Configure the Connection in Script Mode for Salesforce

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Configure the Synchronization (Optional)

Set up Sync Rules

Once you test the Connection, you can choose to configure the synchronization behavior with the help of Sync Rules (Groovy-based scripts) and

1. Edit your Connection.

There are multiple ways to edit your connection:

- Navigate to **Connections →** 📝 **Edit connection**.

- If you just created a connection, select **Configure sync**.
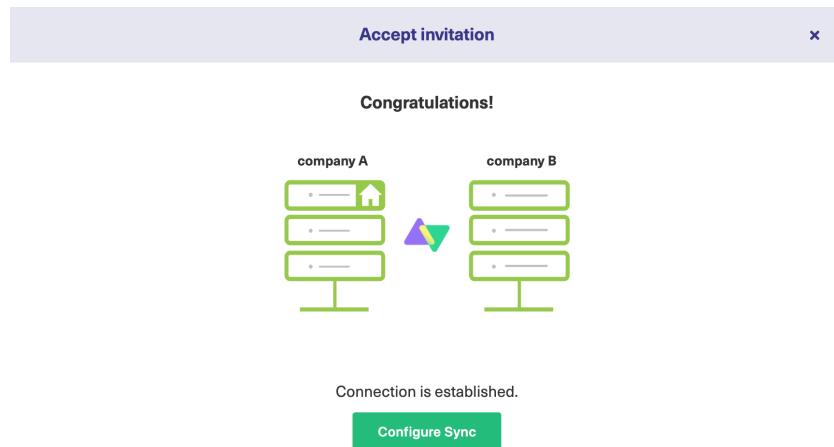
2. Set up **Outgoing sync** and **Incoming sync** in the **Rules** tab.

> **Note**: Outgoing sync and Incoming sync scripts:
>
> - are generated by default once the connection has been set up. You can, however, add, edit or remove these scripts to configure your sync according to your requirements.
> - are platform specific.
> - are present at both the source and the destination instance to give independent control

> over what data needs to be sent or received.

In the **Outgoing sync,** you can enter scripts to specify what data you send.

In the **Incoming sync,** you can enter scripts to specify what data you receive.
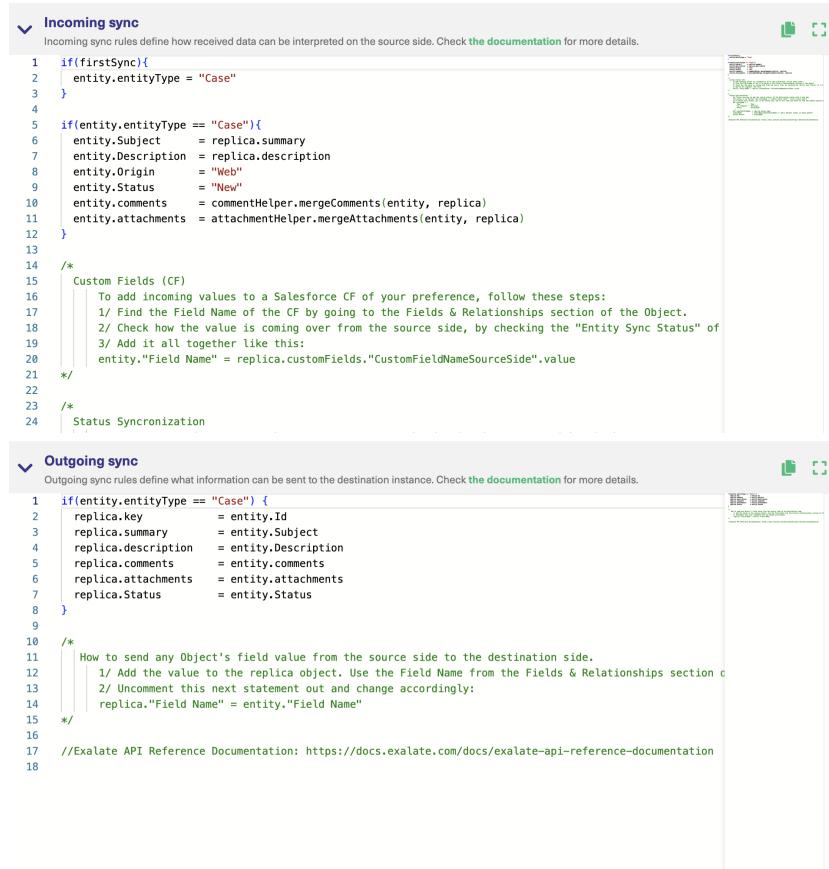
```
Incoming sync
Incoming sync rules define how received data can be interpreted on the source side. Check the documentation for more details.
1   if(firstSync){
2     entity.entityType = "Case"
3   }
4
5   if(entity.entityType == "Case"){
6     entity.Subject      = replica.summary
7     entity.Description  = replica.description
8     entity.Origin       = "Web"
9     entity.Status       = "New"
10    entity.comments     = commentHelper.mergeComments(entity, replica)
11    entity.attachments  = attachmentHelper.mergeAttachments(entity, replica)
12  }
13
14  /*
15    Custom Fields (CF)
16      To add incoming values to a Salesforce CF of your preference, follow these steps:
17        1/ Find the Field Name of the CF by going to the Fields & Relationships section of the Object.
18        2/ Check how the value is coming over from the source side, by checking the "Entity Sync Status" of
19        3/ Add it all together like this:
20        entity."Field Name" = replica.customFields."CustomFieldNameSourceSide".value
21  */
22
23  /*
24    Status Syncronization
```

```
Outgoing sync
Outgoing sync rules define what information can be sent to the destination instance. Check the documentation for more details.
1   if(entity.entityType == "Case") {
2     replica.key          = entity.Id
3     replica.summary      = entity.Subject
4     replica.description  = entity.Description
5     replica.comments     = entity.comments
6     replica.attachments  = entity.attachments
7     replica.Status       = entity.Status
8   }
9
10  /*
11    How to send any Object's field value from the source side to the destination side.
12      1/ Add the value to the replica object. Use the Field Name from the Fields & Relationships section o
13      2/ Uncomment this next statement out and change accordingly:
14      replica."Field Name" = entity."Field Name"
15  */
16
17  //Exalate API Reference Documentation: https://docs.exalate.com/docs/exalate-api-reference-documentation
18
```

Automate your Synchronization through Triggers

Specify **Triggers** if necessary.

With triggers, you can set up automatic sync of entities that fit a specific search query.

You can create **Triggers** by editing the connection or by configuring the sync as shown in the previous step. You can also create them on the Exalate Admin Console under the **Triggers** tab.

> **Note**: For more information, check out How to create a trigger.

Publish the changes made to the Connection

Click **Publish** to save a connection.

> **Note**: You can also use these hotkeys to publish a connection:

- Ctrl+S on Windows or Linux
- Cmd+S on Mac

Note: Changes in existing connections are not applied before you update the entity. Please make sure to update the entity, if you want to apply changes.

What's Next?

Well done! You have successfully completed your "Getting Started" journey. But there's more.

Options you can consider next:

- Sit back and relax! Sync happens based on the Sync Rules and Triggers you have set up in this step.
- You can also read the Configuration Guides to see more synchronization examples.
- You can also read the Exalate API Reference Documentation to learn more about how to work with incoming and outgoing sync scripts (aka Sync Rules).

Product

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