

# ClearSlide for Salesforce: Integration Overview

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## Introduction

The ClearSlide for Salesforce installation guide is intended for Salesforce System Administrators and ClearSlide Admins, and will serve as a reference guide for integrating a ClearSlide instance with a Salesforce environment. Any user going through the configuration will need System Admin credentials and privileges to both ClearSlide and Salesforce.

## Salesforce Requirements

The ClearSlide for Salesforce app is supported on the Developer, Professional, Enterprise, Ultimate, and Performance editions of Salesforce. Due to ClearSlide's Gold Partnership with Salesforce, it is no longer required that Professional editions of Salesforce have API Enabled explicitly for data communication between the two systems. However, if your Salesforce environment already has API Enabled, then communicating with ClearSlide will still cost API calls.

## ClearSlide Requirements

The ClearSlide for Salesforce app is only available to teams on the Group, Enterprise, or Ultimate editions of ClearSlide. It is not available to teams on the ClearSlide Pro edition. The app is a contracted feature that must be purchased in addition to your ClearSlide license(s). Please ensure that you have the ClearSlide for Salesforce app purchased by referencing your contract before attempting to integrate the two systems.

## Overview

ClearSlide and Salesforce are two fully functional and useful platforms on their own, but the value and capabilities of each are extended by virtue of an integration between the two systems. The ClearSlide and Salesforce Integration allows you to search, view, and pull in name and email information from Salesforce into your ClearSlide activities, so that workflows are streamlined and accurate. On the other end, ClearSlide will log these activities, and key engagement metrics about these activities such as email opens and viewtime information, back into Salesforce automatically. With the integration between the two environments, the utility of each system improves, and daily processes become more efficient and cohesive. The integration uses Salesforce's REST API to send information across the communication channel.

The standard integration between ClearSlide and Salesforce can be fully set up and functional within 40 minutes.

The end-to-end setup of the integration is covered within our [Setup](#) guide

For information on how to diagnose and resolve some of the most common issues that can arise with the integration, please refer to the **Troubleshooting** steps on slides 41-48 of the [Setup](#) guide

Please refer to the **Appendix** on slides 49-51 of the [Setup](#) guide for a detailed explanation on each of the configuration options available for the ClearSlide/Salesforce Integration behaviors.

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