



Salesforce Integration

Introduction to Salesforce

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Salesforce Integration Tools and Patterns



Contents

- Integration options
- Integration patterns
- Integration architecture
- Real world examples

Salesforce integration connects your CRM with external systems

Integrating Salesforce with other systems allows businesses to have a unified view of customer data.

Integration automates the data exchange between Salesforce and other business applications, streamlining business processes. This eliminates the need for manual data entry, reducing errors, saving time, and increasing productivity across teams.

With integrated systems, businesses can provide a seamless customer experience across different channels.

Integration enables real-time data flow between Salesforce and other systems, providing businesses with up-to-date information for making informed decisions.

As businesses grow, their processes and systems become more complex. Integration helps in maintaining agility and scalability, allowing systems to communicate with each other efficiently.

By automating data exchange and streamlining business processes, integration reduces operational costs.

Integrating systems within a controlled and secure environment helps maintain data integrity and compliance with regulatory requirements.

With data from various systems flowing into Salesforce, businesses can leverage advanced analytics and reporting capabilities.

Why is integration important?

Benefits of Salesforce Integration Solution



Point-to-Point

In the context of Salesforce this involves directly connecting Salesforce with another system or application to facilitate a two-way exchange of data or functionality. This type of integration creates a direct link between Salesforce and the other system, allowing them to communicate and share information without the need for an intermediary system or middleware.

In a point-to-point integration scenario, custom APIs, web services, or existing Salesforce connectors are often used to establish the connection. This integration method requires the development of specific interfaces for each system that needs to be connected, with clear protocols for how data is exchanged, updated, and managed between the systems.

When to use?

Simple Integration Requirements: When the integration needs are straightforward, involving only a few data fields or processes between two systems, point-to-point integration can be a quick and effective solution.

Limited Number of Integrations: For organizations that only require Salesforce to be integrated with one or a small number of other systems, point-to-point integration can be manageable and cost-effective since the complexity and overhead are relatively low.

Specific Use Cases: In cases where there is a very specific use case or a need for real-time data synchronization between Salesforce and another application, point-to-point integration can provide a tailored solution that meets the exact requirements.

Rapid Implementation: When there is an urgent need to establish an integration quickly, point-to-point can be faster to implement compared to more complex integration architectures, assuming the integration scope is narrow and well-defined.

Cost Considerations: For small businesses or projects with limited budgets, point-to-point integration might be more feasible than investing in an integration platform or middleware, especially if the integration needs are minimal and unlikely to scale significantly.

Middleware

Involves using a third-party platform or software that acts as an intermediary to facilitate communication and data exchange between Salesforce and other systems or applications. This middleware layer abstracts the complexity of direct connections between systems, providing a more manageable and scalable approach to integration.

Middleware serves as a central hub through which all integrations can pass. It handles the data transformation, routing, and communication protocols needed to exchange information between disparate systems. This can include not just Salesforce and another application, but potentially many systems across an organization's IT ecosystem. Middleware platforms often offer pre-built connectors, standardized APIs, data mapping tools, and a visual interface for designing and managing integrations without extensive coding.

When to use?

Complex Integration Requirements: When the integration involves complex data transformations, multiple systems, or sophisticated business logic, middleware can significantly simplify the process by managing these complexities centrally.

Scalability Needs: For organizations anticipating growth in the number of applications and systems that need to be integrated, middleware offers a scalable solution that can accommodate additional integrations more easily than point-to-point connections.

Reducing Maintenance Overhead: Middleware can reduce the long-term maintenance burden associated with integrations by providing a single platform through which all integrations are managed, rather than maintaining numerous point-to-point connections.

Enhanced Data Security and Compliance: Well-established middleware solutions offer robust security features and compliance standards, ensuring that data exchanged between systems is secure and meets regulatory requirements.

Real-time Data Processing: Many middleware platforms support real-time data processing and event-driven architectures, enabling businesses to respond promptly to data changes across their integrated systems.

Salesforce AppExchange

Is Salesforce's online marketplace, offering a wide array of pre-built apps, solutions, and extensions that integrate directly with the Salesforce platform. These solutions range from sales and marketing to customer service, and from analytics to industry-specific solutions, all designed to extend the capabilities of Salesforce and improve its integration with other systems.

AppExchange provides a platform for third-party developers and Salesforce partners to develop and list their applications, which can be installed directly into a Salesforce instance.

These apps often use Salesforce's APIs and custom objects to seamlessly integrate with the Salesforce ecosystem, offering added functionalities or enabling integration with external systems without the need for custom development.

When to use?

Quick Solution Implementation: When businesses need to rapidly implement solutions to extend Salesforce capabilities or integrate with other systems, AppExchange apps can be quickly installed and configured, significantly reducing development time.

Verified Solutions: Apps on the AppExchange have been vetted and verified by Salesforce, providing a level of trust and security. They often come with support and maintenance from the provider, ensuring reliability.

Wide Range of Needs: Whether looking for specific functionality enhancements, industry-specific solutions, or integrations with popular software (like email marketing tools, accounting software, etc.), AppExchange likely has an app that meets these needs.

Cost-Effective: Many AppExchange apps offer cost-effective solutions compared to custom development or purchasing standalone software. There are free and paid apps available, catering to various budget constraints.

Minimized Development Effort: For businesses with limited development resources, AppExchange apps provide a way to extend functionality without the need for extensive custom coding or API management.

API (Application Programming Interface) Integrations

Involves the direct use of APIs to enable communication and data exchange between Salesforce and other systems, applications, or services. APIs define the rules and methods for accessing functionalities or data, acting as an interface between different software programs.

In the context of Salesforce, API integrations typically involve Salesforce's own APIs (such as REST, SOAP, Bulk, Streaming, etc.) to perform operations within Salesforce or to integrate Salesforce with external systems. These APIs allow developers to execute a wide range of tasks, from simple data queries to complex business operations. External systems can use these APIs to communicate with Salesforce directly, and vice versa, Salesforce can use external APIs to interact with other systems.

When to use?

Custom Integrations: When there is a need for highly tailored integration logic that isn't covered by off-the-shelf middleware or connectors, using APIs allows for custom development to meet specific requirements.

Real-Time Data Sync: For applications where real-time data synchronization between Salesforce and other systems is crucial, API integrations can facilitate immediate data exchange.

Limited Scope Projects: For projects with a clear and limited scope of integration, where the overhead of middleware might not be justified, direct API integration can be a more straightforward and efficient choice.

High Performance and Efficiency: API integrations can offer high performance and efficiency, particularly for operations that require quick responses and minimal latency.

Mobile and Web App Integration: Integrating Salesforce with mobile and web applications often requires the use of APIs to fetch or send data in real-time, ensuring a seamless user experience across platforms.

Salesforce REST API

- **Uses standard HTTP methods** like GET, POST, PUT, and DELETE for CRUD (Create, Read, Update, Delete) operations, making it intuitive for web developers.
- **Data format:** Primarily communicates in JSON, facilitating easier parsing and handling in client applications.
- **Authentication:** Utilizes OAuth for secure access, ensuring that the data exchange between Salesforce and external applications is protected.

REST Explorer

BRENDAN DELANEY AT UNUM GROUP ON API 58.0

Try the Salesforce APIs for Postman.

Choose an HTTP method to perform on the REST API service URI below:

☒ GET ☐ POST ☐ PUT ☐ PATCH ☐ DELETE ☐ HEAD Headers Reset Up

/services/data/v58.0

Execute

Expand All | Collapse All | Show Raw Response

✎ metadata: /services/data/v58.0/metadata

✎ eclair: /services/data/v58.0/eclair

✎ folders: /services/data/v58.0/folders

✎ jsonxform: /services/data/v58.0/jsonxform

✎ appMenu: /services/data/v58.0/appMenu

✎ iot: /services/data/v58.0/iot

✎ analytics: /services/data/v58.0/analytics

✎ smartdatadiscovery: /services/data/v58.0/smartdatadiscovery

✎ composite: /services/data/v58.0/composite

✎ parameterizedSearch: /services/data/v58.0/parameterizedSearch

✎ fingerprint: /services/data/v58.0/fingerprint

✎ domino: /services/data/v58.0/domino

✎ serviceTemplates: /services/data/v58.0/serviceTemplates

✎ recent: /services/data/v58.0/recent

✎ dedupe: /services/data/v58.0/dedupe

✎ async-queries: /services/data/v58.0/async-queries

✎ query: /services/data/v58.0/query [SAMPLE]

✎ ai: /services/data/v58.0/ai

✎ consent: /services/data/v58.0/consent

✎ digitalwallet: /services/data/v58.0/digitalwallet

✎ compactLayouts: /services/data/v58.0/compactLayouts

✎ knowledgeManagement: /services/data/v58.0/knowledgeManagement

✎ actions: /services/data/v58.0/actions

✎ support: /services/data/v58.0/support

✎ tooling: /services/data/v58.0/tooling

✎ prechatForms: /services/data/v58.0/prechatForms

✎ contact-tracing: /services/data/v58.0/contact-tracing

✎ chatter: /services/data/v58.0/chatter

✎ payments: /services/data/v58.0/payments

✎ tabs: /services/data/v58.0/tabs

✎ quickActions: /services/data/v58.0/quickActions

✎ queryAll: /services/data/v58.0/queryAll

✎ commerce: /services/data/v58.0/commerce

✎ wave: /services/data/v58.0/wave

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✎ identity: /id/000880000008jckUAA/0058c000008pefbAAB

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✎ nouns: /services/data/v58.0/nouns

✎ event: /services/data/v58.0/event

✎ connect: /services/data/v58.0/connect

✎ licensing: /services/data/v58.0/licensing

✎ limits: /services/data/v58.0/limits

✎ process: /services/data/v58.0/process

✎ jobs: /services/data/v58.0/jobs

✎ localizedvalue: /services/data/v58.0/localizedvalue

✎ mobile: /services/data/v58.0/mobile

✎ emailConnect: /services/data/v58.0/emailConnect

✎ tokenizer: /services/data/v58.0/tokenizer

✎ subjects: /services/data/v58.0/subjects

Requested in 0.060 sec
Workbench 58.0.0

▼ Salesforce Platform APIs

> Async Query

> Auth

> Bulk v1

> Bulk v2

> Composite

> Connect (Chatter)

> CPQ

> Metadata

▼ REST

> Actions

> SObject

> Lightning Metrics

> List Views

> Logs

> Scheduling

> Search

> Platform Events

> Processes

> Support and Knowledge

GET Apex REST

> GET Versions

GET Resources by Version

GET Limits

GET AppMenu

GET Consent

GET Product Schedules

GET Query

GET QueryAll

GET Record Count

GET Tabs

GET Themes

> Tooling

> UI

> Einstein Prediction Service

> GraphQL



Salesforce SOAP API

- **XML-based messages:** Uses XML for all requests and responses, ensuring strict adherence to data types and structures.
- **Security:** Incorporates built-in standards such as WS-Security for encryption and authentication, making it highly secure.
- **Compatibility:** Offers WSDL (Web Services Description Language) files for defining exact specifications of the service interface, promoting strong interoperability.

