



PRODUCT DOCUMENTATION

"Seamless & Native Salesforce to Salesforce Data Migration & Integration"

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Product Documentation

Installation & Setup Guide

User Documentation

**available on
AppExchange**

salesforce

*"Seamless & Native Salesforce to Salesforce
Data Migration & Integration"*



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Installation & Setup Guide

❖ **Install Packages:**

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000MSq5FEAT>

❖ **Post Installation Guideline**

• **Basic Settings (Optional):**

1. Data Sync Transactional Objects - This holds all the transactional objects name
2. System Properties - This holds various key/value settings

❖ **App Setup Steps**

- Create Named Credential - (Click here for Details)
- Create Record in Org master Using Named Credential - (Click here for Details)
- Create Template - (Click here for Details)
- Add Template Lines & configure them to select related objects - (Click here for Details)
- Provide data filter if required - (Click here for Details)
- Go to Preview tab & Preview it - (Click here for Details)
- Go to Execute tab - (Click here for Details)
- Optionally check metadata mismatch - (Click here for Details)
- Optionally Enable/disable metadata in destination org - (Click here for Details)
- Click on the sync now button - (Click here for Details)
- Verify data by clicking on the detailed report or via login to the destination org - (Click here for Details)

❖ **Advance Settings**

- Object Settings - holds object-specific settings like batch size, Virtual Key, Include/Exclude relationships (Click here for Details)
- Field Mappings - holds field mapping of source vs. Destination object (Click here for Details)
- Conceal Settings - holds data masking settings in JSON format (Click here for Details)

(Please note - App Setting UI would be available in Next Product Release)



Key Terminology

- **What is a Source Org:**

This is the org where your source data resides, the user will perform all action from source org, We can give license to the System Admin, Sandbox manager, Project lead developer, Project Lead QA.

- **What is a Destination/Target Org:**

Org where you want to migrate your source org's data, for example, it could be your developer sandbox, it could be UAT sandbox or it could be Production.

- **What is a Connected App:**

A "Connected App" is an application that can connect to salesforce.com over Identity and Data APIs. A connected app integrates an application with Salesforce using APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide single sign-on, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow Salesforce admins to set various security policies and have explicit control over who can use the corresponding apps.

- **What is Named Credentials:**

A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. To simplify the setup of authenticated callouts, specify a named credential as the callout endpoint. If you instead specify a URL as the callout endpoint, you must register that URL in your org's remote site settings and handle the authentication yourself. For example, for an Apex callout, your code would need to handle authentication, which can be less secure and especially complicated for OAuth implementations. Check User Guide for setup.

- **What is a Template:**

Data Sync template is a way to pick the Objects/records and hold all the objects with different settings. You will define what data you want to copy from the source org to the destination org. For example - Users want to create a new sandbox for a new CPQ Development project, so you need to select - Account, Product and Rules. Users do not need to select their child objects like contact, asset, product price, product feature, rule conditions, etc.



Org Master

Summary:

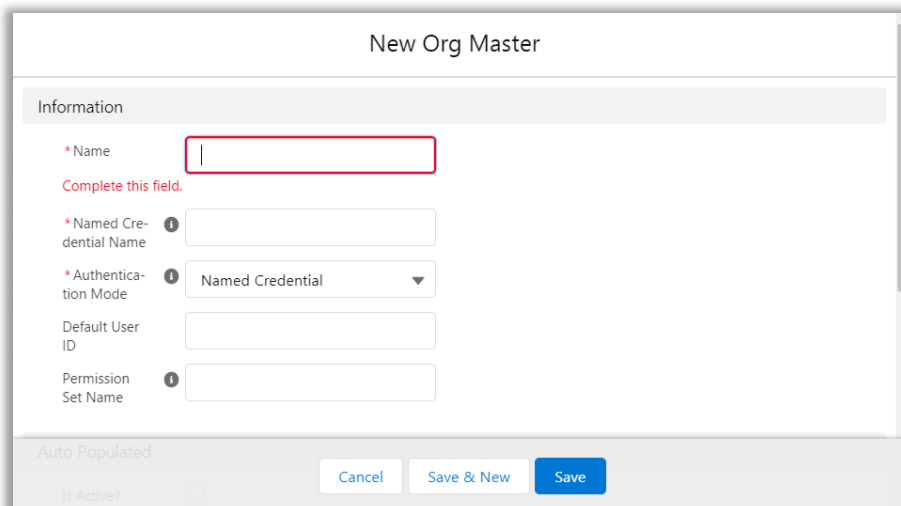
Org Master holds various connected org, to create Org Master we need a **Named Credential** Name. For example, if we want to move data from production to sandbox, create org master record on production which points to sandbox.

- Follow the steps for creating an Org under Org master.
- Navigate to  App Launcher → iSyncSF → Tab - **Org Master**.
- Click on New Button to create New connected org.
- Provide all Necessary Information.
- **Name:** Provide User friendly destination org Name, Example (UAT1)
- **Named Credential Name:** Provide Valid Named Credential Name – “**How to Create Named Credential**” – **Click Here**.
- **Authentication Mode:** Keep this as “Named Credential” only.
- **Permission Set Name:** Provide a permission set name which exists in the Destination Org, this permission set would be used when the application tries to create new Fields or Objects.
- Click the Save button.

