eTrigue Corporation
6399 San Ignacio Avenue
San Jose, CA 95119

www.etrigue.com

800.858.8500 toll-free
408.490.2901 fax

eTrigue® DemandCenter®
Salesforce CRM Integration - Creating Tasks via eTrigue

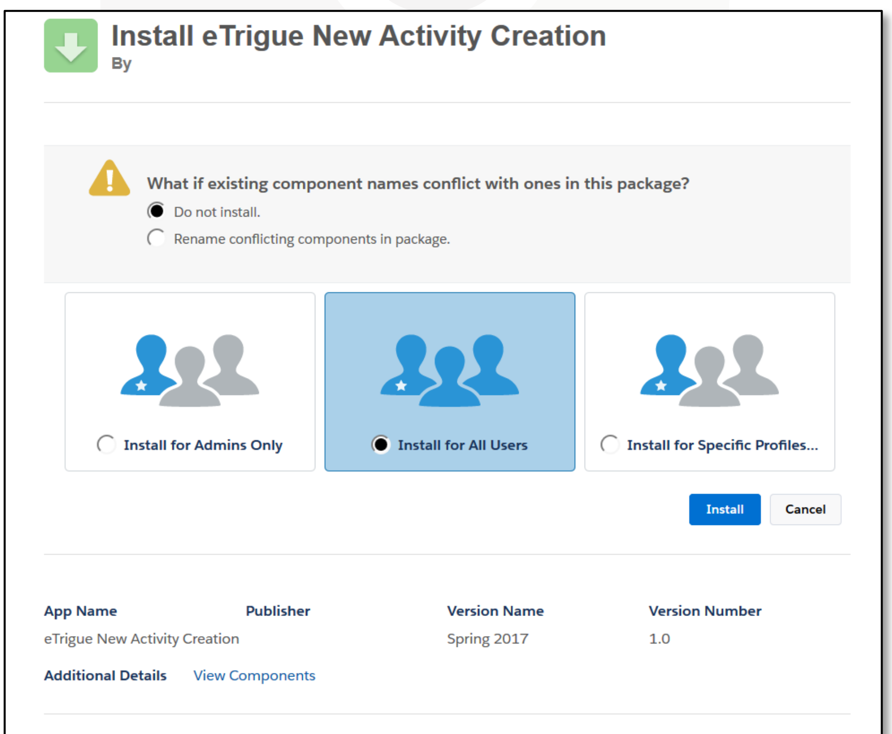
eTrigue CRM Integration provides the ability to create tasks in Salesforce directly from eTrigue DemandCenter. By simply setting a value on a prospect record either manually or via a campaign, you can create as many desired tasks of any desired names with expected due dates.

How to Get Started (Part 1 of 2) - Salesforce Setup:

1. Click on the link below or (copy/paste into your browser) to install the **eTrigue New Activity Creation - Version 1 (Spring 2017)** package:
   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t40000000U74Z

   Note - If you are installing into a Salesforce test instance, use this URL:
   https://test.salesforce.com/packaging/installPackage.apexp?p0=04t40000000U74Z

2. If prompted, enter your Salesforce credentials to log in and proceed with the installation.
   a. If given the option, choose **Install for All Users**.



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The package will install the components listed below:

Field Label	Data Type	Length	API Name	Notes
eTrigue New Activity Subject	Text	255	eTrigue_New_Activity_Subject__c	Lead Object
eTrigue New Activity Due in Days	Number	3,0	eTrigue_New_Activity_Due_in_Days_c	Lead Object
eTrigue New Activity Subject	Text	255	eTrigue_New_Activity_Subject__c	Contact
eTrigue New Activity Due in Days	Number	3,0	eTrigue_New_Activity_Due_in_Days_c	Contact Object
CreateNewTaskLeadTestCls	n/a	n/a		Apex Class
CreateNewTaskForLeadTrigger	n/a	n/a		Apex Trigger
CreateNewTaskContactTestCls	n/a	n/a		Apex Class
CreateNewTaskForContactTrigger	n/a	n/a		Apex Trigger

The Apex Classes and Triggers work together to create your Tasks for Leads and Contacts. When a Lead or Contact's **eTrigue New Activity Subject** field is changed, the triggers will create a new task under that Lead or Contact.

- The task's **Subject** line will be set to the value of **eTrigue New Activity Subject**.

- The task's **Due Date** will be to set the date the **Activity** was created plus the value of **eTrigue New Activity Due in Days.**

  Note **-** If **eTrigue New Activity Due in Days** is zero or empty, then the task will not have a due date.

