FUEL CYCLE

How to configure Salesforce Marketing Cloud for Fuel Cycle

How Does It Work?

Sync your customer data seamlessly between Salesforce Marketing Cloud and Fuel Cycle in a few simple steps. You can choose to push data from Salesforce to Fuel Cycle and pull Fuel Cycle profile map data into Salesforce. Once setup, the data is synced every 24 hours.

Push Data

When push data is enabled, an additional option will be available in Profile Maps for “Push to CRMs.” All profile maps set to Push to CRMs will be pushed to a data extension in Salesforce called “FC_IMPORT.” The data can be synced to users in Salesforce based on matching email address.

Pull Data

When pull data is enabled, any Salesforce data added to the data extension “FC_EXPORT” will be pulled into Fuel Cycle where it will be synced to members based on matching email address. The data can used as a source in profile maps where they can then be added to member exports and used for segmentation in dynamic groups.

Please Note: We are only able to match users based on email address at this time. If you have users inside Salesforce Marketing Cloud without an email address, we cannot match those users inside Fuel Cycle.

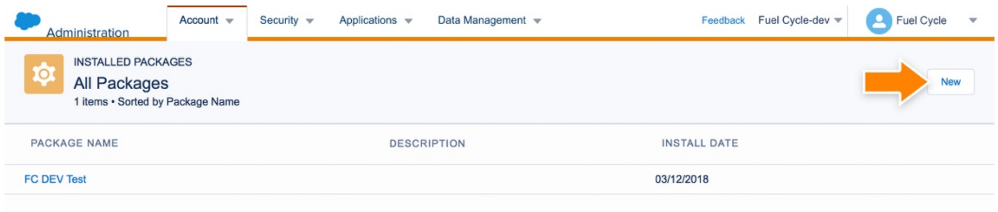
Salesforce Marketing Cloud Configuration Steps

The following steps are done inside your Salesforce Marketing Cloud account. Please provide this information to your internal Salesforce team to perform these tasks.

1. **Login to Salesforce Marketing Cloud**

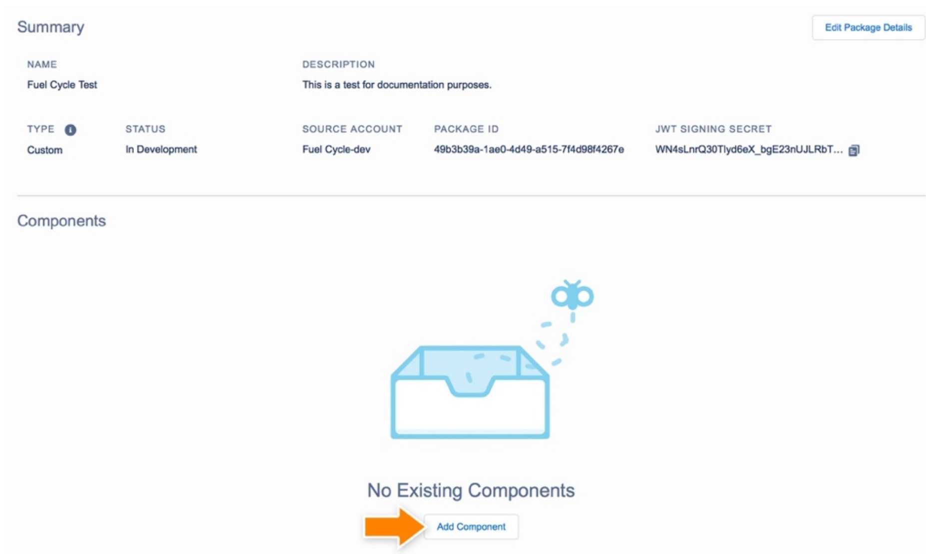
2. **Create a Package**
    a. Hover over the username in the upper right-hand corner, then “Administration” > “Account” > “Installed Packages”

