

Migrating Salesforce Integrations

Complete the following steps to migrate from the legacy Salesforce Legacy data connector to the new Salesforce connector. The legacy data connector uses only REST API to import data. The new Salesforce data connector enables you to use Bulk import and REST API.

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Characteristics of Ingested Data

When migrating data from one place or version, it is worth being aware of how that data might be transformed. The following sections outline some important characteristics to be aware of.

Campaign

You can ingest more than 50 assets.

Column	Old Data Type	New Data Type
createdDate	string	timestamp
modifiedDate	string	timestamp

Campaign Assets

Column	Old Data Type	New Data Type
createdDate	string	ISO 8601 string

Other date time values are converted to UTC.

Contact

Ingestion is limited to:

- root and system defined data
- **one-to-one** and **one-to-many** relationships
 - one-to-one relationships are saved as a single JSON
 - one-to-many relationships are saved as a JSON array

Other attributes must be ingested using the Treasure Data ingestion feature.

Contact attributes are collected for root and system, you are not able to limit ingested attributes.

The number of records per page used the default value of 2000.

Data Extension

Ingestion is limited to:

- one data extension at a time

Old Column Name	New Column Name
-----------------	-----------------

<data-extension>-<column-name>	<column-name>
--------------------------------	---------------

Column	Old Data Type	New Data Type	Format of Data
<any-datetime>	string	timestamp	UTC

TD generated properties have an underscore prefix of “_” so that they can be easily identified.

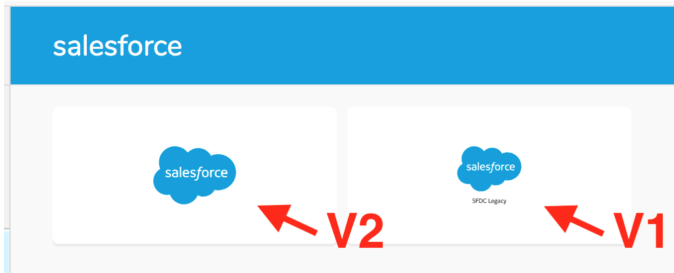
The number of records per page used the default value of 2500.

Email Event

Ingestion excludes subscribers associated with an event.

Create a New Salesforce V2 Connector

Go to Treasure Data Catalog, then search and select Salesforce v2.



In the dialog box, enter the values that you enter in your legacy Salesforce connector.

Salesforce v2 connector requires that you remove unnecessary letters from Login URL parameter. For example, instead of <https://login.salesforce.com/?locale=jp>, use <https://login.salesforce.com/>.

Enter your username (your email) and password, as well as your Client ID, Client Secret and Security Token.

New Authentication



Salesforce V2

1 Credentials > 2 Details

Login URL

Authentication method

Credentials ▼

Authentication by "Session ID" currently works only for export

Username

Username for Force.com

Password

Password for Force.com

Client ID

Client ID for your application. Required for import from Salesforce

Client secret

Client secret for your application. Required for import from Salesforce

Security token

Can be omitted if appended to the password

Initial retry delay

The first time we fail to connect, wait this many seconds before retrying (with exponential backoff)

Retry limit

[Learn more](#)

[CONTINUE](#)

Save Settings and Run the Legacy Salesforce Data Connector One Last Time

You can save your legacy setting from TD Console or from the CLI.

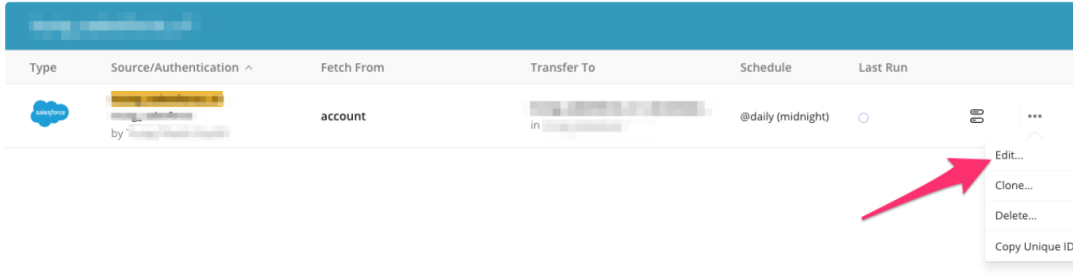
- [Campaign](#)
- [Contact](#)
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- Using TD Console
- Using CLI and Workflow
- Using TD Console
- Using CLI
- Using Workflow