Note:

Once you hit the save button, System will try to validate the named credential which you have provided. If Named credential is valid, System will populate the following fields automatically. (This is an sync process so it might take a few seconds)

- Is Production, Instance Name, Org ID, Org Name, Is Active.



Templates

Summary:

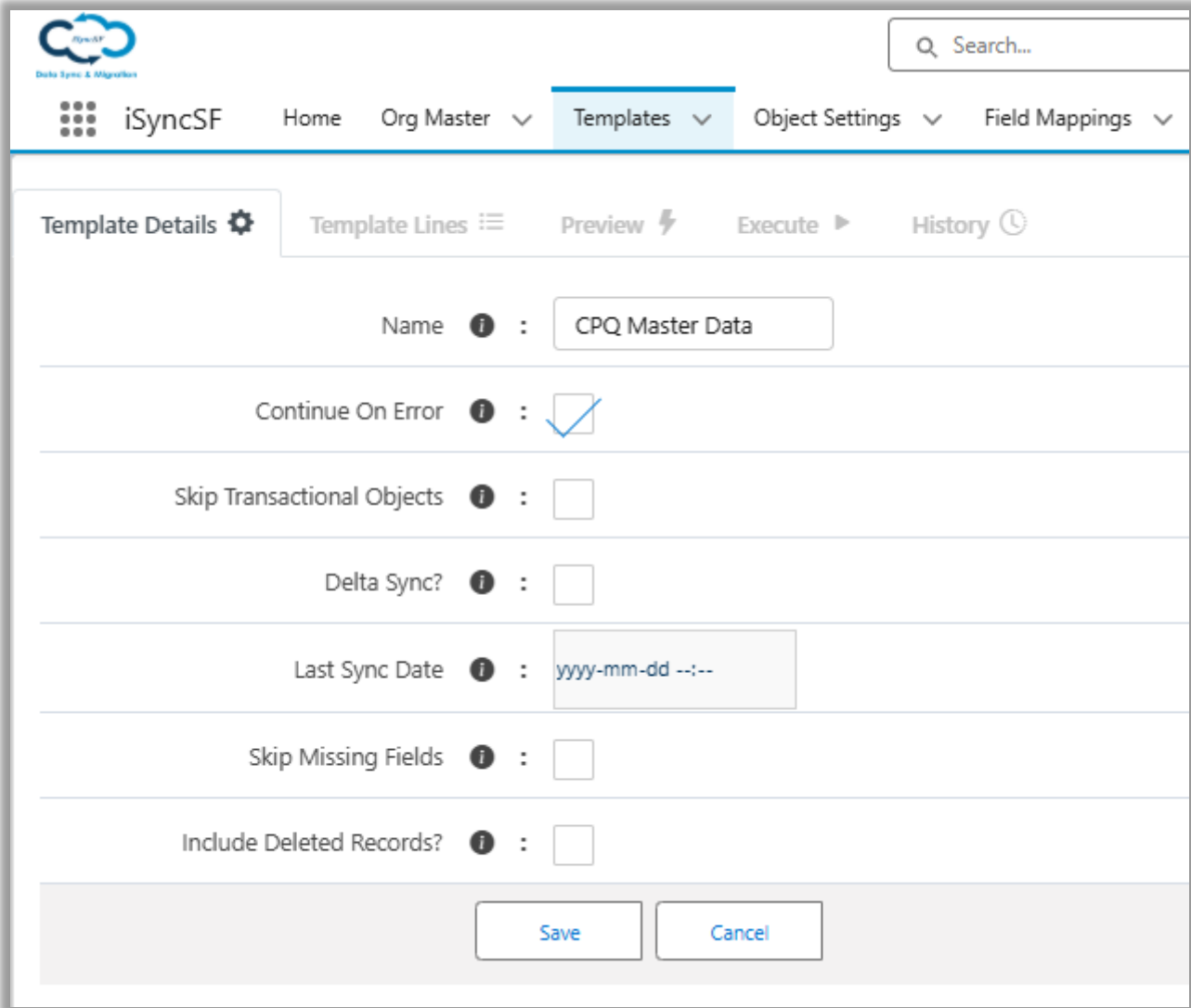
As the name suggests, this is just like a sandbox template; these templates store template lines & various settings for the data sync. Template contains a template-line that has a primary object and other related objects can be configured from the same template-line. For related objects, no sequence needs to be defined.

- Following are the steps for how to Create Template.
- Navigate to  App Launcher ➔ iSyncSF. And select tab's Template.
- Click on New Button to create a new template or click on edit to modify it.

Template Details:

- **Name:** Provide logical template name (**Example:** CPQ Master Data or Project X Dev Sandbox).
- **Continue On Error:** If this is checked, the system will continue migrating data even if there is any error while migrating records to destination Org.
- **Skip Transactional Objects** – Check this, if you don't want to include a transactional object's record. User can mention transactional object list in the custom setting name: **Data Sync Transactional Objects**
- **Delta Sync?** – Check this if the user wants to migrate data which modified or created after a specific date
- **Last Sync Date:** By default, the system will store last sync data, but the user can override it based on the requirement.
- **Skip Missing Fields:** This option controls whether the migration process should continue if fields are missing in the target org.
 - Unchecked: The system will stop the migration if any required field is not found on the target org.
- **Include Deleted Records?:** Enabling this option allows the system to delete records in the destination that have been deleted in the source.
 - Requirement: The deleted records in the source must still be in the recycle bin for this functionality to work.
 - Helps maintain data consistency between source and destination environments.
 - Useful for keeping both environments synchronized by reflecting deletions as well as insertions and updates.





