

# How to Pass Iterable Events to Salesforce

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Using Digioh pipelines in an Iterable Journey depends on your current contract. Contact your account manager or Digioh Support for more information.

**Use case:** If you want to pass iterable user events (Like Email Activity ie Email Click. Open and Send) to Salesforce Object (Lead OR Contact) We have a prebuilt pipeline for it. You have to add the pipeline and select the appropriate authentication if you are testing the use case you can select the Iterable and Salesforce Sandbox Authentication.

## Iterable to Salesforce Sync Requirements

Before setting up this sync, you will need to complete the following items:

- Authenticate Iterable in Digioh ([How to add Iterable API Key](#))
- Authenticate Salesforce in Digioh ([How to connect Salesforce CRM](#))
- Need to add a [System Webhook](#) in iterable with the Events according to your use case (Once the pipeline is added you can grab the hook URLs)

The Prebuilt pipeline template only supports **emailSend** Event for additional events you have to update the pipeline.

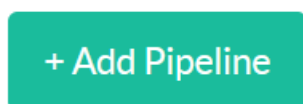
## How to add the Pipeline

Step 1: Goto Digioh and login and goto connect tab

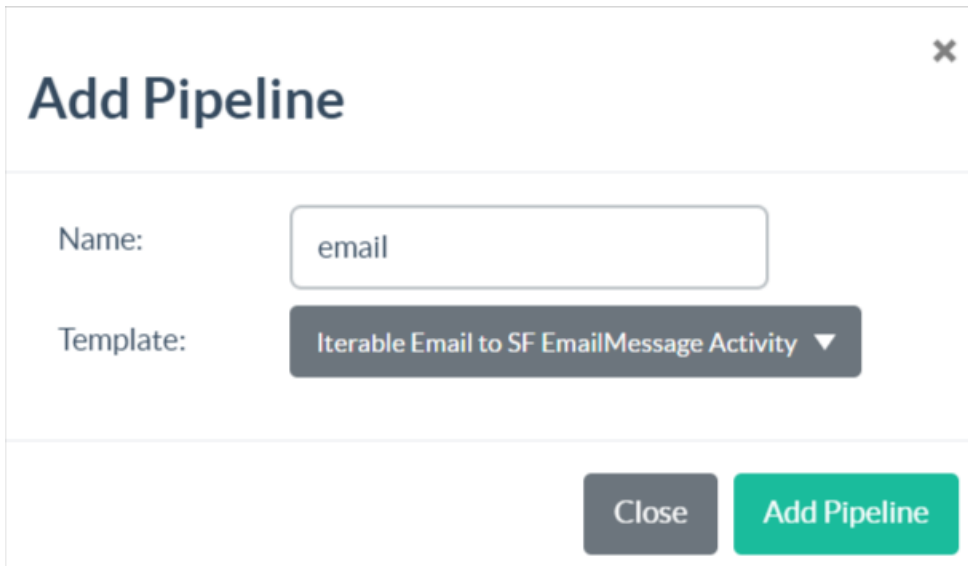
The screenshot shows the Digioh dashboard interface. The navigation menu at the top includes 'Boxes', 'Reporting', 'Experiments', 'Connect', 'Integrations', 'Files', 'Help', and 'Admin'. The 'Connect' tab is highlighted with a red box. Below the navigation menu, there are several tabs for device types (All, Phone, Tablet, Desktop) and layout options (All, Lightbox, Sidebar, Inline, Banner). There are also buttons for '+ Create New Box', 'Create New Quiz', 'Publish', and 'More'. The main content area displays a table of existing pipelines.

ID	Name	Conditions	Integrations	Preview	Actions	Data	Eligible	Live
259567	Segment Demo	+ Add	+ Add	Preview	Actions	Data	ON	
220415	Shopify	Edit	Edit (1)	Preview	Actions	Data	OFF	
220471	Attentivemobile with Email and Phone fields	+ Add	Edit (1)	Preview	Actions	Data	OFF	
220472	Attentivemobile with Only Phone field	+ Add	Edit (3)	Preview	Actions	Data	OFF	
220736	Hubspot (rename)	Edit	Edit (1)	Preview	Actions	Data	OFF	
221088	Phone Validation Custom js app refactoring	Edit	+ Add	Preview	Actions	Data	OFF	

Step 2: Create a new Pipeline



Step 3: Set pipeline name and select template: **Iterable Email to SF Email Message Activity**.



