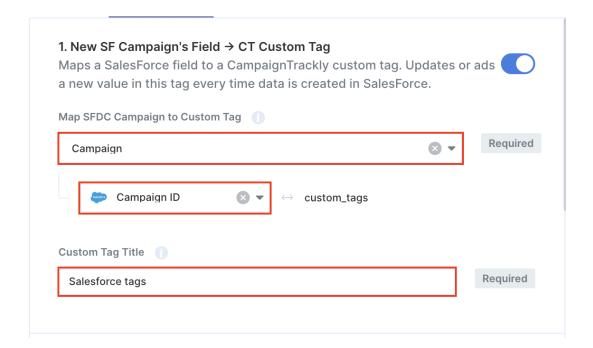**Document all SALESFORCE 1-click Workflows**

General Notes:

- When a workflow is first created, it needs to be tested to verify that its behavior matches the expected one.
- Some workflows **require additional Custom Salesforce Fields** to be created by the user. This is a rather straightforward task. For reference, all such fields are collected in the following. The user will only need to implement the fields that are part of the Workflows used by the user. Each Workflow states all custom fields relevant to it.

Workflow 1

Input fields for the user:
        1: Campaign (i.e. the SFDC object used in the workflow).
        2: SFDC property the workflow will identify (i.e. map) with the CT custom tag.
        3: The name of the CT custom tag to be used by the workflow.
        Example: see the snapshot above. Campaign needs to be typed exactly like that; the other two fields are up to the user to select.

This workflow requires the following Custom Salesforce Fields: **Task Messages from CT**

The workflow is triggered by the creation of a new SFDC Campaign (an update to the Campaign will not trigger any action).

The workflow will add the value to the specified CampaignTrackly custom tag and will then display a confirmation message in the SF custom Campaign field **Task Messages from CT**

If for some reason the tag cannot be created, an error message will be displayed in **Task Messages from CT**. This can happen, for example, if the custom tag specified by the user in the field **Custom Tag Title** is not found in CampaignTrackly. The user must ensure that the tag specified already exists in CampaignTrackly and its spelling agrees.

If a tag value with the same name already exists in CampaignTrackly, it will not be overridden or duplicated and the workflow task will be deemed to have been successful.
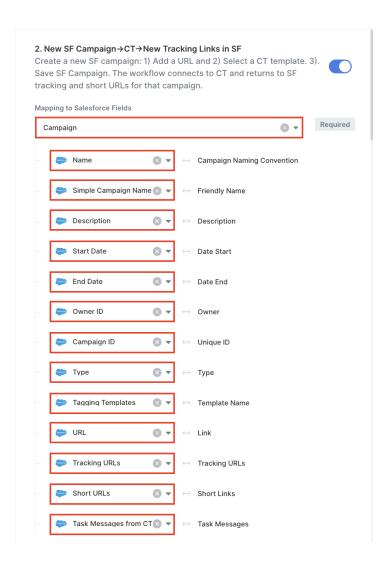

Workflow 2:

Input fields for the user: there are 14 fields, see the boxes in red in the workflow snapshot. Typical example values for each field are shown there. Campaign needs to be typed exactly like that; the other fields are up to the user to select.

The workflow triggers only if there is a link. If the link field is empty, the workflow will not start (and will not send a message).

This workflow requires the following Custom Salesforce Fields:
- **Simple Campaign Name**
- **Tagging Templates**
- **URL**
- **Tracking URLs**
- **Short URLs**
- **Task Messages from CT**

2. New SF Campaign→CT→New Tracking Links in SF
Create a new SF campaign: 1) Add a URL and 2) Select a CT template. 3).
Save SF Campaign. The workflow connects to CT and returns to SF
tracking and short URLs for that campaign.

Mapping to Salesforce Fields

| Campaign | ⊗ ▼ | Required |

Name	⊗ ▼	↔ Campaign Naming Convention
Simple Campaign Name	⊗ ▼	↔ Friendly Name
Description	⊗ ▼	↔ Description
Start Date	⊗ ▼	↔ Date Start
End Date	⊗ ▼	↔ Date End
Owner ID	⊗ ▼	↔ Owner
Campaign ID	⊗ ▼	↔ Unique ID
Type	⊗ ▼	↔ Type
Tagging Templates	⊗ ▼	↔ Template Name
URL	⊗ ▼	↔ Link
Tracking URLs	⊗ ▼	↔ Tracking URLs
Short URLs	⊗ ▼	↔ Short Links
Task Messages from CT	⊗ ▼	↔ Task Messages

Workflow 3:

Input fields for the user: there are 8 fields + fields for up to 20 Custom Tags + fields for the names of these Custom Tags, see the boxes in red in the workflow snapshot. Typical example values for each field are shown there. *Campaign* needs to be typed exactly like that; the other fields are up to the user to select.

