

APPENDIX - iCare — Salesforce configuration changes

About this page

Instance: iCare

Scope: 6 configuration changes — Fields, Reports, Users, Logic

Owner: CRM Admin / Marketing Ops

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C-01 - AI Outreach flag

Object	Campaign
Field label	AI Outreach
API name	clay_ai_outreach__c
Field type	Boolean (checkbox)
Default value	FALSE
Populated by	User — set manually by MARCOM Ops

When set to TRUE, indicates that this Campaign is being executed via the Clay / Smartlead capability. Used by MARCOM Ops to scope reporting and filter campaigns eligible for the Clay workflow. No automated logic — user-managed only.

Governance Table

Managed by	MARCOM Ops (set) · CRM Admin (created)
Write access	MARCOM Ops profile and above
Read access	All internal users
Integration source	None — user-managed only
Data sensitivity	Low

C-02 - Cold Lead flag

Object	Lead
Field label	Cold Lead
API name	clay_cold_lead__c
Field type	Boolean (checkbox)
Default value	FALSE

Populated by	Automation / scheduled Flow
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Identifies Leads eligible for inclusion in Clay-driven AI outreach campaigns. A Lead is considered cold when it has not engaged recently and passes all exclusion checks. Used to filter the Cold Lead Report and as a prerequisite for Campaign Member inclusion.

Governance Table

Managed by	CRM Admin (field) - Automation (value)
Write access	Automation / Flow only — no manual edits
Read access	MARCOM Ops, Sales, CRM Admin
Integration source	None — derived from SFDC field values
Data sensitivity	Medium — drives outreach eligibility decisions

Logic

Exclusion rules — any one of these disqualifies the lead

- HasOptedOutOfEmail = TRUE exclude
- clay_overall_hard_bounce__c = TRUE exclude
- Lead has one or more related Contact records exclude

Positive rules — lead must meet at least one

- Status = 'Unqualified' always cold
- Any other status + Last_Interaction_Date__c is NULL or older than 365 days cold

C-03 · Last Interaction Date

Purpose

Records the date of the most recent Pardot engagement activity on a Lead. Used by the Cold Lead logic (C-02) to determine whether a Lead has been inactive for 365 or more days. Without this field, recency-based cold lead qualification cannot function.

Field definition

Object	Lead
Field label	Last Interaction Date
API name	Last_Interaction_Date__c
Field type	Date
Default value	Blank
Populated by	Salesforce Flow — triggered by Pardot activity sync


Logic

Activity types that update this field

Activity type	Source
Email open	Pardot engagement sync
Email click	Pardot engagement sync
Form submission	Pardot engagement sync
Any other Pardot activity	Pardot engagement sync


How the Flow works

- Trigger: a Pardot engagement activity is created or synced to the Lead record
- Condition: activity type is one of the approved types above
- Action: stamp Last_Interaction_Date__c with today's date
- Overwrite rule: always overwrite with the most recent date — no set-once logic.

 This field is write-once per event, not cumulative. It stores only the date of the most recent qualifying activity — not a count or history of all interactions. Full interaction history remains in the Pardot Engagement History related list on the Lead.

Dependency — Cold Lead logic (C-02)

The Cold Lead flow reads Last_Interaction_Date__c to determine inactivity. If this field is blank, the Lead is treated as having never interacted and will qualify as cold (assuming no other exclusion applies). If this field is populated but older than 365 days, the Lead also qualifies as cold.

 If the Flow that populates Last_Interaction_Date__c is inactive or misconfigured, cold lead qualification will be unreliable. CRM Admin must monitor Flow error logs and ensure the Flow is active whenever a Clay campaign is running.

Governance Table

Managed by	CRM Admin (field + Flow)
Write access	Flow / automation only — no manual edits by users
Read access	MARCOM Ops, Sales, CRM Admin
Integration source	Pardot engagement sync Salesforce Flow
Downstream dependencies	clay_cold_lead__c logic (C-02) · Cold Lead Report (C-04)
Data sensitivity	Low — date only, no personal data
Flow name	TBC — to be confirmed by CRM Admin on deployment

Logic

Exclusion rules — any one of these disqualifies the lead

- HasOptedOutOfEmail = TRUE exclude
- clay_overall_hard_bounce__c = TRUE exclude
- Lead has one or more related Contact records exclude

Positive rules — lead must meet at least one

- Status = 'Unqualified' always cold
- Any other status + Last_Interaction_Date__c is NULL or older than 365 days cold