    b. Click the “New” button to create a start new package

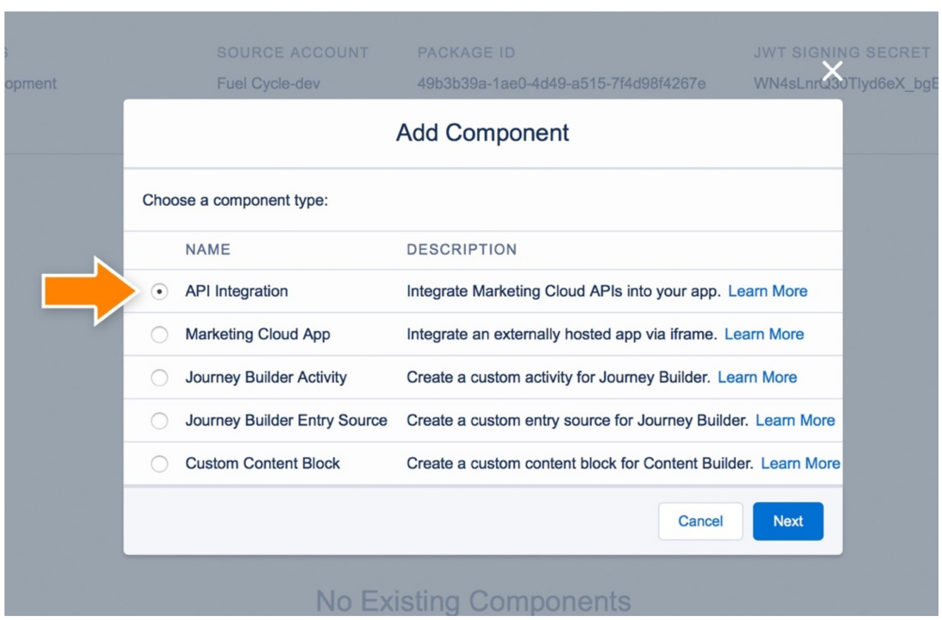


c. Name the package whatever you prefer and provide an option description, then click Save.

