

D&B Optimizer for Marketing Salesforce Contact Integration

Installation Guide



Version 1.6
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1. Introduction

D&B Optimizer for Marketing Salesforce Integration optimizes contacts in your Salesforce instance within the Optimizer application. Once configured, you can optimize your Contacts without logging into your Salesforce account.

This guide takes you through the process of configuring your Optimizer for Marketing to integrate with your instance of Salesforce.

2. Configuring your Salesforce Org

In order to use the D&B Optimizer for Marketing Salesforce Integration, a connection must be established between your Salesforce Org and Optimizer for Marketing. The process begins in the target Salesforce organization where you need to generate a Consumer Key and Consumer Secret and then enter into Optimizer for Marketing. Depending on which user interface you are using in Salesforce, the steps will vary.

Salesforce Org Requirements:

- Salesforce Sales Cloud Enterprise edition or Professional edition with API support
- Administrative privileges that can install Connected Apps

Salesforce User Requirements:

The SFDC user must have administrative privilege that can install Connected Apps.

NOTE: The SFDC username must be the same as the Optimizer for Marketing username. If they are not the same, the SFDC Connector will not function.

Lightning Users

Steps in Salesforce:

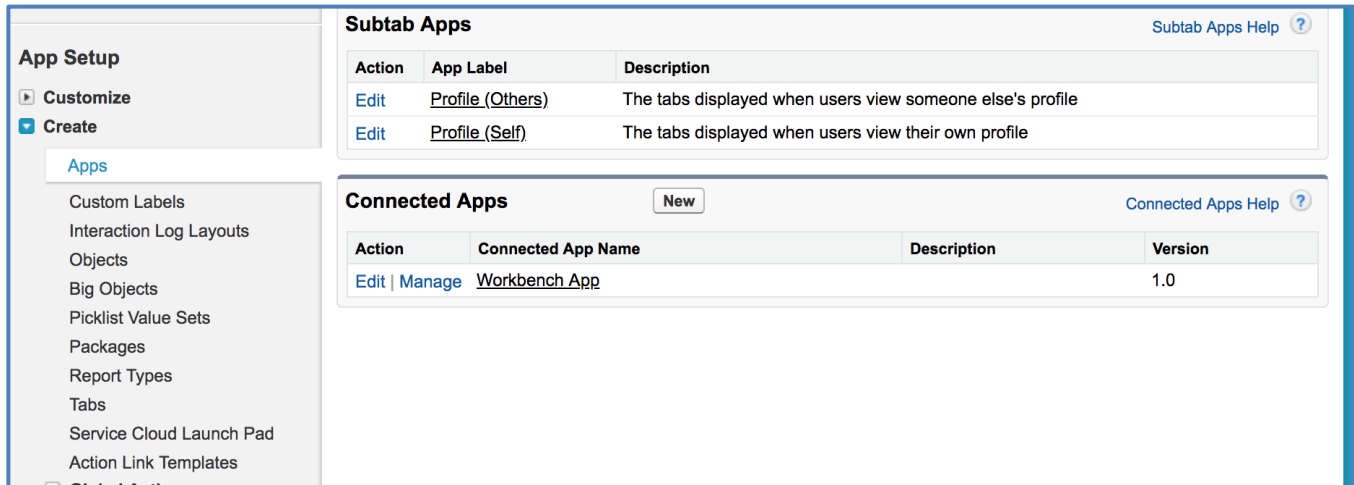
1. Log into Salesforce **using the same username email address** being used for your Optimizer for Marketing account. This must be a valid email address.
2. Navigate to the Setup page.
3. In the menu on the left, click **Apps** → **App Manager**
4. Click **New Connected App** and complete the form with the following parameters:
 - **Connected App Name:** Optimizer App (Recommended)
 - **API Name:** Optimizer_App (Recommended)
 - **Contact Email:** support@dnb.com
 - **Enable OAuth Settings:** Check this box
 - **Callback URL:** <https://app.dnboptimizer.com/integration/sfdc>
 - **Selected OAuth Scopes:**
 1. Full access (full)
 2. Perform requests on your behalf at any time (refresh_token, offline_access)
5. Leave all other options in their default state and click Save and then Continue.

