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

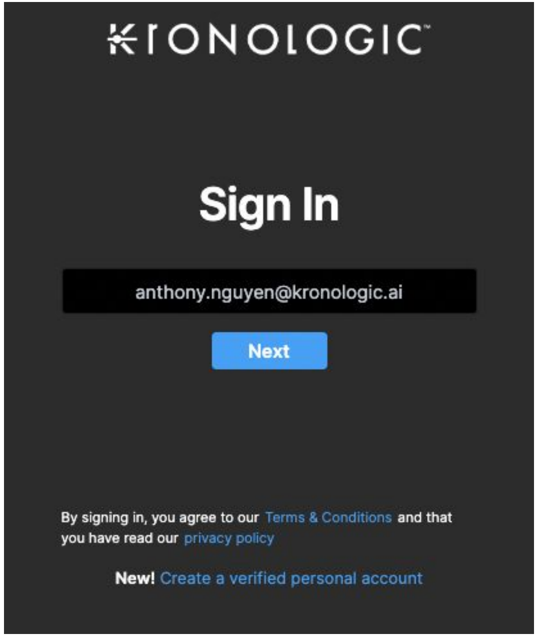
Salesforce Knowledge Base: Assign user permissions
https://help.salesforce.com/s/articleView?id=sf.perm_sets_assigning.htm&type=5

Log into Kronologic

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

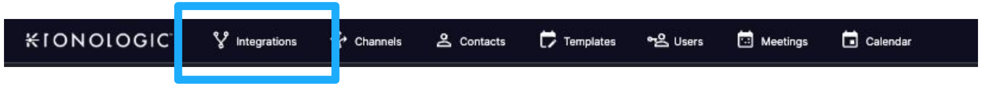
Enter in your corporate email address and click
Next

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

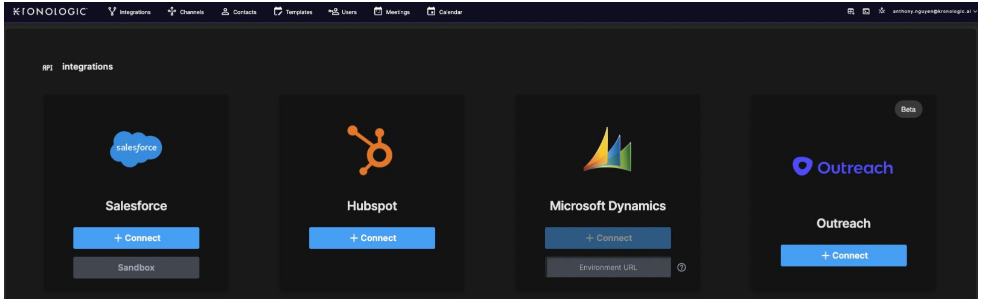


Navigate to Integrations

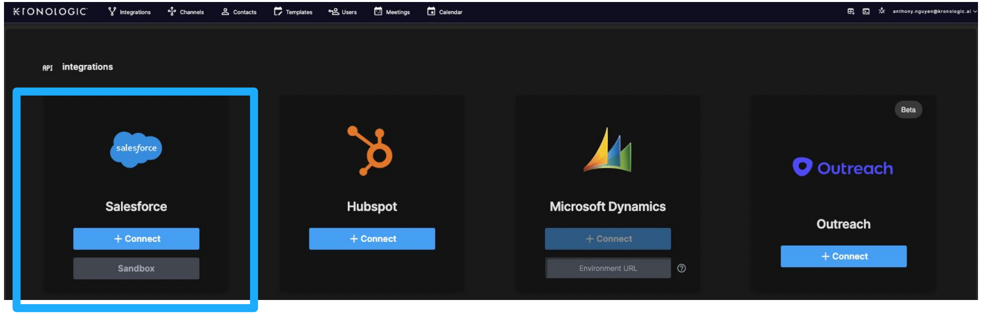
Navigate to **Integrations** on the menu bar
If the Integrations option on the menu is not available, you may not have admin rights to access. Please reach out to your Kronologic administrator to ensure you have the right permission.



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

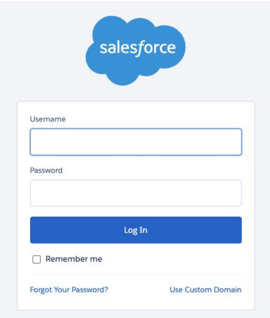


Locate the Salesforce option and click **+Connect** (production) or **Sandbox** to execute the prompt to the Salesforce login page

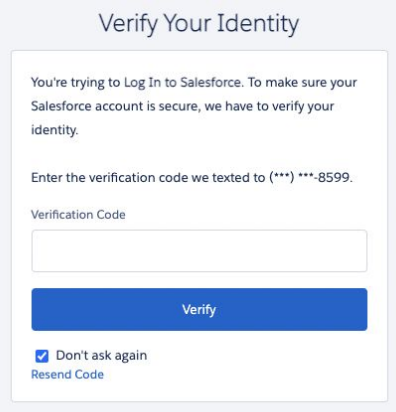


Salesforce Integrated User Log in

Log in with the Salesforce integrated user credentials

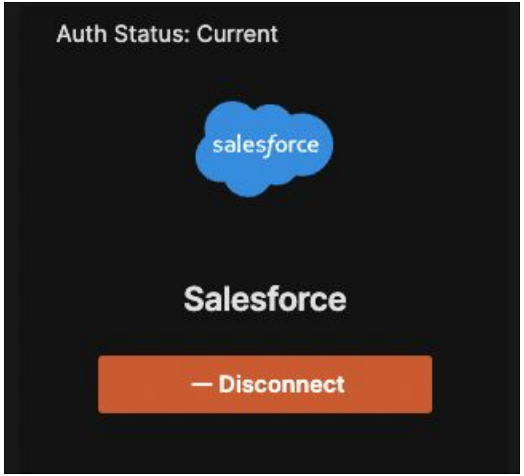


Verify your identity (if needed)



Confirm Salesforce integration is successful

If you have successfully logged in the 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.