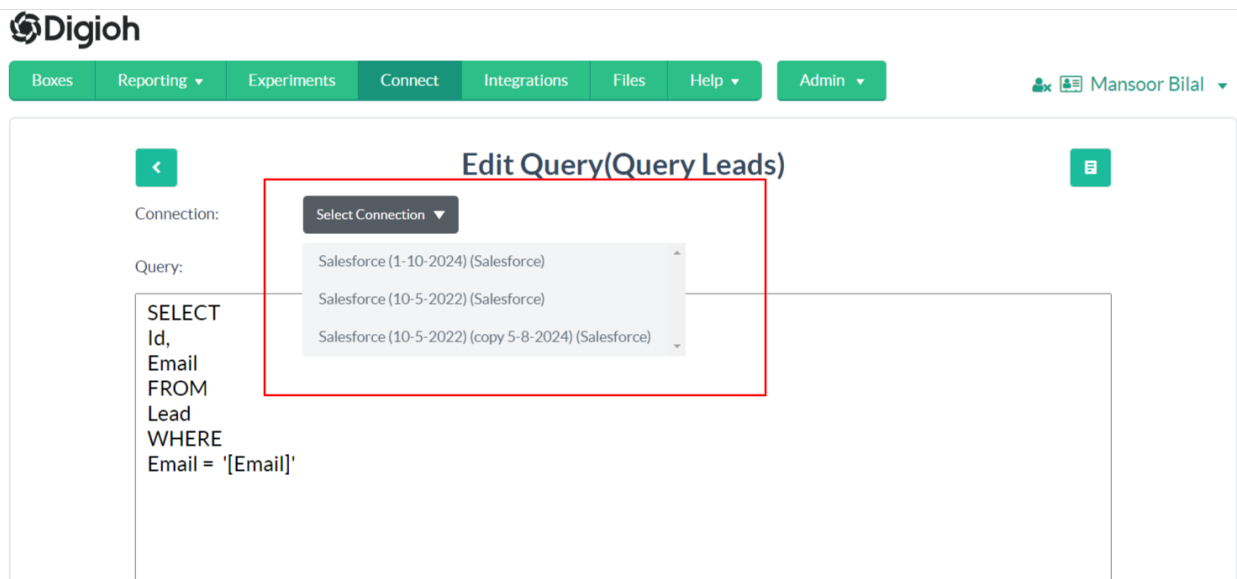
**Add Pipeline** [Close] [Add Pipeline]

Name:

Template: **Iterable Email to SF EmailMessage Activity** ▼

Once the pipeline is added click on edit button and update the API connection for Salesforce and Iterable.

i - Edit Pipeline > Edit Task: **Query Leads** > Select Connection of Salesforce (Either SandCampaign or Production)



**Digioh**

Boxes Reporting Experiments **Connect** Integrations Files Help Admin

Mansoor Bilal

### Edit Query(Query Leads)

Connection: **Select Connection** ▼

- Salesforce (1-10-2024) (Salesforce)
- Salesforce (10-5-2022) (Salesforce)
- Salesforce (10-5-2022) (copy 5-8-2024) (Salesforce)

Query:

```
SELECT  
Id,  
Email  
FROM  
Lead  
WHERE  
Email = '[Email]'
```

ii- Edit Pipeline > Edit Task: **Query Contacts** > Select Connection of Salesforce (Either SandCampaign or Production)

### Edit Query(Query Contacts)

Connection: Select Connection ▼

Query:

```
SELECT
Id,
Email
FROM
Contact
WHERE
Email = '[Email]'
```

Salesforce (1-10-2024) (Salesforce)  
Salesforce (10-5-2022) (Salesforce)  
Salesforce (10-5-2022) (copy 5-8-2024) (Salesforce)

iii- Edit Pipeline > Edit Task: **Get Email** > Select Connection of Iterable (Either SandCampaign or Production)

### Iterable API (Get Email)

API Operation: Get Sent Email ▼

Connection: Select Connection ▼

Path to Email:

Iterable - Sandbox B2B (copy 2-24-2023) (Iterable)  
Iterable (Digioh Demo) (Iterable)

Path to Message Id: Item Data ▼

dataFields.messageId

Merge Nested Objects

Save

iv- Edit Pipeline > Edit Task: **Create Email in Salesforce** > Select Connection of Iterable (Either SandCampaign or Production)

### Create Object (Create Email in Salesforce)

Connection: ▼

Salesforce Object Name:

Path to Object Data:

Salesforce (1-10-2024) (Salesforce)

Salesforce (10-5-2022) (Salesforce)

Salesforce (10-5-2022) (copy 5-8-2024) (Salesforce)

v- Once all the tasks connections above are updated. Publish the pipeline.