Salesforce Bulk API

- **Batch Processing:** The Bulk API operates on the concept of batch processing, allowing for the handling of data in chunks or batches rather than individual records. Each batch can contain thousands of records, optimizing performance for bulk data operations.
- **CSV and XML Formats:** Supports both CSV (Comma-Separated Values) and XML (eXtensible Markup Language) formats for data input and output. CSV is commonly used for simplicity and ease of integration, while XML offers a more structured approach.
- **Asynchronous Operations:** Processes operations asynchronously, enabling long-running jobs without affecting the user experience. Users can submit a job, check its status, and retrieve results when the processing is complete.

Setup

Home

Object Manager

bulk

Environments

Jobs

Bulk Data Load Jobs

Didn't find what you're looking for?
Try using Global Search.

SETUP

Bulk Data Load Jobs

Monitor Bulk Data Load Jobs

Help for this Page

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.

Resource used in the last 24 hours:
CPU: 0 milliseconds
IO: 0 bytes
Disk: 157,941 bytes

In Progress

Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
No records to display.									

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
7508B000002dTuA	System Admin API	3/6/2024, 1:01 AM	3/6/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Login Geo Data	370	0	00:01
7508B000002dTuF	System Admin API	3/6/2024, 1:01 AM	3/6/2024, 1:01 AM	Closed	Bulk V1	QueryAll	User Login	620	0	00:01
7508B000002dTuK	System Admin API	3/6/2024, 1:01 AM	3/6/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:00
7508B000002dRt0	System Admin API	3/5/2024, 1:01 AM	3/5/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Login Geo Data	346	0	00:01
7508B000002dRt5	System Admin API	3/5/2024, 1:01 AM	3/5/2024, 1:01 AM	Closed	Bulk V1	QueryAll	User Login	619	0	00:01
7508B000002dRtA	System Admin API	3/5/2024, 1:01 AM	3/5/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:00
7508B000002dPiP	System Admin API	3/4/2024, 1:01 AM	3/4/2024, 1:01 AM	Closed	Bulk V1	QueryAll	User Login	612	0	00:01
7508B000002dPiU	System Admin API	3/4/2024, 1:01 AM	3/4/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:00
7508B000002dPiZ	System Admin API	3/4/2024, 1:01 AM	3/4/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Login Geo Data	286	0	00:00
7508B000002dO72	System Admin API	3/3/2024, 1:02 AM	3/3/2024, 1:02 AM	Closed	Bulk V1	QueryAll	User Login	612	0	00:01
7508B000002dO6x	System Admin API	3/3/2024, 1:02 AM	3/3/2024, 1:02 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:00
7508B000002dO77	System Admin API	3/3/2024, 1:02 AM	3/3/2024, 1:02 AM	Closed	Bulk V1	QueryAll	Login Geo Data	276	0	00:00
7508B000002dMk0	System Admin API	3/2/2024, 1:01 AM	3/2/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Login Geo Data	257	0	00:01
7508B000002dMKT	System Admin API	3/2/2024, 1:01 AM	3/2/2024, 1:01 AM	Closed	Bulk V1	QueryAll	User Login	611	0	00:01
7508B000002dMkO	System Admin API	3/2/2024, 1:01 AM	3/2/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:00
7508B000002dKRN	System Admin API	3/1/2024, 1:01 AM	3/1/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Content Delivery	0	0	00:01
7508B000002dKRS	System Admin API	3/1/2024, 1:01 AM	3/1/2024, 1:01 AM	Closed	Bulk V1	QueryAll	User Login	602	0	00:01
7508B000002dKRX	System Admin API	3/1/2024, 1:01 AM	3/1/2024, 1:01 AM	Closed	Bulk V1	QueryAll	Login Geo Data	150	0	00:01
7508B000002dJMM	System Admin API	2/29/2024, 1:51 PM	2/29/2024, 1:51 PM	Closed	Bulk V1	Update	Account	1	0	00:01
7508B000002dJMH	System Admin API	2/29/2024, 1:51 PM	2/29/2024, 1:51 PM	Closed	Bulk V1	Insert	Partner	1115	896	00:02
7508B000002dJMC	System Admin API	2/29/2024, 1:51 PM	2/29/2024, 1:51 PM	Closed	Bulk V1	Insert	Opportunity Product	9	0	00:01
7508B000002dJM7	System Admin API	2/29/2024, 1:50 PM	2/29/2024, 1:50 PM	Closed	Bulk V1	Insert	Account Team Member	344	0	00:02
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7508B000002dJKf	System Admin API	2/29/2024, 1:49 PM	2/29/2024, 1:50 PM	Closed	Bulk V1	Insert	Partner	6183	32	00:31

Show me fewer / more records per list page

Salesforce Streaming API

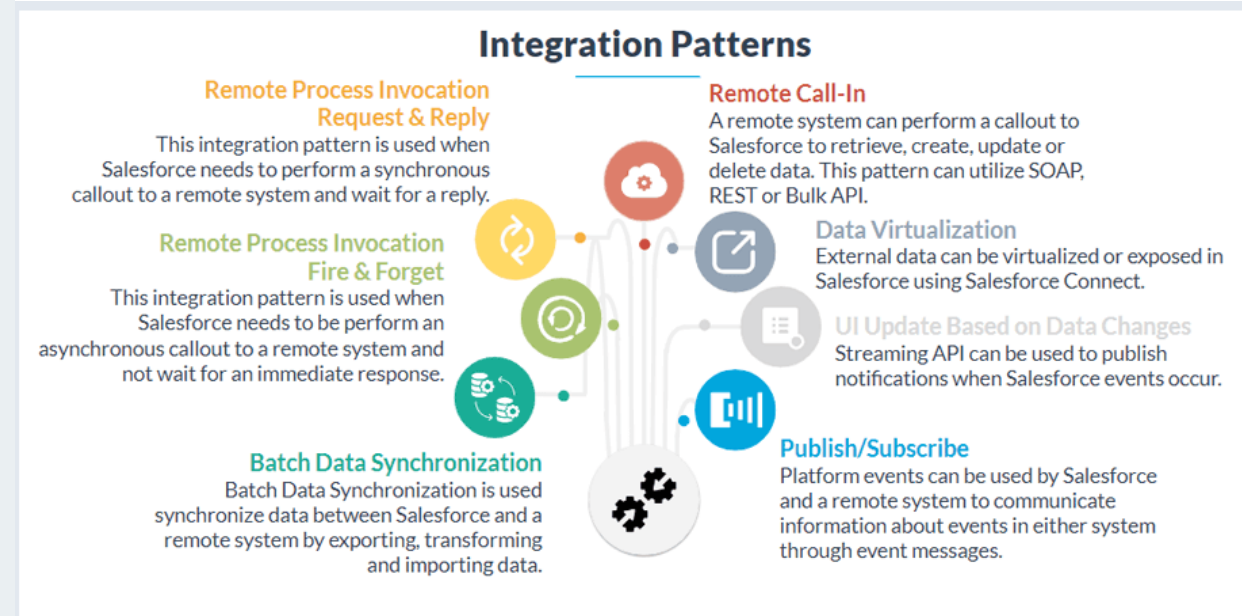


Salesforce Streaming API

- **Push Technology:** Utilizes a push mechanism, enabling Salesforce to deliver real-time events directly to subscribing applications. This is in contrast to pull-based methods where applications repeatedly query for updates.
- **Topics and Events:** Events are organized into topics, representing different types of data changes (e.g., new records, updates, deletions). Subscribers can choose which topics to listen to, ensuring they receive only the relevant events.
- **Long Polling or WebSocket Protocol:** Supports two mechanisms for event delivery. Long polling involves making a request to the server and keeping the connection open until an event occurs. WebSocket establishes permanent bi-directional connection between the client and Salesforce