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How to Get Started (Part 2 of 2) – eTrigue DemandCenter Setup:

1. Log into your eTrigue DemandCenter account: https://login.etrigue.com

2. Navigate to **Prospects > Add/Edit Prospect fields**. Create two custom fields exactly named below and type:

Field Name	Type
eTrigue New Activity Subject	Text (250)
eTrigue New Activity Due in Days	Integer

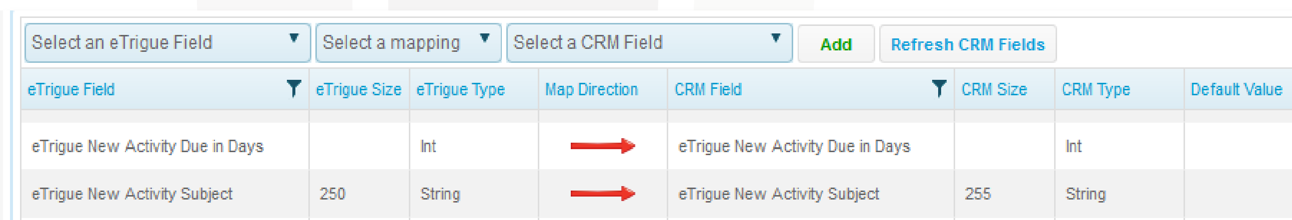
3. Navigate to **Settings > CRM Management > Integration Parameters**. Uncheck the box next to **Integration Active** to temporarily pause the CRM Integration service, then click **Save**.

4. Navigate to **Settings > CRM Management > Mapping**.

   a. Click on **Refresh CRM Fields**. This will cause your listing of available fields to be updated with the fields created from the CRM package.

   b. Map the two custom fields (created from Step 2) to their corresponding Salesforce fields.

   IMPORTANT: In eTrigue DemandCenter, the two fields should be mapped under both the **Lead** and **Contact** tabs. There should be four new mappings in total.


Select an eTrigue Field | Select a mapping | Select a CRM Field | Add | Refresh CRM Fields

eTrigue Field	eTrigue Size	eTrigue Type	Map Direction	CRM Field	CRM Size	CRM Type	Default Value
eTrigue New Activity Due in Days		Int	→	eTrigue New Activity Due in Days		Int	
eTrigue New Activity Subject	250	String	→	eTrigue New Activity Subject	255	String	

5. Navigate to **Settings > CRM Management > Integration Parameters**. Check the box next to **Integration Active** to resume the CRM Integration service, then click **Save**.

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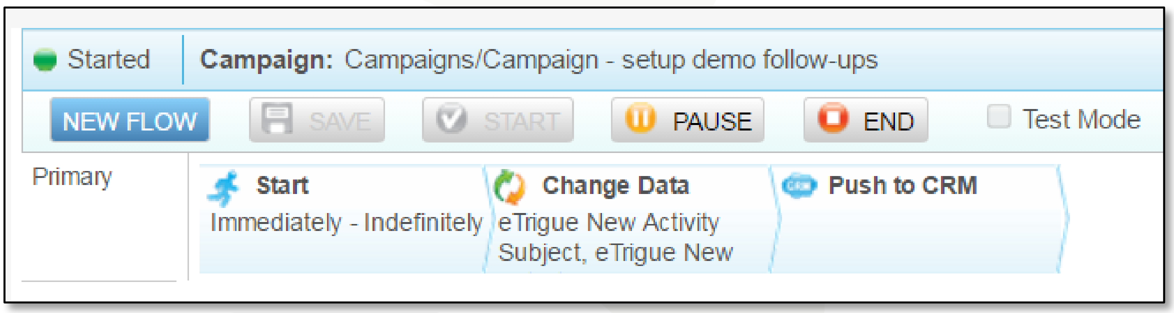
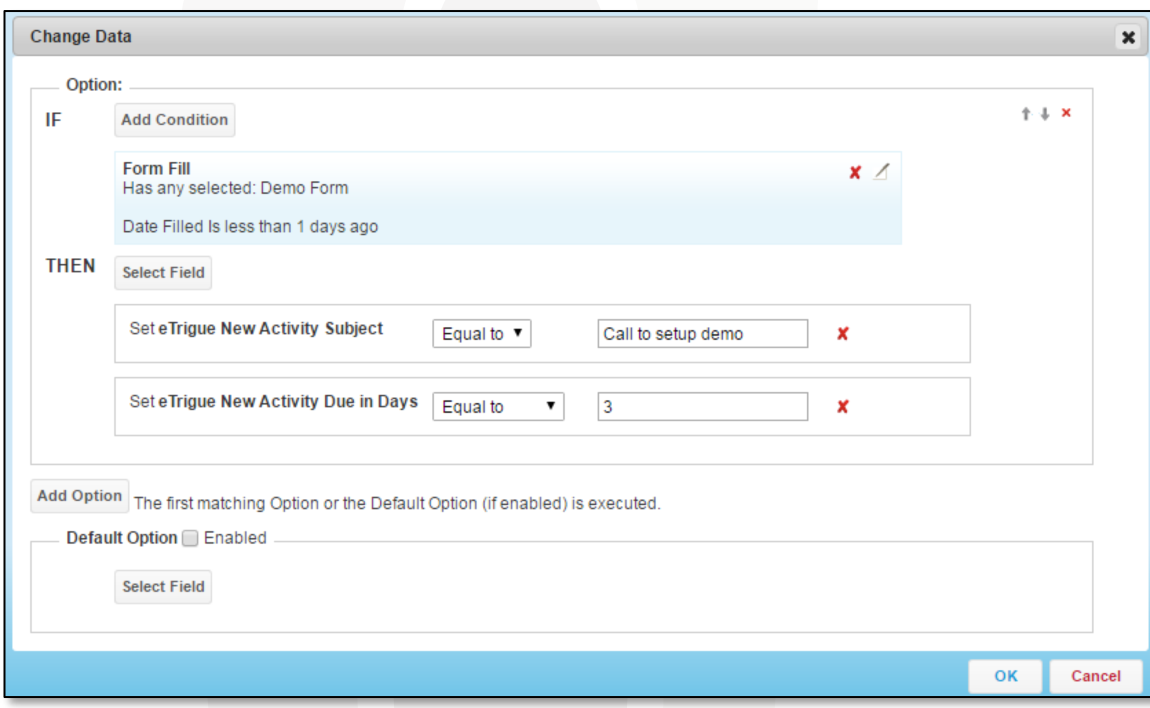
How to Create a Task from an eTrigue DemandCenter Campaign:

1. In a campaign, add a **Change Data** Action.

2. Select the **eTrigue New Activity Subject** field and set the value to the name of the Subject you want on the Salesforce task (example: "Call and recommend product X" or "Send a follow-up Email").

3. Select the **eTrigue New Activity Due in Days** field and set the value to the number of days from when the task is created as the task's **Due Date.** If this value is left blank, then the task will not have a due date.





Example: *In the campaign above, the **Change Data** Action will set the task fields when it encounters a prospect that filled out the Demo Form. The **Push to CRM** Action will synchronize the prospect, along with the task information, to the corresponding Lead or Contact in CRM. The Salesforce record will have a new task. The subject of the task will be "Call to setup demo" and the assigned Salesforce owner will have 3 days to complete the task.*

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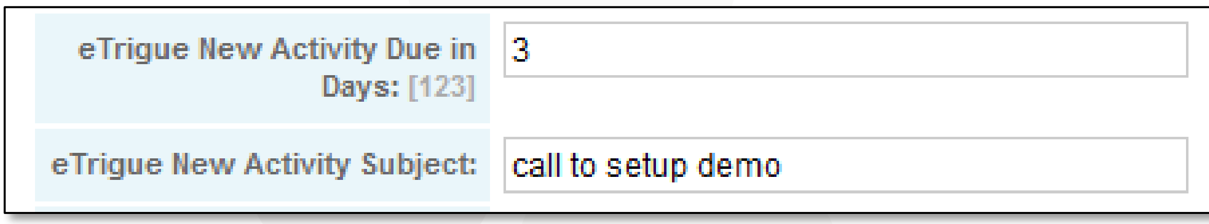
How to Create a Task manually from an eTrigue Prospect Record:

1. In eTrigue DemandCenter, view an eTrigue Prospect and navigate to their **Details** tab.

2. Find the **eTrigue New Activity Subject** field and set the value to the name of the **Subject** you want on the Salesforce task (example: “Call and recommend product X” or “Send a follow-up Email”).

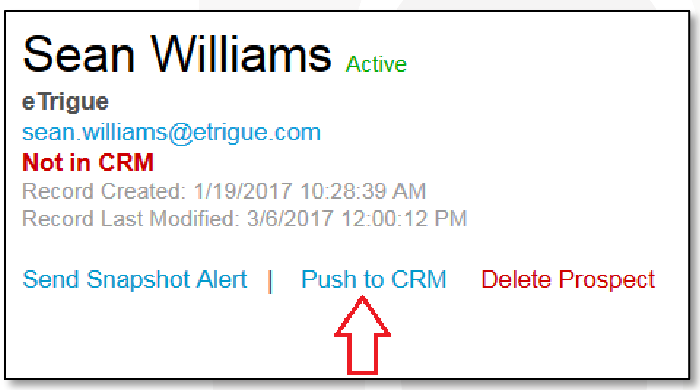
4. Find the **eTrigue New Activity Due in Days** field and set the value to the number of days from when the task is created as the task’s **Due Date.** If this value is left blank, then a task will not have a due date.