### (41724) Iterable Email Activity to Salesforce.

Show Details

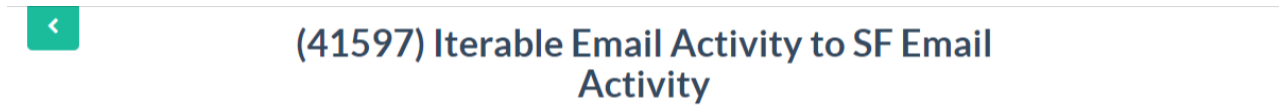
- 69139 Query Leads Type: Salesforce Query
- 69140 Query Contacts Type: Salesforce Query
- 69141 Delay 10 Seconds Type: Delay
- 69142 Get Email Type: Iterable API    Continue On Failure: Yes
- 69143 Map Email Fields Type: Map Data
- 69144 Set Tolds Type: Render Template
- 69145 Merge to Final Email Payload Type: Merge Data
- 69146 Create Email in Salesforce Type: Salesforce Create Object

That's All the Pipeline is active now.

## Webhook

After creating the pipeline we have to find a hook url.

- We need to edit the pipeline and click on the show details link to get the hook URL.



Show Details

- Then on the explored section, we need to click on the 'show URL' section

Hook URL: show

- Copy iterable hook url

Hook URLs: Hide Details

JSON:

Salesforce:

Iterable:

- Next, Add this webhook to the Iterable [System Webhook](#).

Once you configured the webhook in Iterable you can see the emailSend events on the Salesforce Contact or Lead Object Activity section.

## Logs

You can also check the Pipeline logs to check the data that Digioh receives and processes for Salesforce.

- Click on the Activity Button IT will open the Chart view of Activity.

## Pipelines

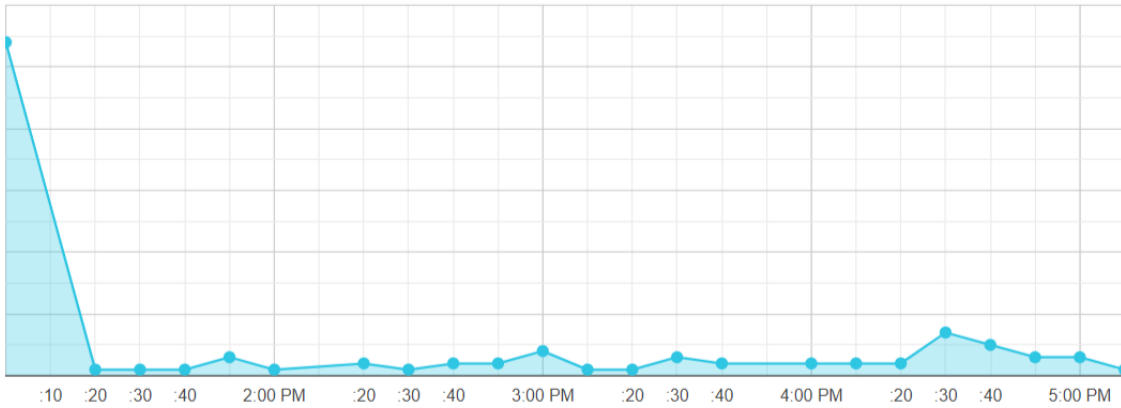
(40818) Salesforce Lead Or Contact to Iterable User Jobs (2)	Unpublished Changes	Edit	Activity	🗑️
(41097) Iterable Email Activity to SF Email Activity		Edit	Activity	🗑️
(41099) Update Ready_Substatus_c		Edit	Activity	🗑️
(41130) Update Ready_Substatus to Abandoned		Edit	Activity	🗑️
(41155) Salesforce EmailMessage Record Update		Edit	Activity	🗑️

- Chart View



### Iterable Email Activity to SF Email Activity Activity

#### Pipeline Tasks



Logs

Edit

Last 6 Hours

Last 24 Hours

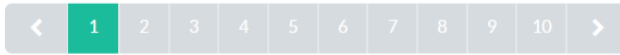
Last 7 Days

Last 30 Days

Last 90 Days

- Click on the Logs Button it will open the Details of the records.