6. Once the app is saved, Salesforce will generate the “Consumer Key” and “Consumer Secret” that a user will need to configure the Salesforce integration in the Optimizer for Marketing settings. It will take about 10-15 minutes for the app to be generate these credentials. Optimizer for Marketing cannot be configured before this Salesforce process has completed
7. Open a new window in your browser, leaving these credentials readily available

Classic Users

Steps in Salesforce:

1. Log into Salesforce **using the same username email address** being used for your Optimizer for Marketing account. This must be a valid email address.
2. Navigate to the Setup page.
3. In the menu on the left, click **Create → Apps → New Connected App**



4. Create the new Connected App with the following parameters:
 - **Connected App Name:** Optimizer App (Recommended)
 - **API Name:** Optimizer_App (Recommended)
 - **Contact Email:** support@dnb.com
 - **Enable OAuth Settings:** Check this box
 - **Callback URL:** <https://app.dnboptimizer.com/integration/sfdc>
 - **Selected OAuth Scopes:**
 1. Full access (full)
 2. Perform requests on your behalf at any time (refresh_token, offline_access)

Connected App Name Help for this Page ?

Workbench App

Save Cancel

To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.

Basic Information ! = Required Information

Connected App Name

API Name

Contact Email

Contact Phone

Logo Image URL

Icon URL

Info URL

Description

API (Enable OAuth Settings)

Enable OAuth Settings

API (Enable OAuth Settings)

Enable OAuth Settings

Enable for Device Flow

Callback URL

Use digital signatures

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Selected OAuth Scopes

- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)

Add

Remove

Require Secret for Web Server Flow

Include ID Token

Enable Single Logout


Enable Asset Tokens

5. Click save, then continue.
6. Once the app is saved, Salesforce will generate the “Consumer Key” and “Consumer Secret” that a user will need to set up an integration in Optimizer for Marketing. It will take about 10-15 minutes for the app to be generate these credentials. Optimizer for Marketing cannot be configured before this Salesforce process has completed

Connected App Name
Workbench App

« Back to List: Custom Apps

Allow from 2-10 minutes for your changes to take effect on the server before using the connected app.



Version	1.0
API Name	Workbench_App
Created Date	3/18/2018 4:05 PM
By:	John Zilch
Contact Email	workbenchsupport@dnb.com
Contact Phone	
Last Modified Date	3/18/2018 4:05 PM
By:	John Zilch
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key	3MVG9CEn_O [redacted]	DLSkq_eNBwt5xU	Consumer Secret	291172 [redacted]
Selected OAuth Scopes	Full access (full) Perform requests on your behalf at any time (refresh_token, offline_access)		Callback URL	https://workbench.dnb.com/inte
Enable for Device Flow	<input type="checkbox"/>		Require Secret for Web Server Flow	<input checked="" type="checkbox"/>
Token Valid for	0 Hour(s)		Include Custom Attributes	<input type="checkbox"/>
Include Custom Permissions	<input type="checkbox"/>			
Enable Single Logout	Single Logout disabled			

▼ Custom Connected App Handler

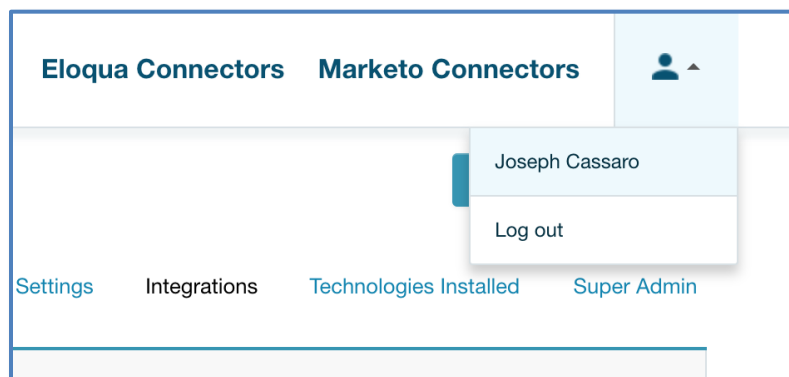
Apex Plugin Class	
Run As	

7. Open a new window in your browser, leaving these credentials readily available

3. Configure Optimizer to Communicate with Salesforce

Once a connected app has been created in Salesforce (as described above), the Optimizer for Marketing application needs to be linked back. To establish the link:

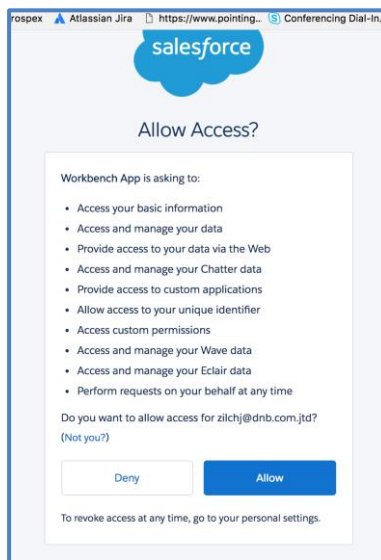
1. In your new window, log into Optimizer for Marketing using your normal credentials
2. Click the User Icon and then your name to bring up Optimizer for Marketing settings



3. Select “Integrations” and then select the Salesforce tile
4. Copy & Paste the Consumer Key & Consumer Secret provided by your Salesforce org
 - (If you receive an error after entering correct credentials, the app is not yet ready on the Salesforce side. Waiting a few additional minutes and re-attempting should resolve the issue)
5. Click “Save Credentials”

The screenshot shows a Salesforce interface for entering credentials. At the top, there is a navigation bar with the Salesforce logo and two tabs: 'ACCOUNT CREDENTIALS' (selected) and 'INPUT MAPPINGS'. Below the navigation bar, the heading reads 'Enter Your SFDC Connected App Credentials'. A link is provided for help: 'For help on setting up a Connected App in Salesforce, please [click here](#).' There are two input fields: 'Consumer Key' and 'Consumer Secret'. Below these fields is a blue button labeled 'Save Credentials'.

6. When the credentials have been successfully saved, the browser will automatically redirect to Salesforce, where you’ll be prompted for approval. Click “Allow” to grant Optimizer for Marketing the necessary permissions for the integration. Once access is granted, the next step is configuring the Input Mappings.



4. Configure Input Mappings

After your Salesforce Org and Optimizer for Marketing accounts are linked, input mappings need to be configured in Optimizer for Marketing. Input Mappings determine which Salesforce fields will be used when attempting a contact match

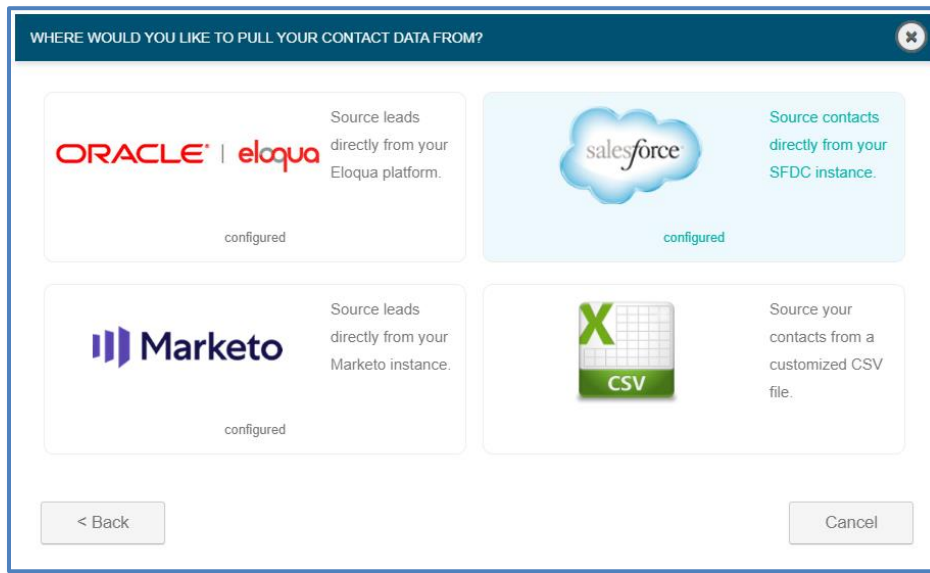
1. In the Integrations section, select “INPUT MAPPINGS”
2. Using the dropdown menus in the right column, select the appropriate Salesforce fields that should be considered when D&B attempts a match. Map as many fields as possible/applicable to your Salesforce data
3. When satisfied with the mappings, click “Save”

