

# Sansan x Salesforce Integration

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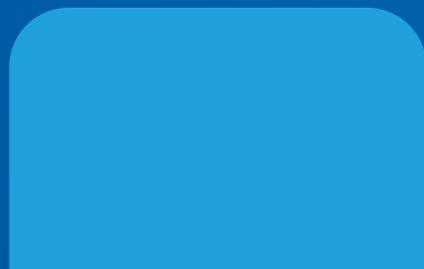


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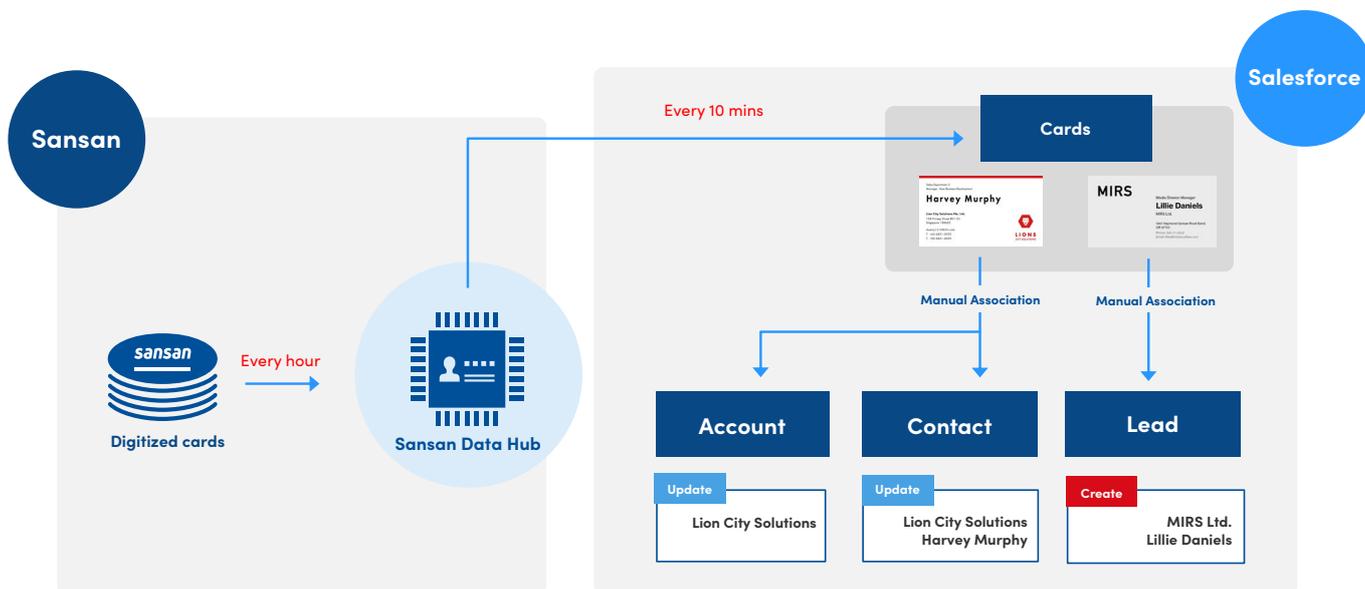
# Overview

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# About Salesforce integration

- Digitized business cards will be sent to Sansan Data Hub once per hour.
- Card info in Sansan Data Hub will be sent to Salesforce once every 10 mins.