The screenshot shows the 'iSyncSF' application interface. The top navigation bar includes 'Home', 'Org Master', 'Templates' (selected), 'Object Settings', and 'Field Mappings'. A search bar is located in the top right. The 'Template Details' section is active, showing configuration options for a template named 'CPQ Master Data'. The options include 'Continue On Error' (checked), 'Skip Transactional Objects' (unchecked), 'Delta Sync?' (unchecked), 'Last Sync Date' (placeholder: yyyy-mm-dd --:--), 'Skip Missing Fields' (unchecked), and 'Include Deleted Records?' (unchecked). 'Save' and 'Cancel' buttons are at the bottom.

Template Details

Name : CPQ Master Data

Continue On Error : ☒

Skip Transactional Objects : ☐

Delta Sync? : ☐

Last Sync Date : yyyy-mm-dd --:--

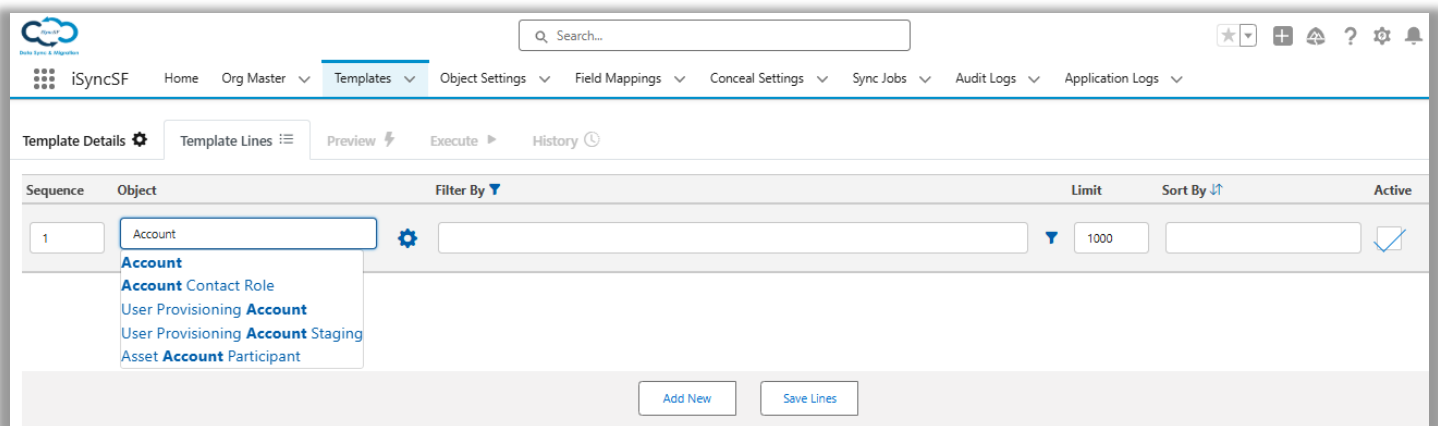
Skip Missing Fields : ☐

Include Deleted Records? : ☐

Save Cancel

Template Line:

- Select the object which you want to sync/migrate. (**Example: Account**)
- Multiple Objects can be added by clicking on the add new button again.



The screenshot shows the 'iSyncSF' application interface with the 'Template Lines' section active. It displays a table with columns: Sequence, Object, Filter By, Limit, Sort By, and Active. The first row shows '1' in the Sequence column, 'Account' in the Object column, and a gear icon in the Filter By column. A dropdown menu is open under 'Account', listing: 'Account', 'Account Contact Role', 'User Provisioning Account', 'User Provisioning Account Staging', and 'Asset Account Participant'. The Limit is set to 1000. 'Add New' and 'Save Lines' buttons are at the bottom.

