.com/docs/atlas.en-us.mc-apis.meta/mc-apis/index-api.htm>.

## Retrieving the client ID and client secret

Perform the following steps to retrieve the Client ID and Client Secret for a new package:

1. Log in to Salesforce Marketing Cloud.
2. Go to **Setup > Apps > Installed Packages**.
3. Click **New** to create a new package.
4. In the **New Package Details** window, enter the name and description for the package.  
To use OAuth 2.0, select **Create with enhanced functionality (recommended)**.
5. Click **Add Component**.
6. Select **API Integration** as the component type.
7. Click **Next**.
8. Select **Server-to-Server** as the integration type.
9. Click **Next**.
10. Select the following permissions for the Server-to-Server properties:
  - List and Subscribers - Read
  - Marketing Cloud Connect - Read
  - Data Extensions - ReadThese are the minimum permissions required to use Salesforce Marketing Cloud Connector.
11. Click **Save**.  
The Components section displays the Client ID and Client Secret for the package.

Perform the following steps to retrieve the Client ID and Client Secret for an existing package:

1. Go to **Setup > Apps > Installed Packages**.  
The **Installed Packages** page lists all the packages installed in the Salesforce Marketing Cloud account.
2. Select a package and go to the **Components** section.
  - To add a new component, click **Add Component**.
  - To edit existing component, click **Edit**.The Components section displays the Client ID and Client Secret for the package.
3. Click **Save**.

**Note:** Informatica recommends that you upgrade to OAuth 2.0. If an existing package uses OAuth 1.0, you cannot edit the package to use OAuth 2.0. You must create a new package to use OAuth 2.0.

For information about configuring installed packages and API integration, see the Salesforce documentation.

## Assigning administrator role to users

Perform the following steps to assign Administrator role to users in the Salesforce Marketing Cloud account:

1. Log in to Salesforce Marketing Cloud.
2. Go to **Setup > Users > Users**  
The **Users** page lists all the users available in the Salesforce Marketing Cloud account.
3. Select the user to whom you want to assign Administrator role.
4. Click **Manage Roles** tab.
5. Click on **Edit Roles**.

6. Select **Marketing Cloud Administrator** and **Grant the user access to the web services** to assign Administrator role to the user that you selected.

## Disabling the Salesforce Marketing Cloud account password expiry date

Perform the following steps to disable the Salesforce Marketing Cloud account password expiry date permanently.

1. Log in to Salesforce Marketing Cloud.
2. Go to **Setup > Users > Users**.  
The **Users** page lists all the users available in the Salesforce Marketing Cloud account.
3. Select the user for whom you want to disable password expiry date.
4. Click **Edit**.
5. Specify **Yes** in the **API User** property.
6. Click **Save**.

## Prerequisites to perform insert operations

Consider the following prerequisites to perform an insert operation in Salesforce Marketing Cloud:

- Contact key is required in the source data to write to the Salesforce Marketing Cloud target.
- Data extension created as a child object of Contacts object should be linked to Contact ID of contacts.
- The Contact ID is an auto generated field in Salesforce Marketing Cloud. Do not map the Contact ID while mapping the fields. The flat file must contain all the mandatory columns of data extensions, such as HTML Enabled in Email Addresses.

## CHAPTER 2

# Salesforce Marketing Cloud Connections

Create a Salesforce Marketing Cloud connection to connect to Salesforce Marketing Cloud. Use the connection to read data from Salesforce Marketing Cloud. Use Salesforce Marketing Cloud connection as a source connection object when you read records from Salesforce Marketing Cloud.

You create a Salesforce Marketing Cloud connection on the **Connections** page.

## Salesforce Marketing Cloud connection properties

When you set up a Salesforce Marketing Cloud connection, configure the connection properties.

The following table describes the Salesforce Marketing Cloud connection properties:

Property	Description
Connection Name	Name of the connection. Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + -, Maximum length is 255 characters.
Description	Description of the connection. Maximum length is 4000 characters.
Type	The Salesforce Marketing Cloud connection type.
Runtime Environment	The name of the runtime environment where you want to run the tasks. Specify a Secure Agent or a Hosted Agent.
Salesforce Marketing Cloud Url	The URL that the agent uses to connect to the Salesforce Marketing Cloud WSDL. The following URL is an example for OAuth 2.0 URL: <code>https://&lt;SUBDOMAIN&gt;.soap.marketingcloudapis.com/etframework.wsd1</code>
Username	Applies to basic authentication. The user name of the Salesforce Marketing Cloud account.
Password	Applies to basic authentication. The password for the Salesforce Marketing Cloud account.
Client ID	The client ID of Salesforce Marketing Cloud required to generate a valid access token.

<b>Property</b>	<b>Description</b>
Client Secret	The client secret of Salesforce Marketing Cloud required to generate a valid access token.
Use Proxy Server	Connects to Salesforce Marketing Cloud through proxy.
Enable Logging	Enables logging for the task. When you enable logging, you can view the session log for the log details.
UTC offset	Uses the UTC offset connection property to read data from and write data to Salesforce Marketing Cloud in the UTC offset time zone.
Batch Size	Number of rows that the agent writes in a batch to the target. When you insert or update data and specify the contact key, the data associated with the specified contact ID is inserted or updated in a batch to Salesforce Marketing Cloud. When you upsert data to Salesforce Marketing Cloud, do not specify the contact key.
Enable Multiple BU	Uses the Salesforce Marketing Cloud connection to access data across all business units. Select this option if there are multiple business units in your Salesforce Marketing Cloud account.

## CHAPTER 3

# Mappings and mapping tasks with Salesforce Marketing Cloud Connector

Use the Mapping Designer in Data Integration to add the Source and Target transformations in the mapping canvas and configure the Salesforce Marketing Cloud Source and Target properties.

