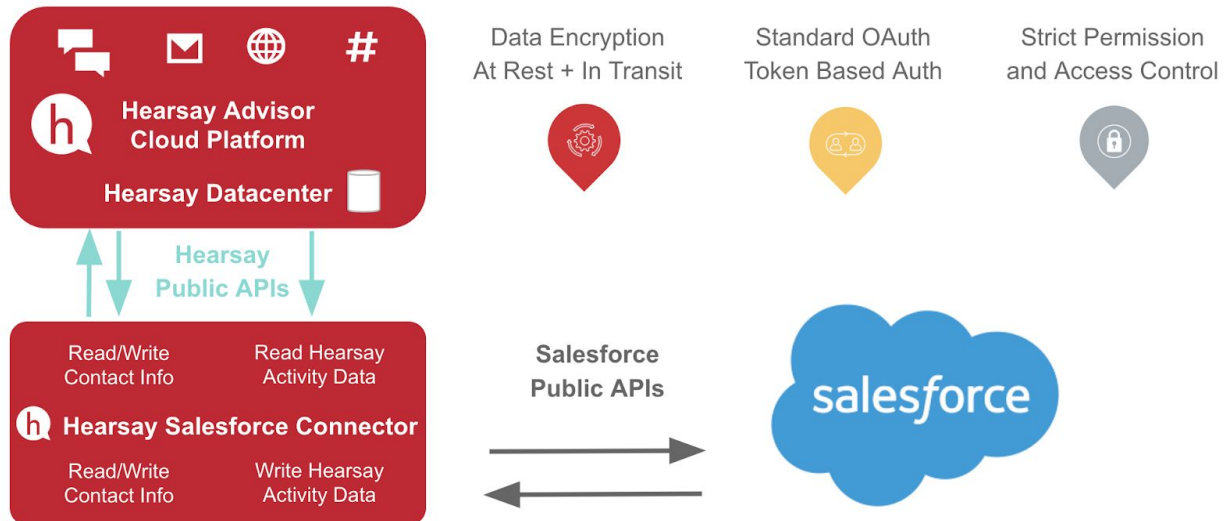


Hearsay Salesforce Connector

Overview

The Hearsay Salesforce Connector uses the Hearsay Public APIs and Salesforce Public APIs to read and write Contact information between the systems and to read Hearsay Activity data from Hearsay to write into Salesforce. The Hearsay Salesforce Connector is hosted and managed by Hearsay in AWS as a part of the Hearsay platform. All data in transit and at rest is encrypted. No Connector code is required to be installed outside of Hearsay's AWS environment.

Architecture and Data Flow



Connector Use Cases

Standard Contact & Activity Sync

Business Use Case: Advisors need access to the latest contact information available in their Salesforce CRM system when engaging with their clients via Hearsay product, and the engagement activities need to be stored in Salesforce to track the relationship timeline.

Contact information stored within Salesforce CRM will be available in the Hearsay platform, and Hearsay engagement activities will be written back into Salesforce in the Activity Timeline.

Advisors will be able to access the *latest/updated contact details from Salesforce, including:

1. First & last name
2. Phone number

3. Email address
4. Birthdate

These fields can be mapped from standard or custom objects within Salesforce related to person accounts: Contacts, Leads or Accounts. Hearsay will determine which merge Salesforce Contacts with a Hearsay Contact based on any combination of the following fields:

1. First Name + Last Name
2. Phone Number
3. Email

**By default, users will not be able to edit contact information within the Hearsay products. Any new contacts created in Hearsay will not be written back into Salesforce.*

See below for more information on [Standard Field Mapping](#) within Salesforce for Hearsay Contacts and Activities.