C-04 · Hard bounce management

Field 1 — Clay External Hard Bounce

Object	Lead
Field label	Clay External Hard Bounce
API name	clay_external_hard_bounce__c
Field type	Boolean (checkbox)
Default value	FALSE
Populated by	Clay connector (writeback)

Field 2 — Overall Hard Bounce

Object	Lead
Field label	Overall Hard Bounce
API name	clay_overall_hard_bounce__c
Field type	Formula (Boolean)
Default value	Calculated
Populated by	Formula — read only

Consolidates hard bounce signals from Pardot and Clay/Smartlead into a single unified flag. All downstream exclusion logic references clay_overall_hard_bounce__c only — never the individual source fields.

Governance Table

Managed by	CRM Admin
clay_external_hard_bounce__c	Written by Clay connector only — no manual edits
clay_overall_hard_bounce__c	Formula field — read only, cannot be written to
Integration source	Clay Salesforce connector
Downstream dependencies	clay_cold_lead__c exclusion logic (C-02) · Cold Lead Report (C-04)
Data sensitivity	Medium — affects deliverability compliance

Logic

Formula — clay_overall_hard_bounce__c resolves to TRUE if either source is TRUE

- pi_pardot_hard_bounced__c = TRUE overall bounce = TRUE
- clay_external_hard_bounce__c = TRUE overall bounce = TRUE

Positive rules — lead must meet at least one

- Status = 'Unqualified' always cold
- Any other status + Last_Interaction_Date__c is NULL or older than 365 days cold

C-05 · New reports

Report specs · Governance

Report 1 — Cold Lead — Eligible for AI Outreach


Report name	Cold Lead — Eligible for AI Outreach
Object	Leads
Primary filter	clay_cold_lead__c = TRUE
Purpose	Used by MARCOM Ops to identify Leads eligible for AI outreach before building Campaign Member lists

Report 2 — SFDC Campaign Member Export for Clay Import

Report name	SFDC Campaign Member Export for Clay Import
Object	Campaign Members
Purpose	Only approved report for exporting Campaign Members to Clay. Must not be modified.

Included Fields

Field	Notes
CampaignMemberId	Stable key for writeback matching — required
LeadId	Stable key for Lead record matching — required
Full name	Lead full name
Email	Primary email address
Company	Lead company name
Description	Used for enrichment writeback

 CampaignMemberId and LeadId are mandatory columns. If either is missing from an export, do not import to Clay — writeback will fail or create mismatched records.

Governance Table

Report owner	CRM Admin
Report access	MARCOM Ops (run) · CRM Admin (edit)
Modification policy	The Campaign Member Export report must not be modified without CRM Admin approval — field changes affect writeback integrity
Location	Salesforce Reports Clay Integration folder

C-06 · Integration users

Purpose

Dedicated Salesforce integration users for the Clay native connector, scoped per CRM instance. Using dedicated users ensures connector activity is clearly identifiable in audit logs and access can be revoked independently per instance.

Integration users

Instance	Username UAT	Username PRD	Role
CORE	clayintegrationuser@syensqo.com.crm.uat		Clay connector — read/write
iCare	clayintegrationuser@syensqo.com.spp.uat		Clay connector — read/write

Minimum permissions required

Read	Leads, Campaign Members, Campaigns
Write	clay_has_replied__c · clay_reply_classification__c · clay_external_hard_bounce__c · Description (Lead, append only)
No access	Opportunities, Accounts, Contacts, or any object outside integration scope

Governance Table

Report owner	CRM Admin
Report access	MARCOM Ops (run) · CRM Admin (edit)
Modification policy	The Campaign Member Export report must not be modified without CRM Admin approval — field changes affect writeback integrity
Location	Salesforce Reports Clay Integration folder

C-07 · Campaign Member reply fields

Field 1 — Reply Classification

Object	Campaign Member
Field label	Reply Classification
API name	clay_reply_classification__c
Field type	Picklist
Default value	Blank
Populated by	Clay connector (writeback)

Value	Meaning
Positive	Lead expressed genuine interest or requested follow-up
Neutral	Non-committal reply — neither positive nor negative
Negative	Lead explicitly not interested
Not now	Interested but asked to be contacted later
Wrong person	Replied to say they are not the right contact
OOO	Out-of-office auto-reply detected
Unsubscribe	Replied requesting removal — must trigger unsubscribe process

Field 2 — Has Replied

Object	Campaign Member
Field label	Has Replied
API name	clay_has_replied__c
Field type	Formula (Boolean)
Default value	FALSE
Populated by	Formula — derived from FirstRespondedDate

Logic

Has Replied — formula:

IF(NOT(ISNULL(FirstRespondedDate)), TRUE, FALSE)

Set-once behaviour: Once FirstRespondedDate is populated, clay_has_replied__c becomes TRUE permanently
Do not attempt to clear FirstRespondedDate to reset this field — that corrupts response history

Reply Classification — write logic

Clay classifies each inbound reply in Smartlead and writes the value back via the connector. If a reply is misclassified, MARCOM Ops can correct it manually in Clay and it will sync on the next connector run.



