



# SALESFORCE.COM CONNECTOR GUIDE

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Version 1.0

April 11, 2007

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## 1. Introduction

Aptar Data Integration is an open source data quality and data integration software that allows Salesforce.com users and developers to quickly and affordably extract, transform and load customer data to/from salesforce.com from/to a variety of data sources and formats. Capabilities enable users to pull information from your other applications and populate Salesforce.com. The tool also allows you to integrate Salesforce.com with your other existing on-premise and on-demand applications. It easily provides integrating your Salesforce.com data, such as accounts, leads, and opportunities, with your business intelligence, data warehouse, accounting, ERP, SCM, and other business applications.

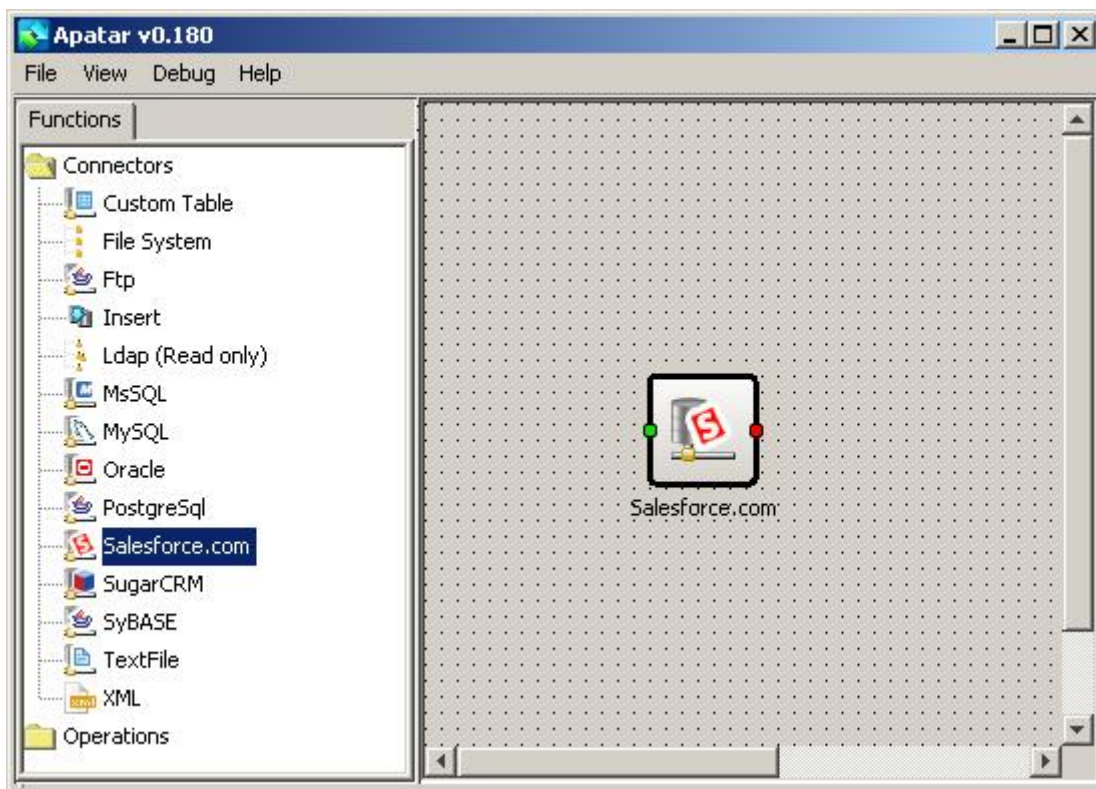
## 2. Configure Salesforce.com Connector

To configure Salesforce.com connector, please perform the following steps.

### 2.1. Step #1: Drag-and-drop Salesforce.com Icon

Drag-and-drop Salesforce.com icon from Connectors section into Aptar's Visual Job Designer

**Figure 2.1.1 Drag-and-drop**



## 2.2. Step #2: Double-click on the Icon

## 2.3. Step #3: Enter Salesforce.com Details

Enter your Salesforce.com password and username.

