

# Salesforce



## Jitterbit Cloud Studio

### Salesforce Connector

#### Overview

The Salesforce connector is accessed from the **Connectivity** tab of the design [component palette](#):



This connector is used to first configure a [Salesforce connection](#) to establish a connection with a Salesforce instance, and then to configure one or more Salesforce activities associated with that connection to use as a source or target within an operation:

#### Standard Salesforce Activities

- **Query:** Queries data from a Salesforce connection and is used as a source in an operation.
- **Insert:** Inserts new data in a Salesforce connection and is used as a target in an operation.
- **Update:** Updates existing data in a Salesforce connection and is used as a target in an operation.
- **Upsert:** Both updates existing data and inserts new data in a Salesforce connection and is used as a target in an operation.
- **Delete:** Deletes data in a Salesforce connection and is used as a target in an operation.

#### Bulk Salesforce Activities

Salesforce bulk activities are faster and scale better than non-bulk Salesforce activities, but should be used only if you do not need to use a transformation to change data prior to reaching the target.

- **Bulk Query:** Queries a large number of records from a Salesforce connection and is used as a source in an operation.
- **Bulk Insert:** Inserts a large number of new records in a Salesforce connection and is used as a target in an operation.
- **Bulk Update:** Updates a large number of existing records in a Salesforce connection and is used as a target in an operation.
- **Bulk Upsert:** Both updates a large number of existing records and inserts a large number of new records in a Salesforce connection and is used as a target in an operation.
- **Bulk Delete:** Deletes a large number of records from a Salesforce connection and is used as a target in an operation. Deleted records are stored in the Salesforce Recycle Bin prior to being permanently deleted.
- **Bulk Hard Delete:** Hard deletes a large number of records from a Salesforce connection and is used as a target in an operation. Hard deleted records automatically become eligible for deletion.



**NOTE:** Cloud Studio supports Salesforce API version 47 from the Salesforce Winter '20 release.

Together, a specific Salesforce connection and its activities are referred to as a Salesforce endpoint. Once a connection is configured, activities associated with the endpoint are available from the **Endpoints** filter:

#### On This Page

- [Overview](#)
  - [Standard Salesforce Activities](#)
  - [Bulk Salesforce Activities](#)
- [Creating a Salesforce Custom Field / External ID for Jitterbit](#)
- [Salesforce Functions and Jitterbit Variables](#)

#### Pages in This Topic

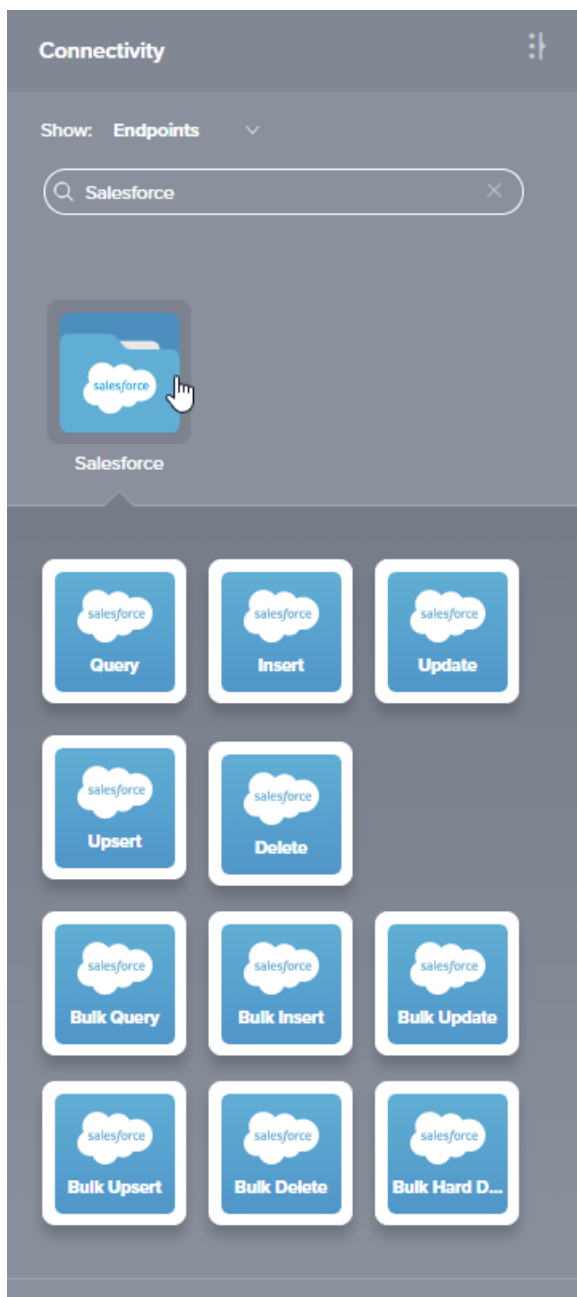
- [Salesforce Connection](#)
- [Salesforce Query Activity](#)
- [Salesforce Insert or Update Activity](#)
- [Salesforce Upsert Activity](#)
- [Salesforce Delete Activity](#)
- [Salesforce Bulk Query Activity](#)
- [Salesforce Bulk Insert or Bulk Update Activity](#)
- [Salesforce Bulk Upsert Activity](#)
- [Salesforce Bulk Delete or Bulk Hard Delete Activity](#)