# How business cards are displayed in Salesforce

	<input type="checkbox"/> Card ↑	Contact	Lead	D...	Department
1	<input type="checkbox"/> Adams Curtis @ General Liquid Consulting, Inc.	Curtis Adams		<input type="checkbox"/>	
2	<input type="checkbox"/> Allen Gloria @ Lion City Solutions Pte. Ltd.			<input type="checkbox"/>	Marketing Department
3	<input type="checkbox"/> Alvarez Evelyn @ Lion City Solutions Pte. Ltd.	Evelyn Alvarez		<input type="checkbox"/>	Legal Department
4	<input type="checkbox"/> Anderson Lillie @ Lion City Solutions Pte. Ltd.	Lillie Anderson		<input type="checkbox"/>	Sales Department 3
5	<input type="checkbox"/> Armstrong Ricardo @ Singapore Natural Resources Engineering, Inc.		Ricardo Armstrong	<input type="checkbox"/>	
6	<input type="checkbox"/> Arnold Erin @ Lion City Solutions Pte. Ltd.		Curtis Arnold	<input type="checkbox"/>	Finance Department
7	<input type="checkbox"/> Austin Christine @ Lion City Solutions Pte. Ltd.			<input type="checkbox"/>	
8	<input type="checkbox"/> Bailey Lucy @ Sansan Motor PVT. LTD.		Lucy Bailey	<input type="checkbox"/>	
9	<input type="checkbox"/> Baker Marilyn @ Sansan Motor PVT. LTD.		Marilyn Baker	<input type="checkbox"/>	
10	<input type="checkbox"/> Banks Mark @ East Asian Development Consulting PTE LTD	Mar Banks		<input type="checkbox"/>	
11	<input type="checkbox"/> Barnes Joanne @ Sansan Motor PVT. LTD.			<input type="checkbox"/>	
12	<input type="checkbox"/> Barnes Max @ General Liquid Consulting, Inc.			<input type="checkbox"/>	
13	<input type="checkbox"/> Bates Anne @ Sansan Motor PVT. LTD.			<input type="checkbox"/>	
14	<input type="checkbox"/> Beck Leon @ Sansan Motor PVT. LTD.			<input type="checkbox"/>	
15	<input type="checkbox"/> Bell Zachary @ Lion City Solutions Pte. Ltd.			<input type="checkbox"/>	

# How to create/update a record

- Pattern 1** Associate to the existing Account/Contact.
- Pattern 2** Create a new Contact under an existing Account.
- Pattern 3** Create a new Account and Contact.
- Pattern 4** Create a new Lead.

The screenshot shows the 'Link cards' section of the Sansan interface. It features a search method for linkings with two options: 'ID/search criteria match' (selected) and 'No conditions'. Below this is a table of links. The table has columns for 'Select', 'Account Name', 'Full Name', 'Billing Street', 'Department', 'Email', and 'Mobile Phone'. The first row shows an existing record for 'Lion City Solutions Pte. Ltd.' with contact 'Carr Leo'. The second and third rows show 'Create new record' options. A callout box titled 'Individual registration screen for contacts' is overlaid on the right, showing a table with columns for 'Display order', 'Objects', 'Display custom fields', and 'Items'. This table lists six items: Account Name, Full Name, Billing Street, Department, Email, and Mobile Phone, each with a dropdown menu for the object type and a checkbox for displaying custom fields.

**Pattern 1** (Selected) - Associate to the existing Account/Contact.

**Pattern 2** - Create a new Contact under an existing Account.

**Pattern 3** - Create a new Account and Contact.

**Pattern 4** - Create a new Lead.

Fields shown here can be edited from the Business Card Setting object.

You can set up to 6 fields. \*2 fields are fixed

Display order	Objects	Display custom fields	Items
1	Account	<input type="checkbox"/>	Account Name [Name]
2	Contact	<input type="checkbox"/>	Full Name [Name]
3	Account	<input type="checkbox"/>	Billing Street [BillingStreet]
4	Contact	<input type="checkbox"/>	Department [Department]
5	Contact	<input type="checkbox"/>	Email [Email]
6	Contact	<input type="checkbox"/>	Mobile Phone [MobilePhone]

# Implementation

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# Steps needed for Salesforce integration

## Implementation (2.5-3.5h)

1. Install package to create 'Cards' object (0.5h)
2. Salesforce Authentication and Mapping Configuration (2h-3h)

## Initial Settings (4-5h)

1. Display tabs for 'Cards' and 'Card Settings' objects in Salesforce (0.5h)
2. Display business cards associated with a Contact or Lead (1h)
3. Initial settings to associate business cards with Accounts/Contacts/Leads (1h-2h)
4. Set permissions for using 'Cards' object (1h)
5. Add links for Sansan company and person info (0.5h)

# 1. Install package to create 'Cards' object

From Setup > Platform Tools > Apps > Packaging > Installed Packages, please confirm that 'Sansan\_CI' is installed.

