Unica Link V12.1.4 Salesforce Connector User Guide

Contents

Chapter 1. Introduction to Salesforce

Salesforce (CRM) saves and updates details about users.

Salesforce supports two operations, 'Create' and 'Update', as well as two objects 'Lead' and 'Contact'. Also supported are two objects, 'Lead' and 'Contact'.

Chapter 2. Prerequisites

In order to use Salesforce, you must first obtain a Salesforce account.

After your account is created, you will receive these details:

- Username
- Password
- Client ID
- Client secret

These details are further user to generate an instance URL and access token.

Chapter 3. Configuration

To configure Salesforce, you must have these details:

- **Instance URL** – Domain on which Salesforce REST service is available.
- **Access token** – Specifies security token which grants access to a given REST endpoint.

After these details are entered, click on **Fetch** to fetch the available versions from **Salesforce**.

Chapter 4. Test connection

After you define a connection, press the **Test** button to test the connection.

Pressing the **Test** button invokes a query operation on Salesforce to ensure that the server can be reached and that the connection parameters are valid.

Chapter 5. Event tracking

There are no events in Salesforce.

The following is an example of a typical response from Salesforce showing, **status**, **errormessage**, **timestamp** and **identity fields**.

If `contact_action` is **Create - Error**

```
error,Required fields are missing: [LastName],2021-07-22T00:42:25,<Identity
Fields>
```

If `contact_action` is **Update- Success**

```
true,,2021-07-22T00:47:47,<Identity Fields>
```

If `contact_action` is **Update- Error**

```
error,Key field: LastNameis not present in data,2021-07-22T02:54:59,<Identity
Fields>
```