

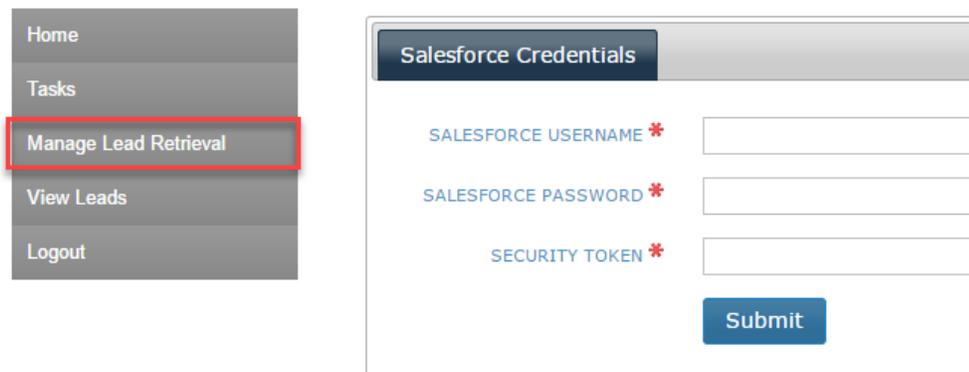
dreamforce®

Salesforce Integration Guide

Thank you for selecting to use our Cvent Lead Retrieval. We're looking forward to helping you realize the full potential of your leads.

Set Up Your Exhibitor Salesforce.com Instance

Step 1: Since your scanned leads will flow directly into your Salesforce instance, we recommend setting up your exhibitor salesforce integration before the show begins. Note, you must have already purchased a Lead Retrieval device via the ERC and must enter your Salesforce credentials. Once you have purchased the Salesforce Integration order you will see **Manage Lead Retrieval** on the left navigation bar.



Home
Tasks
Manage Lead Retrieval
View Leads
Logout

Salesforce Credentials

SALESFORCE USERNAME *

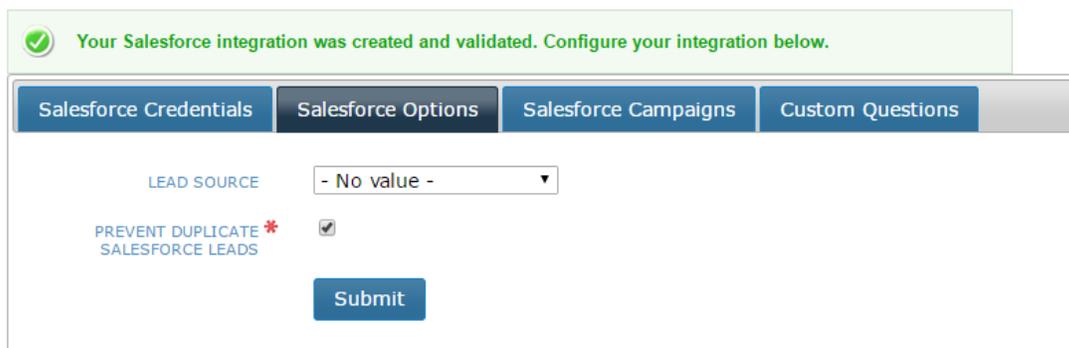
SALESFORCE PASSWORD *

SECURITY TOKEN *

Submit

Step 2: You must obtain your login and enter your security token from your Salesforce account. **Note:** If you do not have credentials for your Salesforce instance, please contact your company's Salesforce administrator to provide them to you. Your security token should have been emailed to you when your account was created at [Salesforce.com](https://www.salesforce.com). If you need a new token, log into Salesforce; Click on your name in the upper right; Pick "My Settings", expand "Personal" in the left navigation bar; and Select "Reset My Security Token". Your security token will be reset and the new token will be emailed to you.