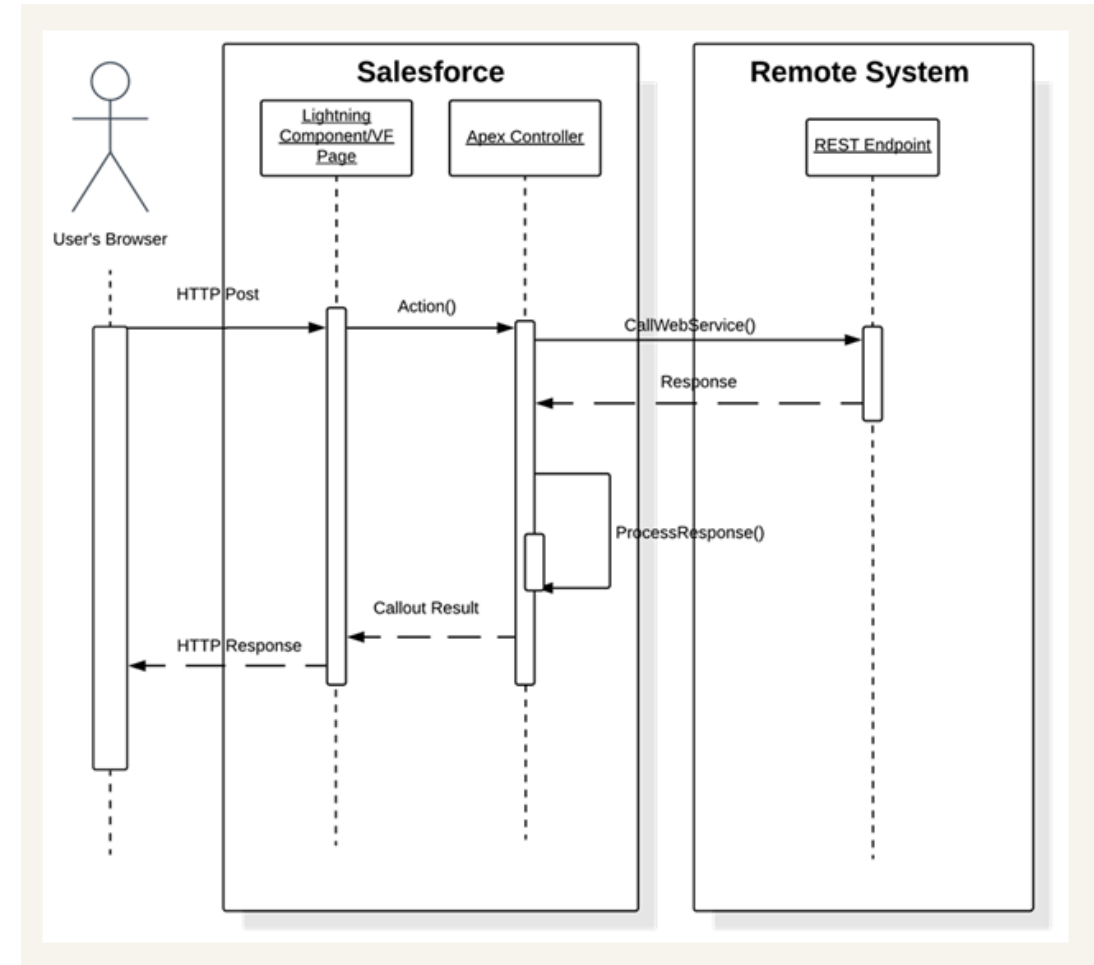
INTEGRATION PATTERNS

- Request-Reply
- Fire and Forget
- Batch Data Synchronization
- Remote Call-In
- UI Update Based on Data Changes
- Data Virtualization
- Publish/Subscribe

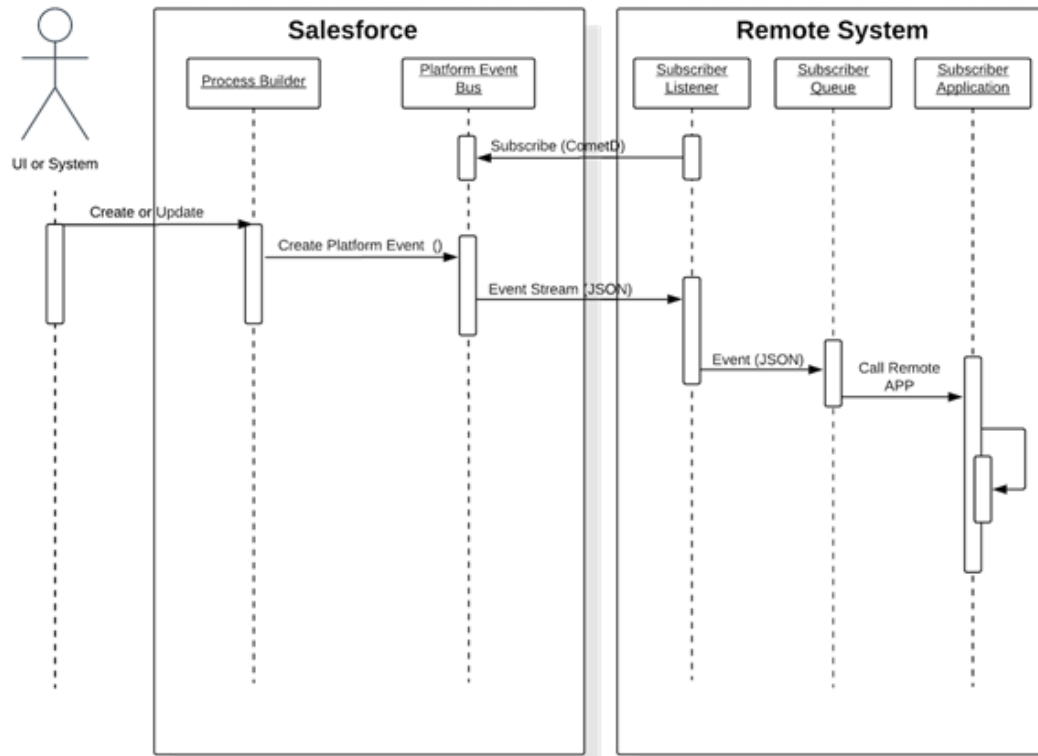


Request & Reply

- **Client Sends Request:** An external client, which could be a web or mobile application, sends a request to Salesforce.
- **Salesforce Processes Request:** Salesforce processes the incoming request, executing the required operations or queries on its data.
- **Salesforce Sends Response:** After processing the request, Salesforce sends a response back to the client, providing the requested data or acknowledging the success of the operation.



Fire & Forget

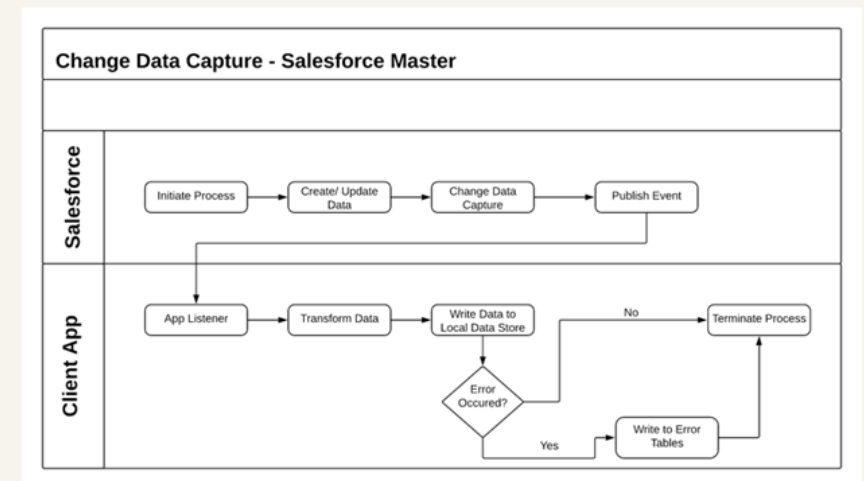
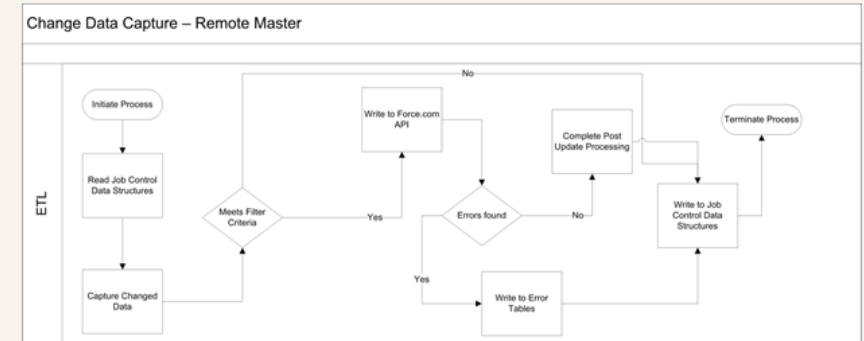


- **Background Operations:** Ideal for scenarios where the client initiates background operations in Salesforce that don't require immediate confirmation or real-time responses.
- **Non-Critical Tasks:** Suitable for non-critical tasks where the client can proceed with its operations without relying on the outcome of the request sent to Salesforce.
- **Batch Processing:** Commonly used in scenarios involving batch processing, data imports, or other tasks that can be executed asynchronously.

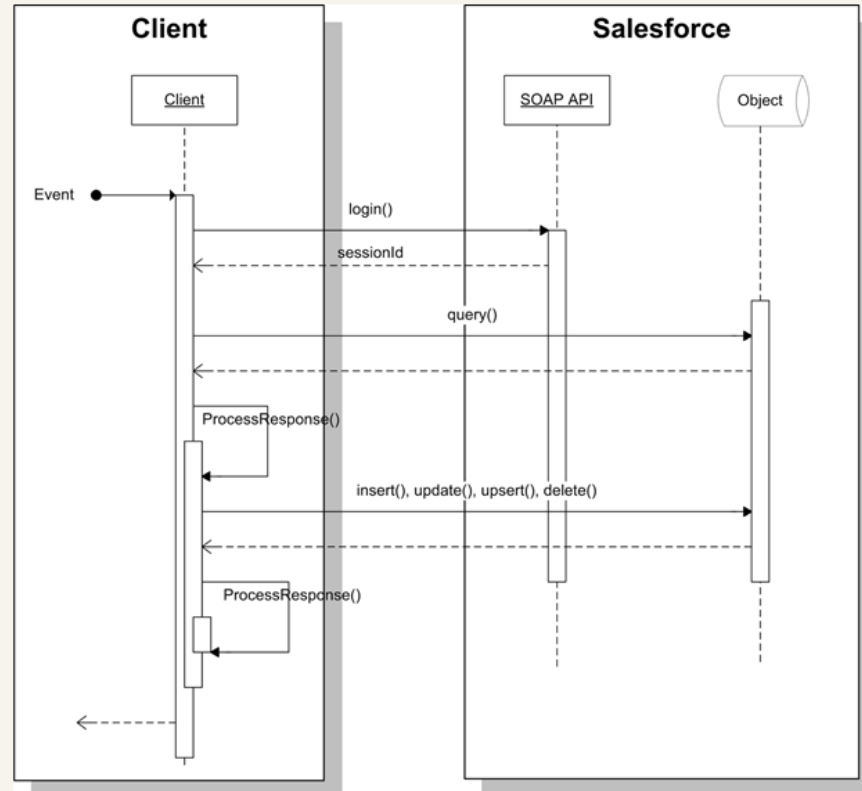
Batch Data Synchronization

- **Scheduled Batch Process:** External systems schedule batch processes to synchronize data with Salesforce. These processes run at specified intervals, synchronizing data changes that occurred since the last synchronization.
- **Data Extraction:** During each batch, the external system extracts data from its database that requires synchronization with Salesforce. This data may include new records, updated information, or deletions.
- **Data Transformation:** The extracted data may undergo transformation to align with Salesforce data models or requirements.
- **Data Loading to Salesforce:** The transformed data is loaded into Salesforce, updating records, creating new entries, or handling deletions based on the changes in the external system.
- **Logging and Monitoring:** The batch synchronization process often includes logging and monitoring mechanisms to track the status of each synchronization run, including successes, failures, and any data inconsistencies.