Sansan Support Center

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, App Manager, AppExchange Marketplace, Connected Apps, Lightning Bolt, Mobile Apps, Packaging). The 'Installed Packages' link in the Apps section is highlighted with a blue box. The main content area shows the 'Installed Packages' page with a table of installed packages. The 'Sansan\_CI' package is highlighted in the table.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date
Uninstall	<a href="#">Salesforce and Chatter Apps</a>	Salesforce.com	1.19	sf_chtr_apps	11/10/20...
Uninstall	<a href="#">Sansan_CI</a>	Sansan Customer Intelligence	1.33	Sansan_CI	28/09/20...

# 2. Salesforce Authentication and Mapping Configuration

Map Sansan and Salesforce accounts from Admin Settings > Integration with Other Services > Salesforce.

**Integration with Other Services**

You can link with external CRMs, SFAs, or address book services, and send business card data there.

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[Return to list of connection targets](#)

1. Authenticate ✓

2. Select a user ✓

3. Recipient ✓

Automatic match is performed based on email addresses registered in Sansan and Salesforce.  
Please confirm that the transfer destination is correct.

[More info](#)

Refine   Include unconnected users All 10 items

<input type="checkbox"/>	Department	User Name	Email Address (Sansan)	Salesforce User for Transfer	<input type="button" value="Edit"/>
<input type="checkbox"/>	Sansan Global	test	gcs+test@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Marketing	John Smith	bizdev+john@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Marketing	William Dorsey	bizdev+william@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Marketing	Melissa Lim	bizdev+melissa@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Business Development	Ethan Martinez	bizdev+ethan@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Global	Exam	exam@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Global	Tommy	bizdev+demo@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Consulting	Sara Choi	bizdev+kent@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Consulting	Nia Pang	bizdev+nia@sansan.com	bizdev+demo@sansan.com	<input type="button" value="Edit"/>
<input type="checkbox"/>	Consulting			bizdev+demo@sansan.com	<input type="button" value="Edit"/>

Sansan Account

Salesforce Account

All 10 items

## 2. Salesforce Authentication and Mapping Configuration

For example, if you map Tommy (Sansan user) with Tommy Brown (Salesforce account), it will be integrated as below.

The screenshot shows a user profile page for Philip Mckinney. The breadcrumb navigation at the top reads: Pacific Marine Shipment Pte. Ltd. > Philip Mckinney > 2021/04/15 Tommy [Global].

The left sidebar contains the following menu items:

- Philip Mckinney
- Career (1)
- Cards (1)
- Reports (0)
- Opportunities (0)
- News
- Contact Updates

The main content area is titled "Card info" and displays:

- Contact Person : **Tommy [Global]**
- Contact Since : 2021/04/15

Below this information is a business card for Philip Mckinney, Pacific Marine Shipment Pte. Ltd., with contact details: Tel: +65-6765-4324, Fax: +65-6765-4324, Email: pmk@pms.com.sg.

An overlay window titled "Salesforce integration info" is shown on the right, displaying:

- Owner: admin
- Contact: **Brown Tommy**

A blue callout line connects the "Tommy [Global]" text in the "Card info" section to the "Brown Tommy" contact name in the "Salesforce integration info" overlay.