3. Click **Save** to apply your changes to the eTrigue Prospect.

4. During the next CRM Integration synchronization cycle, the Prospect’s corresponding Lead or Contact in your CRM will have a new task created.

   If needed, users may need to push the prospect first to have them connected to Salesforce. To push the prospect, click **Push to CRM**.



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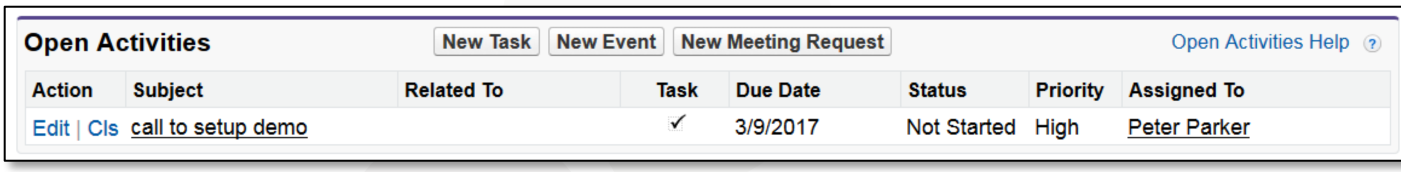
How to View and Close Tasks in Salesforce:

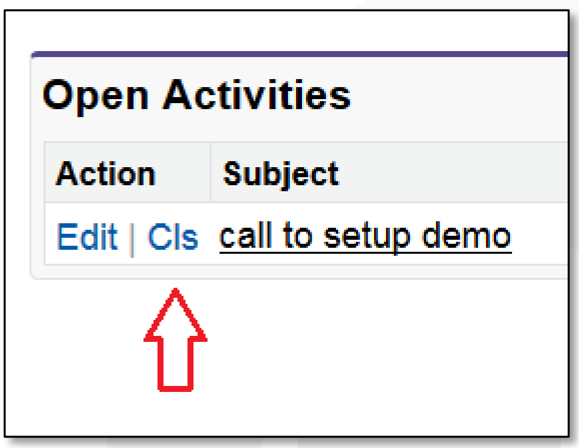
To view tasks:

After the task information is synced to Salesforce, a new open Activity will be listed under the Lead or Contact's **Open Activities** section.



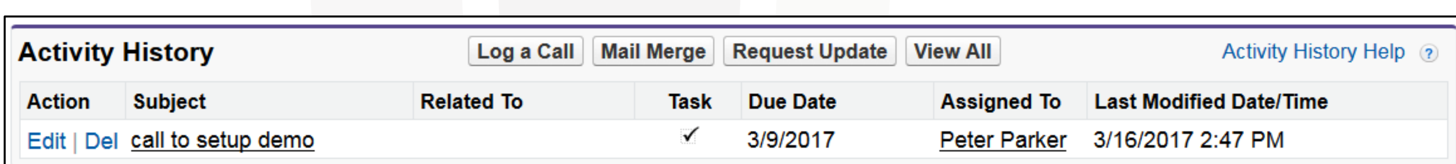
To close tasks:

1. Locate the task you want to close and click on **CLs.**



2. In the task's details, provide any additional information. For example, you may want to add notes to the **Comments** field.

3. Click **Save.** The task will be completed and moved to the Lead or Contact's **Activity History** section.



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Additional Guidelines, Tips, and Recommendations:

- CRM Integration can create Tasks in Salesforce, but does not update Tasks.
- Each unique change in the **eTrigue New Activity Subject** field creates a new Task in Salesforce. The same field will be used to create additional tasks.
- CRM Integration does not create duplicate task names as the creation is based on a change of the value in the **eTrigue New Activity Subject** field.

  Example scenario to illustrate concepts above:

  1. On Monday, you set **eTrigue New Activity Subject** to "Call Sally" and **eTrigue New Activity Due in Days** to 3.

     During the next CRM sync interval, a task will be created on the corresponding Lead or Contact with "Call Sally" as the subject and a due date of 3 days from the date the task is created.

  2. On Tuesday, you changed **eTrigue New Activity Subject** to "Email Sean".

     During the next CRM sync interval, a new task will be created on the corresponding Lead or Contact with "Email Sean" as the subject and a due date of 3 days from the date the task is created.

  3. On Wednesday, you keep eTrigue **New Activity Subject** as "Email Sean", but you change **eTrigue New Activity Due in Days** to 5.

     During the next CRM sync interval, no change will occur. The due date for "Email Sean" remains at 3 days from the date the task was originally created.

- **IMPORTANT:** In Salesforce, do not add the **eTrigue New Activity Subject** and **eTrigue New Activity Due in Days** fields to the Lead or Contact views/layouts.

  If these two fields are accessible by Salesforce users, then users are able to those fields and that will cause the triggers to create a new Activities and tasks.