Figure 2.3.1 Salesforce.com Details

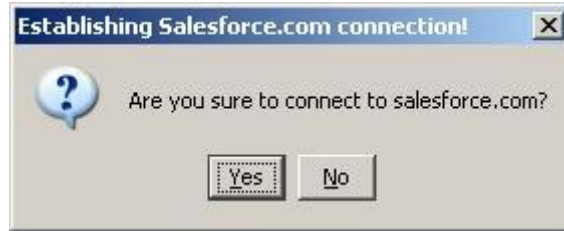
The screenshot shows a 'Salesforce.com Property' dialog box. At the top, there is a title bar with the text 'Salesforce.com Property' and a close button. Below the title bar is a dropdown menu with 'default' selected. Underneath the dropdown are three icons: a font size icon (A 2), a list icon, and a document icon. Below these icons is a table with two columns: 'password' and 'userName'. The 'password' cell contains 'password' and the 'userName' cell contains 'SVR'. Below the table is a preview area showing 'password' and 'password'. At the bottom of the dialog are buttons for 'New', 'Delete', 'Back', 'Next', and 'Cancel'.

## 2.4. Step #4: Press "Next" button

## 2.5. Step #5: Click "Yes"

Click "Yes" to establish connection to Salesforce.com.

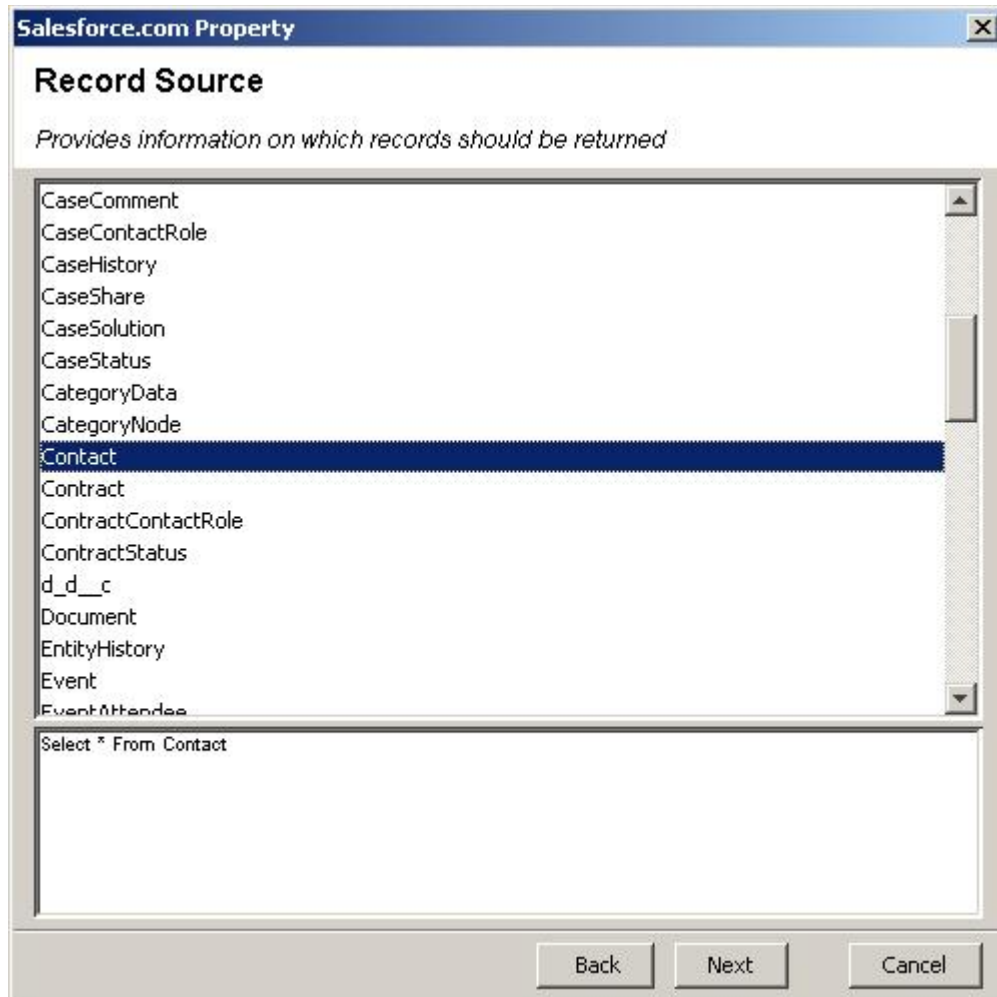
**Figure 2.5.1 Confirmation Window**



## 2.6. Step #6: Choose the source table

Choose the table with source data.