Template Lines

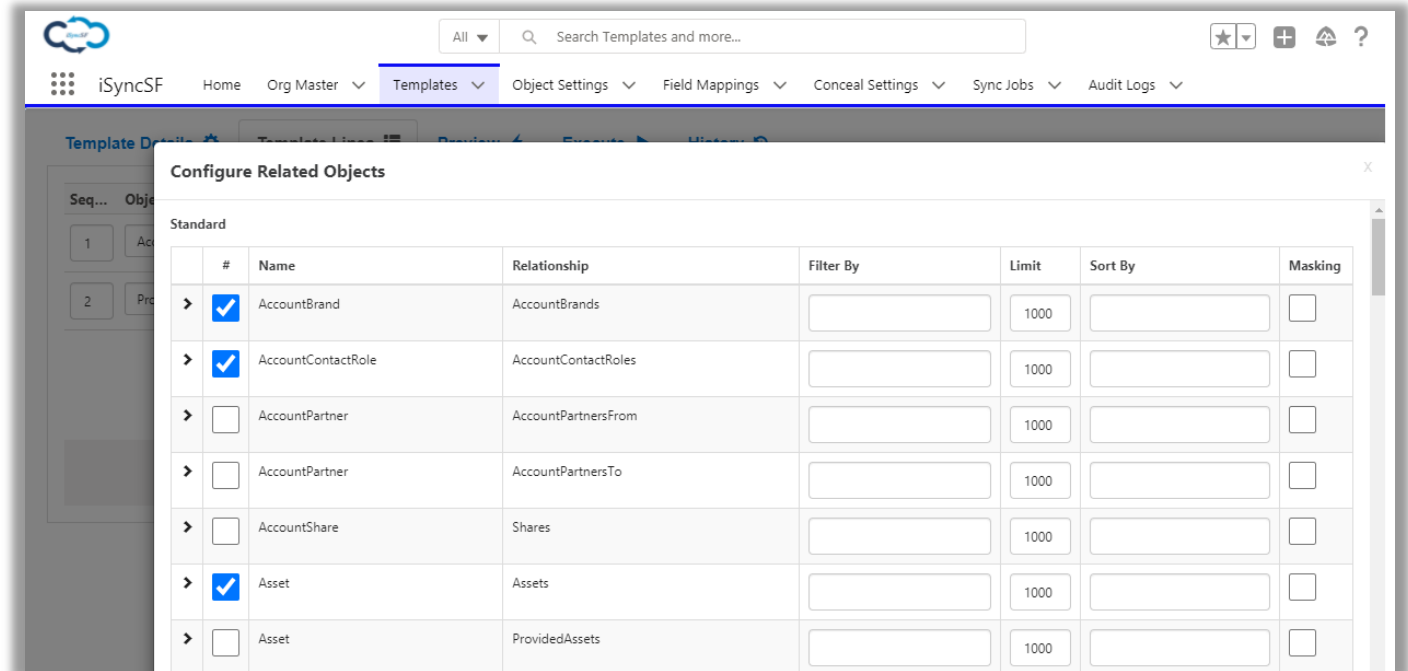
Sequence	Object	Filter By	Limit	Sort By	Active
1	Account		1000		☒

Account
Account Contact Role
User Provisioning Account
User Provisioning Account Staging
Asset Account Participant

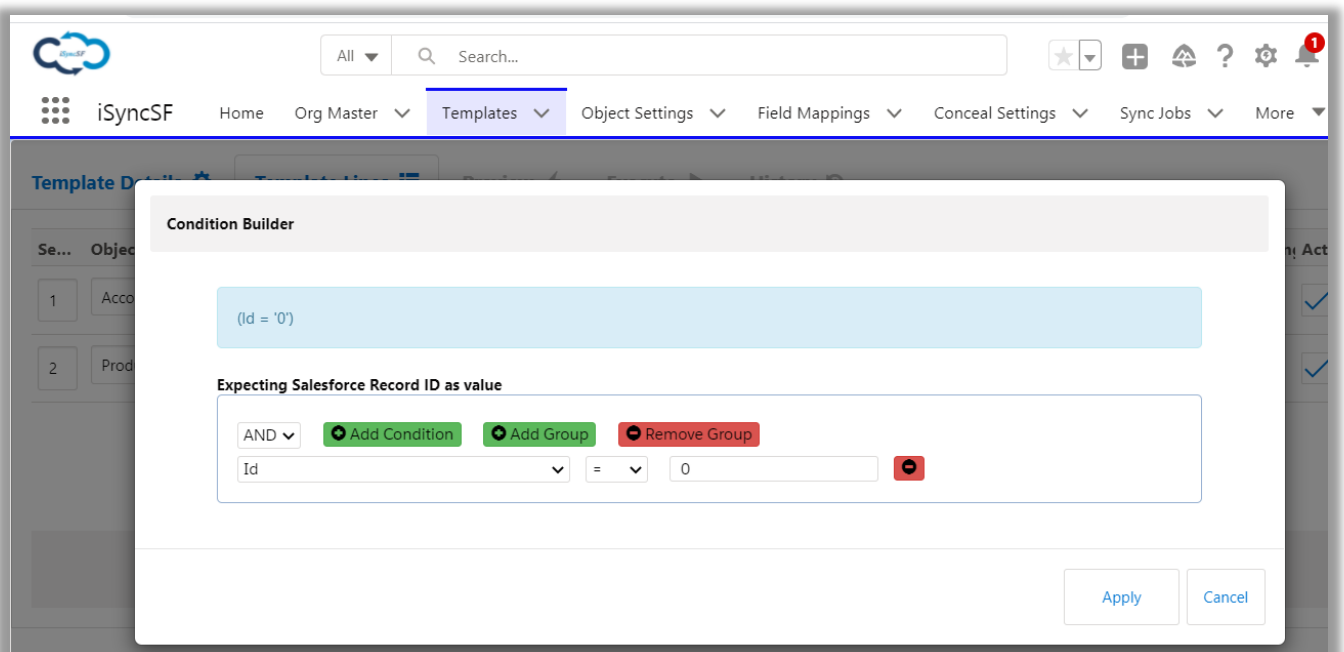
Add New Save Lines



- Click on  for **Configuring Related Objects**: – no need to add each object separately in each template line – simply select it from the popup – Application will maintain relationship and sequence internally.