Describe the flow of data from source and target along with the required transformations before the agent writes data to the target. When you create a mapping task, select the mapping that you want to use. Use the Mapping Task wizard to create a mapping task. Validate and run the mapping to read data from sources and write to a target. The mapping task processes data based on the data flow logic you define in the mapping.

## Salesforce Marketing Cloud sources in mappings

To read data from Salesforce Marketing Cloud, configure a Salesforce Marketing Cloud object as the Source transformation in a mapping.

Specify the name and description of the Salesforce Marketing Cloud source. Configure the source, query options, and advanced properties for the source object.

The following table describes the source properties that you can configure for a Salesforce Marketing Cloud source:

Property	Description
Connection	<p>Name of the source connection.</p> <p>You can select an existing connection, create a new connection, or define parameter values for the source connection property.</p> <p>If you want to overwrite the source connection properties at runtime, select the <b>Allow parameter to be overridden at run time</b> option.</p> <p>Specify the parameter file directory and name in the advanced session properties.</p>
Source Type	<p>Type of the source object.</p> <p>Select one of the following source types:</p> <ul style="list-style-type: none"> <li>- Single Object</li> <li>- Multiple Objects</li> <li>- Parameter</li> </ul> <p>Default is <b>Single Object</b>.</p>
Parameter	<p>A parameter file where you define values that you want to update without having to edit the task. Select an existing parameter for the source object or click <b>New Parameter</b> to define a new parameter for the source object.</p> <p>The <b>Parameter</b> property appears only if you select parameter as the source type.</p> <p>If you want to overwrite the parameter at runtime, select the <b>Allow parameter to be overridden at run time</b> option.</p> <p>When the task runs, the Secure Agent uses the parameters from the file that you specify in the advanced session properties.</p>
Object	<p>Name of the Salesforce Marketing Cloud source object based on the source type selected.</p> <p>Select the source object for a single source. When you select the multiple source option, you can add multiple source objects and configure a relationship between them.</p>

The following table describes the query options that you can configure for a Salesforce Marketing Cloud source:

Property	Description
Filter	<p>Filter value in a read operation. Click <b>Configure</b> to add conditions to filter records and reduce the number of rows that the Secure Agent reads from the source.</p> <p>Specify one of the following filter conditions:</p> <ul style="list-style-type: none"> <li>- Not Parameterized. Use a basic filter to specify the object, field, operator, and value to select specific records.</li> <li>- Completely Parameterized. Use a parameter to represent the field mapping.</li> <li>- Advanced. Not applicable.</li> </ul> <p>Default is <b>Not Parameterized</b>.</p>
Sort	Not applicable for Salesforce Marketing Cloud Connector.

The following table describes the advanced source properties that you can configure for a Salesforce Marketing Cloud source:

Property	Description
Batch Size	Minimum number of rows that the Secure Agent reads in a batch. This property overrides the batch size value that you entered in the <b>Connection</b> property. Enter a number greater than 0. Default is <b>0</b> .
Read Parameter File	Not applicable.
Tracing Level	Determines the amount of detail that appears in the log file. Select one of the following options: <ul style="list-style-type: none"> <li>- Terse</li> <li>- Normal</li> <li>- Verbose Initialization</li> <li>- Verbose Data</li> </ul> Default is <b>Normal</b> .

## Salesforce Marketing Cloud targets in mappings

To write data to Salesforce Marketing Cloud, configure a Salesforce Marketing Cloud object as the Target transformation in a mapping.

The following table describes the target properties that you can configure for a Salesforce Marketing Cloud target:

Property	Description
Connection	Name of the target connection.
Target Type	Type of the target object. Select one of the following target types: <ul style="list-style-type: none"> <li>- Single Object</li> <li>- Multiple Objects</li> <li>- Parameter</li> </ul> Default is <b>Single Object</b> .
Object	Name of the Salesforce Marketing Cloud target object based on the target type selected.
Operation	Target operation. Select one of the following target operations: <ul style="list-style-type: none"> <li>- Insert</li> <li>- Upsert</li> <li>- Delete</li> <li>- Data Driven</li> </ul> Default is <b>Insert</b> .



The following table describes the advanced target properties that you can configure for a Salesforce Marketing Cloud target:

Property	Description
Batch Size	<p>Minimum number of rows that the Secure Agent writes in a batch. This property overrides the batch size value that you entered in the <b>Connection</b> property.</p> <p>Enter a number greater than 0.</p> <p>Default is <b>0</b>.</p>
Success File Directory	<p>Directory for the success file. Specify a directory path that is available on each agent machine in the runtime environment. By default, Data Integration writes the success file to the following directory:</p> <pre data-bbox="472 604 1451 653">&lt;Secure Agent installation directory&gt;\apps\Data_Integration_Server\data\succes</pre>
Error File Directory	<p>Directory for the error file. Specify a directory path that is available on each agent machine in the runtime environment. By default, Data Integration writes the error file to the following directory:</p> <pre data-bbox="472 751 1451 779">&lt;Secure Agent installation directory&gt;\apps\Data_Integration_Server\data\error.</pre>
Forward Rejected Rows	<p>Determines whether the transformation passes rejected rows to the next transformation or drops rejected rows. By default, the mapping task forwards rejected rows to the next transformation.</p> <p>If you select the Forward Rejected Rows option, the Secure Agent flags the rows for reject and writes them to the reject file.</p> <p>If you do not select the Forward Rejected Rows option, the Secure Agent drops the rejected rows and writes them to the session log file.</p> <p>The Secure Agent does not write the rejected rows to the reject file.</p> <p>Default is enabled.</p>

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