## Iterable Email Activity to SF Email Activity Logs



Date Processed (UTC)	Item Id	Status	Message	
2024-06-11T17:16:55	311a5ed9-5443-44e2-8940-f615b53f579b	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T17:05:10	1f5f9601-5bd9-4519-9606-fa07dee7793e	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T17:02:23	2d4d91e8-d68b-4abc-b11c-e83227aba774	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T17:00:49	d8df1abf-0460-4533-beba-aeaf021530a9	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:55:44	d0c87fc4-53a7-4f12-b526-74c25c66f133	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:53:02	5f111b4f-6129-4dec-9bf3-10f909ea9acd	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:52:48	25fd3cb7-4233-4418-a525-7dc6f9785886	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:49:54	e618cf35-6f46-4f94-bd8d-35f05ffb1eae	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:48:49	ef58ccc7-05ab-4941-955b-b7ab2ff944bc	✓	Pipeline Completed	<a href="#">Detail</a>
2024-06-11T16:45:24	c728ccf3-4e08-40e7-8224-7a7a6dc26e75	✓	Pipeline Completed	<a href="#">Detail</a>

- **Detail** Link will open the details of the Each task of the pipeline.

**Note: The Pipeline Logs are only available if Data Storage is turned on.**

### Optional: Task Details

If you would like to understand the pipeline implementation. Here are the Pipeline task details What is happening in each pipeline task?

**Task 1:** On tasks (Query Leads) and (Query Contacts) we are finding email's(received from webhook request) record on salesforce is that contact or lead.

On task (Query Leads) we are fetching ID and email from Lead in salesforce.



### Edit Query(Query Leads)



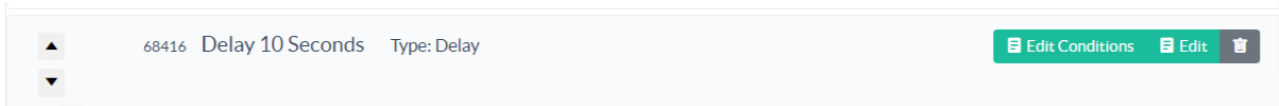
Connection: [REDACTED]

Query:

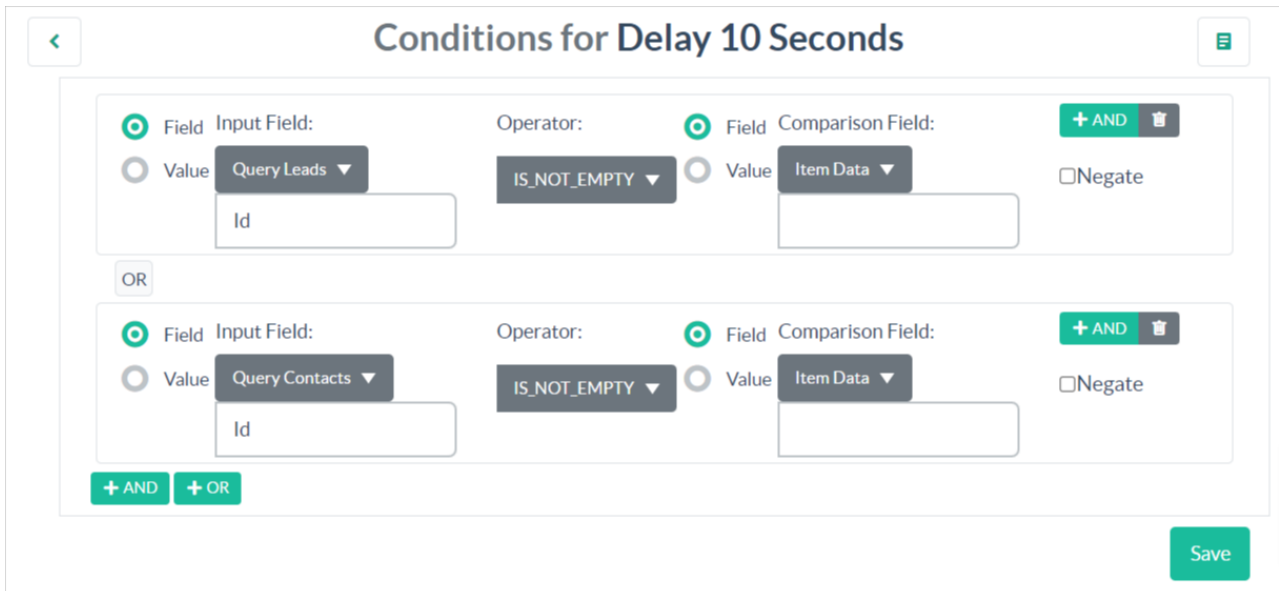
```
SELECT
  Id,
  Email
FROM
  Lead
WHERE
  Email = '[Email]'
```