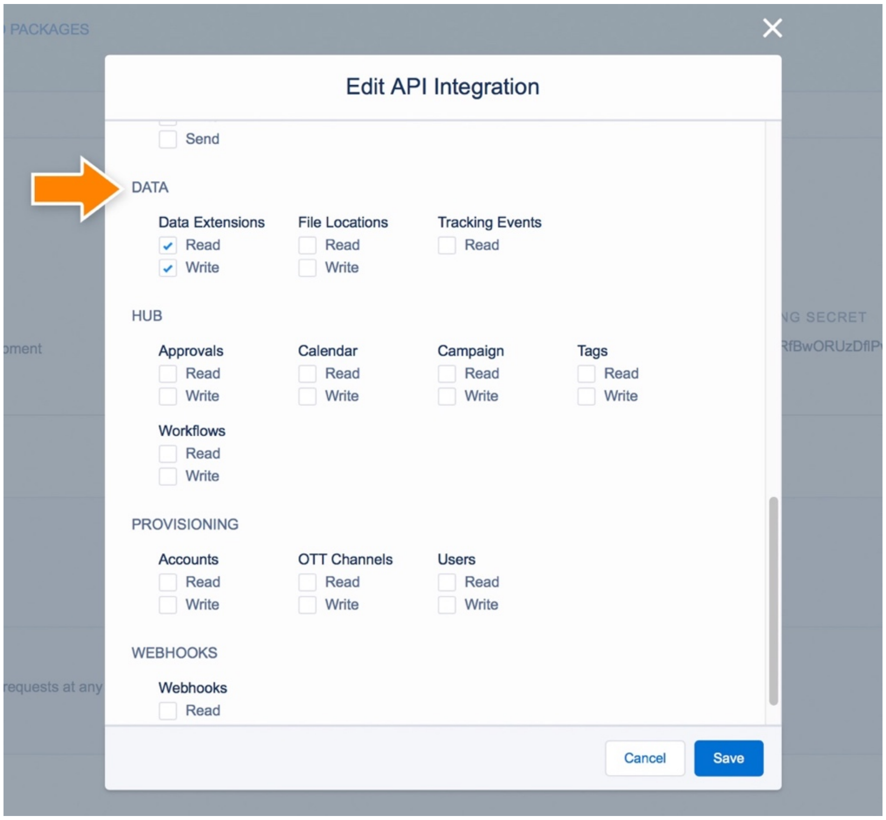
d. Now, click to Add a Component



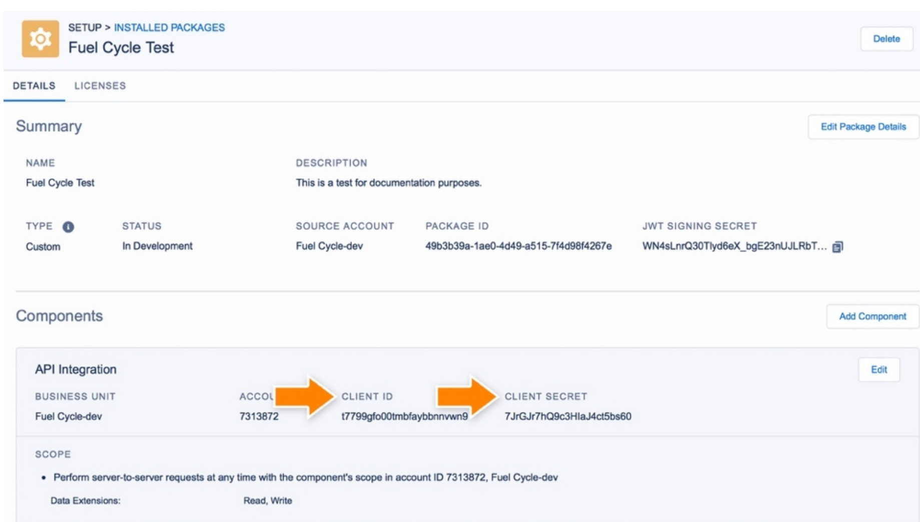
e. Select "API Integration" and click Next



f. On this screen, scroll down to the “Data” section and select “Read” and “Write” under the “Data Extensions” subhead and Save.



g. From this screen, copy and save the following fields, which will need to be given to the person who will enter the information inside Fuel Cycle:



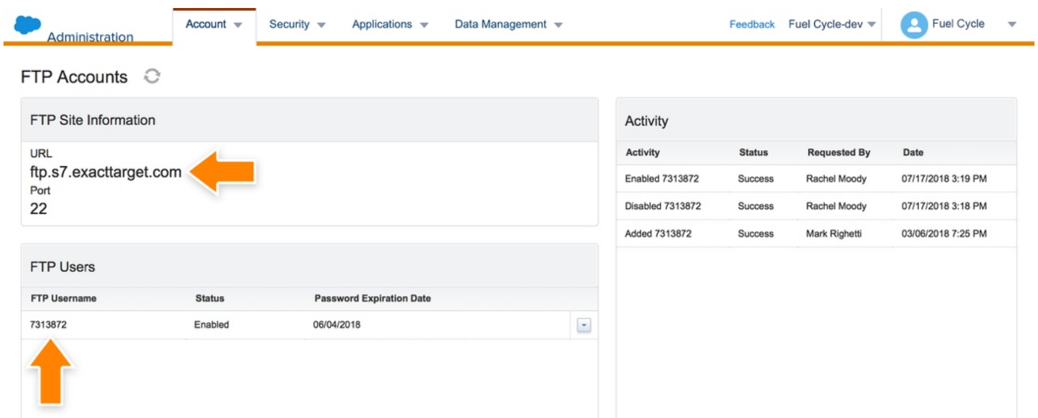
i. Client ID
ii. Client Secret

3. **Retrieve FTP Account details**
    a. If you are unfamiliar with FTP in Salesforce Marketing Cloud, click here for more information.

    b. Hover over the username in the upper right-hand corner, and then click "Administration" > "Account" > "FTP Accounts"

    c. If you don't have an FTP user yet, proceed to create one.

    d. Once you have an FTP user, copy and save the following fields, which will need to be given to the person who will enter the information inside Fuel Cycle:



        i. FTP URL
        ii. FTP Username
        iii. FTP Password (if you don't know your FTP password, click the dropdown button next to the FTP details and click "Edit" then create a new password)
            1. *PLEASE NOTE: FTP Passwords expire every 90 days. You will need to update the password in both Salesforce and in Fuel Cycle settings every 90 days.*

4. You are done with this portion of the setup. Please give the Client ID, Client Secret, FTP URL, FTP Username and FTP Password to your internal Fuel Cycle team member.

    a. **Please Note:** You will need to work with your Fuel Cycle team after the setup is complete inside Fuel Cycle to determine the data that should be pushed from Salesforce Marketing Cloud to Fuel Cycle (details outlined below). Your Fuel Cycle team will work with you when that step is ready.