- Select the related objects based on the requirement.
- Provide filter/limit & sort by for further data filtering.
- Click on the save button to save the selection of related objects.
- Click on  icon to filter the Template-Line Object

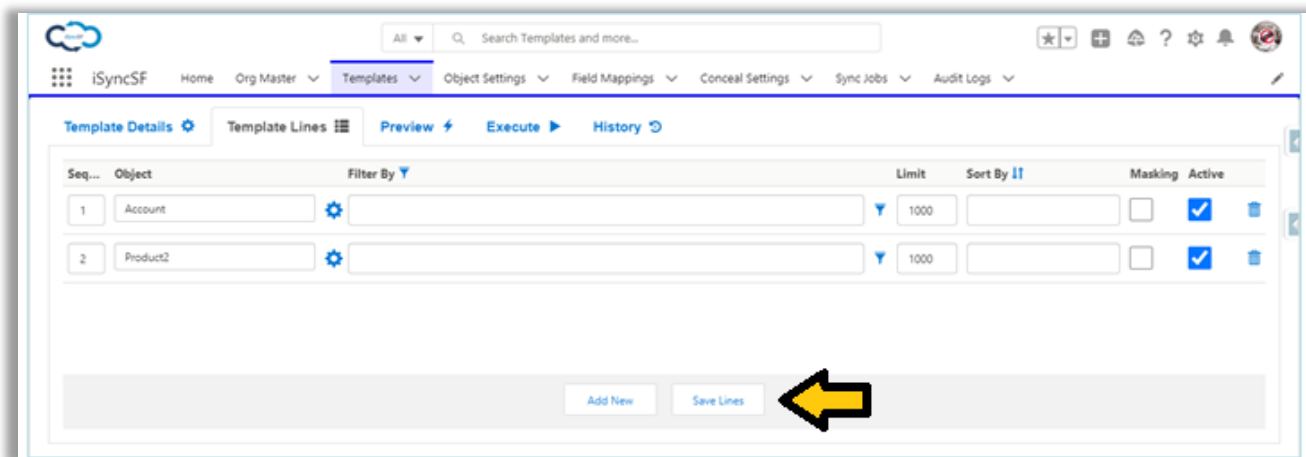


- Users can build the complex condition by adding groups
- System will provide hint on expected value while changing fields
- Click on “Apply” Button.

Example:

Let’s say a user wants to migrate Account, Opportunity, contact, cases & Product data from one org to another org.

- Post creating template, Click on Add New to add blank template line
- Select Account as object in template line
- Click on gear icon to select related objects
- Select opportunity, Opportunity line item, contact & cases.
- Click on filter by icon to apply data filter
- Since Product is not related to Account or any of their related objects, user needs to add new line and select the product object- just like account, user can select product’s related data also.
- Click on ‘save line’ to save Template line configuration.

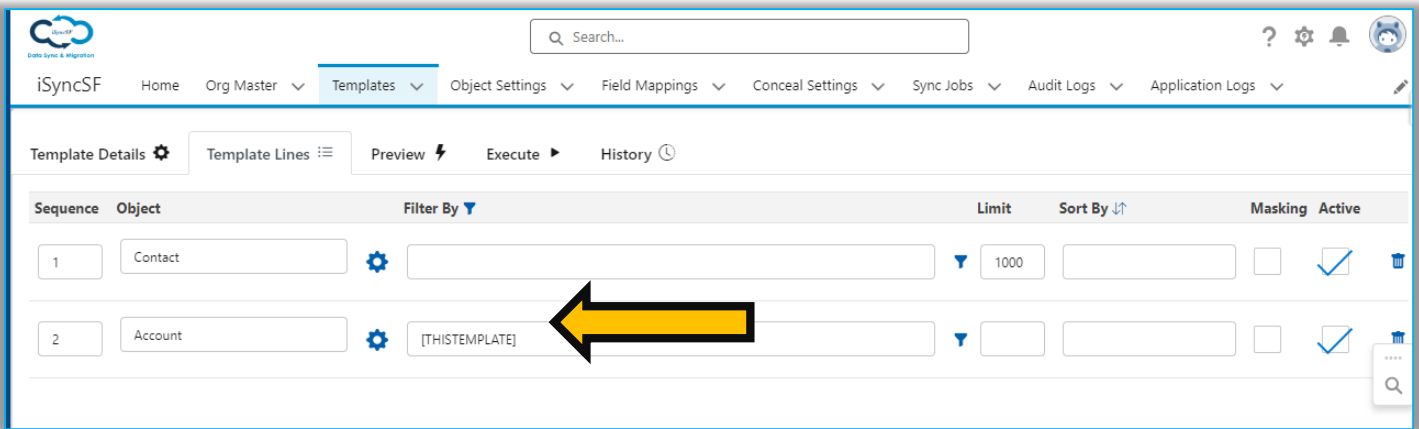


• Use case of: [THISTEMPLATE]

When you select an object and use the template line, if you want to access data from its parent, follow these steps:

- Add a new line.
- Select the parent object.
- Filter by using "[THISTEMPLATE]".