# Initial Settings

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## 1. Display tabs for 'Cards' and 'Card Settings' objects in Salesforce

Sansan Support Center

### Task

Add two items from [Sales App Navigation Items](#)

## 2. Display business cards associated with a Contact or Lead

Sansan Support Center

### Task

Add Business Card to Related Lists from Page Layouts of Contact and Lead

## 3. Set initial settings to associate business cards with Accounts/Contacts/Leads

Sansan Support Center

### Task

1. Enable association function
2. Lead Conversion Field Mapping of custom Fields which are prepared for integration
3. Decide the default setting for which fields to update from business cards

## 4. Set permissions for using 'Cards' object

Sansan Support Center

### Task

1. Set Field-Level Security for user profile
2. Enable Apex class
3. Enable Visualforce Page Access
4. Grant permission to Custom tab setting and Custom object

## 5. Add links for Sansan company and person info

Sansan Support Center

### Task

Add field to account/contact/lead from [Page Layout](#)

## 5. Add fields for Sansan company and person details

Sansan Support Center

# Operation Guide

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# How to check unlinked records

Change view to 03 Company's unlinked cards

The screenshot shows the Sansan CRM interface. At the top, there is a navigation menu with options: Sales, Home, Cards (selected), Card Settings, Leads, Accounts, Contacts, Reports, and Tasks. A search bar contains the text 'philip'. Below the navigation, a dropdown menu for 'Cards' is open, showing '03 Company's unlinked cards' selected. Below this, a status bar indicates '50+ items - Sorted by Card - Filtered by All cards - Don't link, Date and time card was linked - Updated a few seconds ago'. The main content is a table with the following columns: Card (checkbox and arrow), Company name, Name, Department, and Position. The table lists 18 records, each with a checkbox, a truncated name, a company name, a full name, a department, and a position.

<input type="checkbox"/>	Card ↑	C...	Le...	D...	Company name	Name	Department	Position
<input type="checkbox"/>	Allen Gloria @ Lion City Solutions ...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Allen Gloria	Marketing Department	Senior Marketing Manager
<input type="checkbox"/>	Austin Christine @ Lion City Soluti...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Austin Christine		Product Director
<input type="checkbox"/>	Barnes Joanne @ Sansan Motor P...			<input type="checkbox"/>	Sansan Motor PVT. LTD.	Barnes Joanne		
<input type="checkbox"/>	Barnes Max @ General Liquid Con...			<input type="checkbox"/>	General Liquid Consulting, Inc.	Barnes Max		
<input type="checkbox"/>	Bates Anne @ Sansan Motor PVT. L...			<input type="checkbox"/>	Sansan Motor PVT. LTD.	Bates Anne		
<input type="checkbox"/>	Beck Leon @ Sansan Motor PVT. L...			<input type="checkbox"/>	Sansan Motor PVT. LTD.	Beck Leon		
<input type="checkbox"/>	Bell Zachary @ Lion City Solutions ...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Bell Zachary		Legal Department Business Develo.
<input type="checkbox"/>	Brewer Jacqueline @ Lion City Sol...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Brewer Jacqueline	Product Department Factory	Manager
<input type="checkbox"/>	Brewer Roy @ Pacific Marine Ship...			<input type="checkbox"/>	Pacific Marine Shipment Pte. Ltd.	Brewer Roy		
<input type="checkbox"/>	Brooks Gladys @ Pacific Marine Sh...			<input type="checkbox"/>	Pacific Marine Shipment Pte. Ltd.	Brooks Gladys		
<input type="checkbox"/>	Brown George @ International Ma...			<input type="checkbox"/>	International Management System...	Brown George		
<input type="checkbox"/>	Brown Roberta @ East Asian Devel...			<input type="checkbox"/>	East Asian Development Consultin...	Brown Roberta		
<input type="checkbox"/>	Burke Lawrence @ East Asian Dev...			<input type="checkbox"/>	East Asian Development Consultin...	Burke Lawrence		
<input type="checkbox"/>	Burns Amber @ Lion City Solution...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Burns Amber	Sales Department 1	Carrier Sales Manager
<input type="checkbox"/>	Butler Nicole @ United Electronics...			<input type="checkbox"/>	United Electronics Pte. Ltd.	Butler Nicole		
<input type="checkbox"/>	Caldwell Carlos @ Sansan Motor P...			<input type="checkbox"/>	Sansan Motor PVT. LTD.	Caldwell Carlos		
<input type="checkbox"/>	Campbell Annette @ East Asian D...			<input type="checkbox"/>	East Asian Development Consultin...	Campbell Annette		
<input type="checkbox"/>	Carr Leo @ Lion City Solutions Pte...			<input type="checkbox"/>	Lion City Solutions Pte. Ltd.	Carr Leo		Execitives Managing Director

