



Connector SalesForce

Documentation

Summary

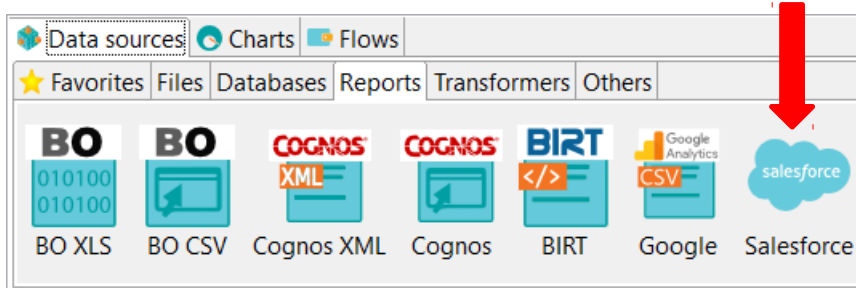
I.Prerequisites.....	3
II.Selecting a new datasource.....	4
III.Authentication.....	5
IV.Listing all Salesforce objects.....	6
V.SOQL assistant.....	7
VI.SOQL query textfield.....	8

I. PREREQUISITES

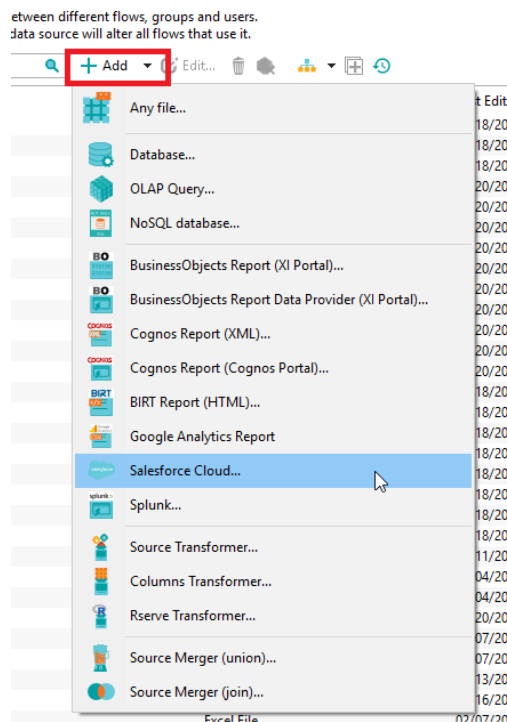
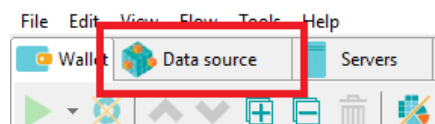
- A Salesforce server with identifiers (see next point)
- Follow configuration document “salesforce_config_en.pdf”

II. SELECTING A NEW DATASOURCE

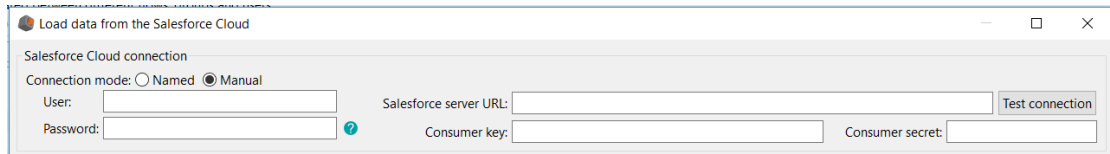
DigDash Enterprise allows you to retrieve information from your Salesforce account. Select the type of report you want to work with, in the toolbar at the bottom of the page.