INTEGRATION PATTERNS



Remote Call-In

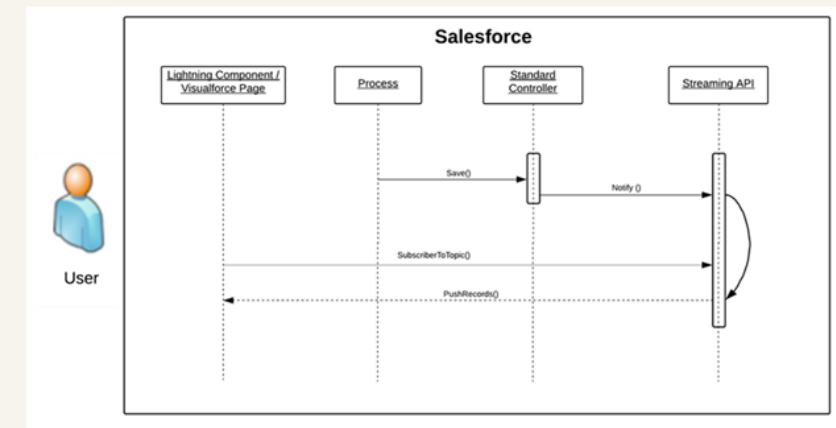


- **External System Initiates Request:** An external system, which can be a third-party application or another platform, initiates a request to Salesforce, specifying the required operation or data retrieval.
- **Salesforce Acknowledges Request:** Salesforce sends an acknowledgement response upon receiving the request (Website contact form)
- **Salesforce Sends Response:** Salesforce processes the incoming request, executing the necessary operations, querying data, or performing other actions based on the external system's request.

UI Update Based on Data Changes

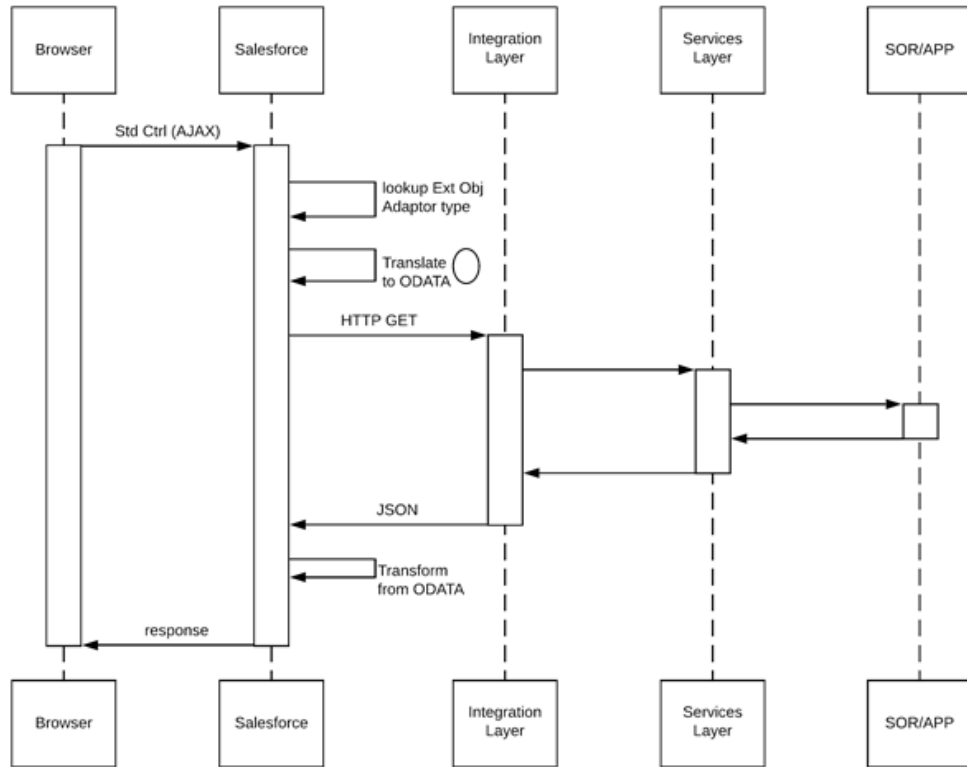
- When you need a UI to react to data changes across different system
- **Scenario:** A shipping carrier updates a tracking status to "Delivered" in their system.
- **Integration:** The carrier calls the Salesforce REST API to update the "Delivery Status" field on an Order record.
- **UI Update:** Because you enabled Change Data Capture (CDC) on the Order object, the support agent's screen instantly flashes green and updates the status while they are looking at it.

UI Update Based on Data Changes



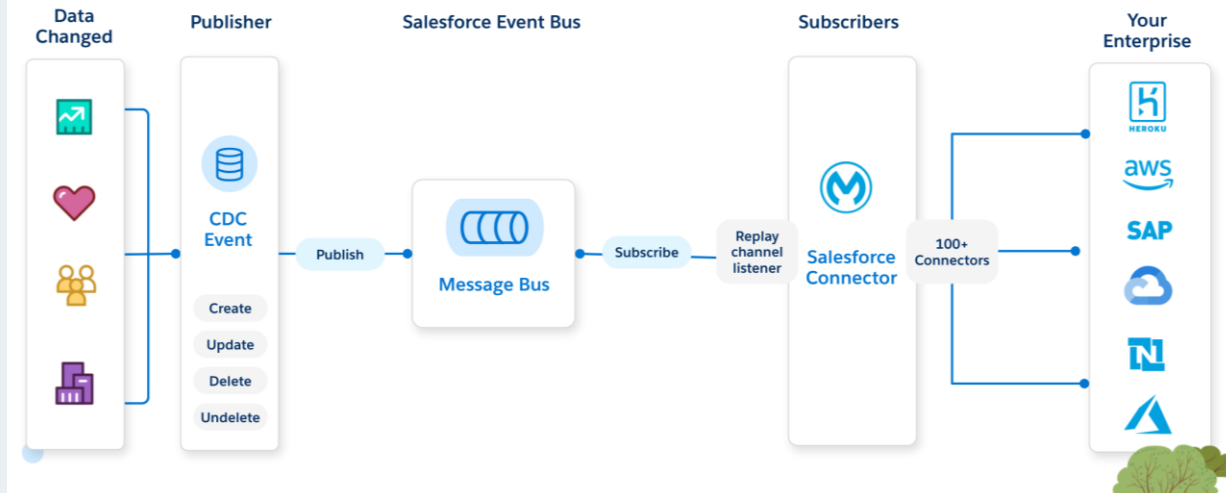
Data Virtualization

- **Data Virtualization:** allows real-time access to, and manipulation of, external system data directly within the Salesforce UI without storing it in the platform.
- **Unified Data Access Layer:** Data virtualization platforms create a unified data access layer that connects to various data sources, including Salesforce and external databases.
- **Real-time Data Integration:** Data virtualization tools facilitate real-time integration and synchronization of data from multiple sources, ensuring that the virtualized data is always up-to-date.
- **Query Optimization:** When users query for data within Salesforce, the data virtualization layer optimizes the query execution, retrieving information from the appropriate sources. This process is transparent to users, who interact with the data as if it were stored locally.
- **Security and Governance:** Data virtualization platforms often include robust security and governance features, ensuring that users only access authorized data and that compliance requirements are met.
- Example: Amazon app

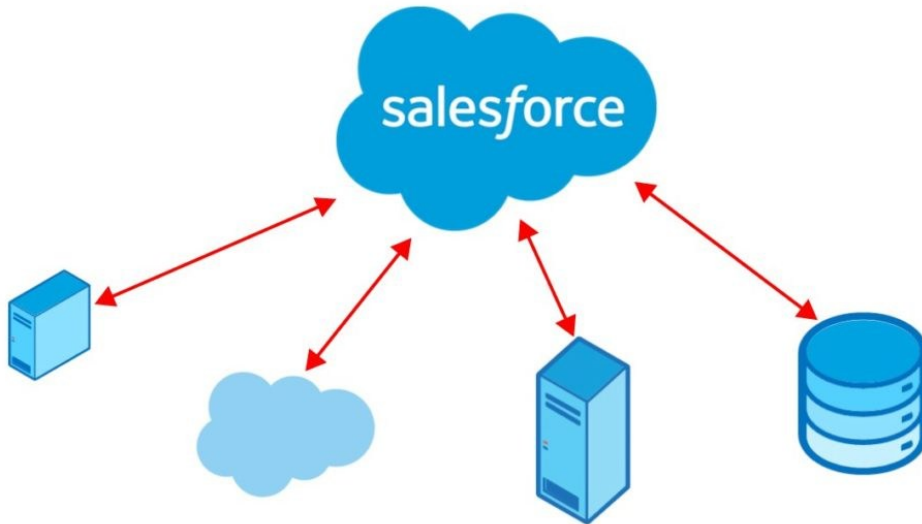


Publish & Subscribe

- **Event Generation (Publishing):** Salesforce generates events based on specific triggers, such as record updates, creation, or custom-defined criteria. These events represent changes or occurrences that other systems might be interested in.
- **Event Channels (Topics):** Events are organized into channels or topics, representing different categories of events. Subscribers can choose to listen to specific channels based on their interest or requirements.
- **Subscriber Registration:** External systems interested in specific types of events register as subscribers to the corresponding channels. This registration establishes a connection between the publisher (Salesforce) and the subscribers.
- **Event Notification (Publishing):** When an event occurs, Salesforce publishes the event to the relevant channels. Subscribers that have registered for those channels receive real-time notifications about the events.
- Example: New Sim card purchase