# How to associate a business card

- A Select search method
- B You can select an existing contact or lead to associate. Otherwise, create a new one.
- C Any fields with changes will be displayed with an explanation mark.
- D Check this if you want to update the field from the business card.

You can decide which fields to update from the business card.

Card  
Carr Leo @ Lion City Solutions Pte. Ltd.

Link cards

Link Contacts or Leads

A Search method for linkings

ID/search criteria match  No conditions

Links

< Contact >

Select	Account Name	Full Name	Billing Street	Department	Email	Filter: Proc...	Mobile Ph...
<input checked="" type="radio"/>	Lion City Solutions Pte. Ltd.	Carr Leo	128 Prinsep Street #01-01		dummy2100@33i.com		
<input type="radio"/>	Lion City Solutions Pte. Ltd.	Create new record	128 Prinsep Street #01-01				
<input type="radio"/>	B Create new record	Create new record					

3

Copy settings for card information

This will apply card information to Contact + Account.

Save Cancel

Copy settings to Account

Item Name	Current value	Value to be copied	Copy
Account Name	Lion City Solutions Pte. Ltd.	Lion City Solutions Pte. Lt...	<input type="checkbox"/>
Billing Zip/Postal Code	168655		<input type="checkbox"/>
Billing State/Province	Singapore		<input type="checkbox"/>
Billing City			<input type="checkbox"/>
Billing Street	128 Prinsep Street #01-01	128 Prinsep Street #01-01 Singapore 168655	<input checked="" type="checkbox"/> C
Account Phone			<input type="checkbox"/>
Account Fax			<input type="checkbox"/>
Website			<input type="checkbox"/>