On task (Query Contacts) we are selecting ID, and email from Contact in Salesforce

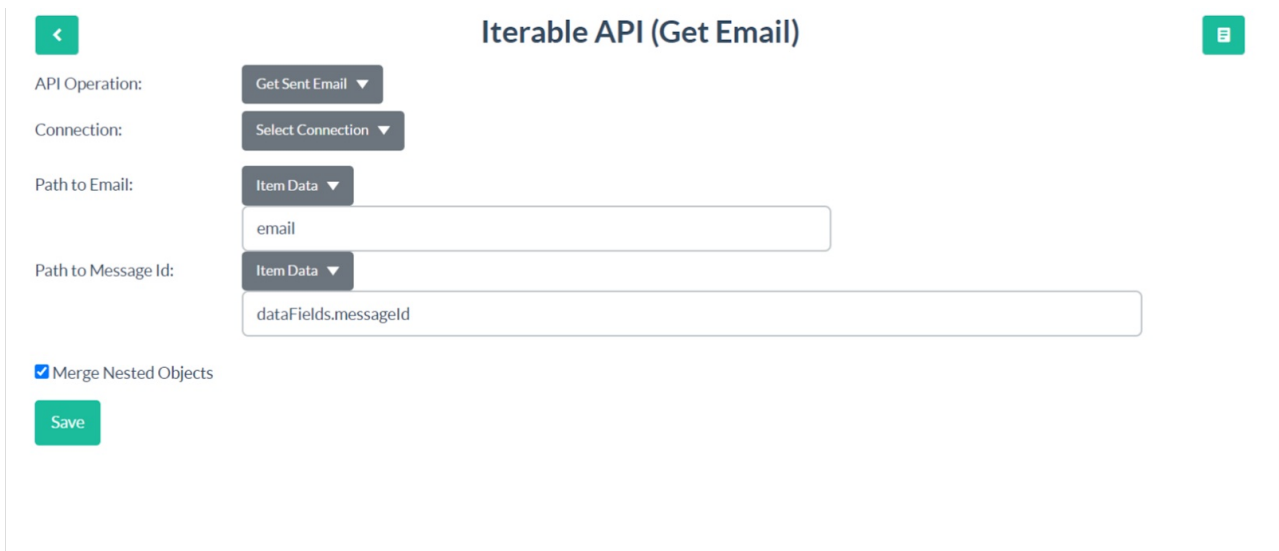
**Task 2:** Then next we created a delay task for waiting 10 seconds



And added a condition on delay task that there must be a record in lead or contact



**Task 3:** In the next step we have created a task to fetch email data from an iterable with the help of messageId(received from webhook).



And on the condition that the event type value is "email send".

<

## Conditions for Get Email

☰

Field **Input Field:**

Value Item Data ▼

eventName

Operator:

EQUALS ▼

Field **Comparison Value:**

Value emailSend

+ AND + OR ✕

Negate

Save

**Task 4 :** Then on the (Mapdata) task we set up data with the help of a map data type task to be sent on the (Create Email in Salesforce) task.

Field **Input Field:** Item Data ▼

Value dataFields.emailSubject

➔

**Output Field:** Subject

**Transform:** None ▼

Field **Input Value:**

Value 3

➔

**Output Field:** Status

**Transform:** None ▼

Field **Input Value:**

Value Iterable

➔

**Output Field:** FromName

**Transform:** None ▼

Field **Input Value:**

Value

➔

**Output Field:** FromAddress

**Transform:** None ▼

Field **Input Field:** Get Email ▼

Value emailBody

➔

**Output Field:** HtmlBody

**Transform:** None ▼

**Task 5:** On the next task we are setting up additional data on a conditional basis with the help of the render template type task

### Edit Template (Set Tolds)

Path to Model:

Template Type:

Output Type:

Template:

```
{
  "Tolds": [
    "{% if model.TaskResults[68415].Id != null and model.TaskResults[68415].Id != "" %}
    {{model.TaskResults[68415].Id}}{% else %}{{model.TaskResults[68414].Id}}{% endif %}"
  ]
}
```

**Task 6:** Then on the next task (Merge to Final Email Payload) we have merged both data to be sent on the (Create Email in Salesforce) task

**Task 7:** Finally, on the task (Create Email in Salesforce) we are creating an EmailMessage object in Salesforce

### Create Object (Create Email in Salesforce)

Connection:

Salesforce Object Name:

Path to Object Data:

If you need help setting up this Sync integration, [send us an email](#), and we'll be glad to help.