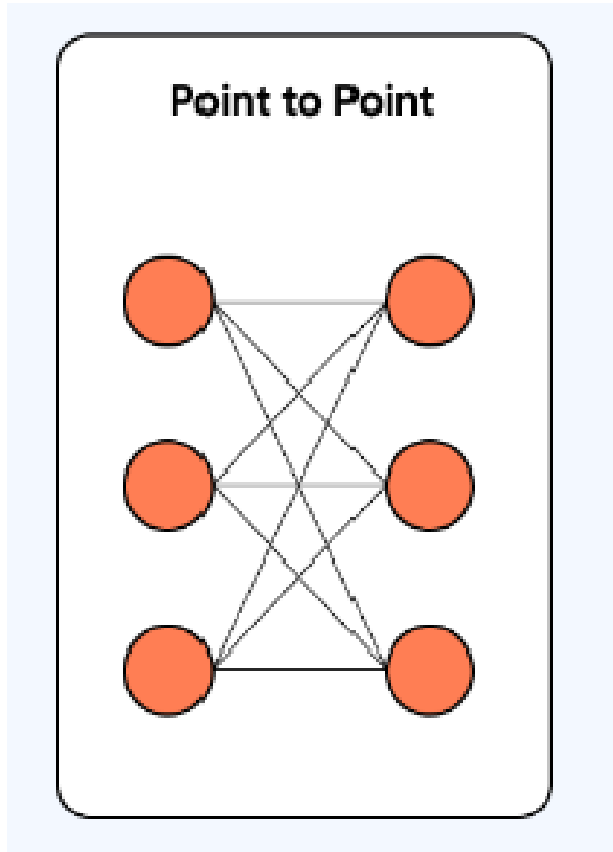


Integration Architectures



- Integration Architecture is the overall design that defines how different systems communicate, share data, and work together reliably.
- Types:
 - Point to Point Integration
 - Hub and Spoke Integration
 - Enterprise Service Bus

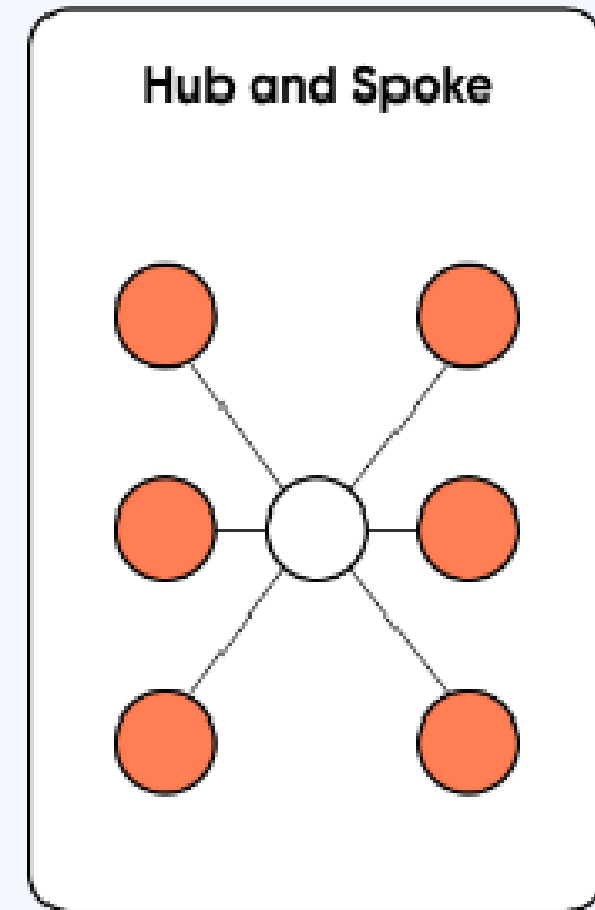
Point-to-Point

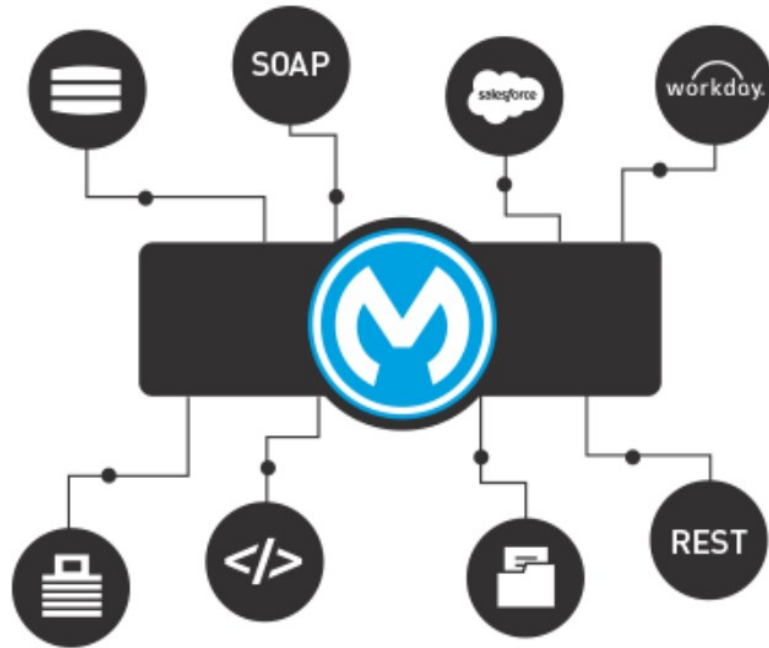


- **Direct Connections:** Each external system connects directly to Salesforce using APIs or other integration methods. There is no central hub orchestrating data flows; instead, each connection operates independently.
- **Custom Integration Logic:** Integration logic, data transformation, and business rules are implemented separately for each point-to-point connection. This means that each integration point has its unique set of rules and logic.
- **Decentralized Management:** The management and maintenance of each integration point are decentralized, with updates and changes handled independently for each connection.

Hub & Spoke

- **Centralized Hub (Salesforce):** Salesforce serves as the central hub, managing and orchestrating data flows between various systems, both internal and external.
- **Spoke Systems:** Spoke systems are individual applications or databases that connect to the central hub (Salesforce). Each spoke system communicates directly with Salesforce for data exchange.
- **Integration Logic in Hub:** The integration logic, such as data transformation, business rules, and orchestration, is primarily implemented within Salesforce, acting as the central point of control.
- **Decentralized Spokes:** Spoke systems operate independently of each other, with their integration logic kept to a minimum. They are focused on exposing or consuming specific functionalities without being directly connected to other spoke systems.

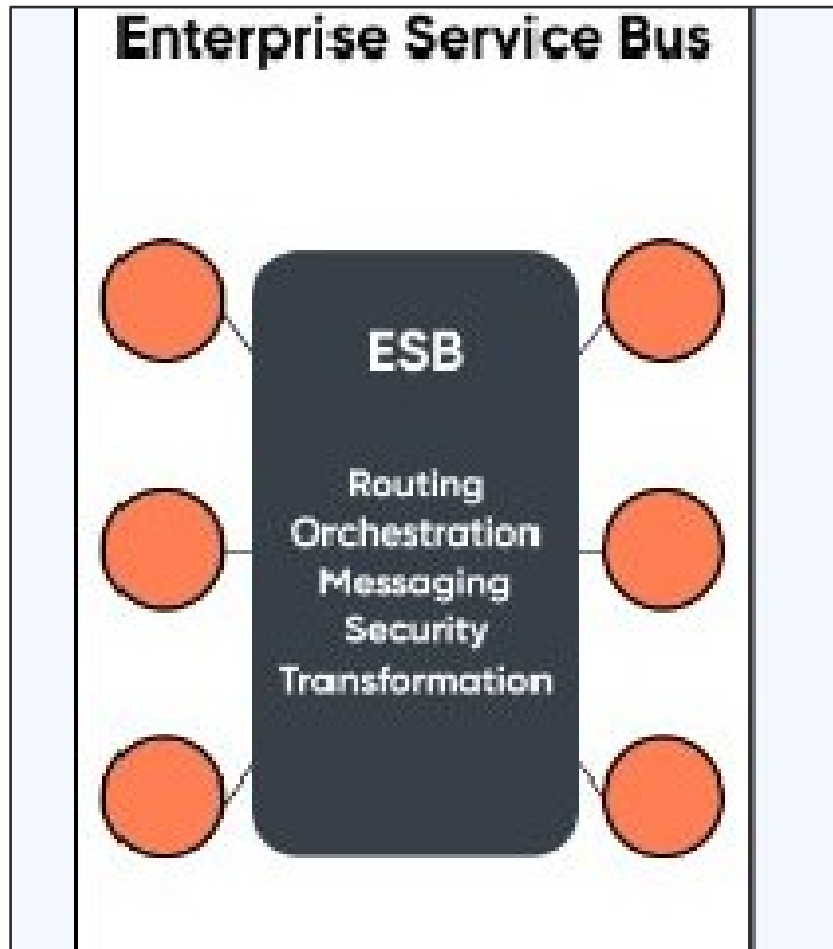




Enterprise Service Bus

- An Enterprise Service Bus (ESB) is an architectural pattern whereby a centralized software application (Ex. MuleSoft) performs integrations between applications.
- The core concept is to integrate different applications by putting a communication bus between them and then enable each application to talk to the bus.
- This decouples systems from each other, allowing them to communicate without dependency on or knowledge of other systems on the bus.
- Most commonly used architecture as it provides increased organizational agility by reducing time to market for new initiatives.

Core Principles



- **Orchestration:** Composing several existing fine-grained components into a single higher order composite service.
- **Transformation:** Data transformation between canonical data formats and specific data formats required by each ESB connector. For example, transforming CSV data to either SOAP/XML or JSON.
- **Transportation (Routing):** Transport protocol negotiation between multiple formats (such as HTTP, JMS, JDBC).
- **Mediation:** Providing multiple interfaces for the purpose of supporting multiple versions of a service for backwards compatibility or alternatively, to allow for multiple channels to the same underlying component implementation.
- **Non-functional consistency (Security):** For a typical ESB initiative, this can include consistency around the way security and monitoring policies are applied and implemented.