Step 3: Once authenticated, new tabs will appear in the Exhibitor Resource Centre. Click on the **Salesforce Options** tab and select your **Lead Source** from the dropdown menu, Lead Source is not a required field. To eliminate duplicate leads in your Salesforce instance, enable **Prevent duplicate Salesforce leads**, which will search for the scanned leads and contacts by email address before adding the lead to Salesforce. Click **Submit** to save your changes and click the **Salesforce Campaigns** tab to continue your configuration.



✓ Your Salesforce integration was created and validated. Configure your integration below.

Salesforce Credentials | **Salesforce Options** | Salesforce Campaigns | Custom Questions

LEAD SOURCE - No value -

PREVENT DUPLICATE SALESFORCE LEADS *

Submit

You'll see a list of the custom questions from your Salesforce instance. Click on the questions you'd like to use, and they will be brought into this question set. These imported questions **cannot be edited** (changed text or values) via the ERC and must be done via your Salesforce instance. If you have purchased **Custom Questions** with your lead package, you will also be able to click **Add New Question** to enter your own custom questions and mix them with the Salesforce questions in your question sets. These Custom Questions will not sync to your Salesforce instance.

✕

Click "Add Field" to add a Salesforce field to the list of questions

Business Unit (Max 20 chars)	Add Field
Career Level	Add Field
Comment History	Add Field
Consent Optin	Add Field

✕ Done

Once you've finished with these steps, you are done configuring your lead retrieval experience. You will be able to assign a question set and campaign to each lead retrieval device at the event, and you can change question sets and add campaigns on your device at any time during the event.

Device Settings

Lanyon
Lead Retrieval

Welcome to Lead Retrieval
Before you begin scanning, please configure the device settings.

QUESTION SET

Salesforce Set▼

SALESFORCE CAMPAIGN

Test Campaign for Training - ...▼

DEVICE NAME

Save Settings

FAQ

1. How long before leads show up on Salesforce?
There is no delay once the leads are synced, the device will sync every 2 minutes.
2. Can I use more than 1 campaign?
Yes, on ERC you can select multiple campaigns you want to pull into a device, however in the device settings you can only select 1 campaign at a time. You can allocate different campaigns to different devices.
3. Can I prevent duplicate leads showing up in my Salesforce account?
*Yes, in the **Salesforce Options** tab you can enable **Prevent Duplicate Salesforce Leads**, unique leads are based on email address.
For leads scanned more than once, Salesforce will automatically append any text field data to the original lead record and default drop down field values to the most recent entry. Since the ERC lead report will capture each scan separately, original notes and field values are retained for future reference.*
4. Can I still view leads in ERC if I have integrated into Salesforce?
*Yes, The **View Leads** link will always be available from the events ERC.*
5. Do I need a campaign or lead source to integrate?
No, leads will sync into Salesforce without a lead source and campaign, but it is recommended you use at least 1 to be able to identify leads from the event.
6. Can I stop the integration at any time?
*Yes, you will need to log out of Salesforce from the **Salesforce Credentials** Tab, this will turn off the integration and will not remove any previous leads scanned.*
7. Where can I find the notes I wrote from the device in my Salesforce account?
*It will show in the **Description** field of the Lead object in Salesforce.*
8. I only want to add Salesforce questions; do I still need to purchase custom questions at \$45?
No, you do not need to purchase custom question. Salesforce questions is included in the Lead Salesforce Integration price.
9. I cannot see specific questions show up from my Salesforce account in the ERC Custom Question tab.
Some questions types will not show, encrypted and number fields will not show.
10. I cannot see the Salesforce Tab in the lead retrieval management page.
*You must first purchase Lead Salesforce Integration, you can find this in the ERC task called **Order Lead Retrieval Devices/Questions***
11. Leads are not syncing into my Salesforce account after integrating.
*We cannot offer full Salesforce integration support as there are different versions and customized version of Salesforce, we will refund your payment if we see that the integration is not syncing leads into your Salesforce account.
The most common reason for leads not syncing is when the country field in Salesforce does not have an **Integration Value**, you can view our country and state mapping list from [here](#).*