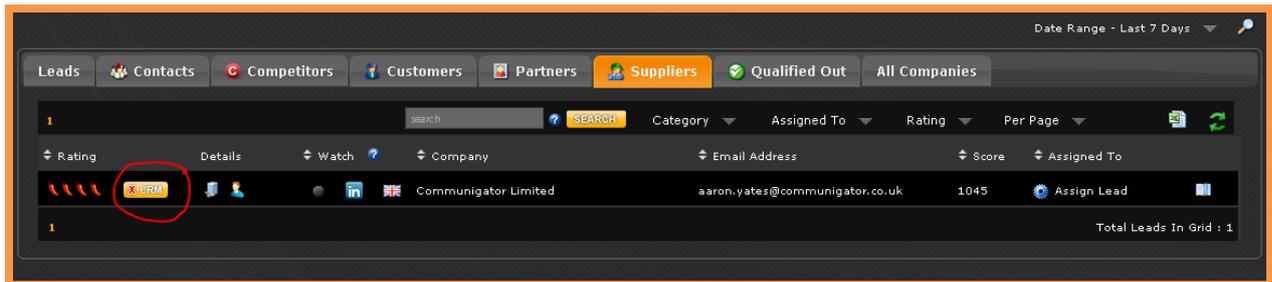


# Salesforce Integration

## Background

Your WOW account can be activated to have a CRM button next to each company lead as in the diagram below.



This button goes to your Salesforce account to find if the company lead already exists as one of your Salesforce accounts. This is done through the standard Salesforce API. The button has 3 states dependant on the actions you take for each company lead.



This company lead has NOT been checked against Salesforce.



This company lead has been assigned as a new LEAD in Salesforce.



This company lead has not be actioned against CRM yet.

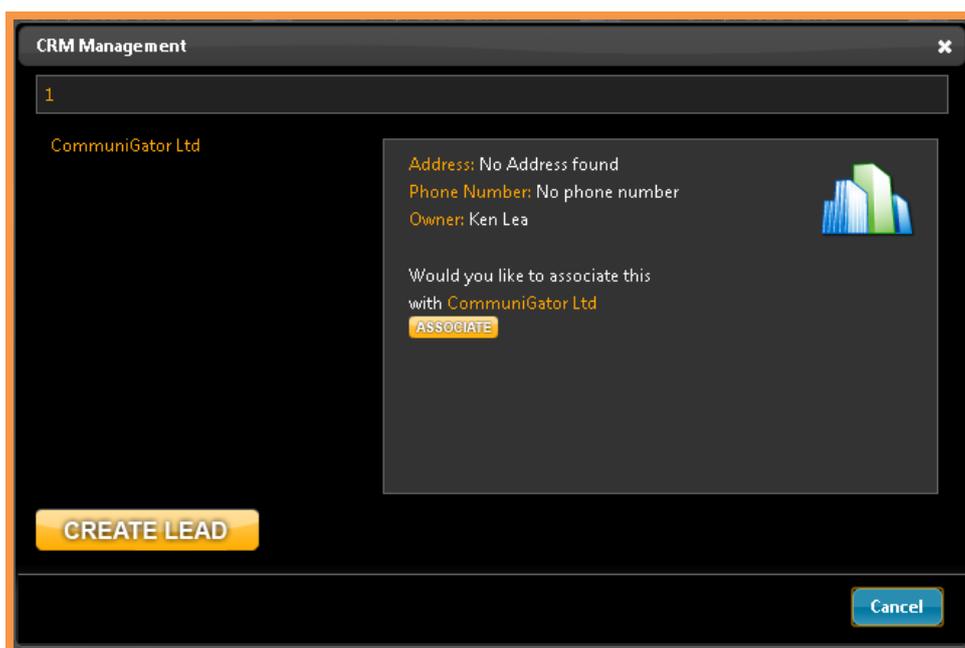
Once the button is clicked there are 2 actions available dependant on whether the company lead exists in CRM or not.

- 1) If the company lead does not match to an existing Salesforce account, WOW will offer the below screen for you to create a Salesforce lead like below.