These adapters are available for Salesforce Connect.		
SALESFORCE CONNECT ADAPTER	DESCRIPTION	WHEN TO USE
Cross-org	Uses the Lightning Platform REST API to access data that's stored in other Salesforce orgs.	To connect data between your Salesforce orgs. For example, provide your service representatives a unified view of customer transactions by integrating data from different Salesforce orgs.
OData 2.0 OData 4.0 OData 4.01	Uses Open Data Protocol to access data that's stored outside Salesforce. The external data must be exposed via OData producers.	To integrate external data sources into your org that support the ODATA protocol and publish an OData provider. For example, give your account executives a unified data view by pulling data from legacy systems such as SAP and Microsoft in real time.
Custom adapter created via Apex	Uses the Apex Connector Framework to develop your own custom adapter when the other available adapters aren't suitable for your needs. A custom adapter can obtain data from anywhere. For example, some data can be retrieved from anywhere in the Internet via callouts, while other data can be manipulated or even generated programmatically.	To develop your own adapter with the Apex Connector Framework when the other available adapters aren't suitable for your needs. For example, when you want to retrieve data via callouts from a REST API.

Salesforce Connect

- Salesforce Connect provides seamless integration of data across systems by letting users view, search, and modify data that's stored outside your Salesforce org.
- Enables live data read/write capabilities using OData protocols to map external data as external objects in Salesforce, thereby saving storage space.
- It uses a protocol-specific adapter to connect to an external system and access its data.
 - Cross-org
 - OData
 - Custom Adapter created via Apex
- It uses External Objects that behave like standard objects, and mirror data stored externally. (e.g., another Salesforce org or external system)
- External object name ends with __x.

External Object Config

External Data Source in Salesforce from Setup

- An External Data Source is the starting point for Salesforce Connect
- It defines:
 - Where the external data lives
 - How Salesforce connects to it
 - What protocol is used

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'external da' and a list of integrations including 'External Data Sources'. The main content area is titled 'External Data Sources' and includes a description: 'Access data in other Salesforce orgs as well as third-party databases and content systems.' Below this is a 'View:' dropdown set to 'All' and a 'Create New View' link. At the top right of the table are buttons for 'New External Data Source' and 'Connect to Amazon DynamoDB'. The table lists three external data sources with columns for Action, Name, External Data Source, Type, and URL.

Action	Name ↑	External Data Source	Type	URL
Edit	InsideView_federated_search	InsideView	Federated Search: OpenSearch	https://search.insideview.com/federatedsearch/salesforce/federatedsearch.xml
Edit Del	Salesforce_ODATA_Experience_API	Salesforce ODATA Experience API	Salesforce Connect: OData 4.0	callout:Salesforce_Odata_Experience_DEV
Edit Del	ToUnumUS	ToUnumUS	Salesforce Connect: Cross-Org	https://test.salesforce.com

External Object Config

External Data Source in Salesforce from Setup

External Data Source Edit: Salesforce ODATA Experience API

Connect to another Salesforce org or a third-party database or content system.

SaveSave and NewCancel

External Data Source@Salesforce ODATA Experi

Name@Salesforce_ODATA_Experiei

TypeSalesforce Connect: OData 4.0

Parameters

URL@callout:Salesforce_Odata_Experience_DEV

Connection Timeout (Seconds)@120

Writable External Objects@☒

High Data Volume@☐

Request Row Counts@☐

Enable Search@☒

Format@JSON

Display Server Errors@☐

CSRF Protection@☐

Eligible for External Change Data Capture@☐

Server Driven Pagination@☐

Compress Requests@☒

Use Free-Text Search Expressions@☐

Special Compatibility@None

SaveSave and NewCancel

MIDDLEWARE INTEGRATION
ODATA VIRTUALIZATION IN SALESFORCE

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External Object Config

Named Credentials in Salesforce from Setup

- A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition, intended to secure and simplify authenticated API callouts to external systems,

Q named

Security

Named Credentials

Didn't find what you're looking for?
Try using Global Search.

SETUP

Named Credentials

Named Credentials External Credentials

10 Items · Sorted by Label

New

Label	Type	URL	External Credential	Actions
Salesforce Odata Experience	Legacy	https://api.experiencecloud.salesforce.com/odata/v1/odata		
Salesforce Odata Experience DEV	Legacy	https://api.experiencecloud.salesforce.com/odata/v1/odata		
Salesforce Odata Experience ITEST	Legacy	https://api.experiencecloud.salesforce.com/odata/v1/odata		
Salesforce Odata Experience UAT	Legacy	https://api.experiencecloud.salesforce.com/odata/v1/odata		
SalesforceOAuth2_NamedCredential	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	
SalesforceOAuth2_NamedCredential_DEV	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	
SalesforceOAuth2_NamedCredential_ITEST	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	
SalesforceOAuth2_NamedCredential_PFIX	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	
SalesforceOAuth2_NamedCredential_TRAIN	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	
SalesforceOAuth2_NamedCredential_UAT	Secured Endpoint	https://api.experiencecloud.salesforce.com/odata/v1/odata	SalesforceOAuth2_ExternalCredential	

External Object Config

Named Credentials in Salesforce from Setup

SETUP

Named Credentials

Named Credential: Salesforce Odata Experience DEV

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

[« Back to Named Credentials](#)

EditDelete

LabelSalesforce Odata Experience DEV

NameSalesforce_Odata_Experience_DEV

URL

Authentication

Certificatesandbox_enterprise_crm_to_layer_7

Identity TypeAnonymous

Authentication ProtocolNo Authentication

Callout Options

Generate Authorization Header☒

Allow Merge Fields in HTTP Header☐

Allow Merge Fields in HTTP Body☐

Outbound Network Connection

External Object Config

Validate and Sync

External Data Source: Salesforce ODATA Experience API

Connect to another Salesforce org or a third-party database or content system.

[« Back to External Data Sources](#)

EditValidate and SyncDelete

External Data Source	Salesforce ODATA Experience API
Name	Salesforce_ODATA_Experience_API
Type	Salesforce Connect: OData 4.0

▼ Parameters

URL	callout:Salesforce_Odata_Experience_DEV
Connection Timeout (Seconds)	120
Writable External Objects	☒
High Data Volume	☐
Server Driven Pagination	☐
Request Row Counts	☐
Compress Requests	☒
Enable Search	☒
Use Free-Text Search Expressions	☐
Format	JSON
Special Compatibility	None
CSRF Protection	☐
Display Server Errors	☐
Eligible for External Change Data Capture	☐

EditValidate and SyncDelete

External Object Config

Validate and Sync

Validate External Data Source: Salesforce ODATA Experience API

Confirm that you can connect to the external system, and synchronize its schema with your Salesforce org.

[« Back to External Data Source: Salesforce ODATA Experience API](#)

Name	Salesforce_ODATA_Experience_API
External Data Source	Salesforce ODATA Experience API
Status	Success

Sync

Sync in background ☐

Select	Table Name	External Object Name	Label	Plural Label	Name Field	Synced
☐	AgentAssistActivities	Agent_Assist_Activity	Agent Assist Activity	Agent Assist Activities	--None--	☒
☐	AgentAssistLeads	Lead_External	Lead (External)	Leads (External)	--None--	☒
☐	CommissionRoles	CMMSN_ROLE	Commission Role	Commission Roles	--None--	☒
☐	GroupAccountsSummaries	BCN_DET	BCN Detail	BCN Details	--None--	☒
☐	Organizations	Organizations	Organizations	Organizations	--None--	☐

External Object Config

External Object Created

Custom HTTP Headers

New

Action	Header Field Name	Header Field Value	Active	Description
Edit	apiKey.		☒	

External Objects

Action	Label	Namespace Prefix	Description	Table Name
Edit Erase Validate	 Agent Assist Activity		An association between an Agent Assist Activity and a Client Account so that user/s can quickly navigate between the Activities and the Account.	AgentAssistActivities
Edit Erase Validate	 BCN Detail		BCN Detail	GroupAccounts
Edit Erase Validate	 Lead (External)		AgentAssistLeads	AgentAssistLeads
Edit Erase Validate	 Commission Role		Account related Commission Roles.	CommissionRoles

External Object Config

External Object created

SETUP

External Objects

External Object Definition Detail

Edit

Delete

Singular Label	BCN Detail	Description	BCN Detail
Plural Label	BCN Details	Enable Reports	☒
Object Name	BCN_DET	Name Field	External ID
API Name	BCN_DET__x	Deployment Status	Deployed
External Data Source	Salesforce ODATA Experience API	Allow Search	☒ If selected, also enable search on the exte
Table Name	GroupAccounts		
Display URL Reference Field			
Created By	Aneesh Nair, 9/14/2022, 3:47 AM	Modified By	Vladimir Plastikov, 2/9/2026, 10:40 AM

Package Information

Installed Package	ACQ_Enterprise.CRM.Core	Available in Versions	0.1 - Current
-------------------	-------------------------	-----------------------	---------------

Standard Fields

Action	Field Label	Field Name	Data Type
	Display URL	DisplayUrl	URL(1000)
	External ID	ExternalId	External Lookup