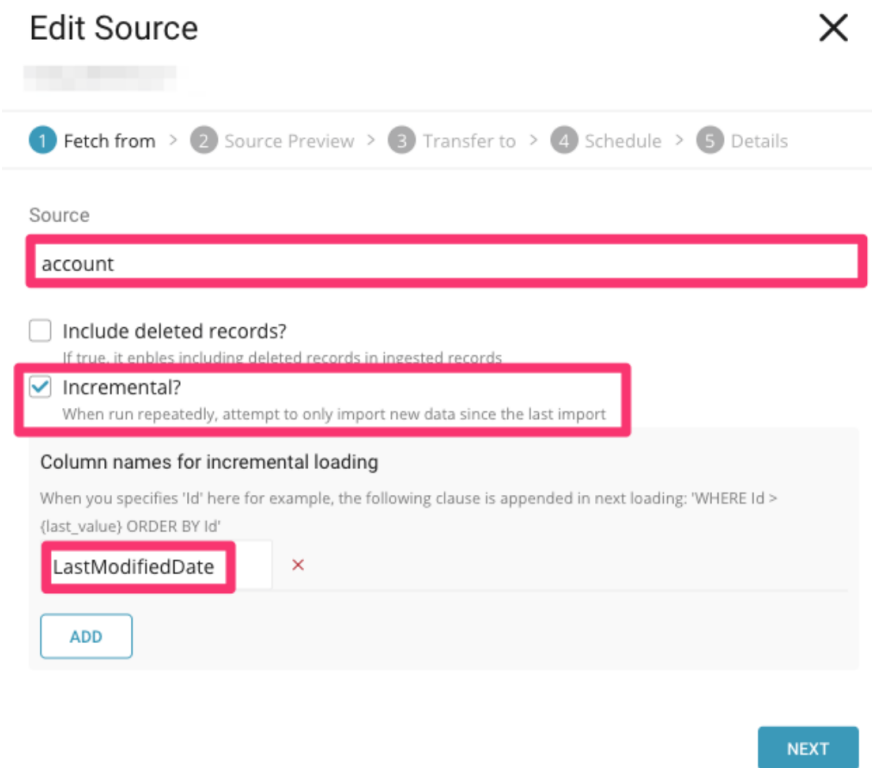
Using TD Console

Save the Settings of Your Scheduled Legacy Salesforce Connector and Run a Final Import

Go to Integration Hub > Sources. Search for your scheduled Salesforce source, select the source and select **Edit**.



In the dialog box, copy the settings to use later:



Also copy any advanced settings:

Edit Source



Fetch from > 2 Source Preview > 3 Transfer to > 4 Schedule > 5 Details

SOQL query

```
SELECT Id, LastModifiedDate FROM account
```

WHERE condition

Columns

ADD

Last record

It is latest record on previous loading.

ADD

CANCEL

SAVE

Next, you configure one final run with the legacy data connector to create a temporary table against which you can run a config-diff. You use the diff to identify and confirm the latest data imported into Treasure Data.

Edit Source



Fetch from > Source Preview > 3 Transfer to > 4 Schedule > 5 Details

Database

Create new database?

Table

salesforce_temp_table

Create new table?

Append: Add records into existing table.

Replace: Clear table before adding records.

Timestamp-based Partition Key

time

Select a column. Columns for user-defined partitions are not supported. See [data partitioning](#).

Data Storage Timezone

UTC (default)

Timezone the data is stored in; data will also be displayed in this timezone.

BACK

NEXT

Before running the final import with the legacy connector, make sure that you change the schedule to one run only:

Edit Source



Fetch from > Source Preview > Transfer to > **4** Schedule > 5 Details

When

- Once now
- Repeat...

Scheduling Timezone

Timezone the schedule operates on.

