

Using Salesforce

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This section describes how you interact through Trifacta® Self-Managed Enterprise Edition with your Salesforce data warehouse.

- Salesforce is a SaaS-based customer relationship management platform for managing the customer lifecycle. For more information, see www.salesforce.com.

Limitations

- This connection is read-only.
- You cannot ingest Salesforce tables that require mandatory filters.

Uses of Salesforce

Trifacta Self-Managed Enterprise Edition can use Salesforce for the following tasks:

1. Create datasets by reading from Salesforce tables.

Before You Begin Using Salesforce

Read Access:

- Your Salesforce administrator must configure read permissions.
- You must acquire a Salesforce security token for use with the Salesforce connection.
- See *Create Salesforce Connections*.

Secure Access

SSL is the default connection method.

Storing Data in Salesforce

Your Salesforce administrator should provide database access for storing datasets. Users should know where shared data is located and where personal data can be saved without interfering with or confusing other users.

NOTE: Trifacta Self-Managed Enterprise Edition does not modify source data in Salesforce. Datasets sourced from Salesforce are read without modification from their source locations.

Reading from Salesforce

When Trifacta Self-Managed Enterprise Edition connects to your Salesforce instance, the application can read from all Salesforce objects that are accessible through the Salesforce account in use, including:

- Salesforce objects and fields are mapped to tables and columns
- Standard and custom objects

NOTE: The names of custom objects are appended with the value `_c`.

- Audit columns
- System fields

NOTE: Unquoted identifiers are converted to uppercase during import.

You can create a Trifacta dataset from a table stored in Salesforce.

For more information, see *Salesforce Browser*.

Writing to Salesforce

Not supported.