Custom Fields & Relationships

New

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	External Alias
Edit Del	 BCN	BCN_TXT__c		Text(128)		BCN_TXT
Edit Del	 Business Address 1	BSN_ADR_1__c		Text(128)		BSN_ADR_1
Edit Del	 Business Address 2	BSN_ADR_2__c		Text(128)		BSN_ADR_2
Edit Del	 Business Address City	BSN_ADR_CTY__c		Text(128)		BSN_ADR_CTY
Edit Del	 Business Address Postal Code	BSN_ADR_POST_CODE__c		Text(128)		BSN_ADR_POST_CODE
Edit Del	 Business Address State	BSN_ADR_STATE__c		Text(128)		BSN_ADR_STATE
Edit Del	 Dating Rule Description	DTG_RUL_DSC_TXT__c		Text(128)		DTG_RUL_DSC_TXT
Edit Del	 Do Not Rework Reason Date	DO_NOT_RWK_RSN_DT__c		Date		DO_NOT_RWK_RSN_DT
Edit Del	 Do Not Rework Reason Description	DO_NOT_RWK_RSN_DSC_TXT__c		Text(128)		DO_NOT_RWK_RSN_DSC_TXT
Edit Del	 Employer Number	EE_NBR_ID__c		Indirect Lookup(Account)		EE_NBR_ID
Edit Del	 Group Ipn	GRP_IPN_TXT__c		Text(128)		GRP_IPN_TXT
Edit Del	 Group Issue Date	GRP_ISU_DT__c		Date		GRP_ISU_DT

External Object Config

External Object exposed on Account page layout via Indirect lookup field (key)

DetailsActivityAgent Assist ActivityRelatedCommission Roles

Account Information

Account Name	STATE OF NEVADA	Account Owner	System Admin API
Type	Client	Parent Account	
Website		Phone	
Description		Industry	State
Employer ID	F1000272	SIC Code	9298 - RETIRED STATE EMPLOYEES
Dun & Bradstreet Number		Employees	
Account Source	Colonial Life		

Client

Account Status	Active	Broker Relationship	Direct
At Risk Reason		Sales Premium Amount	\$0.00
Inforce Premium	\$108,524.62	No of Payors	111
% Penetration		Market Size	
Days Past Due		Market Type Description	Public
Enrollment Start Date		Current Year Sales Premium	\$0
Previous Year Sales Premium	\$3,897	Time Since Last Sale	1 to 1.5 years

Related List Quick Links

Assigned Territories (3)

Users in Assigned Territories (3)

Account Information (1)

Strategic Account Plan (0)

BCN Details (10+)

Partners (2)

Related Contacts (0)

Agent Codes (0)

Show All (16)

Strategic Account Plan (0)

BCN Details (3+)

E7950082

BCN: E7950082

Group Name: NV STATE BOARD OF NURSING POST

Group Status: Inactive

E7222235

BCN: E7222235

Group Name: NEVADA PERS FBP

Group Status: Inactive

E9126822

BCN: E9126822

Group Name: ST OF NEVADA EMPLOYEES C PER

Group Status: Inactive

View All

External Object Config

External Object exposed on Account page layout via Indirect lookup field (key)

Client Management

Accounts

13ZERO3 INC | Acco...

4 EVER CLEAR POOL ...

A D MOYER LUMBER...

state of - Search

STATE OF NEVADA | ...

STATE OF NEVAD...E7950082

BCN Detail

E7950082

Details

Related

Detail

BCN	E7950082		Group Lapse Date	4/1/2013
Display URL	GroupAccounts('E7950082')		Group Lapse Reason Description	LAPSED NONPAYMENT OF PREMIUM
Dating Rule Description	First Of The Month Eff. Date		Group Name	NV STATE BOARD OF NURSING POST
Do Not Rework Reason Date			Group Status	Inactive
Do Not Rework Reason Description			Group Status Code	L
Employer Number	STATE OF NEVADA		Master Group Name	STATE OF NEVADA
External ID	E7950082		Master Group Number	M0000213
Group Ipn	000025492299		Number Of Employees	18
Group Issue Date	3/1/2005		Plan Administrator Name	DEAN ESTES
Tpa Name			Rework Indicator	☐
Underwriting Company Name	Colonial			
Primary BCN Indicator	☐			

Address

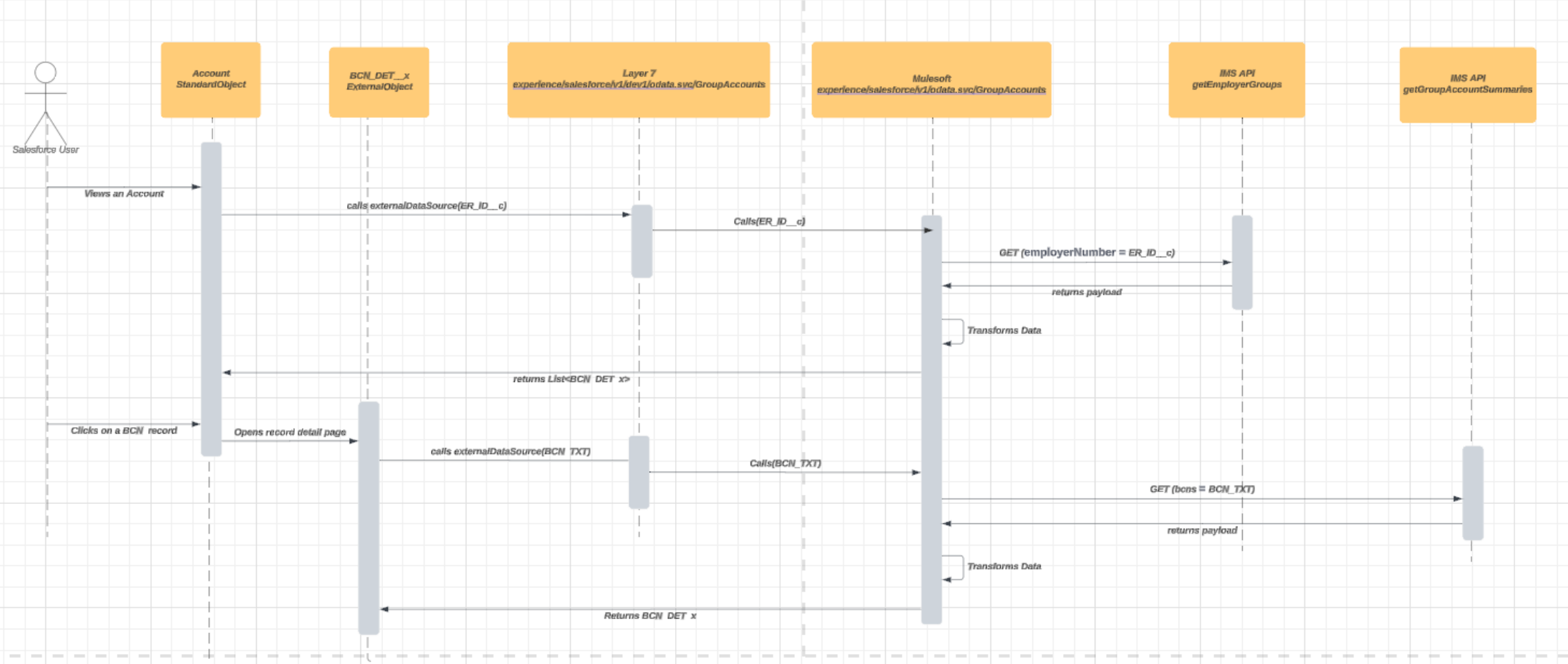
Business Address 1		Business Address Postal Code	
Business Address 2		Business Address State	NV
Business Address City			

Enrollment Dates

Initial Document Date	3/1/2005	Next Bill Due Date	
Issue State	NV	Past Due Date	Standard 90 Day Lapse
Last Enrollment Date	10/17/2006	Standing Effective Day	0

External Object Config

System interactions



Point to Point Integration- Salesforce Connect

Salesforce Connect - Cross Org Adapter



- The Cross-Org Adapter lets Salesforce Connect access live data from another Salesforce org by exposing that org's objects as External Objects in the calling org.
- Uses Lightning Platform REST API calls to access records in other Salesforce orgs.
- No data replication — data is virtualized and retrieved on demand.
- Example: Google drive file sharing.

Point to Point Integration- Salesforce Connect

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'external' and a navigation menu with categories: Email, Apps, and Integrations. Under Integrations, 'External Data Sources' is selected. The main content area is titled 'New External Data Source' and includes a sub-header 'External Data Sources'. Below this, a description states: 'Connect to another Salesforce org or a third-party database or content system.' The form contains several fields: 'External Data Source' (text input), 'Name' (text input), and 'Type' (dropdown menu). The 'Type' dropdown is open, showing options: '--None--', '--None--', 'Amazon DynamoDB', 'Federated Search: OpenSearch', 'GraphQL', 'SQL', 'Salesforce Connect: Cross-Org' (highlighted), 'Salesforce Connect: OData 2.0', 'Salesforce Connect: OData 4.0', 'Salesforce Connect: OData 4.01', and 'Simple URL'. Below the 'Type' field, there is a section for 'Authentication' with fields for 'Identity Type' and 'Authentication Protocol'. At the bottom of the form, there are 'Save', 'Save and New', and 'Cancel' buttons.

Search Setup

Setup Home Object Manager

external

Email

Send through External Email Services

Apps

External Client Apps

Settings

Integrations

External Data Sources

External Objects

External Services

Didn't find what you're looking for? Try using Global Search.

SETUP External Data Sources

New External Data Source

Connect to another Salesforce org or a third-party database or content system.

Save Save and New Cancel

External Data Source

Name

Type

--None--

--None--

Amazon DynamoDB

Federated Search: OpenSearch

GraphQL

SQL

Salesforce Connect: Cross-Org

Salesforce Connect: OData 2.0

Salesforce Connect: OData 4.0

Salesforce Connect: OData 4.01

Simple URL

Authentication

Identity Type

Authentication Protocol

Save Save and New Cancel

Point to Point Integration- Salesforce Connect

external

Email

Send through External Email Services

Apps

External Client Apps

Settings

Integrations

External Data Sources

External Objects

External Services

Didn't find what you're looking for? Try using Global Search.

SETUP

External Data Sources

External Data Source Edit: ToUnumUS

Connect to another Salesforce org or a third-party database or content system.

Save

Save and New

Cancel

External Data Source

ToUnumUS

Name

ToUnumUS

Type

Salesforce Connect: Cross-Org

Parameters

Connect to

Sandbox URL

URL

https://test.salesforce.com

API Version

56.0

Connection Timeout (Seconds)

120

Enable Search

☒

Writable External Objects

☒

Authentication

Identity Type

Named Principal

Authentication Protocol

OAuth 2.0

Authentication Provider

UUS

Scope

full refresh_token offline_acc

Authentication Status

Authenticated as

Start Authentication Flow on Save

☒

Save

Save and New

Cancel

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Point to Point Integration- Salesforce Connect

SETUP

External Data Sources

External Data Source: ToUnumUS

Connect to another Salesforce org or a third-party database or content system.