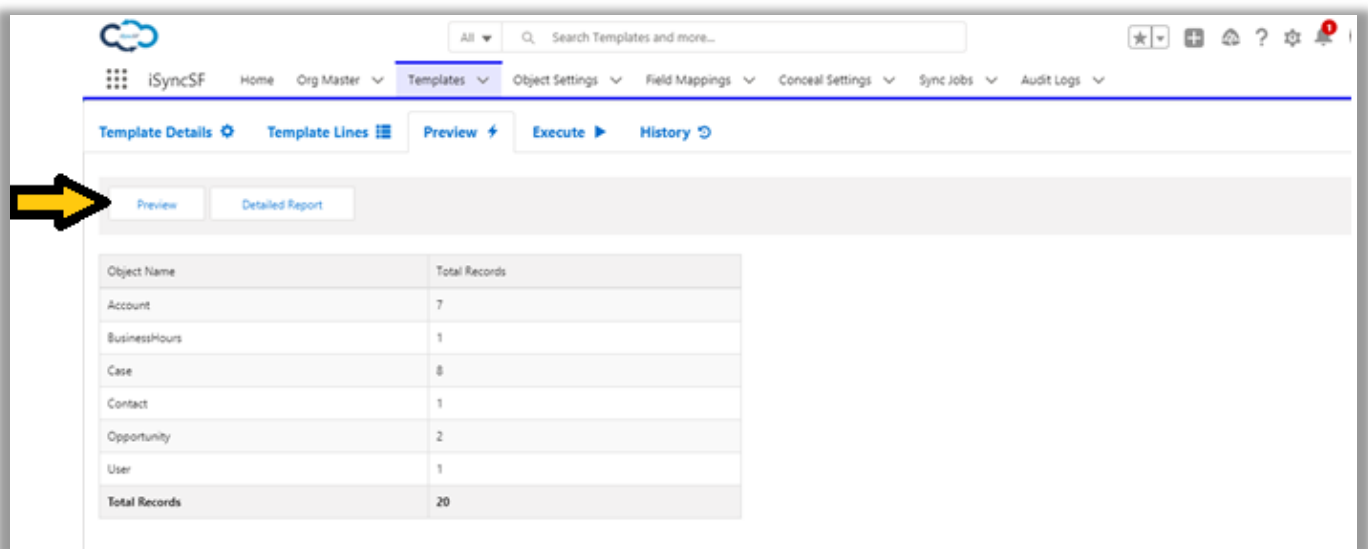




Let's Assume In this example, contact line will extract 5 account IDs. Then, create a new template line account with a filter set to [THISTEMPLATE]. This will extract data for only those 5 account IDs, based on account configuration.

Preview:

- User needs to click on the preview button, System will start processing in the background and the user will see the preview result on screen. (This operation might take some time depending on the amount of data)
- Once the preview is completed, the user can see the # of records which need to migrate.
- Users can also click on detailed report to see which all object/records are going to be migrated - verify this before executing the sync process



Detailed Report:

- This is a simple SFDC report which can be customized based on each organization's requirement.

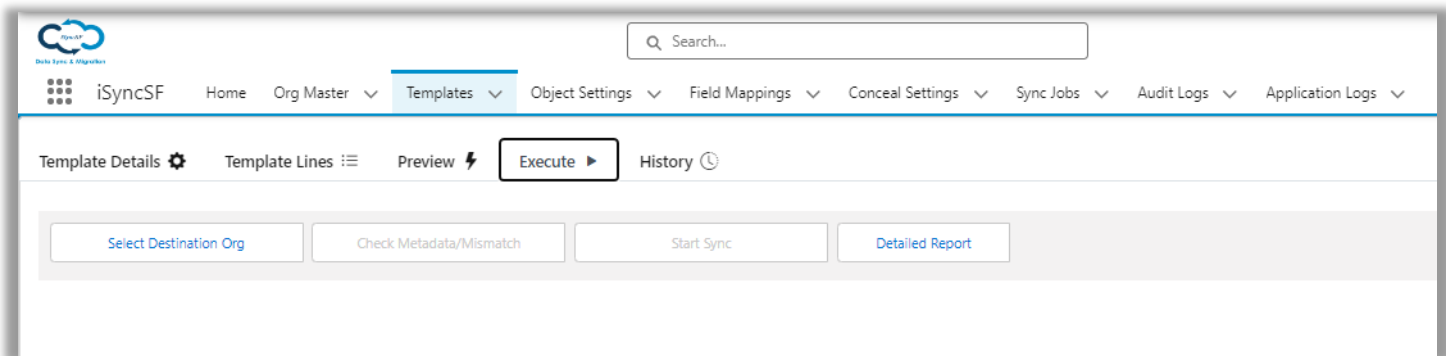


- Verify the data before execute.

Execute:

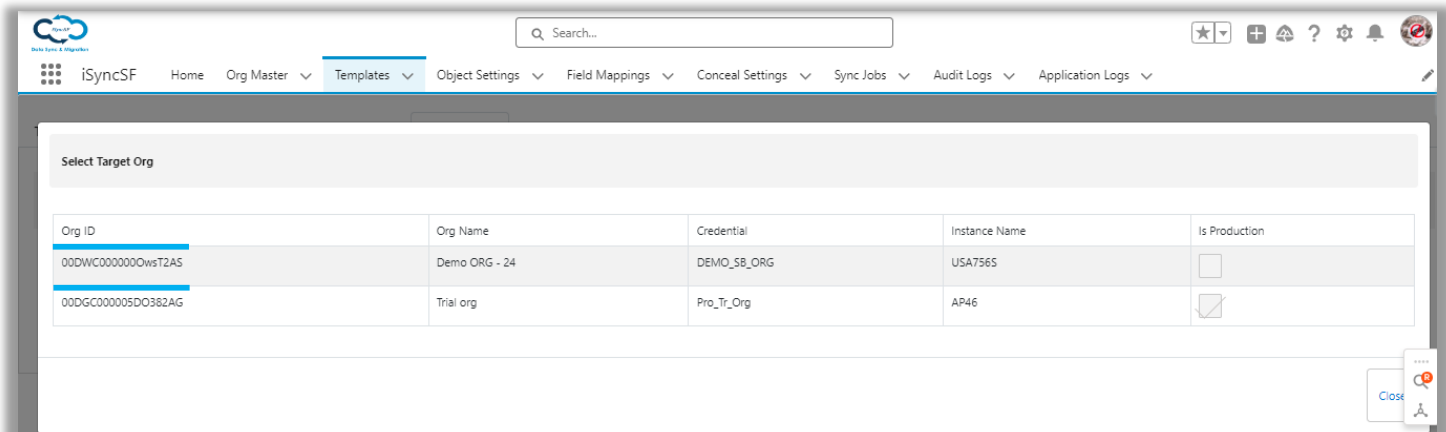
The Execute Tab has 4 actions.