Once every two hours, the workflow takes all existing CampaignTrackly Marketing Campaigns which are not already in Salesforce, and creates a new SF Campaign for each new CT Campaign. The SF ID of the newly created Campaign is then sent to CT and is added to the CT Marketing Campaign.

The check if a CT Campaign exists in SF or not is performed by comparing the CT field "Campaign Naming Convention" and its SF counterpart as defined in the workflow mapping (in the above example this would be SF "Name").

The tags are ordered following the ordering of the names of the CampaignTrackly Custom Tags, see the workflow snapshot.

Please keep in mind that if the mapping of this field is changed for existing Campaigns, new SF campaigns may be created.
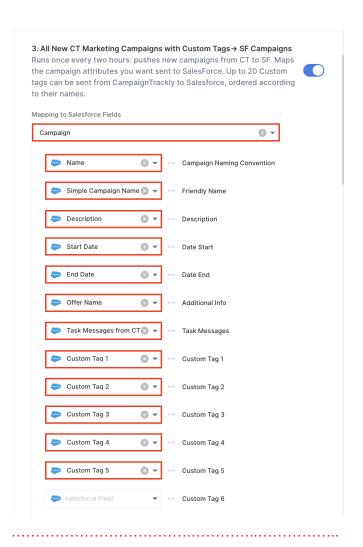
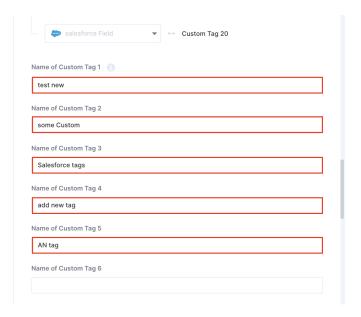This workflow requires the following Custom Salesforce Fields:
- **Simple Campaign Name**
- **Task Messages from CT**
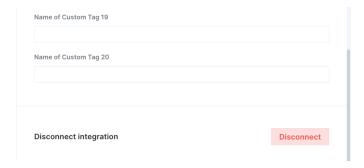
In the example shown, we have mapped the Custom Tags to the following Custom Salesforce Fields:
- **Custom Tag 1**
- **Custom Tag 2**
- **Custom Tag 3**
- **…**

The user can choose other names for these Salesforce fields. Please note that not all 20 custom tags must be utilized; the user can choose to map any number less than 20 and the ones that are not relevant can be left empty.

3. All New CT Marketing Campaigns with Custom Tags→ SF Campaigns

Runs once every two hours: pushes new campaigns from CT to SF. Maps the campaign attributes you want sent to SalesForce. Up to 20 Custom tags can be sent from CampaignTrackly to Salesforce, ordered according to their names.

Mapping to Salesforce Fields

Campaign	⊗ ▼

☁ Name ⊗ ▼	↔	Campaign Naming Convention
☁ Simple Campaign Name ⊗ ▼	↔	Friendly Name
☁ Description ⊗ ▼	↔	Description
☁ Start Date ⊗ ▼	↔	Date Start
☁ End Date ⊗ ▼	↔	Date End
☁ Offer Name ⊗ ▼	↔	Additional Info
☁ Task Messages from CT ⊗ ▼	↔	Task Messages
☁ Custom Tag 1 ⊗ ▼	↔	Custom Tag 1
☁ Custom Tag 2 ⊗ ▼	↔	Custom Tag 2
☁ Custom Tag 3 ⊗ ▼	↔	Custom Tag 3
☁ Custom Tag 4 ⊗ ▼	↔	Custom Tag 4
☁ Custom Tag 5 ⊗ ▼	↔	Custom Tag 5
☁ salesforce Field ▼	↔	Custom Tag 6

- -

| ☁ salesforce Field ▼ | ↔ | Custom Tag 20 |

Name of Custom Tag 1 ⓘ

test new

Name of Custom Tag 2

some Custom

Name of Custom Tag 3

Salesforce tags

Name of Custom Tag 4

add new tag

Name of Custom Tag 5

AN tag

Name of Custom Tag 6

- -

Name of Custom Tag 19

Name of Custom Tag 20

Disconnect integration   Disconnect

Workflow 4:

4. All New CT Templates → SF Templates
Runs daily @ 9:45pm ET: Pushes new Templates from CT to SF.

Once a day, the workflow updates the list of Templates in SF with new Templates that may have been created in CampaignTrackly.

Please note that the Templates are not automatically added to the list of Templates in Salesforce, but rather they are added as Inactive Values by Salesforce. To become Active, they need to be activated by hand (we are not sure if Salesforce allows this to be automated by the user - please double check with Salesforce if interested).