The Salesforce lead will be created with the Company name, a lead source value of 'Wow Analytics' and a permalink will be added. The perma link is a url that when clicked will bring up a browser window of the Company lead full details in WOW so you can see the historical clicks of the this company.

- 2) If the company lead does match to one or many existing Salesforce accounts (the matching uses a like/fuzzy match so any similar accounts will come back), then you will see address phone and owner details and have the ability to either:
  - a. Associate this company lead in WOW to a CRM account – no further action is taken except the CRM button changes to let any users know this account has already been matched. You will be able to choose if many company matches available on which to associate.
  - b. Create yourself a new lead as the companies match are not correct.

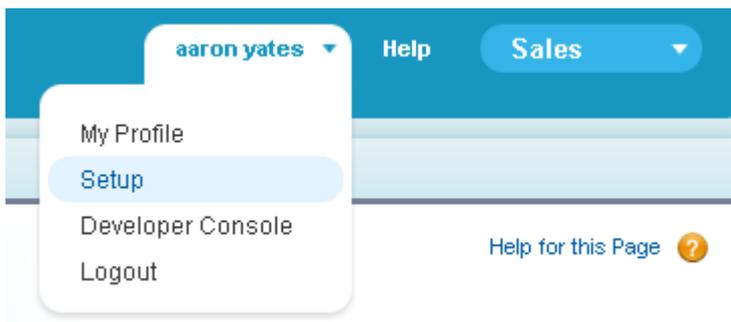


## Setup

To set up your WOW account to integrate with Salesforce, you will require the following prerequisites:

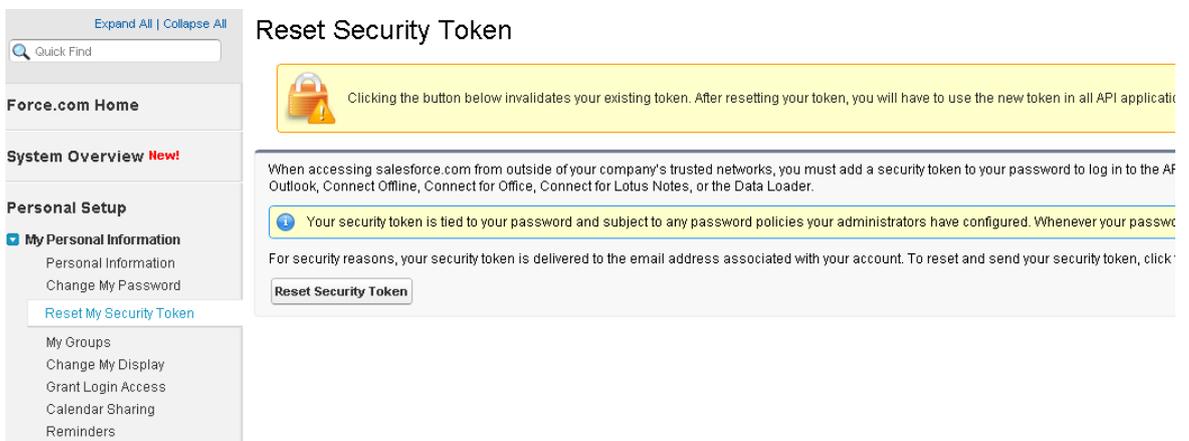
- 1) Salesforce API access – this is a version and paid for option in Salesforce (Enterprise Edition)
- 2) A single salesforce account with
  - a. Salesforce Username
  - b. Salesforce Password
- 3) Salesforce Token to access Salesforce remotely. Below describes how to obtain this in Salesforce.

Login to your Salesforce account and go to, select the user in the top right hand corner and select setup.



Onleft hand side go to 'My Personal Information' and click 'Reset My Security Token'.

