

# 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

<b>Object</b>	Campaign
<b>Field label</b>	AI Outreach
<b>API name</b>	clay_ai_outreach__c
<b>Field type</b>	Boolean (checkbox)
<b>Default value</b>	FALSE
<b>Populated by</b>	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

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

### C-02 · Cold Lead flag

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

<b>Populated by</b>	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

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

<b>Object</b>	Lead
<b>Field label</b>	Last Interaction Date
<b>API name</b>	Last_Interaction_Date__c
<b>Field type</b>	Date
<b>Default value</b>	Blank
<b>Populated by</b>	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

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

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

## Field 2 — Overall Hard Bounce

<b>Object</b>	Lead
<b>Field label</b>	Overall Hard Bounce
<b>API name</b>	clay_overall_hard_bounce__c
<b>Field type</b>	Formula (Boolean)
<b>Default value</b>	Calculated
<b>Populated by</b>	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

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


<b>Report name</b>	Cold Lead — Eligible for AI Outreach
<b>Object</b>	Leads
<b>Primary filter</b>	clay_cold_lead__c = TRUE
<b>Purpose</b>	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

<b>Report name</b>	SFDC Campaign Member Export for Clay Import
<b>Object</b>	Campaign Members
<b>Purpose</b>	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

<b>Report owner</b>	CRM Admin
<b>Report access</b>	MARCOM Ops (run) · CRM Admin (edit)
<b>Modification policy</b>	The Campaign Member Export report must not be modified without CRM Admin approval — field changes affect writeback integrity
<b>Location</b>	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	<a href="mailto:clayintegrationuser@syensqo.com.crm.uat">clayintegrationuser@syensqo.com.crm.uat</a>		Clay connector — read/write
iCare	<a href="mailto:clayintegrationuser@syensqo.com.spp.uat">clayintegrationuser@syensqo.com.spp.uat</a>		Clay connector — read/write

### Minimum permissions required

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

### Governance Table

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

## C-07 · Campaign Member reply fields

### Field 1 — Reply Classification

<b>Object</b>	Campaign Member
<b>Field label</b>	Reply Classification
<b>API name</b>	clay_reply_classification__c
<b>Field type</b>	Picklist
<b>Default value</b>	Blank
<b>Populated by</b>	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

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

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## 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

<b>Managed by</b>	Clay connector (write) · MARCOM Ops (correction via Clay)
<b>clay_reply_classification__c</b>	Written by Clay connector. MARCOM Ops may correct values in Clay before re-sync
<b>clay_has_replied__c</b>	Formula field — read only. Derived from FirstRespondedDate
<b>Integration source</b>	Clay Salesforce connector
<b>Downstream dependencies</b>	Sales Visibility dashboard · Funnel reporting · Unsubscribe automation
<b>Data sensitivity</b>	High — Unsubscribe value carries compliance obligation
<b>Picklist governance</b>	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