The list of Inactive and Active Templates in Salesforce can be accessed from: Setup -> Object Manager -> Campaign -> Fields & Relationships -> Tagging Templates.

This workflow requires the following Custom Salesforce Fields:
- **Tagging Templates**

Complete List of Custom Salesforce Fields required by the CampaignTrackly workflows

1.
   a. Field Label: **Task Messages from CT**
   b. Field Name: **Task_Messages_from_CT**
   c. API Name: **Task_Messages_from_CT__c**
   d. Part of Salesforce object: **Campaign**
   e. Data Type: **Rich Text Area**
   f. Purpose: to display possible messages sent by CampaignTrackly during the execution of the workflow (errors, etc).

2.
   a. Field Label: **Tagging Templates**
   b. Field Name: **Tagging_Templates**
   c. API Name: **Tagging_Templates__c**
   d. Part of Salesforce object: **Campaign**
   e. Data Type: **Picklist**
   f. Purpose: Contains the names of all Templates available in CampaignTrackly. Needed when automatically creating tracking links.

3.
   a. Field Label: **Simple Campaign Name**
   b. Field Name: **Simple_Campaign_Name**
   c. API Name: **Simple_Campaign_Name__c**
   d. Part of Salesforce object: **Campaign**
   e. Data Type: **Text**
   f. Purpose: A Campaign's user-friendly name.

4.
   a. Field Label: **URL**
   b. Field Name: **URL**
   c. API Name: **URL__c**
   d. Part of Salesforce object: **Campaign**
   e. Data Type: **URL**
   f. Purpose: The basic URL link relevant to the Campaign.

5.
   a. Field Label: **Tracking URLs**
   b. Field Name: **Tracking_URLs**
   c. API Name: **Tracking_URLs__c**
   d. Part of Salesforce object: **Campaign**

     e. Data Type: **Rich Text Area**

     f. Purpose: A list of tracking links produced by CampaignTrackly.

6.

     a. Field Label: **Short URLs**

     b. Field Name: **Short_URLs**

     c. API Name: **Short_URLs__c**

     d. Part of Salesforce object: **Campaign**

     e. Data Type: **Rich Text Area**

     f. Purpose: Short links (if any) corresponding to the set of **Tracking URLs.**

7.

     a. Field Label: **Custom Tag 1**

     b. Field Name: **Custom_Tag_1**

     c. API Name: **Custom_Tag_1__c**

     d. Part of Salesforce object: **Campaign**

     e. Data Type: **Text (with 255 characters)**

     f. Purpose: The value of a Custom tag send from CampaignTrackly. The actual name of the Custom tag is not stored here.

NOTE: same for the remaining fields for **Custom Tag 2,3,...**

Document all ADOBE WORKFRONT 1-click Workflows

General Notes:

- When a workflow is first created, it needs to be tested to verify that its behavior matches the expected one.
- Some workflows **require additional Custom Workfront Fields** (their names begin with "DE:") to be created by the user. This is a rather straightforward task. For reference, all such fields are collected in the following. The user will only need to implement the fields that are part of the Workflows used by the user. Each Workflow states all custom fields relevant to it.

Workflow 1

The workflow runs once a day, late at night Eastern US time, and maps all new Workfront Projects to new CampaignTrackly Marketing Campaigns. Only Projects that do not have a corresponding CampaignTrackly Campaign are pushed; the ones that already exist in CampaignTrackly are not pushed.

Note: Projects are being identified as new/existing based on their CampaignTrackly **Unique ID**. Usually, in Workfront this would correspond to Workfront Project **ID**, but other choices can be made if appropriate.

The workflow requires the names of 13 fields. An example can be seen in the snapshot below. Basically, the name above each box is the CampaignTrackly Marketing Campaign attribute, while the file in the box (outlined in red in the example below) is the Workfront field the user wishes to map it to. The choice of Workfront field is totally up to the user. One can use standard Workfront fields or can create their own custom fields (the ones whose names are beginning with **DE:**).

The last field is for passing messages to Workfront about the workflow's execution.

New Workfront Project→CT→New Tracking Links in Workfront

Runs periodically: Pushes new Workfront Projects to CT Marketing Campaigns. The tagged and shortened links are returned back to Workfront.

Campaign Naming Convention ⓘ

DE:Campaign Naming Convention

Friendly Name

name

Description

description

Date Start

DE:Date Start

Date End

DE:Date End

Owner

ownerID

Unique ID

ID

Type

objCode

Template Name

DE:Tagging Template

Link

DE:Link

Tracking URLs

DE:Tracking URLs

Short Links

DE:Short URLs

Task Messages

DE:Task Messages from CT