Fuel Cycle Configuration Steps

The following steps are done inside your Fuel Cycle account. Please provide this information to your internal Fuel Cycle team to perform these tasks.

1. **Create connection to Salesforce Marketing Cloud inside Fuel Cycle**

    a. Login to the Fuel Cycle Admin

    b. Navigate to Exchange and click the "Configure" button on the Salesforce Marketing Cloud card

c. From the settings page, enter the following details provided to you from your Salesforce team (based on the steps outlined above):
    i. Account Nickname: This is for internal use only and can be any name you want to give it
    ii. Client ID
    iii. Client Secret
    iv. FTP URL
    v. FTP Username
    vi. FTP Password

d. You can then choose what type of data sync options you want to enable for the community:
    i. **Pull Data from Salesforce Marketing Cloud:** When this option is selected, a new Data Extension will automatically be created in your account called "FC_EXPORT." You will need to return to Salesforce Marketing Cloud and add any data you want pulled into Fuel Cycle to that data extension (see "Setting up Profile Data to Sync" section below for details on how to do this).

    ii. **Push Data to Salesforce Marketing Cloud:** When this option is selected, a new Data Extension will automatically be created in your account called "FC_IMPORT." All profile maps set to "Push to CRMs" will be pushed to that data extension inside Salesforce. Marketing Cloud (see "Setting up Profile Data to Sync" section below for details on how to do this).

e. Click the "Test Connection" button to verify the connection between Fuel Cycle and Salesforce Marketing Cloud works.

f. Once the test is successful, you can Save the configuration.

g. The configuration is now done, but additional steps are needed to choose the data to include in the sync (see below).

Setting up Profile Data to Sync

1. **Pull Data**
    a. Once the connection is saved in Fuel Cycle, a new data extension called "FC_EXPORT" will automatically be created in your Salesforce Marketing Cloud account.

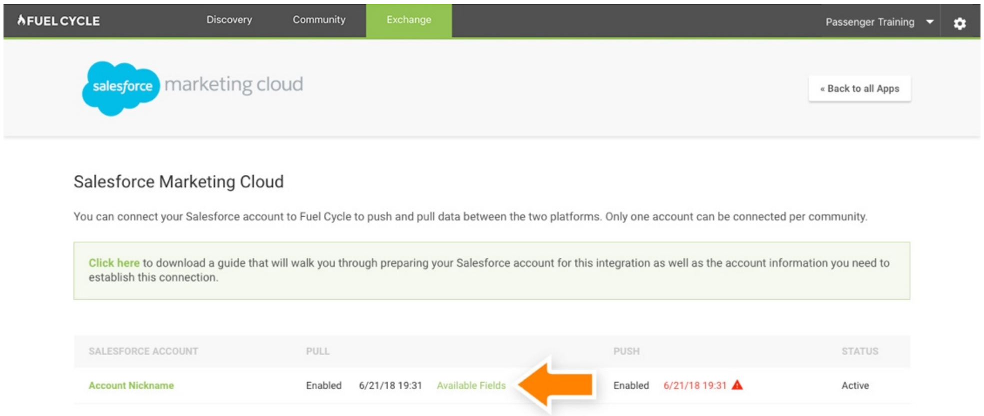
    b. Work with your internal Salesforce Marketing Cloud team to determine the profile data inside your Salesforce Marketing Cloud account that you want to pull into Fuel Cycle.

    c. Once you know what data you want to pull, have your internal Salesforce team add those fields to the FC_EXPORT Data Extension inside Salesforce Marketing Cloud.

    d. Every 24 hours, Fuel Cycle will pull all data from the FC_EXPORT data extension into Fuel Cycle. The sync will occur every 24 hours at midnight Pacific.

