

KRONOLOGIC

HOW TO GUIDE

Salesforce Integration

Salesforce Integration Overview

Objective

Ability to integrate with the Salesforce to allow import of contacts, leads, opportunity and campaign member objects without the need of CSVs

Authentication

Kronologic uses the standard OAuth 2.0 protocol to authenticate; the open protocol enables authorization and a secure data sharing between Kronologic and Salesforce.

API Call Volume

Kronologic checks Salesforce for contact, lead, opportunity member records changes every 2-3 minutes, and throttles API calls:

- Up to 800 calls per hour
- Each call can import up to 2k new/updated records



Prerequisites

Create a secure Salesforce integrated user

Kronologic recommends creating an integrated user in your organization solely for integration purposes. That way, if an actual user leaves your organization, you'll always have a user with the correct permissions available.

User Permissions

Assign the appropriate permission set to the integration user. Kronologic will work with your HubSpot admin to define the right permission set based on what is required to fulfill the business requirements and needs

Salesforce Knowledge Base: Add and Remove Users

<https://help.salesforce.com/articleView?id=000331470&type=1&mode=1>

Salesforce Knowledge Base: Assign user permissions

https://help.salesforce.com/s/articleView?id=sf.perm_sets_assigning.htm&type=5

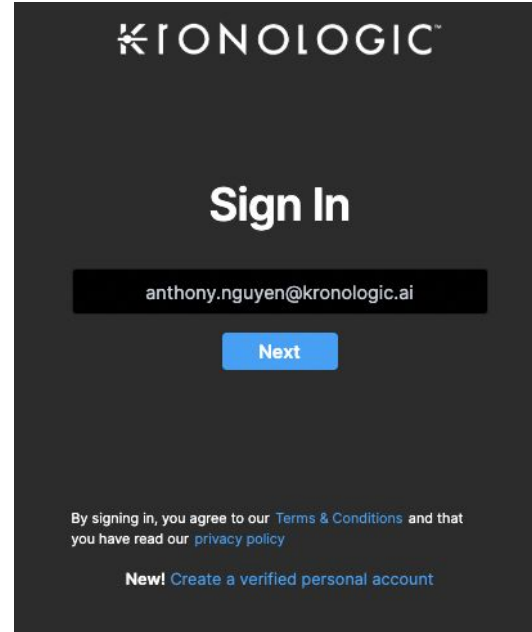


Log into Kronologic

Open your browser and go to
us.app.kronologic.ai

Enter in your corporate email address and click
Next

If SSO is activated, you do not need to enter in
your password. Otherwise, please enter in your
password to log in.



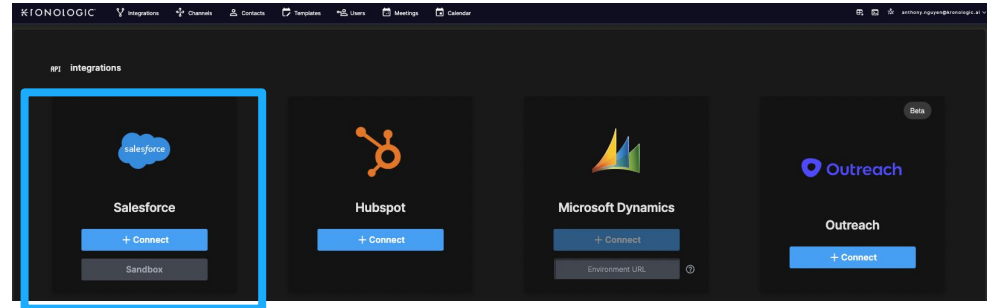
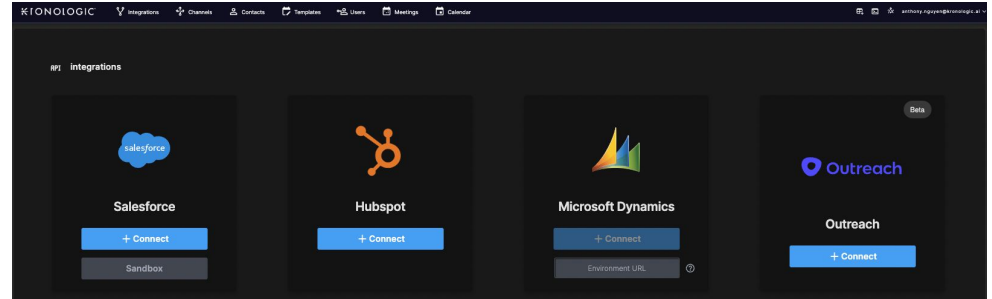
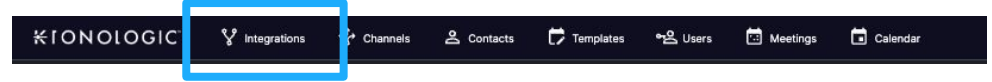
Navigate to Integrations

Navigate to **Integrations** on the menu bar

If the Integrations option on the menu is not available, you may not have admin rights to access. Please reach out to your Kronologic administrator to ensure you have the right permission.

Click on the **Integrations** option to load the integrations page

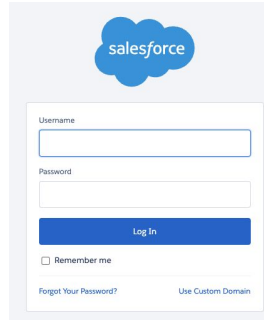
Locate the Salesforce option and click **+Connect** (production) or **Sandbox** to execute the prompt to the Salesforce login page



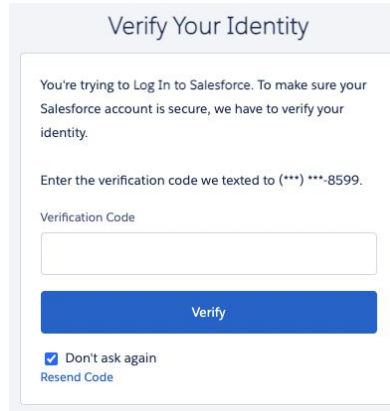
Salesforce Integrated User Log in

Log in with the Salesforce integrated user credentials

Verify your identity (if needed)



The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it is a form with two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Underneath the button is a checkbox labeled 'Remember me'. At the bottom of the form are two links: 'Forgot Your Password?' and 'Use Custom Domain'.



The image shows the 'Verify Your Identity' screen. The title is 'Verify Your Identity'. The main text reads: 'You're trying to Log In to Salesforce. To make sure your Salesforce account is secure, we have to verify your identity.' Below this is a line of text: 'Enter the verification code we texted to (***) ***-8599.' There is a 'Verification Code' input field. A blue 'Verify' button is located below the input field. At the bottom, there is a checked checkbox labeled 'Don't ask again' and a link 'Resend Code'.



Confirm Salesforce integration is successful

If you have successfully logged in with correct credentials in Salesforce, Kronologic will automatically navigate back to the API Integrations page. If the integration is successful, it will display – **Disconnect**

The Salesforce integration is now complete and Channels now can be created to import contacts into Kronologic.