OR click on **New model** in the datasource manager tab and choose **Salesforce Cloud...**



III. AUTHENTICATION



Load data from the Salesforce Cloud

Salesforce Cloud connection

Connection mode: Named Manual

User: Salesforce server URL: Test connection

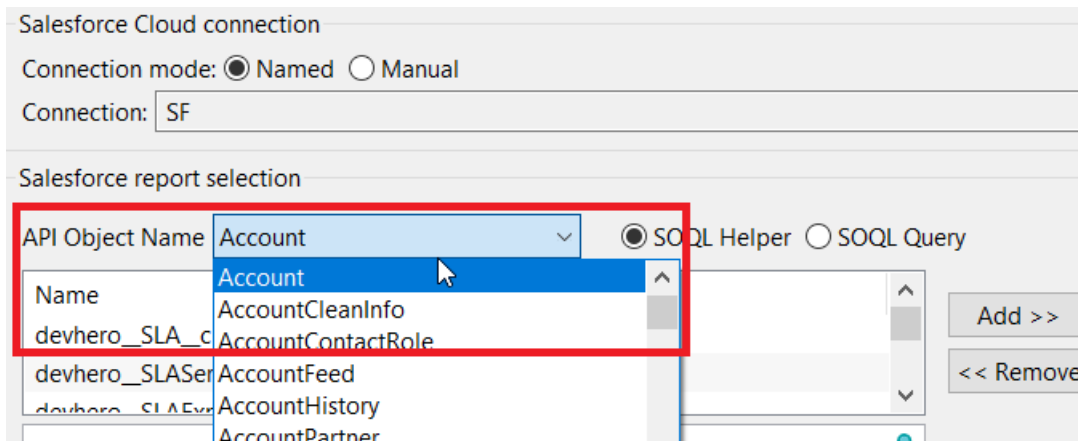
Password: Consumer key: Consumer secret:

Digdash requires the following information to connect to your Salesforce account:

- **User:** it is your Salesforce user name
- **Password:** it is your Salesforce password directly followed by your Security token
- **Salesforce server URL**
- **Consumer key**
- **Consumer secret**

IV. LISTING ALL SALESFORCE OBJECTS

A drop-down list in the User Interface allows you to have all available Salesforce objects of your server.

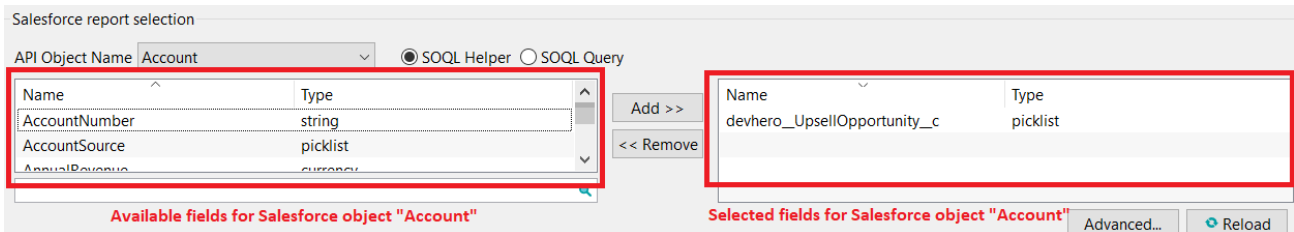


Screenshot: Drop-down list displaying all Salesforce objects

Selecting one Salesforce object will automatically update all the fields related to the selected object.

V. SOQL ASSISTANT

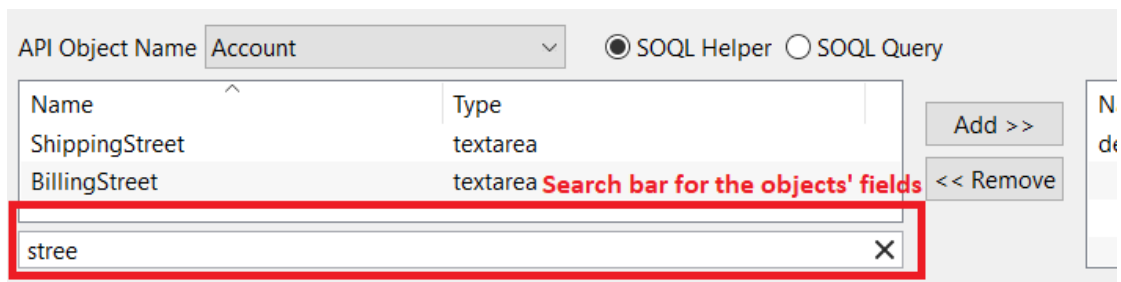
The SOQL assistant lists all available fields for the selected Salesforce object. It comes with their name and their type.