The Unsubscribe classification value must trigger a downstream unsubscribe process. CRM Admin must ensure an automation or flow is in place to handle this value when it is written back.

Governance Table

Managed by	Clay connector (write) · MARCOM Ops (correction via Clay)
clay_reply_classification__c	Written by Clay connector. MARCOM Ops may correct values in Clay before re-sync
clay_has_replied__c	Formula field — read only. Derived from FirstRespondedDate
Integration source	Clay Salesforce connector
Downstream dependencies	Sales Visibility dashboard · Funnel reporting · Unsubscribe automation
Data sensitivity	High — Unsubscribe value carries compliance obligation
Picklist governance	Values must not be modified without CRM Admin and MARCOM Ops alignment — Clay classification logic depends on these exact values

C-08 · AI Outreach Performance Dashboard

Purpose

A Salesforce dashboard in the iCare providing end-to-end visibility of the AI Outreach programme. Covers executive-level KPIs, funnel progression, pipeline influence, reply breakdown by campaign and region, and list health monitoring. Intended audiences are MARCOM Ops (campaign performance), Sales (pipeline and conversion), and CRM Admin (list health and data quality).

Components

Row 1 — Executive snapshot

Tile	Definition	Source
Reply Rate	Replies ÷ total members in scope	Campaign Member Funnel report
Positive Reply Rate	Positive replies ÷ total members in scope	Campaign Member Funnel report
Opportunities Created	Count of distinct opportunities linked to AI Outreach campaigns via Campaign Influence	Influenced Opportunity report
Pipeline Influenced (€)	Total unweighted amount of influenced opportunities	Influenced Opportunity report

Row 2 — Top 5 Opportunities

Horizontal bar chart showing the five largest influenced opportunities sorted by amount, grouped by campaign. Each bar represents one opportunity labelled by account name. Sourced from the Influenced Opportunity report.

Row 3 — Funnel detail

Tile	Definition	Source
Members in Scope	Total count of Campaign Members across all AI Outreach campaigns	Campaign Member Funnel report
Responded	Count of members where clay_has_replied__c = TRUE	Campaign Member Funnel report
Positive Replies	Count of members where clay_reply_classification__c = Positive	Campaign Member Funnel report
Converted Leads	Count of leads linked to AI Outreach campaigns that have been converted	Converted Leads report (separate report type)
Conversion Rate	Converted Leads ÷ Members in Scope	Calculated



Converted Leads and Members in Scope are sourced from different report types due to a Salesforce platform limitation — converted leads are removed from the Campaign Members report once converted. This is a known limitation documented in the build notes and accepted for Phase 1.

Row 4 — Replies by Campaign and Region

Bar chart grouped by Campaign Name and coloured by Account Region. Shows reply count per campaign broken down by geography. Useful for identifying which campaigns and regions are generating the most engagement. Sourced from the Campaign Member Funnel report.

Row 5 — List Health

Tile	Definition	Source
Hard Bounce Rate	Members where <code>clay_overall_hard_bounce__c = TRUE</code> ÷ total unconverted leads in scope	Campaigns with Leads report
Unsubscribe Rate	Members where <code>HasOptedOutOfEmail = TRUE</code> ÷ total unconverted leads in scope	Campaigns with Leads report



Both list health metrics use the Campaigns with Leads report type, which excludes converted leads from the denominator. This is a known limitation accepted for Phase 1 and documented in the build notes.

Governance Table

Dashboard owner	CRM Admin
Primary audience	MARCOM Ops · Sales · CRM Admin
Edit access	CRM Admin only
View access	MARCOM Ops, Sales
Phase 1 known limitations	Converted leads excluded from Campaign Member report · List health denominator excludes converted leads
Production deployment gate	Legal approval confirmed · UAT sign-off by MARCOM Ops and Sales
Build notes reference	Link to build notes page — TBC