Dun & Bradstreet Input Field	SFDC Value
Email Address *	Email
First Name	First Name
Last Name	Last Name
Job Title	Choose Mapping
Job Hierarchy	Choose Mapping
Job Title Function	Choose Mapping

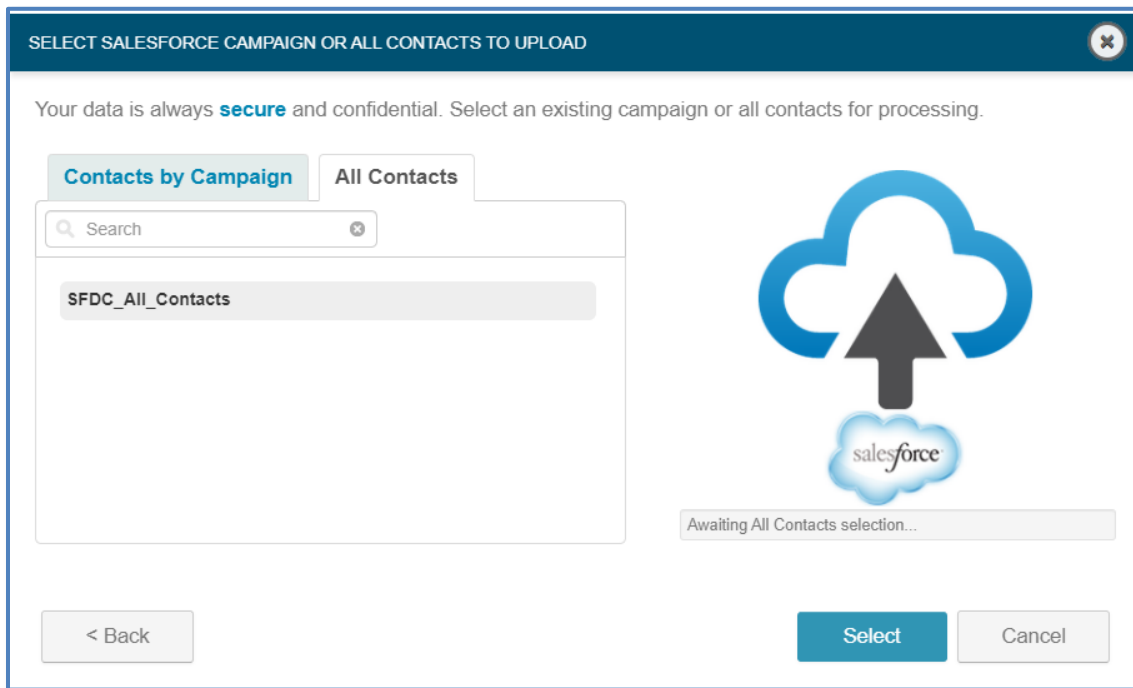
5. Importing Contacts into Optimizer for Marketing

Using the Salesforce integration is very similar to Optimizing any data source in Optimizer for Marketing. To Optimize your Salesforce contacts:

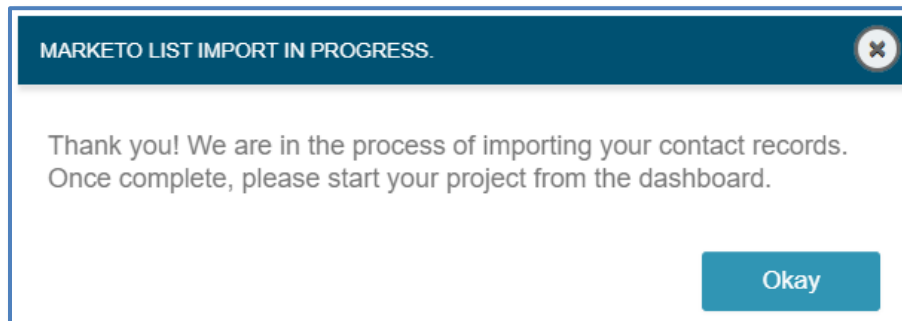
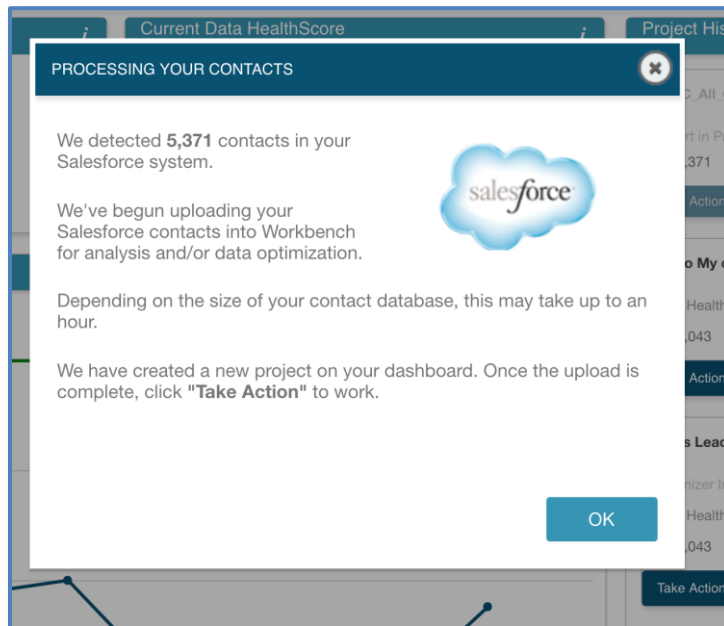
1. Navigate to the Optimize tab of Optimizer for Marketing
2. Click “Upload Data”
3. Select “Contact Data”
4. Select the Salesforce tile
 - o Note: It should say “configured” if the process has been completed successfully. If it does not say “configured”, configure the Salesforce Credentials in the User Name (top right corner of UI) > Integrations > Salesforce > Enter Your Market Credentials.



5. Select from the list Contacts and Campaigns that you want to import into the Market Integration.



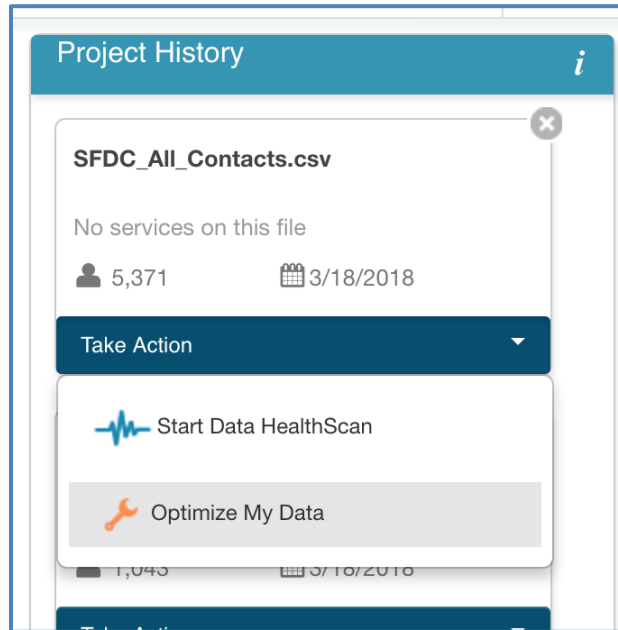
6. There will be a notice stating how many contacts are within the connected Salesforce org and these contacts will begin importing to Optimizer for Marketing. Click "OK" to dismiss the notice



