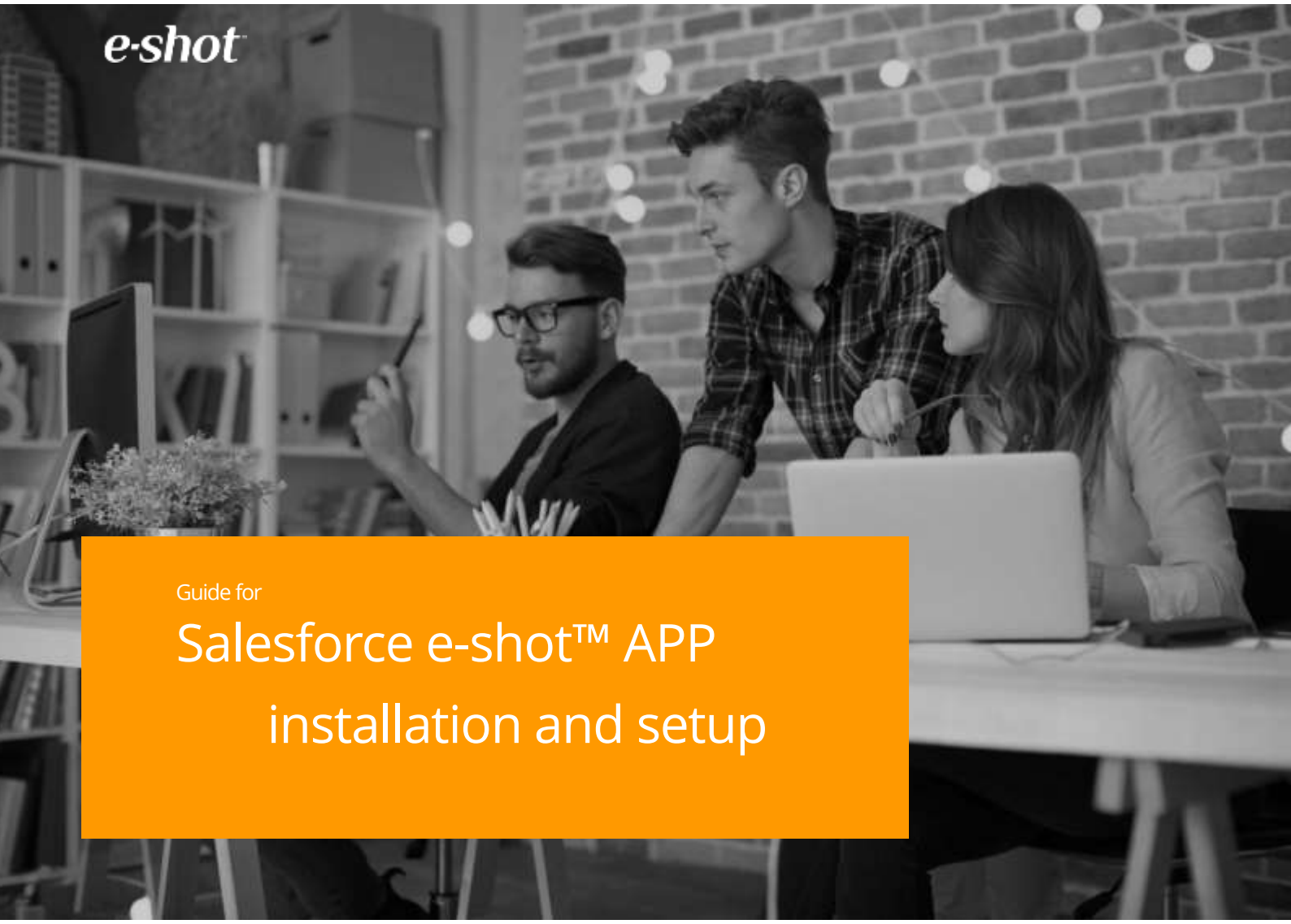


Guide for

Salesforce e-shot™ APP installation and setup

How to set up Salesforce to integrate with e-shot™

Version 1

March 2018

Contents

1. Installation

Within Salesforce, navigate to the AppExchange, search for and install the 'e-shot' plugin.

2. Setup

The next step is to navigate to the Configuration page, which is accessed by clicking the new 'e-shot Configuration' menu item and is only accessible by a Salesforce System Administrator. From here the following four sections need to be completed.