Feature	Experience	Social	Mail	Relate	Sites	
Salesforce > Hearsay Contacts sync	Pulls the latest contact data from Salesforce into Hearsay	√	√	√	√	
Hearsay > Salesforce Activities sync	All activities that occur within Hearsay products will be written into Salesforce	Facebook - Post - Like - Comment - Share - Message	Twitter - Tweet - Retweet - Mention - Favorites	- Sent - Open - Bounce - Not Sent - Unsubscribe - Click - Spam - Drop	- Messages sent - Messages received - Voice calls made	- Site Form Submission
Deep linking	Links to Hearsay contacts & activities from Salesforce		- Hearsay Mail for Single Contact - Hearsay Mail for Multiple Contacts	- Hearsay Message		

Access and Authentication

Hearsay supports token-based authentication for API Integrations. Authentication between Hearsay and Salesforce is supported via OAuth and user-based access control. The Hearsay service user will require read and write access for the specific Salesforce objects and fields included in the scope of the integration. Hearsay will read and write only the data based on the Salesforce User and Contact sharing rules and logic. All permission and access is controlled by the customer within their Salesforce environment. Permission and access required only to the objects, fields, and contacts required for the integration.

Additional details on API Authentication supported can be found here:

<https://hearsaydocs.readme.io/v3.0/reference#authentication-and-security> (password: HearsayDocs).

Standard Field Mapping

Hearsay Salesforce Connector provides the option to modify the Salesforce fields and the overall scope of fields used for mapping. The following is the standard mapping used that can be configured depending on the customer's Salesforce environment.

Standard Mapping for Contact Data

Hearsay Field	Salesforce Field (Contact, Lead, Account)
First Name	FirstName
Last Name	LastName
Phone	MobilePhone
Email	Email
Birthdate	BirthDate

Standard Mapping for Activity Data

Hearsay will write Hearsay Activity to the Salesforce Task fields on the Contact, Lead, and/or Account (Person) objects.

Social Activity

Hearsay Field	Salesforce Field
Asset Type	Task Type
Type	Task Subtype
Date	Activity Date (Custom)
Asset Type - Type: Title/Text	Subject
Text	Comments
Permalink	Hearsay Reference (Custom)

Email Activity

Hearsay Field	Salesforce Field
Asset Type	Task Type
Type	Task Subtype
Date	Activity Date
Asset Type - Type: Subject	Subject
Text	Comments
Permalink	Hearsay Reference (Custom)
Campaign Name	Name (Campaign object)

Hearsay Text Message Activity

Hearsay Field	Salesforce Field
Asset Type	Task Type
Type	Task Subtype
Date	Activity Date (Custom)
Asset Type - Type	Subject
Text	Comments

Details on payloads Hearsay sends for integrations and structure / format of data available (including examples of Hearsay fields referenced above) relating to Hearsay Contact and Hearsay Activity is available in the Hearsay Public API Documentation for [Contacts API](#) and [Activity API](#) (password: HearsayDocs).

Deep Linking

Hearsay offers deep links that can be added to the Salesforce environment using action buttons. Hearsay will provide the appropriate URLs for common Hearsay actions that can be triggered out of Salesforce including:

- Hearsay Contact Record
- Hearsay Mail for a Single Contact
- Hearsay Mail for Multiple Contacts
- Subscribe a Contact to Hearsay Mail Campaign



- Hearsay Message for Contact

Hearsay deep links support referencing Salesforce fields available in Salesforce. Hearsay will manage the mapping of Salesforce fields in real time to the appropriate Hearsay fields (Hearsay Contact ID, Hearsay Workspace ID) to support the deep linking.

Scalability and Performance

API calls can be configured for different intervals and specified time windows depending on the volume of data and volume of API calls desired.

Hearsay has internal performance metrics for Public API operations and actively manages to the performance metrics.

Hearsay's request for timeout settings for 3rd party integrations is set to 3 minutes after which the request will be filled if it doesn't return.

Logging and Monitoring

Hearsay connector uses CloudWatch for logging and monitoring applications.

Error Handling

Hearsay APIs return industry standard HTTP error codes with error messages. Hearsay does not currently offer a customer facing dashboard to track errors.