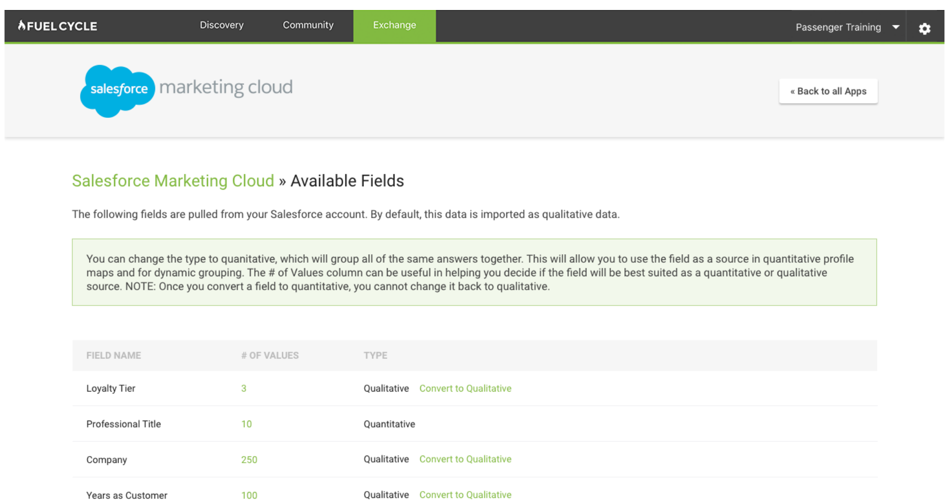
    e. You can return to Fuel Cycle admin and click Exchange, then Salesforce Marketing Cloud to view the date and time the most recent pull sync occurred.

f. In addition, you can click the "Available Fields" link to view all of the fields that have been pulled from Salesforce Marketing Cloud.



g. All data that comes from Salesforce Marketing Cloud will be imported as qualitative data, which may not be useful inside Fuel Cycle for all fields.

i. When you click the "Available Fields" link, you'll be taken to a page where you can view all imported fields including the total number of values imported from each field.



ii. You can click the # of Values link to view a list of all values.

iii. If you have a field that you want to convert into a Quantitative data source, click the "Convert to Quantitative" link and the field will be converted so that you can use it as a source for quantitative profile maps. This is valuable because you can then use the data for dynamic grouping.

1. EXAMPLE USE CASE:

a. You have a field called "Loyalty Tier" with only 3 possible values for "Platinum," "Gold," and "Silver."

b. You want to be able to create a dynamic group of all members in the Platinum tier.
c. To achieve this, convert the field to Quantitative and then create a new profile map with Loyalty Tier as the source (since the field has been converted, you can map it like a survey question).
d. You can then create a dynamic group of all members with the loyalty tier as Platinum.

2. *IMPORTANT: Once a field has been converted to Quantitative, it cannot be changed back to Qualitative. Make sure you want to convert the field before* clicking the link.

h. All imported data (as either qualitative and quantitative) can be used as a source in profile maps. By adding it as a source to profile maps, the data can then be added to member exports, pushed as embedded data to SurveyGizmo or Qualtrics and can be used in dynamic grouping logic.

2. Push Data

a. Once the connection is saved in Fuel Cycle, a new data extension called “FC_IMPORT” will automatically be created in your Salesforce Marketing Cloud account.

b. You will need to select the Fuel Cycle profile map data that you want to push to Salesforce Marketing Cloud.

c. To do this, inside Fuel Cycle admin go to Members > Profile Maps and click to edit a profile map you want to push to Salesforce Marketing Cloud.

d. You’ll see a new option for “Push to CRMS” in the first tab. Simply select this option and click the Save button to enable the push for that profile map.
   i. Continue to enable the option for all profile maps you want to push to Salesforce Marketing Cloud.
   ii. When done, make sure to click the “Refresh Data” button to save all changes to the Profile Maps.

e. Every 24 hours, Fuel Cycle will push all profile maps set to Push to CRMs to the FC_IMPORT data extension in Salesforce Marketing Cloud. The sync will occur every 24 hours at midnight Pacific.

f. Work with your Internal Salesforce Marketing Cloud team so they know about this data being pushed from Fuel Cycle and can use it inside Salesforce Marketing Cloud for your business and marketing needs.

Troubleshooting Connection Issues

If a sync job has failed, you’ll see a red warning icon and the date and time when the sync failed in red. There are many reasons a sync might fail and there are often no details available as to why. We will continue to attempt to run the sync job every 24 hours. In many cases, if there is a failure, it will work the next time the job runs. Once it runs successfully, the warning icon will no longer display to let you know it’s working properly.

In the case of the job continuing to fail, please check all settings to verify the connection is still working. Keep in mind that the FTP password must be reset in Salesforce Marketing Cloud every 90 days. Check that the FTP

Password is still active and if not, reset the password and change it in your Fuel Cycle settings. Use the Test Connection button to verify the connection is working properly.