*Screenshot: User Interface with the available fields for the selected Salesforce object
On the left: The available fields On the right: The selected fields*

You can select one or multiple fields at the same time.

The User Interface also integrates a search bar to find your fields faster.



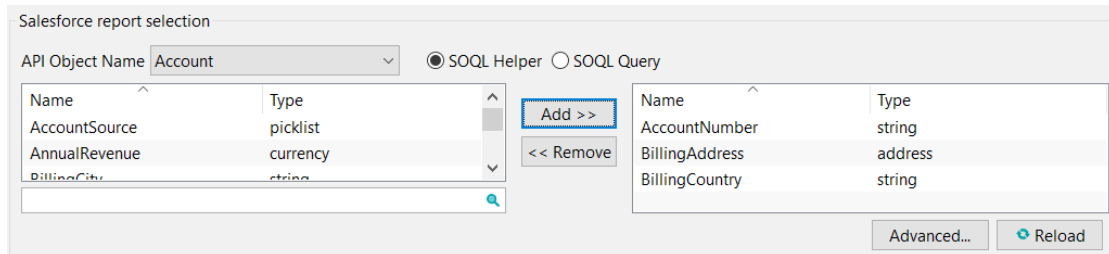
Screenshot: The User Interface integrates a search bar

Note: the search will apply on the names and types.

VI. SOQL QUERY TEXTFIELD

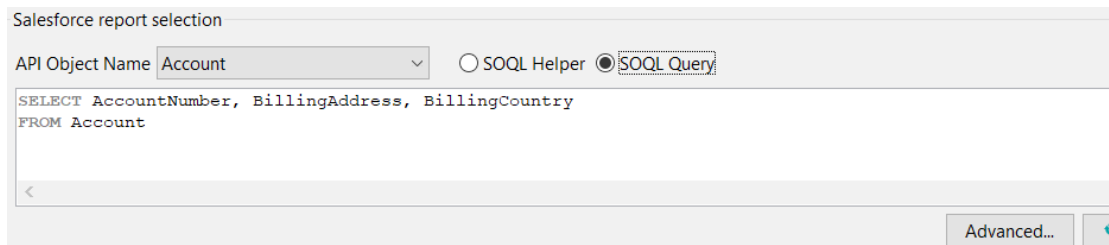
Entering manually your SOQL query is possible, but first, you need to pick your Salesforce object you want to work with in the Salesforce objects list.

Please note the automatic generation of your SOQL query using the SOQL assistant.



The screenshot shows the 'Salesforce report selection' interface. At the top, 'API Object Name' is set to 'Account'. Below this, there are two radio buttons: 'SOQL Helper' (selected) and 'SOQL Query'. The main area is divided into two columns. The left column lists fields from the 'Account' object: 'AccountSource' (picklist), 'AnnualRevenue' (currency), and 'BillingCity' (string). The right column lists the selected fields: 'AccountNumber' (string), 'BillingAddress' (address), and 'BillingCountry' (string). There are 'Add >>' and '<< Remove' buttons between the columns. At the bottom right, there are 'Advanced...' and 'Reload' buttons.

Screenshot: Selecting fields called « AccountNumber », « BillingCity » et « BillingCountry » of Salesforce object « Account »



The screenshot shows the 'Salesforce report selection' interface with the 'SOQL Query' radio button selected. The 'API Object Name' is still 'Account'. The main text area now contains the generated SOQL query: `SELECT AccountNumber, BillingAddress, BillingCountry FROM Account`. At the bottom right, there are 'Advanced...' and 'Reload' buttons.

Screenshot: Automatic update of SOQL query when using SOQL assistant