- Select Destination org
- Check Metadata/Mismatch
- Start Sync
- Detailed Report



Select Destination org:

- Select the destination org from the pop-up
- Users can see the Org ID, Org Name, Credential, Instance Name and Is Production flag.
- Click anywhere on the row, to select destination org

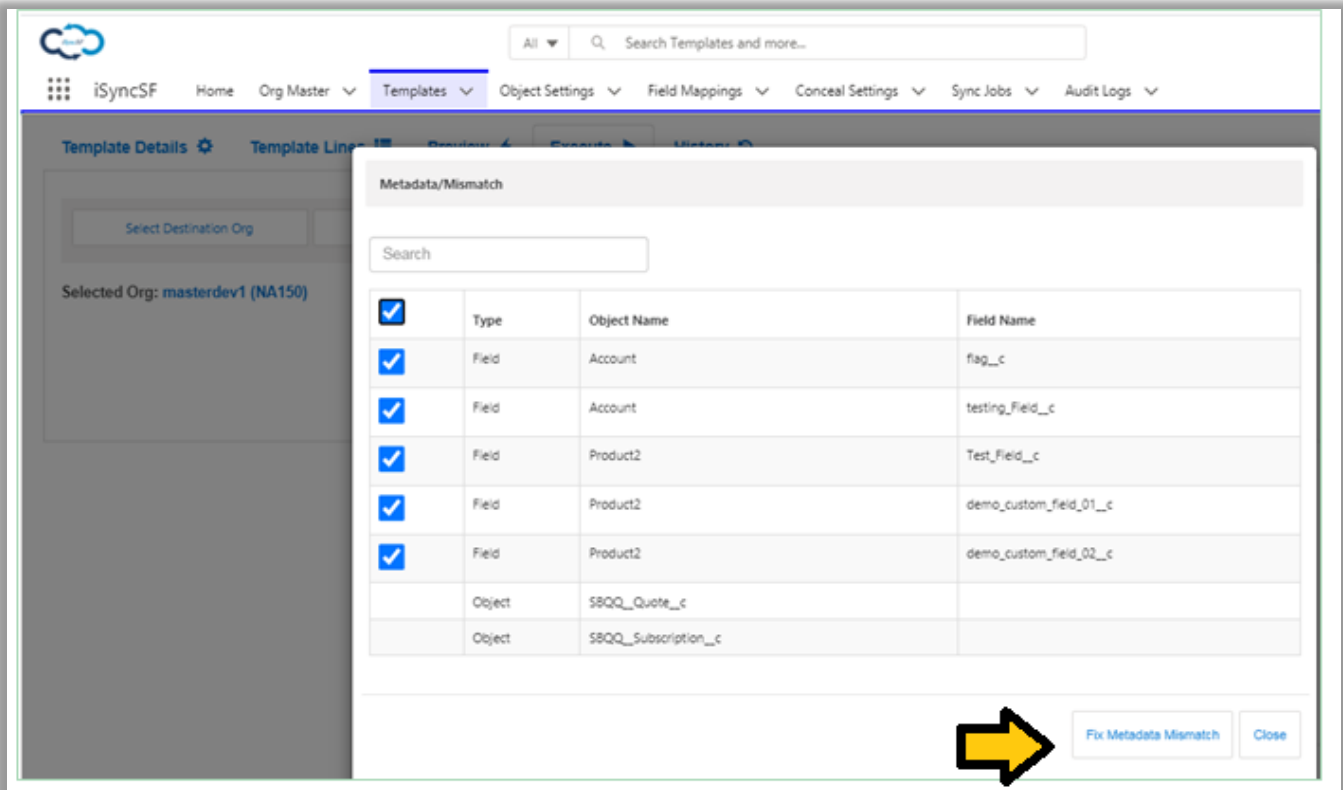


Check Metadata/Mismatch:

- This will provide list of fields/objects which are not available in Destination org
- User can create fields/objects/record type in Destination org by clicking on Fix Metadata Mismatch button