Copy settings to Contact

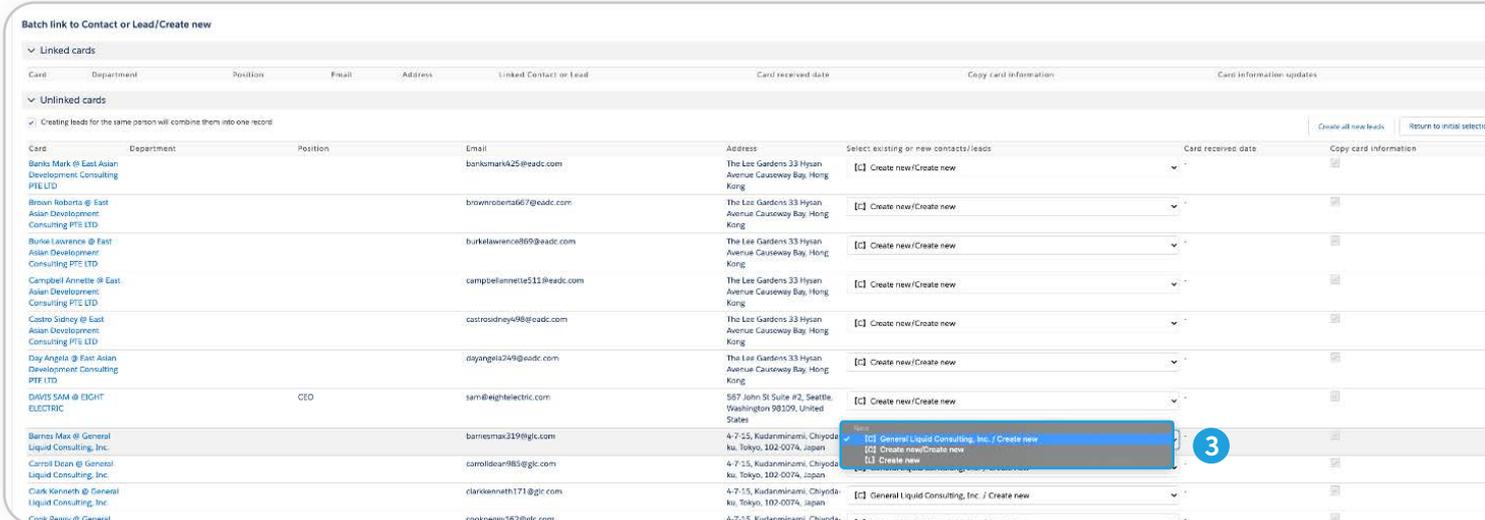
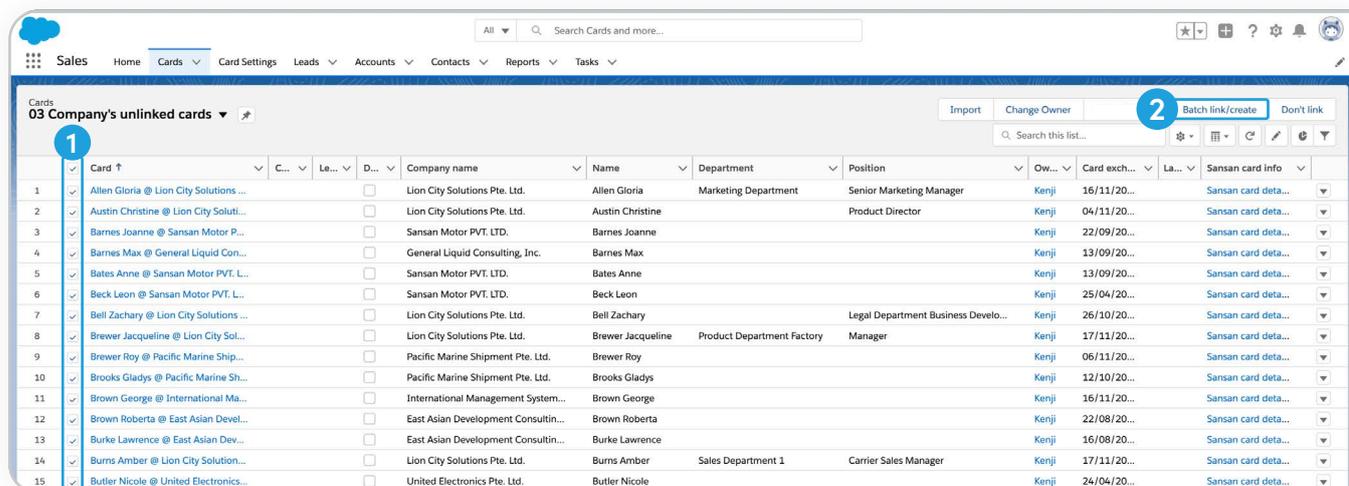
Item Name	Current value	Value to be copied	Copy
Last Name	Carr	Carr	<input type="checkbox"/>
First Name	Leo	Leo	<input type="checkbox"/>
Department			<input checked="" type="checkbox"/>
Title	Executive Managing Director	Executive Vice President	<input checked="" type="checkbox"/>
Email	dummy2100@33i.com	dummy2100@33i.com	<input checked="" type="checkbox"/>
Mobile Phone			<input checked="" type="checkbox"/>

D

# How to associate in bulk

- 1 Check this
- 2 Click on Batch link/create
- 3 C=Contact, L=Lead

Business cards you selected in the previous screen will be listed up. Please select whether to update an existing record or create a new record from each business card.



***sansan***

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