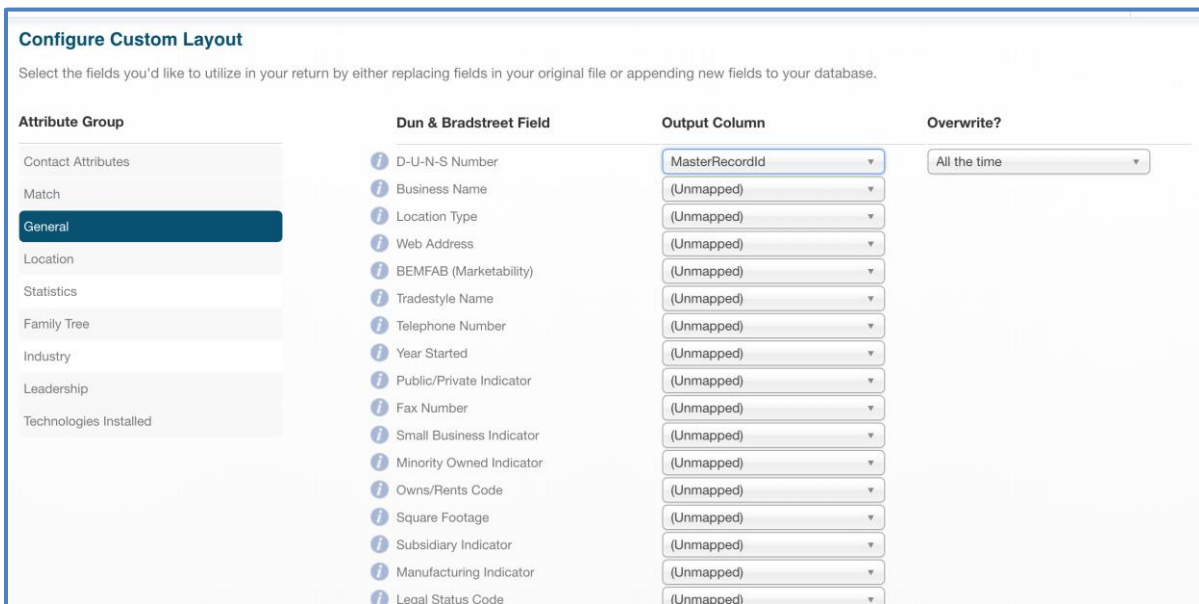
6. Optimizing Contacts

Once imported, Salesforce contacts will appear as a list in the “Project History” pannel of the Optimize tab. To continue the process:

1. Click “Take Action” on the Salesforce Contact list and select “Optimize My Data.” (Note: At this point, a Data Health Scan can also be run)



2. Configure Contact Optimizer settings as you would for any other file
3. On the next page, there will be a prompt to configure a custom layout. In this section, select where each D&B data attribute (Dun & Bradstreet Field) should be written on the Salesforce Contact Object (Output Column.) You can also determine the writing behavior (Either overwrite or write only when blank) in the far right column. Only the mapped attributes will be published back to the Salesforce Contacts. When satisfied, click “Start Contact Optimizer”

