

Heeet Salesforce Implementation Guide

Version 2024.1

SUMMARY

- Install Heeet Salesforce Package
- Add your Heeet API Key
- Schedule Paid Platforms Sync
- Schedule Campaign Snapshot Sync
- Field Mapping


Salesforce Package Installation

Installing Heeet in Salesforce is quite straight forward and does not require lot of actions from your Salesforce Admin team.

1-Package installation


Once your subscription activated in our back office, we'll provide you with the link to install Heeet in your Salesforce org (or sandbox org). One of your Salesforce Admin will have to install and grant « Access to all users »

Heeet package contains all required fields that are automatically added to Lead, Account, Contact and Opportunity objects in Salesforce.




Install Heeet


By



Install for Admins Only



Install for All Users



Install for Specific Profiles...

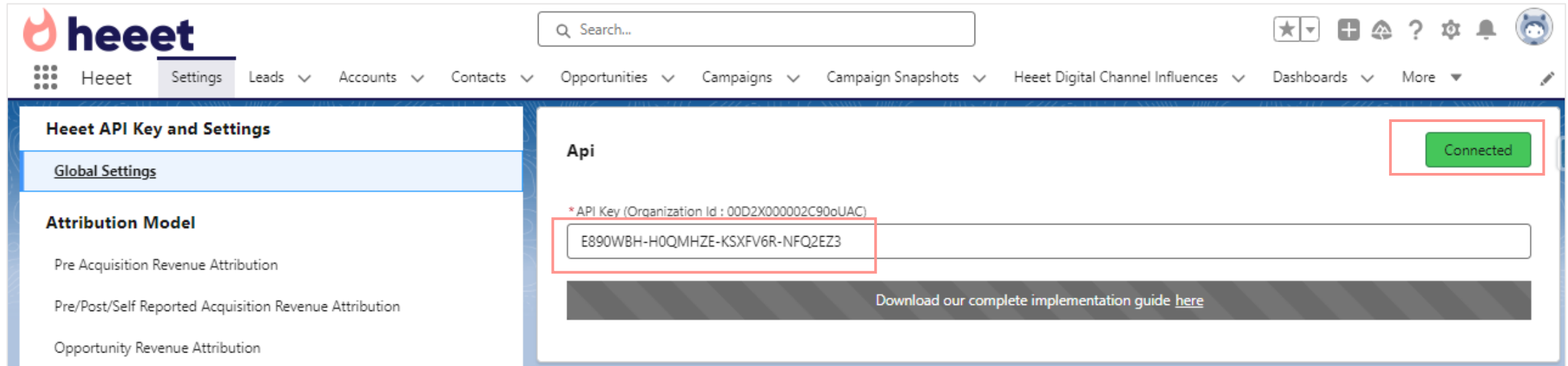
App Name	Publisher	Version Name	Version Number
Heeet		202401.12	202401.12

Additional Details [View Components](#)

Salesforce Package Installation

2-Add Heeet API Key in Heeet settings

Once installed, either someone with access to Heeet or an admin will have to put the API Key we provide you with in the Heeet settings and click on « Connect »



The screenshot displays the Heeet settings interface within a Salesforce environment. The top navigation bar includes the Heeet logo, a search bar, and various utility icons. The main navigation menu lists several categories: Heeet, Settings (selected), Leads, Accounts, Contacts, Opportunities, Campaigns, Campaign Snapshots, Heeet Digital Channel Influences, Dashboards, and More. The left sidebar is titled "Heeet API Key and Settings" and contains sub-sections for "Global Settings" and "Attribution Model". The "Attribution Model" section lists three options: "Pre Acquisition Revenue Attribution", "Pre/Post/Self Reported Acquisition Revenue Attribution", and "Opportunity Revenue Attribution". The main content area is titled "Api" and features a green "Connected" button in the top right corner. Below this, a text input field contains the API key "E890WBH-H0QMHZE-KSXFV6R-NFQ2EZ3", with a red box highlighting the key and a red asterisk above it indicating it is required. A note specifies the Organization Id as "00D2X000002C90oUAC". At the bottom of the main content area, there is a dark grey banner with the text "Download our complete implementation guide [here](#)".

Salesforce Package Installation

3-Activate Paid Platforms schedule

Once marketing admin have connected all required paid platforms (Google Ads, LinkedIn Ads,...) a Salesforce Admin will have to open Salesforce Developer Console > Debug > Open Execute Anonymous Window and paste the following codes.

```
Heeet_SyncScheduler.schedule();
```

This code will schedule initial paid campaigns sync with Salesforce campaigns and their hourly data update.

4-Activate Campaign Snapshot schedule

If you want to use our Campaign Snapshot feature, ask your Salesforce admin open Salesforce Developer Console > Debug > Open Execute Anonymous Window and paste the following code.