[« Back to External Data Sources](#)

EditValidate and SyncDelete

External Data SourceToUnumUS

NameToUnumUS

TypeSalesforce Connect: Cross-Org

Parameters

Authentication

EditValidate and SyncDelete

External Objects

Action	Label	Namespace Prefix	Description	Table Name
Edit Erase	 Account Partner (UUS)			AccountPartner
Edit Erase	 Account Team Member (UUS)			AccountTeamMember
Edit Erase	 Account (UUS)			Account
Edit Erase	 Technology Platform (UUS)			TECH_PLTFM__c
Edit Erase	 Product Inforce (UUS)			Agreement_Product__c
Edit Erase	 Partner Contact (UUS)		This is a external object displaying Contact Role object from UUS	CNTCT_ROLE__c
Edit Erase	 Email Message (UUS)			EmailMessage
Edit Erase	 Opportunity (UUS)		This is a external object displaying Opportunity object from UUS	Opportunity
Edit Erase	 Service Request (UUS)			Case

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Point to Point Integration- Salesforce Connect

 **SETUP**
External Data Sources

Validate External Data Source: ToUnumUS

Confirm that you can connect to the external system, and synchronize its schema with your Salesforce org.

[« Back to External Data Source: ToUnumUS](#)

Name	ToUnumUS
External Data Source	ToUnumUS
Status	Success

Sync

Sync in background ☐

Select	Table Name	External Object Name	Label	Plural Label	Synced
☐	AAKCS__Campaign_Status_Default_Value__ChangeEvent	AAKCS__Campaign_Status	Change Event: Campaign M	Change Event: Campaign M	☐
☐	AAKCS__Campaign_Status_Default_Value__Tag	AAKCS__Campaign_Status	Tag: Campaign Member Stat	Tag: Campaign Member Stat	☐
☐	AAKCS__Campaign_Status_Default_Value__c	AAKCS__Campaign_Status	Campaign Member Status D	Campaign Member Status D	☐
☐	AAKCS__Campaign_Status_Default__ChangeEvent	AAKCS__Campaign_Status	Change Event: Campaign St	Change Event: Campaign St	☐
☐	AAKCS__Campaign_Status_Default__Share	AAKCS__Campaign_Status	Share: Campaign Status Del	Share: Campaign Status Del	☐
☐	AAKCS__Campaign_Status_Default__Tag	AAKCS__Campaign_Status	Tag: Campaign Status Defau	Tag: Campaign Status Defau	☐
☐	AAKCS__Campaign_Status_Default__c	AAKCS__Campaign_Status	Campaign Status Default	Campaign Status Defaults	☐
☐	ACT_Contact__ChangeEvent	ACT_Contact__ChangeEver	Change Event: ESP Contact	Change Event: ESP Contact	☐
☐	ACT_Contact__Share	ACT_Contact__Share	Share: ESP Contact	Share: ESP Contact	☐
☐	ACT_Contact__Tag	ACT_Contact__Tag	Tag: ESP Contact	Tag: ESP Contact	☐
☐	ACT_Contact__c	ACT_Contact__c	ESP Contact	ESP Contacts	☐

Point to Point Integration- Salesforce Connect

 **External Data Sources**

External Data Source: ToUnumUS

Connect to another Salesforce org or a third-party database or content system.

[« Back to External Data Sources](#)

EditValidate and SyncDelete

External Data Source	ToUnumUS
Name	ToUnumUS
Type	Salesforce Connect: Cross-Org

Parameters

Authentication

EditValidate and SyncDelete

External Objects

Action	Label	Namespace Prefix	Description	Table Name
Edit Erase	 Account Partner (UUS)			AccountPartner
Edit Erase	 Account Team Member (UUS)			AccountTeamMember
Edit Erase	 Account (UUS)			Account
Edit Erase	 Technology Platform (UUS)			TECH_PLTFM__c
Edit Erase	 Product Inforce (UUS)			Agreement_Product__c
Edit Erase	 Partner Contact (UUS)		This is a external object displaying Contact Role object from UUS	CNTCT_ROLE__c
Edit Erase	 Email Message (UUS)			EmailMessage
Edit Erase	 Opportunity (UUS)		This is a external object displaying Opportunity object from UUS	Opportunity
Edit Erase	 Service Request (UUS)			Case

Point to Point Integration- Salesforce Connect

SETUP

External Objects

External Object

Account (UUS) (Unlocked)

Help for this Page

__MISSING LABEL__ PropertyFile - val EntitySecondGenInstalledEditable not found in section VirtualEntityTypeManagableUI

Standard Fields (2) | Custom Fields & Relationships (15) | Page Layouts (1) | Field Sets (0) | Compact Layouts (1) | Search Layouts (5) | Buttons, Links, and Actions (7)

External Object Definition Detail

EditDelete

Singular Label	Account (UUS)	Description	
Plural Label	Accounts (UUS)	Enable Reports	☐
Object Name	Account	Name Field	Account Name
API Name	Account__x	Deployment Status	Deployed
External Data Source	ToUnumUS	Allow Search	☒ If selected, also enable search on the external data source.
Table Name	Account		
Display URL Reference Field			
Created By	System Admin API, 8/16/2023, 2:14 AM	Modified By	System Admin API, 8/16/2023, 2:17 AM

Package Information

Installed Package

ACQ_Enterprise.CRM.Core

Available in Versions

0.1 - Current

Standard Fields

Action	Field Label	Field Name	Data Type
	Display URL	DisplayUrl	URL(1000)
	External ID	ExternalId	External Lookup

Custom Fields & Relationships

New

Action	Field Label	API Name	Installed Package	Data Type	Controlling Field	External Alias	Modified By
Edit Del	Account Name	Name__c		Text(255)		Name	System Admin API, 8/16/2023, 2:15 AM
Edit Del	Active Office	ACTIVE_OFC_TXT__c		Text(255)		ACTIVE_OFC_TXT__c	System Admin API, 8/16/2023, 2:15 AM
Edit Del	Broker Contact Only Indicator	Broker_Contact_Only_Indicator__c		Checkbox		Broker_Contact_Only_Indicator__c	Ananya Kansal, 9/10/2025, 3:29 PM
Edit Del	Cross-Brand Solutions	CROSS_BRAND_SALE_IND__c		Checkbox		CROSS_BRAND_SALE_IND__c	Ananya Kansal, 9/10/2025, 3:29 PM
Edit Del	Digital Service Capabilities	SERV_CPPLY_TXT__c		Picklist (Multi-Select)		SERV_CPPLY_TXT__c	System Admin API, 8/16/2023, 2:15 AM
Edit Del	Enterprise Client Id	ENTPR_CLNT_ID__c		Indirect Lookup(Account)		ENTPR_CLNT_ID__c	System Admin API, 8/16/2023, 2:15 AM
Edit Del	External Business Id	XTL_BUSN_ID__c		Text(12)		XTL_BUSN_ID__c	System Admin API, 7/2/2025, 4:04 AM
Edit Del	Gabor Biller	INGBT_BILL_IND__c		Checkbox		INGBT_BILL_IND__c	Ananya Kansal, 9/10/2025, 3:29 PM

Point to Point Integration- Salesforce Connect

us-enterprise-crm--uat.sandbox.lightning.force.com/lightning/r/Account/0015C00000zEx8pQAC/view

Sandbox: UAT | [Log out](#)

Client Success Accounts SETU DEMO Account...

Recently Viewed

18 items • Updated a few seconds ago

Search this list...

Recently Viewed ↓

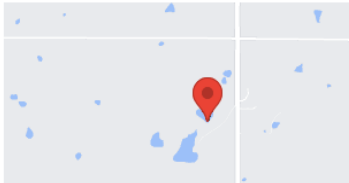
SETU DEMO Account 1	bdelaney
1 800 HEATERS INC 732-417-0099	Colonial Life ENTCRM
INTEGRITY PROPERTY MANAGEMENT 701-291-7800	Colonial Life vlad
ALPHABET LAND CHILDCARE 216-509-7517	Colonial Life ENTCRM
ALPHABET JUNCTION LEARNING CEN 952-212-9011	Colonial Life ENTCRM
ALPHABET ZOO 2 PRESCHOOL 239-542-3938	Colonial Life ENTCRM
Alphabet Inc +1 650 253 0000	vlad
WESTERN MILLWRIGHT SERVICES 479-968-6852	Colonial Life ENTCRM
BURK, DEBRA A 438-508-3727	Colonial Life ENTCRM
GALLAGHER BENEFIT SERVICES INC +1-507-579-1938x4199	Colonial Life ENTCRM

Account SETU DEMO Account 1

Phone Billing Address Account Owner
United States Brendan Delaney

Details

Section

Account Name	SETU DEMO Account 1	Industry	
Billing Address	United States	SIC Code	
		Type	
		Enterprise Client Id	BD12345
Account Source			

Account (UUS) (1)

Account Name	Underwriting Segment	Active Office	MyUnum
SETU Demo Account 2			No

Point to Point Integration- Salesforce Connect

The screenshot displays the Salesforce CRM interface for a demo account. The browser address bar shows the URL: `us-enterprise-crm--uat.sandbox.lightning.force.com/lightning/r/Account__x/x073J00000Za8kaQAB/view?ws=%2Fflightning%2Fr%2FAccount%2F0015C00000zEx8pQAC%2Fview`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Client Success, Accounts, and a dropdown menu. The main content area shows the details for 'SETU Demo Account 2' (Account (UUS)). The details are organized into two columns with various fields and their values.

Related		Details	
Account Name	SETU Demo Account 2	Record Type Name	Prospect
Active Office ¹		MyUnum ¹	No
Underwriting Segment ¹		Total Leave ¹	☐
		Status ¹	
Benefits Environment			
Technology Partner ¹		Technology Platform ¹	
Digital Service Capabilities			