2.1. Connect to e-shot API

Each account will be provided API login credentials, simply enter the information and click 'Validate credentials'. If there are any issues with the credentials then a message will display on screen and our support team will be happy to help resolve any issues.

The API login credentials provided will be tied to an agreed e-shot™ subaccount.

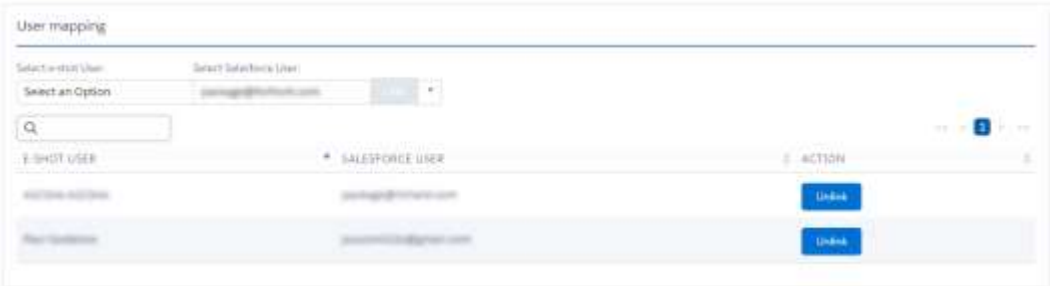
2.2. Synchronisation schedule

The schedule for automatic synchronisations can be set manually from this field. Every synchronisation call will pull campaign statistics from e-shot™ and will update Contacts and Leads in Salesforce with e-shot™ campaign send and interaction statistics.

Companies with a Professional Salesforce licence have to pay for API calls made, so a synchronisation schedule set infrequently to match their demands can be used. Companies with an Enterprise or Unlimited Salesforce licence type have access to unlimited API calls so a more frequent schedule can be chosen.

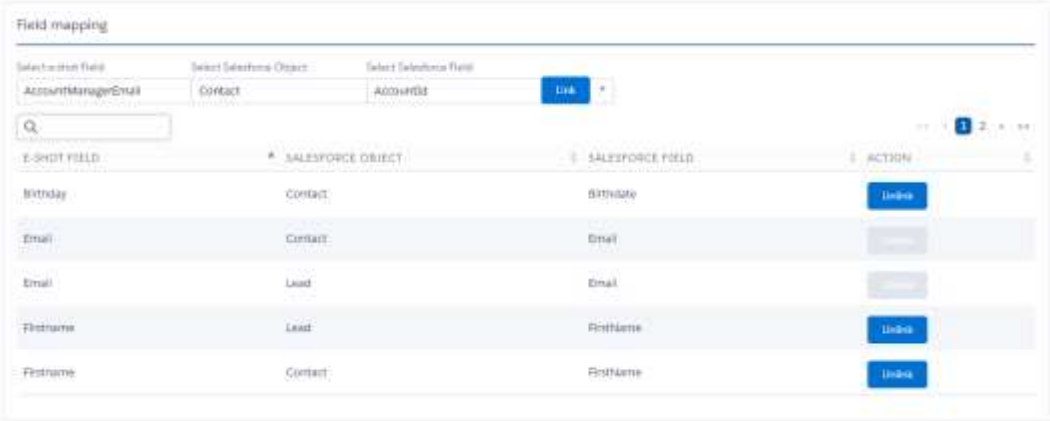
2.3. User mapping

This section enables Salesforce users to be linked with e-shot™ users, which allows them to perform campaign synchronisations. Linked Salesforce users can also be unlinked, but once a user is unlinked they will not be able to perform any campaign synchronisations, although they will still be able to view campaign statistical data specific to the Contact or Lead.



2.4. Field mapping

The field mapping section allows Salesforce Contact and Lead fields to be linked to e-shot™ fields. There are two sets of field mappings, one for Contacts and the other for Leads, allowing a different set of mappings to be used for each if required. This mapping is used to control which contact fields within e-shot™ are populated by the contact synchronisation process.



By default we map matching Salesforce and e-shot™ fields. The required fields; Email, SalesforceLeadID and SalesforceContactID will be mapped automatically and cannot be unmapped. If you wish to map a Salesforce field to e-shot™, but no equivalent e-shot™ field exists, simply add the field to e-shot™ via the Field Manager.

Once the Configuration page has been completed you are ready to use the e-shot™ integration features, which are detailed in our Salesforce User Guide.