

# Kelverion

## IM for Salesforce

### Salesforce Smart Discovery Integration for Azure Automation

Integrating with Salesforce directly via PowerShell requires you to know upfront exactly what Record Types, Field names and Field values you want to interact with before you can start configuring your Salesforce API calls.

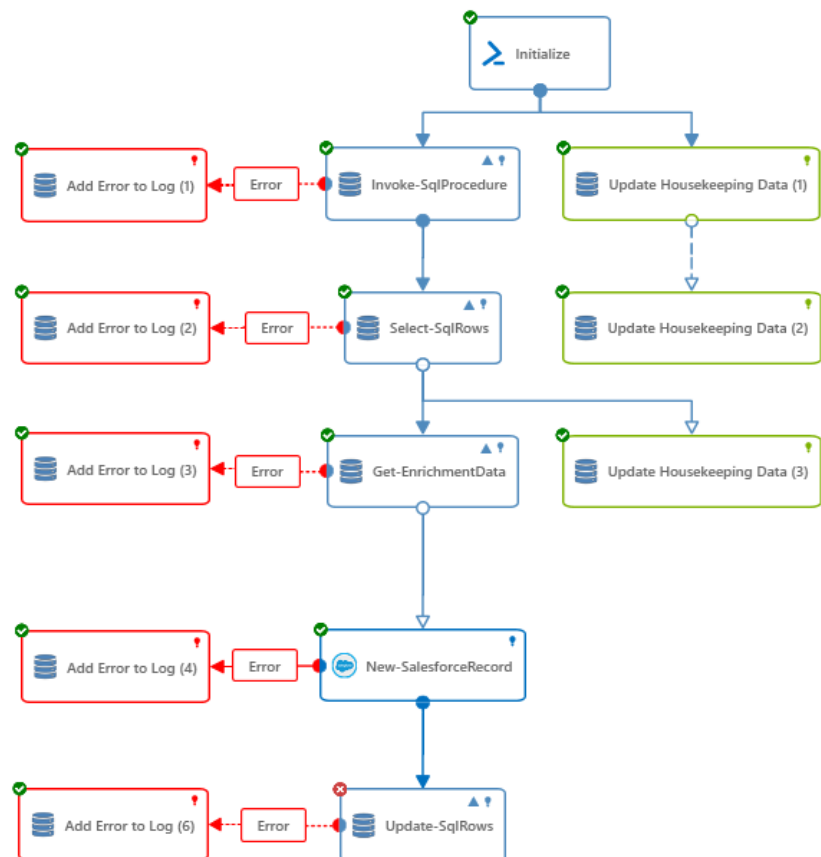
The Integration Module for Salesforce provides a set of ready built activities for integrating with Salesforce from within Azure Automation and the Kelverion Runbook Studio. These are forms driven activities which allow you to define interactions with Salesforce without having to write any PowerShell code.

When the Integration Module is used from within the Runbook Studio you also get the benefit of the Smart Discovery. You create a Smart Connection to a Salesforce and the IM will query the Instance to find out all the Record types in that Instance and presents you a list of the available Record types. You then select a Record type and the IM will automatically configure its self to show all the Fields in the Record type as a Parameter for the command and the preconfigured value for the Fields where appropriate.

This means you don't need to be an expert on the Salesforce configuration before you can interact with it because the IM will tell you how the system is configured and then you just configure the activity to achieve the interaction you require.

For example if you want to get a Record from Salesforce you often what to limit the Record type selected to those where the contents of a fields equals a given value. In the IM activity for Get-SalesforceRecord there is a filter option and the IM immediately presents you with a list of the fields in the Record type you selected to set your filter criteria against.

When done from within the Runbook Studio this is all achieved without writing any PowerShell script.



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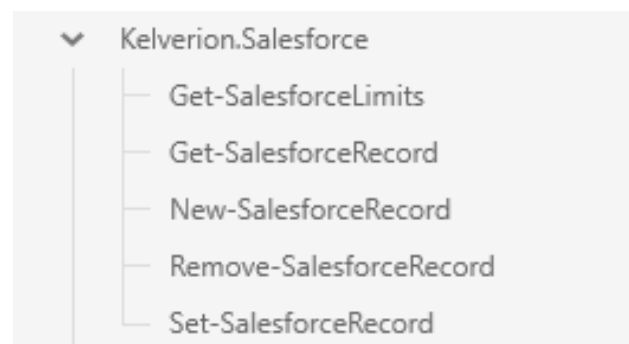
The Key capabilities added to your Runbook Studio solution include:

- Automatically builds and executes the necessary Salesforce interactions without the user having to write or understand PowerShell
- Simplifies Runbook design by automatically mapping Record fields to input properties, filters and published data items
- Prevents errors by controlling access to read-only fields, enforcing mandatory inputs and by providing value browsers for common data types.
- Smart Connections establish a reusable link between the Runbook Studio and a specific Salesforce instance. You can create as many Smart Connections as you require, specifying links to multiple Salesforce instances. You can also create multiple Smart Connections to the same Salesforce instance to allow for differences in security privileges for different user accounts.

## IM FOR SALESFORCE ACTIVITIES

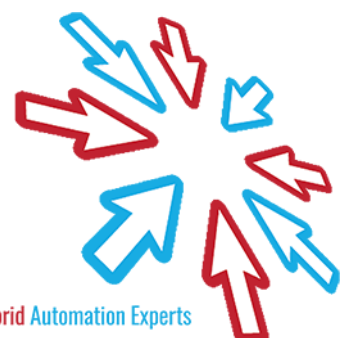
Get-SalesforceLimits	Retrieves Salesforce API limits
Get-SalesforceRecord	Retrieves and filters Salesforce records
New-SalesforceRecord	Creates a new record
Remove-SalesforceRecord	Remove an existing record
Set-SalesforceRecord	Update an existing record

For more information on the Kelverion Integration Module for Salesforce please contact [info@kelverion.com](mailto:info@kelverion.com).



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