

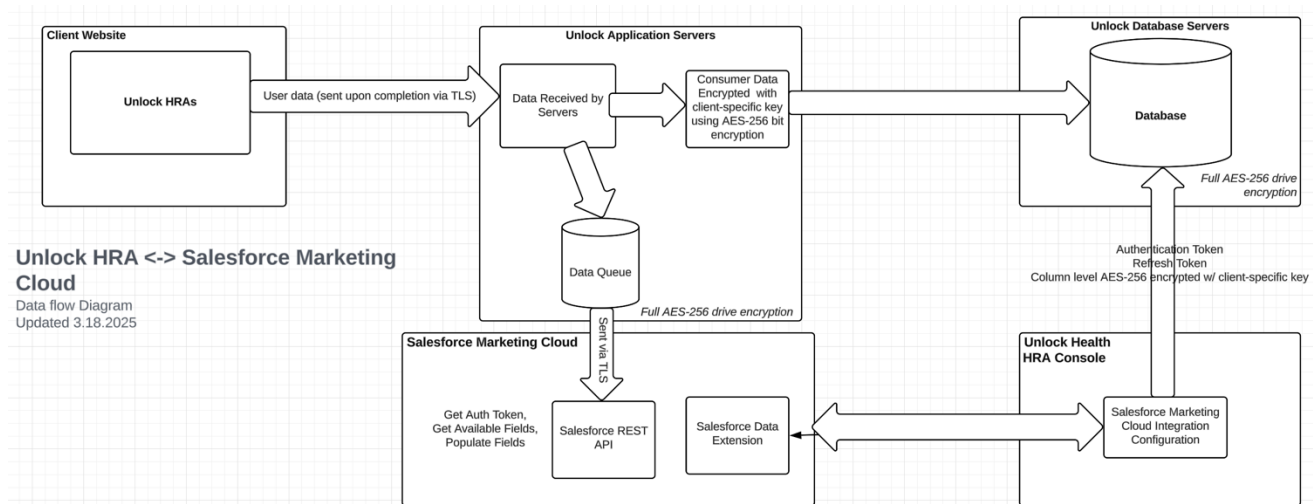


# Salesforce Marketing Cloud Integration

## Overview

The Salesforce Marketing Cloud Integration for Unlock Health HRAs allows for real-time data to be delivered to Salesforce as users complete the HRA. Information is sent from Unlock Health servers directly to Salesforce over an SSL link using the Salesforce REST API and is stored within the Salesforce Data object. Each HRA completion is written one time to the Salesforce system as a Lead record. This is written as a new record for each HRA completion. There is no upsert or update behavior. The API is authenticated using a package which creates Subdomain, Account ID, Client ID, Client Secret, and Salesforce Data Extension. Once this authentication is completed, the integration can be added to each HRA as part of each HRA's Follow-up Plan. The user who configures the authentication must confirm that the client has secured a BAA with Salesforce before proceeding.

## Data Flow Diagram



## Authentication Process

To set up the integration, you must authenticate using a package which created Subdomain, Account ID, Client ID, Client Secret, and Salesforce Data Extension. Unlock receives an authentication token and a refresh token that allows us to maintain a link to write information into your Salesforce system as users complete HRAs.

**TIP: Use an integration user (i.e. service account) to set up the integration with the Unlock HRA Console instead of a user tied to a person within your organization for business continuity reasons.**



## API Volume & Concurrency Requirements

All user completions from the HRA side are first delivered to a queueing within Unlock HRA platform infrastructure. This queueing system allows us to ensure that we are not overtaxing a client's API and allows us to handle API availability errors gracefully. Requests are processed one at a time sequentially so there are no high concurrency requirements.

Unlock has constructed the integration to be very efficient, so for each HRA completion, only 2 API calls will occur. When planning for API volume, connect with the teams promoting the HRA to determine how much traffic they expect to drive to the HRAs. If there are 300 HRA completions a day, there will be 600 API calls per day.

## Data Mapping

Whenever possible, we deliver data into the Lead object using standard Salesforce fields. Some data elements from the HRA are NOT part of the standard Salesforce fields. Because of this, we provide a data dictionary that outlines custom field names that we look for when sending data. If the custom fields exist within the client's data object, we will place information in the custom field. For cross-vendor and backwards compatibility, multiple custom field names are checked for in order and the first one that matches is where data is written. See the Salesforce Marketing Cloud Data Dictionary for the most current set of fields available.

***TIP: When creating custom fields, we strongly recommend using Text fields instead of Picklists to reduce the potential for failure, though we can support Picklists if the client chooses to use them for explicit known value sets.***