



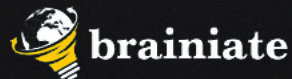
salesforce

MVP

# Simplify Your Salesforce Org in 6 Steps

Hosted by:

David Giller, Salesforce MVP



## Part 4 | Integrations, Apps & Syncs

Use this workbook to organize your notes while completing this unit

# Workbook for Part 4 – Integrations, Apps & Syncs

---

## What are integrations?

By definition - integrations are data connections between two or more systems.

Within a Salesforce context, one of these systems is Salesforce, and the other system can be any other web tool or database.

## What are some of the most common Salesforce integrations?

- › Web forms
  - Contact us forms
  - Download a white paper
  - Submit a customer support ticket
  - Sign up for our newsletter
- › Outlook/Google contact and calendar sync
- › Apps you've downloaded from the AppExchange to connect various other systems to Salesforce
- › Generic DIY Integration Tools:
  - Zapier
  - Workato
- › Other Integration Types
  - Financial systems
  - ERP
  - Custom APIs

## Step 1

# Find Your Salesforce Integrations

- › Setup > Installed Packages
- › Ask your in-house Administrators, Developers and CRM leaders
- › Look for users labeled as integration users
- › Identify mystery records and look at “Last modified by” and “Created by” details

## Step 2

# Ask the Difficult Questions

- › Why do we have this integration?
- › How is it currently configured?
  - Every time a new record gets created in the external system:
    - Does it just automatically create a new record in Salesforce, without checking if that record already exists?
    - Does it look to find a matching record (and based on what criteria are we defining a match), and is automatically updating that existing record?
    - What happens if the information submitted via the external system is less accurate or different than the information we already have for that person in Salesforce?
- › Is the existing configuration precisely what we want?
- › What modifications are needed?
  - Should all records get blindly created.
  - Should only some records get created?
  - Should the system be looking for existing Salesforce records that might be related or duplicated?
  - When a matching related record (same company but new person) - what should the integration do? Block the new record? Create the new record? Alert someone?

## Step 3

# Modify as Needed

- › Implement the modifications you identified.
- › Test the configuration modifications.
- › Deploy the modified configuration.

Links to additional resources to better understand some of the concepts covered in this unit:

- › [Integrate Outlook and Gmail with Salesforce](#)
- › [How Your Contacts Sync with Salesforce for Outlook](#)
- › [How Events Sync with Salesforce for Outlook](#)
- › [How Tasks Sync with Salesforce for Outlook](#)
- › [Using Event Monitoring](#)

## Understand Platform Integration Users:

- › What is the Platform Integration User?
- › Create a Secure Salesforce API User

Fill in your notes from Part 4 here:

# Worksheet to help you review your current integrations:

General

Integration Name:

ex. Outlook Integration

What is the business purpose/goal for this integration?

Which business unit, team or executive champion requires this integration?

ex. Sales, Marketing

What problem are we trying to solve with this integration?

Who is the key decision maker with regard to this integration?

## Review of Current Configuration

Who currently has access to this integration?

---

---

---

Under what conditions are records PUSHED INTO Salesforce from the external source?

---

---

---

Under what conditions are records PULLED FROM Salesforce into the external source?

---

---

---

What happens when a new record is **created in the external system and pushed into Salesforce?** (Who can see that record? Who has edit access to it? Which Account does the Contact get associated with? What happens if a duplicate of that individual already exists in Salesforce?)

---

---

---

---

---

What happens when an existing Salesforce record gets **updated via the the external system and pushed into Salesforce?** (Who can see that record? Who has edit access to it? Which Account does the Contact get associated with? What happens if a duplicate of that individual already exists in Salesforce?)

---

---

---

---

---

What happens when an existing Salesforce record gets **deleted in the external system?** (Does it also get deleted from Salesforce? Should it?)

---

---

---

---

---

---

What happens when **a new record gets created in Salesforce?** Does it automatically get pushed to the external system? Should it?

---

---

---

---

---

---

What happens when an **existing record gets edited in Salesforce?** Does the update automatically get pushed to the external system? Should it?

---

---

---

---

---

---

What happens when an **existing record gets deleted in Salesforce?** Does that same record automatically get deleted from the external system? Should it?

---

---

---

---

---

---

## Necessary Changes To Existing Configuration Based On Items Identified Above

Who should have access to this integration?

---

---

---

Under what conditions should records get PUSHED INTO Salesforce from the external source?

---

---

---

Under what conditions should records get PULLED FROM Salesforce into the external source?

---

---

---

What should happen when a new record is **created in the external system and pushed into Salesforce?** (Who should be able to see that record? Who should have edit access to it? Which Account should the Contact get associated with? What should happen if a duplicate of that individual already exists in Salesforce?)

---

---

---

---

---

What should happen when an existing Salesforce record gets **updated via the the external system and pushed into Salesforce?** (Who should be able to see that record? Who should have edit access to it? Which Account should the Contact get associated with? What should happen if a duplicate of that individual already exists in Salesforce?)

---

---

---

---

---



What should happen when an existing Salesforce record gets **deleted in the external system?** (Should it also get deleted from Salesforce?)

---

---

---

---

---

---

What should happen when a **new record gets created in Salesforce?** Should it automatically get pushed to the external system?

---

---

---

---

---

---

What should happen when an **existing record gets edited in Salesforce?** Should the update automatically get pushed to the external system?

---

---

---

---

---

---

What should happen when an **existing record gets deleted in Salesforce?** Should that same record automatically get deleted from the external system?

---

---

---

---

---

---



# Release Dynamix for Salesforce.com

You Deserve Salesforce Release Certainty

Resolve potential change delivery risks and ensure quality ahead of time with:

- › A detailed summary of entities impacted by daily modifications, scheduled releases or major projects
- › A list of development and customization tasks, derived from project scope and assigned to team members
- › Test plan scoping according to impacted entry points
- › Continuous risk assessment and multidimensional views of potential risks

[Learn more](#)

[www.panaya.com/product/rdx-for-salesforce](http://www.panaya.com/product/rdx-for-salesforce)

Panaya Release Dynamix  
The Enterprise Agile Delivery Solution

