Integrate with Salesforce for Advocate

Looking to integrate with Performance or Creator? This guide explains how to integrate with Salesforce for your Advocate program. Refer to Integrate with Salesforce (https://integrations.impact.com/impact-brand/docs/integrate-with-salesforce) for Performance- and Creator-specific instructions.

Step 1: Enable the Salesforce integration in impact.com

Start by enabling Salesforce for your impact.com account's Advocate program.

1. In impact.com, from the left navigation menu, select **[Menu]** → **Settings** (https://app.impact.com/secure/advertiser/account-settings-flow.ihtml).
2. On the left, below *Advocate Settings*, select **Integrations**.
3. On the Salesforce card, select **+ [Expand]**, then select **Enable Salesforce**.
4. Select **Log in with Salesforce** and enter your Salesforce credentials.
5. Select **Allow** to give impact.com access to your Salesforce organization.

Step 2: Install the impact.com package to Salesforce

Warning: Only Salesforce System Administrators should install and configure the impact.com package.

1. In the Salesforce AppExchange, go to the impact.com Partner Manager page (https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000QsHhwEAF&tab=e).

2. Select **Get It Now**.

3. Follow the on-screen instructions to install the impact.com app.

If you experience any issues installing from AppExchange, you can find a direct link to the package from the *Salesforce* card in your Advocate integration settings.

Step 3: Configure your Sync settings in impact.com

1. Return to your Advocate program's *Integrations* page.

2. On the Salesforce card, select **+ [Expand]** to expand the integration settings.

3. Select **Sync Settings**. Then, choose the Advocate program you want to connect and the sync frequency.
    - Only custom fields need to be set up in the sync settings. Basic lead and contact fields don't need to be mapped here.

4. **Save** your changes.

Step 4: Configure your impact.com credentials in Salesforce

You'll need your impact.com Account SID, Auth Token, and Program ID. Refer to Get Brand API Access & Credentials (https://help.impact.com/en/support/solutions/articles/155000000004-get-brand-api-access-credentials) for help finding your Account SID and Auth Token. To find your program ID in your impact.com account, select the account selection dropdown menu in the upper-left corner of the page. Your program ID is listed on the right, below the *Programs* heading.

1. In your Salesforce account, open the impact.com integration, then navigate to the **Impact Setup** tab.

2. Input the required fields:
    - Impact account SID
    - Auth token
    - Program ID

3. Select **Save**.

4. In the *Activate Data Sync* section, toggle on the option to enable communication between Salesforce and impact.com.

Step 5: Configure field mappings and event triggers in Salesforce

In this step, you'll identify which conditions in Salesforce need to occur for impact.com to track a conversion event.

Alternatively, you can use Flow Builder to set up custom logic on when events should be sent to impact.com. If you plan to use Flow Builder instead, contact your impact.com-assigned Implementation Engineer or our support team (https://app.impact.com/secure/advertiser/support/customer-support-portal-flow.ihtml) for assistance.

Field mappings

The Field Mappings section is where you can specify which Salesforce fields are associated with impact.com fields to ensure accurate conversion and action reporting in impact.com.

1. In your Salesforce account, open the impact.com integration, then navigate to the **Impact Field Mapping** tab.
2. Ensure that the Salesforce field `email` is mapped with the impact.com field `customerEmail`.
3. Some fields are mapped automatically. You can map other fields as required. If you're not sure which fields to map, reach out to your impact.com-assigned Implementation Engineer or our support team (https://app.impact.com/secure/advertiser/support/customer-support-portal-flow.ihtml) for assistance.

Event triggers

1. In Salesforce, navigate to the **Impact Event Triggers** tab.
2. In the section *Enable trigger event when a new record is created*, use the toggles to choose which events will trigger a conversion event in impact.com when a record is created in Salesforce for that object.

3. In the section *Enable trigger event when a field is changed*, use the toggles to add triggers for an event, if you want impact.com to create a conversion (and thus, create an action) when a record of the specified event is modified.
4. Exit the impact.com integration and return to your main Salesforce dashboard.

Step 6: Add Advocate fields to your layout

1. In Salesforce, select the **Leads** tab.
2. In the upper-right corner, select **[Settings]**, then **Edit Object**.
3. In the left navigation menu, select **Page Layouts**.
4. Select the layout you want to edit (e.g., **Lead Layout**).
5. From the layout panel at the top of the page, select and drag the **Section** field into the layout.
6. In the *Section Properties* window, enter a name (e.g., Advocate Information) and select a column style.
7. From the layout panel at the top of the page, select and drag the **Referral Code** and **Referral Link** fields into your new section.
8. **Save** your changes.
9. Return to the **Leads** tab and verify that the fields have been added to the layout.

You can add Advocate fields to your Contacts by following the steps above within your **Contacts** tab in Salesforce.

Step 7: Build Flows to share data between Salesforce and impact.com

Important: You must set up flows in Salesforce's Flow Builder to share data between Salesforce and your Advocate program. Data cannot be shared between the platforms without a flow.

Work with your impact.com-assigned Implementation Engineer or reach out to our support team (https://app.impact.com/secure/advertiser/support/customer-support-portal-flow.ihtml) for help setting up flows. We recommend setting up two primary flows:

- Upserting a user via flow (required)
- Tracking events via flow (optional)

For general examples of each flow type, refer to Example Salesforce Flows for Advocate (https://integrations.impact.com/impact-brand/docs/salesforce-flows-for-advocate).

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