BACK

NEXT

After the job is complete, look at and copy **config_diff** in job query information somewhere to use later.

```
"config_diff": {  
  "in": {  
    "last_record": [  
      {  
        "key": "LastModifiedDate",  
        "value": "2018-05-28T08:42:57.000+0000"  
      }  
    ]  
  },  
}
```

Create New Salesforce V2 Source

Go to Integration Hub > Authentication. Search for new Salesforce v2 connection that you created:

salesforce_v2			
Type	Authentication ^	Sources	
	 by	0	NEW SOURCE

Select the New Source. Fill in all basic settings and advanced settings that you copied in the preceding steps. Then, if you want the new source to continue ingesting from the point where the legacy connector left, fill in the Last Record field with the config_diff information that you copied in the previous job.

New Source



Fetch from > 2 Source Preview > 3 Transfer to > 4 Schedule > 5 Details

SOQL query

WHERE condition

Columns

ADD

Last record

It is latest record on previous loading.

Entry ×

Column	Value
LastModifiedDate	2018-05-28T08:42:57.000+0000

Column name should be CamelCase

ADD

CANCEL

SAVE

After completing the settings, choose the database and table job to populate data into, then schedule the job and provide a name for your new data connector. Select **Save** and then run the new data connector.

Using CLI and Workflow

Update in: type in your yml configuration from sfdc to sfdc_v2.

For example, your existing workflow configuration might look something like this:

```
in:
  type: sfdc
  username: ${secret:sfdc.username}
  password: ${secret:sfdc.password}
  client_id: ${secret:sfdc.client_id}
  client_secret: ${secret:sfdc.client_secret}
  security_token: ${secret:sfdc.security_token}
  login_url: ${secret:sfdc.login_url}
  target: Lead
out: {}
exec: {}
filters: []
```

Your new workflow configuration would look like this:

```
in:
  type: sfdc_v2
  username: ${secret:sfdc.username}
  password: ${secret:sfdc.password}
  client_id: ${secret:sfdc.client_id}
  client_secret: ${secret:sfdc.client_secret}
  security_token: ${secret:sfdc.security_token}
  login_url: ${secret:sfdc.login_url}
  target: Lead
out: {}
exec: {}
filters: []
```

For Result Output

The SFDC connection is shared between data connector and result output, although there is nothing change in result output, if you use either of those, you should upgrade it too.

Using TD Console

Save the Settings of Legacy Export Connector

Go to TD Console. Go to Query Editor. Open the Query that uses SFDC for its connection.

sfdc_v2					
Name ^	Destination	Schedule	Updated	Last Run	
table_sfdc_v2_query			3:30 pm	—	...

Select the SFDC connector, then copy and save the details of the existing connection to use later.

Export Results



Integration: [redacted]

Object

table_sfdc_v2__c

Mode

append

Concurrency mode

parallel

This should usually be parallel.

Retry limit

5

Batch size

10000



DELETE

DONE

Select **DELETE** to remove the Legacy one.

Modify the Existing Query (to Replace the Legacy Connection)

In the query, select Output Results. Next, you are going to set up the SFDC v2 connector by finding and select the SFDC v2 export connector that you created.

Choose Integration ✕

salesforce_v2

salesforce_v2 salesforce

or [NEW INTEGRATION](#)

In Configuration pane, specify the fields you saved in the previous step, then select **Done**.

Check Output results to... to verify that you are using the created output connection. Select **Save**.

It is strongly recommended to create a test target and use it for the first data export to verify that exported data looks as expected and the new export does not corrupt existing data. In your test case, choose an alternate "Object" for your test target.

Using CLI

Result type protocol needs to update from sfdc to sfdc_v2 for instance from:

```
sfdc://<username>:<password><security_token>@<hostname>/<object_name>
```

to:

```
sfdc_v2://<username>:<password><security_token>@<hostname>/<object_name>
```

Using Workflow

If you have a workflow that used the SFDC, you can keep your result settings the same, but need to update **result_connection** to the new connection_name.

An example of old workflow result output settings is as follows:

```
+td-result-output-sfdc:  
  td>: queries/sample.sql  
  database: sample_datasets  
  result_connection: your_old_connection_name  
  result_settings:  
    object: object_name  
    mode: append  
    concurrency_mode: parallel  
    retry: 2  
    split_records: 10000
```

An example of new workflow result output settings is as follows:

```
+td-result-output-sfdc:  
  td>: queries/sample.sql  
  database: sample_datasets  
  result_connection: your_new_connection_name  
  result_settings:  
    object: object_name  
    mode: append  
    concurrency_mode: parallel  
    retry: 2  
    split_records: 10000
```