

HOW TO SET UP DEMANDBASE CONVERSION

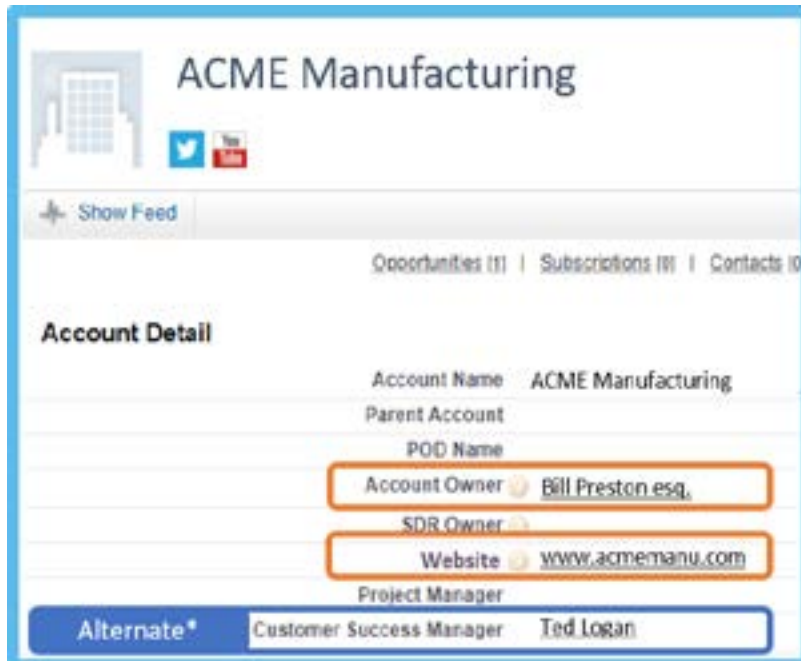
INITIAL SET UP GUIDE FOR DEMANDBASE CONVERSION



Demandbase Conversion allows your sales teams to receive insights on their most important accounts at the right time and in the most actionable place, Salesforce, Slack and Email. This implementation guide will result in the successful connection between Demandbase and Salesforce.

1 SFDC ACCOUNT OWNER RECEIVES THE INSIGHTS

- Delivery through Email, Slack and within Salesforce depend on the **Account Owner** field in your Salesforce instance
- Ensure the **Account Owner** field in SFDC is the correct recipient for Insights
- **Note:** Account Owner is chosen by default. If insights must be delivered to another alternate recipient they need to be identified on the SFDC account record; this field needs to be mapped in the User Table and the Demandbase system*



2 UPDATE THE SFDC WEBSITE FIELD

Demandbase uses the Website domain information to match account records and delivery insights; this is an essential piece of data.

- Review account records to ensure the **Website** field is filled in
- This is a great time to make any website updates on the account record to improve CRM data hygiene

3 SFDC ACCOUNT OWNER RECEIVES THE INSIGHTS

Connecting Salesforce to the Demandbase ABM Platform will allow many benefits including Audience building, enabling Conversion and a full view of pipeline reporting within the platform

- Connect Salesforce by logging into the Demandbase ABM Platform and authorizing in the **Setup** tab
- For more detailed directions please see our **Auth setup page**

4 PROVIDE SALESFORCE ORG ID TO DEMANDBASE

To find your **Salesforce Organization ID** log into Salesforce and follow this menu chain:

- SFDC Classic: Click **Setup** > **Company Profile** > **Company Information**
- SFDC Lightning: Click the **Gear Icon** > **Setup** > **Company Settings** > **Company information**
- Send Demandbase your onboarding contact information

HELPFUL TIP

Once Conversion is set up for your team, help them by building an Account Engagement plan.

Your plan should revolve around reps daily actions and how to use this new information for highest impact.