#### Search in This Topic

#### Related Topics

- [Cloud Studio](#)
- [Connectors](#)
- [Functions](#)
- [Operations](#)
- [Scripts](#)
- [Transformations](#)
- [Variables](#)

Last updated: Dec 16, 2019

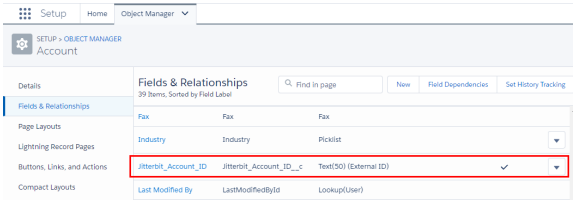


## Creating a Salesforce Custom Field / External ID for Jitterbit

It is recommended to use a custom field in Salesforce to associate records with an external ID for Jitterbit. These steps show how to create a custom field in Salesforce on the **Account** object to create an external ID called "Jitterbit\_Account\_ID":

1. Log in to your Salesforce instance with your credentials.
2. Navigate to **Setup > Platform Tools > Objects and Fields > Object Manager**.
3. From the **Object Manager** tab, select the standard **Account** object.
4. From the **Account** object view, go to the **Fields & Relationships** section, and click **New** in the top right.
  - a. In **Step 1. Choose the field type**, select **Text** as the data type and click **Next**.
  - b. In **Step 2. Enter the details**, configure your new custom field as follows. Then click **Next**.
    - **Field Label:** Jitterbit\_Account\_ID
    - **Length:** 50
    - **Field Name:** Jitterbit\_Account\_ID
    - **External ID:** Checked (very important)
  - c. In **Step 3. Establish field-level security**, accept the default settings by clicking **Next**.
  - d. In **Step 4. Add to page layouts**, accept the defaults by clicking **Save**.

5. You should be returned to the **Fields & Relationships** screen for the **Account** object. Verify that you see the new custom field with the same parameters as shown below.



For more information, refer to Salesforce's documentation for [Create Custom Fields](#).

## Salesforce Functions and Jitterbit Variables

A number of Salesforce functions can be used within [scripts](#) to provide login and session information and lookups for Salesforce instances, including these:

- [GetSalesforceTimestamp](#)
- [LoginToSalesforceAndGetTimeStam](#)
- [SalesforceLogin](#)
- [SetSalesforceSession](#)
- [SfCacheLookup](#)
- [SfLookup](#)
- [SfLookupAll](#)
- [SfLookupAllToFile](#)

In addition, certain Jitterbit variables are provided specifically for use with Salesforce endpoints, including these:

- `jitterbit.sfdc.auto_fieldsToNull`
- `jitterbit.sfdc.dbsource.sfheader`
- `jitterbit.sfdc.failure_record_count`
- `jitterbit.sfdc.query.record_count`
- `jitterbit.sfdc.success_record_count`

For details on using these functions and variables, see [Salesforce Functions](#) and [SFDC Jitterbit Variables](#), respectively.