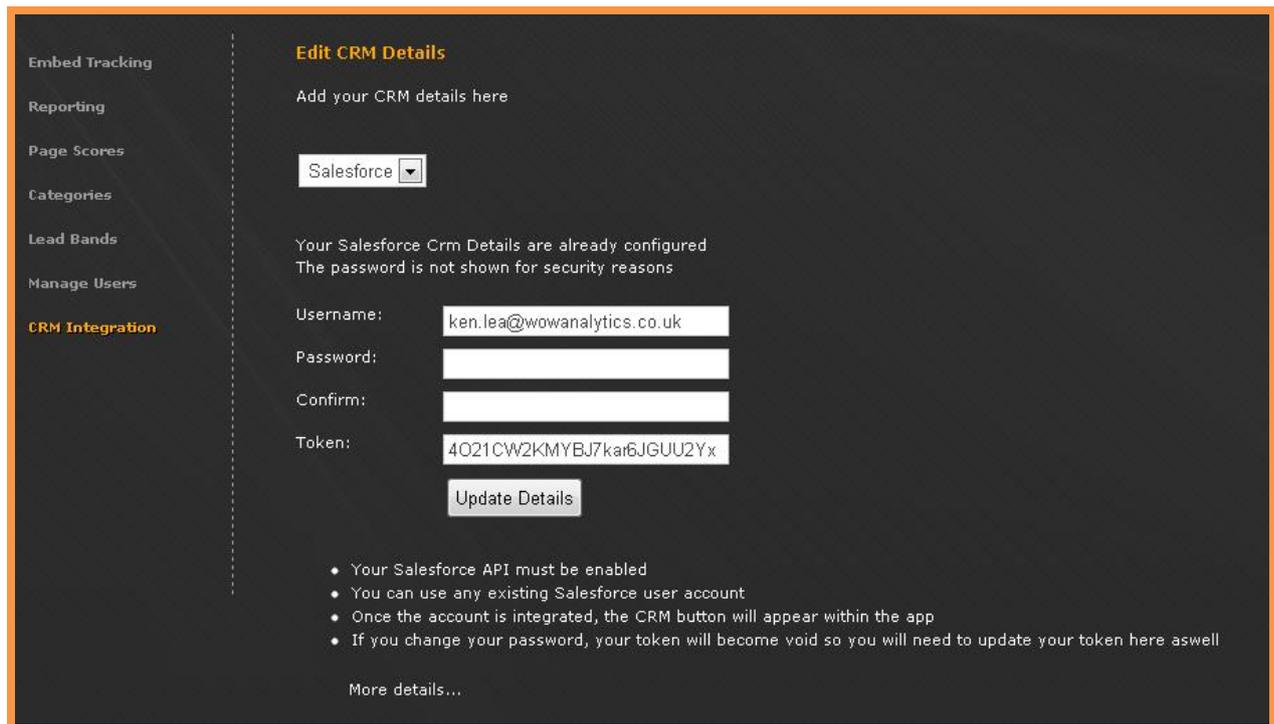
Now click on 'Reset Security token' and an email will be sent to the Salesforce account.

A screenshot of the Salesforce 'Reset Security Token' page. On the left is a navigation sidebar with 'My Personal Information' selected, and 'Reset My Security Token' highlighted. The main content area has a yellow warning box: 'Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applicati...'. Below this is a blue information box: 'Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your passwo...'. At the bottom, there is a 'Reset Security Token' button. The page title is 'Reset Security Token'.

Now you have the required security token login to your WOW account as an admin user, go to admin/CRM Integration, choose 'Salesforce' from the dropdown and enter your Salesforce details for :

Username, Password and Security token.

Update the details and now your account will be set up. Going back to the main WOW lead screen you will see the CRM button now ready against your company leads.



**Edit CRM Details**

Add your CRM details here

Salesforce

Your Salesforce Crm Details are already configured  
The password is not shown for security reasons

Username:

Password:

Confirm:

Token:

- Your Salesforce API must be enabled
- You can use any existing Salesforce user account
- Once the account is integrated, the CRM button will appear within the app
- If you change your password, your token will become void so you will need to update your token here aswell

[More details...](#)

Salesforce Integration complete, any questions then please contact your WOW support.