

Celigo Example Requirements Document

Requirement Category	Requirement
User Story	<p>As a marketing user</p> <p>I want to Create a Marketing Event Campaign in my Marketing Automation application whenever I create a Campaign in my CRM</p> <p>So that I can eliminate manual Entry and keep Campaign information synchronized between marketing and sales operations</p>
Applications Used	Application 1: Salesforce.com Application 2: Hubspot
Data Format	JSON
Web Service	HTTPS
Application Connector/Universal Connector/Templates	Universal Connector
Transport Protocol	HTTPS
APIs/Data Mapping	Salesforce-Sales API, Campaign Object Hubspot - CRM - Marketing Events Hubspot APIs Hubspot CRM/Marketing API Hubspot CRM Data Model Hubspot Scopes Salesforce APIs Salesforce Data Model Salesforce Object Reference
iPaaS Business Rules	<p>Directionality and Source of Truth</p> <ul style="list-style-type: none"> • Source of Truth is Salesforce • Flow goes in one direction - Salesforce to Hubspot but the ID from Hubspot is populated in Salesforce (bidirectional) <p>Primary Identifier</p> <ul style="list-style-type: none"> • Create ExternalID in Hubspot and populate with SF 18 Character IC • Create External ID in SF and populate with Marketing Events Event ID • Custom field External Id fields will need to be

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	<p>created in Hubspot and Salesforce and will be auto populated</p> <p>Orchestrating and Transforming Data</p> <ul style="list-style-type: none"> ● Salesforce Campaign” is matched to a Marketing Event - the Marketing Event should be named identically to the SF Campaign ● The Campaign ID will be mapped to an External ID Field in Hubspot CRM as a Marketing Event ● The Hubspot Marketing Event will be mapped to Salesforce as an External ID ● SF Campaigns will be synchronized to Hubspot on batch basis nightly at 9pm ET <p>Other Requirements</p> <p>This flow may be daisy-chained to other flows - consider this flow as the beginning of a potential set of flows of synchronizing Salesforce CRM Campaigns and Hubspot Marketing Events.</p>

Example Flow:

Data Flow #1: Sync HubSpot Events to Salesforce Campaigns

Synopsis

Campaigns will be created in Salesforce and imported into Hubspot as a Marketing Event. This information will be loaded into Hubspot and the corresponding Salesforce will be moved over along with the mapped information.

Integration Method

- Data Format: JSON
- Transport Protocol: HTTPS
- Frequency: Batch (Recommended Daily)
- Record types: HubSpot Marketing Events, Salesforce Campaigns
- Sample File, Schema, Screenshots:
 - A custom field (External ID) titled HubSpot ID needs to be created to properly identify the corresponding HubSpot record

SETUP > OBJECT MANAGER

Campaign

Details

Fields & Relationships [New](#) [Deleted Fields](#)

1 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
HubSpot ID	HubSpot_ID__c	Text(99) (External ID)	

Page Layouts

Lightning Record Pages

Technical Summary

Integrator.io will, on a scheduled basis:

1. Retrieve marketing events on a daily schedule from Hubspot, 9pm ET nightly
2. Use the HubSpot ID search for existing records in Salesforce
3. If the HubSpot id does not exist
 - a. Create a new Campaign based on the correctly mapped information
 - b. If the Campaign does exist, update based on the HubSpot information given, and proceed to the next Campaign

Flow Creation Notes

1. Create an export with the following
 - a. Select HubSpot
 - b. Export Name: Get Marketing Events
 - c. Connection: Connect with OAuth
 - d. API Version: v3
 - e. API Name: `crm.objects.marketing_events`
 - f. API Endpoint: `crm.objects.marketing_events.read`
 - g. Configure search parameters: Refer to notes above
 - h. Export type: Delta
2. Create an import with the following:
 - a. Select Salesforce
 - b. Import Name: Import events to Campaigns
 - c. Connection: Salesforce Connection
 - d. sObject Type: Campaign
 - e. Operation: Insert/Update
 - f. How can we find existing records?: (Ensure custom fields are created prior to this step) (`HubSpot_ID__c == {{{string id}}}`)
 - g. Mapping:

Rules

Source record field (HubSpot)	↻	Destination record field (Salesforce)	↻
id		HubSpot ID	⚙️
name		Name	⚙️
eventType		Type	⚙️
url		Description	⚙️