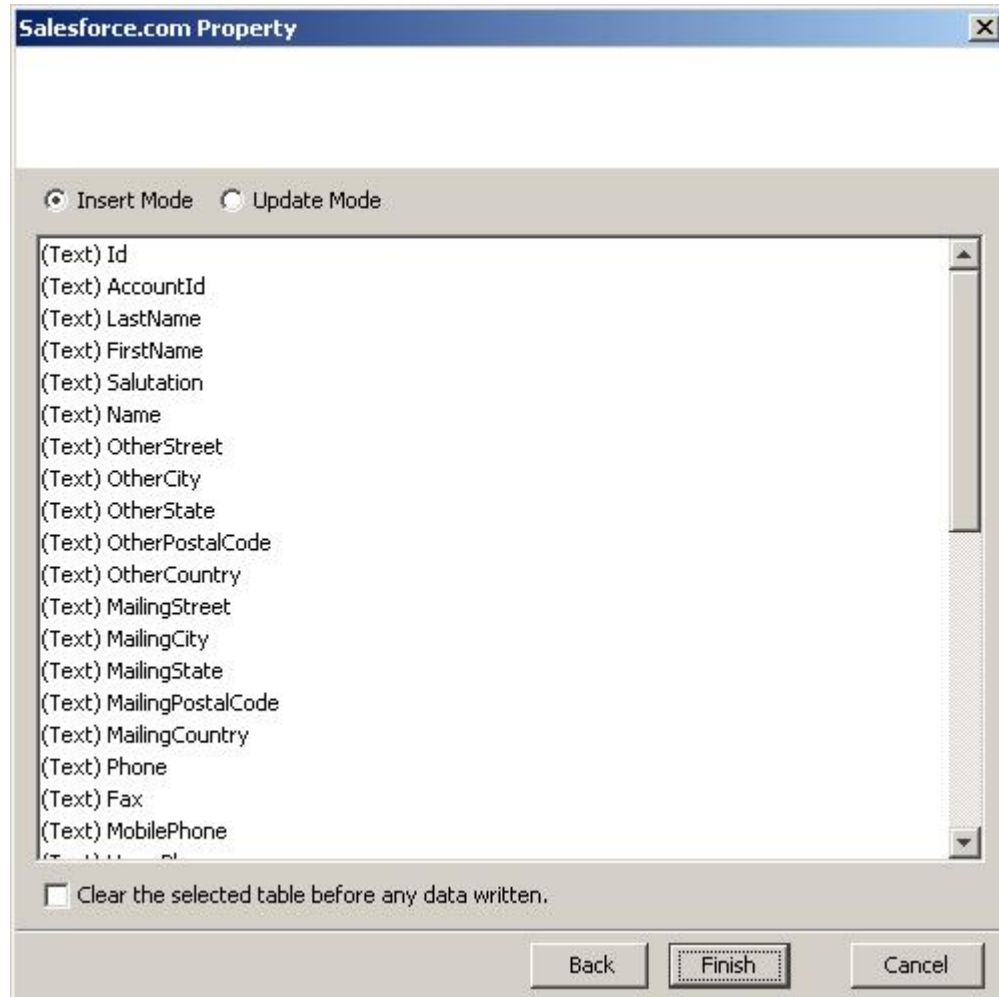
**Figure 2.6.1 The Source Table**



## 2.7. Step #7: Press "Next" button

## 2.8. Step #8: Press "Finish"

Figure 2.8.1 Finish

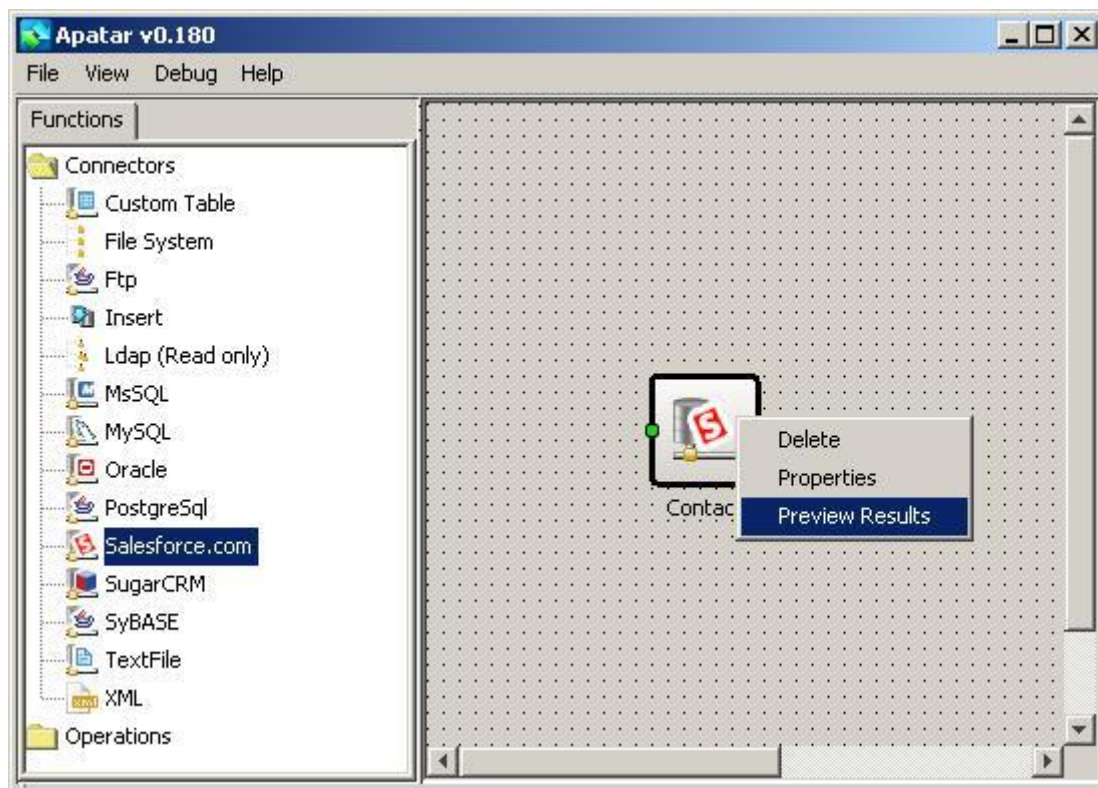


SalesForce.com connector is now configured.

### 3. Preview Results

If necessary, you can preview the entries of the selected Salesforce.com table. To do so, right-click on the Salesforce.com icon and choose "Preview Results".

**Figure 3.1 Preview Results Execution**



A window containing Salesforce.com data will pop up.

**Figure 3.2 Preview Window**

Email	Title	Department	AssistantName	LeadSource
rose@edge.c...	SVP, Procurement	Procurement		Web
sean@edge....	CFO	Finance		Web
dcruz@uog.c...	VP, Production	Production		Purchased Lis
efrank@gene...	VP, Technology	Technology		Partner Ref..
b.levy@expr...	SVP, Operations	Operations	Ron Sage	Phone Inquir
j.davis@expr...	Director, Warehouse Mgmt	Warehouse Mgmt		Phone Inquir
rogers@burli...	VP, Facilities			Web
boyle@uog.c...	SVP, Technology	Technology		Purchased Lis
ajames@uog...	VP, Finance	Finance		Purchased Lis
tripley@uog...	Regional General Manager	Executive Team		Purchased Lis
spavlova@uo...	SVP, Production	Production	Audrey Haynes	Purchased Lis
agreen@uog...	CFO	Finance	Chris Nobel	Purchased Lis
jane_gray@u...	Dean of Administration	Administration		Phone Inquir
barr_tim@gr...	SVP, Administration and Finance	Finance		Partner Ref..
bond_john@...	VP, Facilities	Facilities		Partner Ref..

Close the window. Also, close additional progress window.

**Figure 3.3 Progress Window**



Now you can integrate Salesforce.com with other data sources.