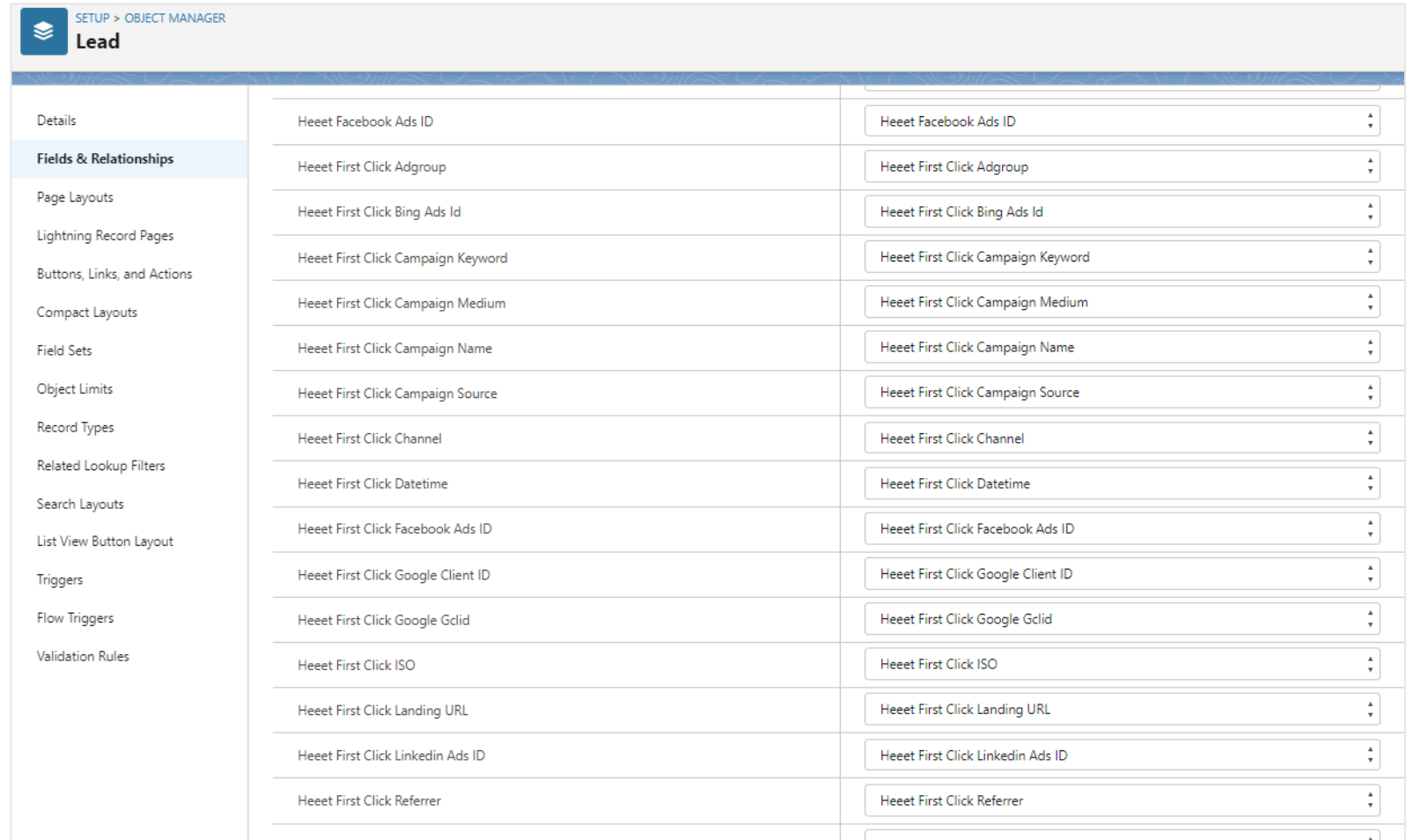
```
system.schedule('Snapshot', '0 0 23 ? * SUN *', new Heeet.Heeet_SnapshotScheduler());
```

Salesforce Package Installation

5-Map lead fields with other objects (Account, Contact, Opportunity)

If you want to pass first/last click marketing acquisition data on converted records from lead, ask your Salesforce admin to go to Object Manager > Lead > Fields & Relationships > Map Lead Fields.

All fields that can be mapped start with « Heeet ».



Field Name	Mapped Field Name
Heeet Facebook Ads ID	Heeet Facebook Ads ID
Heeet First Click Adgroup	Heeet First Click Adgroup
Heeet First Click Bing Ads Id	Heeet First Click Bing Ads Id
Heeet First Click Campaign Keyword	Heeet First Click Campaign Keyword
Heeet First Click Campaign Medium	Heeet First Click Campaign Medium
Heeet First Click Campaign Name	Heeet First Click Campaign Name
Heeet First Click Campaign Source	Heeet First Click Campaign Source
Heeet First Click Channel	Heeet First Click Channel
Heeet First Click Datetime	Heeet First Click Datetime
Heeet First Click Facebook Ads ID	Heeet First Click Facebook Ads ID
Heeet First Click Google Client ID	Heeet First Click Google Client ID
Heeet First Click Google Gclid	Heeet First Click Google Gclid
Heeet First Click ISO	Heeet First Click ISO
Heeet First Click Landing URL	Heeet First Click Landing URL
Heeet First Click LinkedIn Ads ID	Heeet First Click LinkedIn Ads ID
Heeet First Click Referrer	Heeet First Click Referrer

THANK YOU.

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