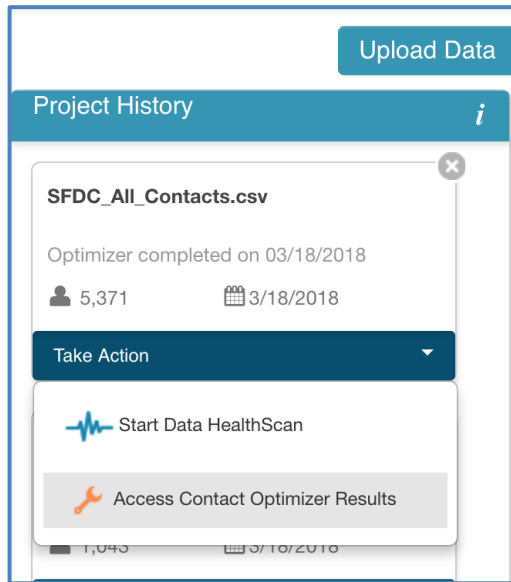


4. You'll be returned to the Optimize dashboard as contact optimization is performed on your file

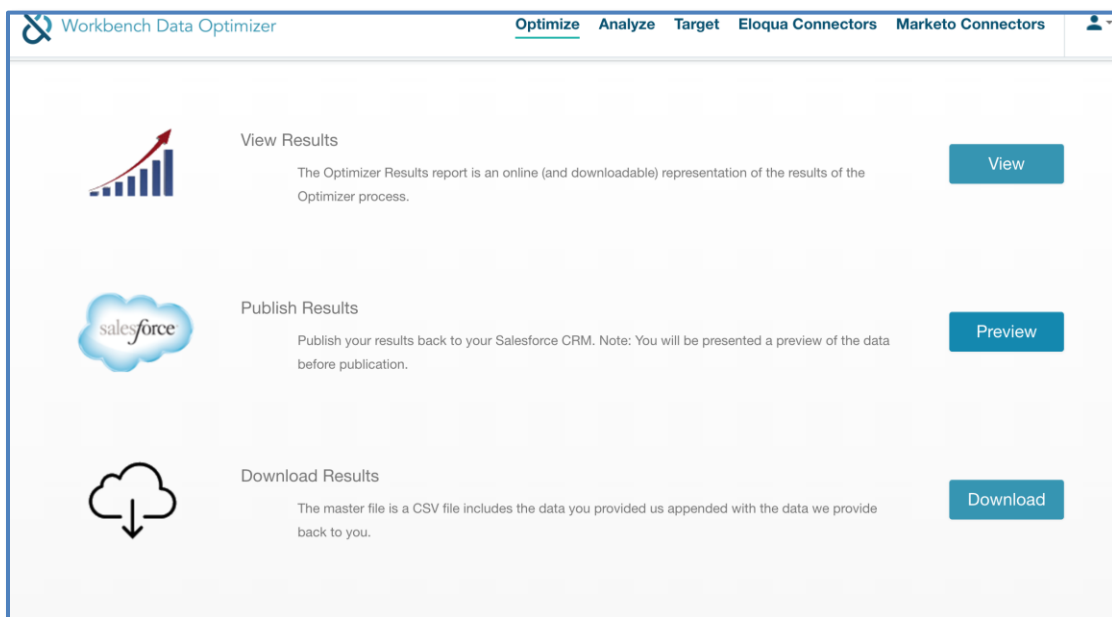
7. Publishing Optimized Contacts back to Salesforce

The project status will updated once the Contact Optimizer has completed. Once complete, the optimized contacts can be updated in Salesforce by doing the following:

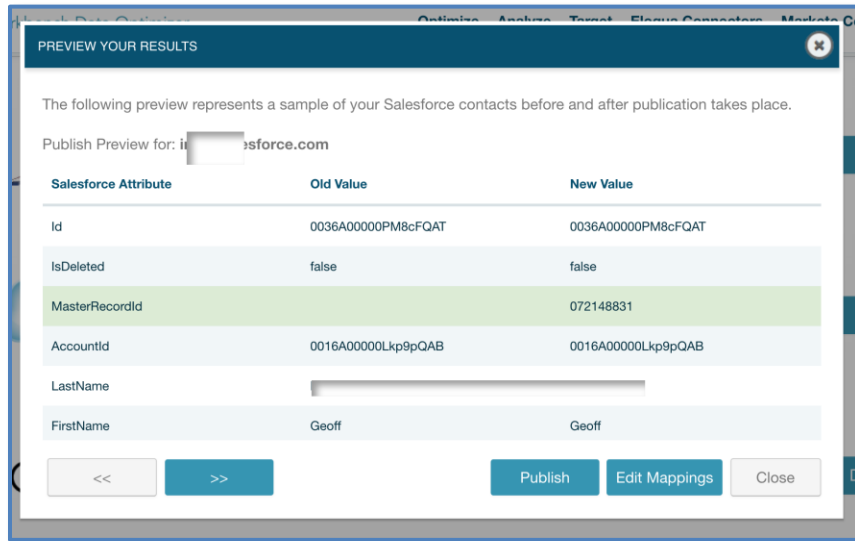
1. From the “Project History” pannel, click “Take Action” and select “Access Contact Optimizer Results.”



2. The following screen allows access to an Optimization report, the ability to publish results or a raw excel file download. Select Salesforce, “Preview”.



3. A modal will display the results of the Contact Optimization in comparison to the original data. Any changes will display as green rows. There will be 5 preview examples.



4. If not satisfied with the way the data is being written from D&B to Salesforce or if field names have been changed or deleted, the field mapping can be quickly updated by selecting “Edit Mappings.” Otherwise, hitting “Publish” will begin pushing all changes back to Salesforce.