



## Sendoso Technical Description of Salesforce API usage:

**Salesforce Objects Required:** Contact, Lead, Campaign Member, Campaign, Account

**Optional Salesforce Objects:** Opportunity (If you'd like us to trigger based on Opportunity data or update Opportunity data)

### **Object Permissions:**

Object	Read	Update	Create
Lead	<input checked="" type="checkbox"/>		
Account	<input checked="" type="checkbox"/>		
Contact	<input checked="" type="checkbox"/>		
Opportunity	<input checked="" type="checkbox"/>		
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign Member	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### **Other Permissions:**

- Access Activities
- API Enabled
- Marketing User (On User Level to be able to create Campaigns)

## Salesforce functions used:

### Contact:

<b>find(id)</b> <b>find_by_email(email)</b> <b>fetch</b> <b>Describe</b>	to find user by id against contact to find any Salesforce user against email to find all the users in Contact to get <b>Field Name</b> instead of <b>API Names</b> to show more user friendly name to Sendoso user
<b>query(query_statement)</b> <b>find_picklist</b>	to run a custom query to get all the possible values of any column

### Lead:

<b>find(id)</b> <b>find_by_email(email)</b> <b>fetch</b> <b>describe</b>	to find user by id against lead to find any Salesforce user against email to find all the users in Contact to get <b>Field Name</b> instead of <b>API Names</b> to show more user friendly name to Sendoso user
<b>query(query_statement)</b> <b>find_picklist</b>	to hit the custom query to get all the possible values of any column

### Opportunity:

<b>find(id)</b> <b>find_by_email(email)</b> <b>fetch</b> <b>describe</b>	to find user by id against opportunity to find any Salesforce user against their email to find all the users in Opportunity to get <b>Field Name</b> instead of <b>API Names</b> to show more user-friendly name to Sendoso user
<b>query(query_statement)</b> <b>find_picklist</b>	to hit the custom query to get all the possible values of any column

### Account:

<b>find(id)</b> <b>find_by_email(email)</b> <b>fetch</b> <b>describe</b>  <b>query(query_statement)</b> <b>find_picklist</b>	to find user by id against opportunity to find any Salesforce user against their email to find all the users in Opportunity to get <b>Field Name</b> instead of <b>API Names</b> to show more user friendly name to Sendoso user  to hit the custom query to get all the possible values of any column
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### Campaign:

<b>find(id)</b> <b>fetch_campaigns</b> <b>update_status(id, status = 'Planned')</b>	to find campaign by ID to find all campaigns to update the status of campaigns in Salesforce
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### Campaign Members:

<b>find(id)</b> <b>fetch_campaigns</b> <b>update_status(id, status = 'Planned')</b> <b>campaign_members(campaign_id)</b> <b>find_member_id_in_lead</b> <b>(campaign_id, member_id)</b>  <b>find_member_id_in_contact</b> <b>(campaign_id, member_id)</b>  <b>add_contact_to_campaign</b> <b>(campaign_id, contact_id)</b>	to find campaign by ID to find all campaigns to update the status of campaigns in Salesforce to get all the members in a campaign find specific member in the Lead Object  find specific member in the Contact Object  add Contact member in a campaign
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<b>add_lead_to_campaign</b> <b>(campaign_id, contact_id)</b>  <b>describe</b>	add Lead member in a campaign  to get <b>Field Name</b> instead of <b>API Names</b> to show more user friendly name to Sendoso user
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**Other:**

<b>Revoke (account)</b>  <b>Initialize (account)</b>	to delete access to Salesforce  a popup appears for user to authenticate using Salesforce credentials and allows Sendoso to save <b>access_token</b> and <b>refresh_token</b> for authentication
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## **Salesforce fields we read from (required):**

### **Contact**

<b>SFDC Field</b>	<b>Description</b>	<b>Sendoso Usage</b>
Name	Name of contact	Mailing Name
Email	Email address of contact	Email of recipient
MailingAddress	Address for contact	Mailing address for recipient
Phone	Phone number of contact	Phone number of recipient
OwnerID	Contact Owner	To notify contact owner of deliveries in automated sends.

### **Lead**

<b>SFDC Field</b>	<b>Description</b>	<b>Sendoso Usage</b>
Name	Name of contact	Mailing Name
Email	Email address of contact	Email of recipient
MailingAddress	Address for contact	Mailing address for recipient
Phone	Phone number of contact	Phone number of recipient
OwnerID	Lead Owner	To notify lead owner of deliveries in automated sends.

### **Account**

<b>SFDC Field</b>	<b>Description</b>	<b>Sendoso Usage</b>
Name	Name of contact	Mailing Name
OwnerID	Account Owner	To notify account owner of deliveries in automated sends.

### **Custom Writeback Fields (optional):**

Note: None of these fields are required, and (most) would need custom fields created in Salesforce to map to.

<b>Sendoso Field</b>	<b>Description</b>	<b>Salesforce Recommended Field</b>
Total \$ Spent on Recipient	Total cost of Sends in Sendoso	Contact.Sendoso Spend
Total \$ Spent on Campaign	Total spent on a campaign in Sendoso	Campaign.Actual Cost in Campaign
Sender Name	Name of person who executed send in Sendoso	Campaign Member.Sendoso Sender
Sender Team	Name of team person who sent belongs to	Campaign Member.Sendoso Team