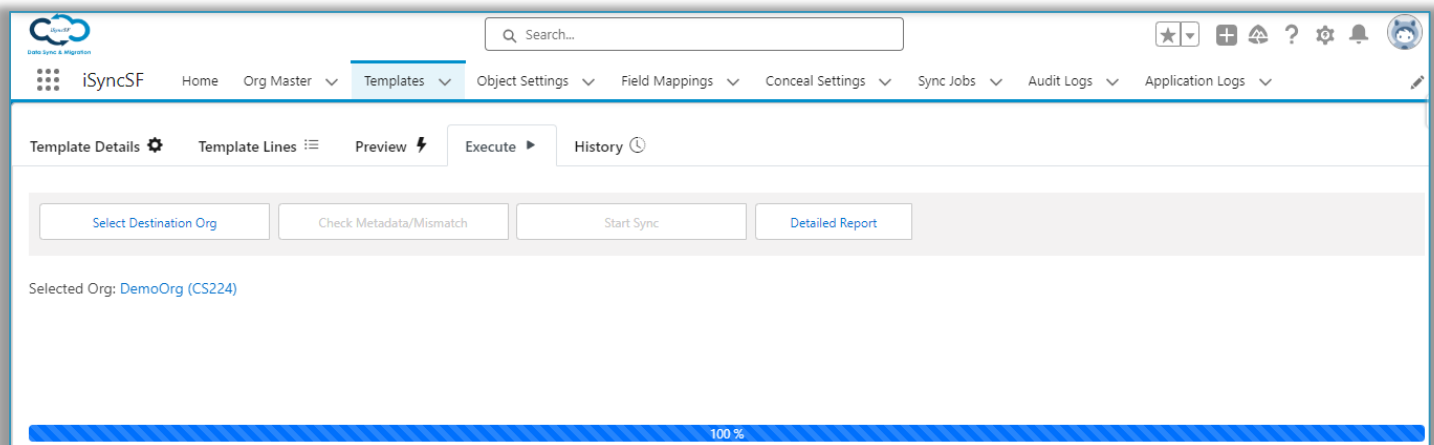


- Please note: Metadata which is part of a managed package, cannot be moved but it will be displayed to the user – so they can take required action.



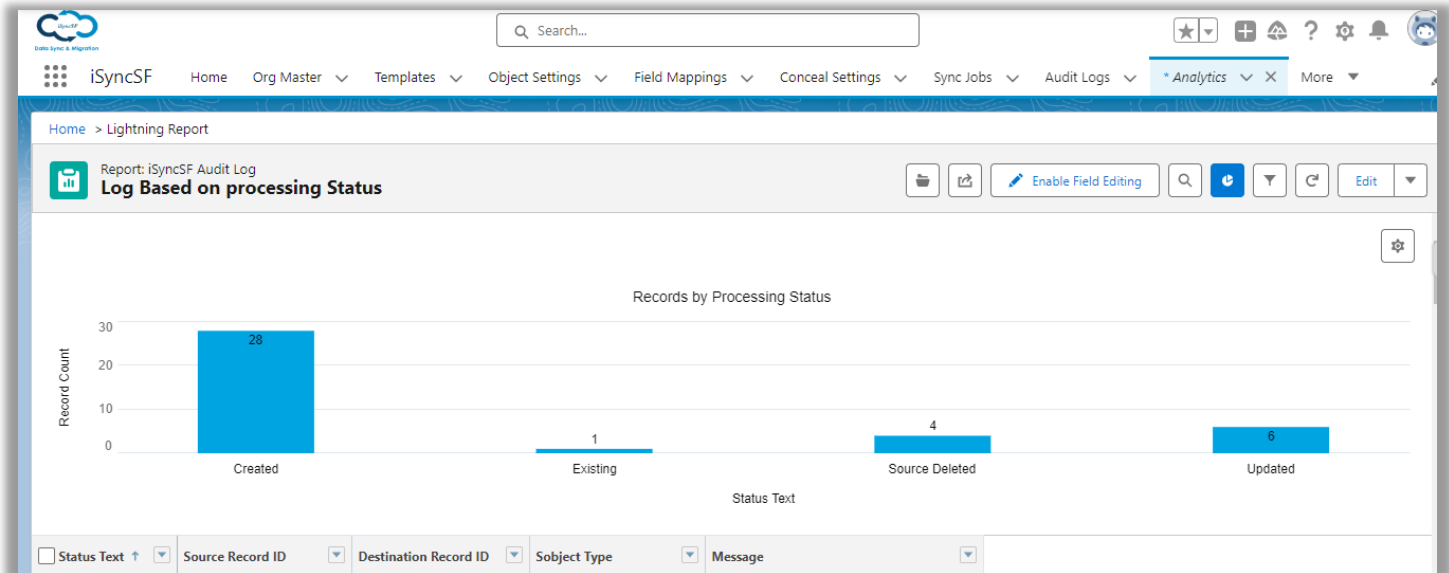
Start Sync:

- Finally click on Start Sync, this can take some time based on the data volume
- Once progress is completed 100%, users can verify data on destination org or they can click on a detailed report for the same.



Detailed Report

- This is a simple SFDC report which can be customized based on each organization's requirement.



History:

- In History, we can see past activities
- Users can click on details to see if there are any errors during the data sync operation and also provide view Report.

The screenshot displays the iSyncSF History table. The table has the following columns: Name, Executed By, Executed Date, Status, Updated Date, Details, and Report. The data rows are as follows:

Name	Executed By	Executed Date	Status	Updated Date	Details	Report
1 ACT With Re.	Harsh Patel	05-10-2024 20:46:16	Synced	05-10-2024 20:46:35	View Details	View Report
1 ACT With Re.	Harsh Patel	05-10-2024 06:58:27	Synced	05-10-2024 06:58:56	View Details	View Report
1 ACT With Re.	Harsh Patel	05-10-2024 06:19:42	Synced	05-10-2024 06:20:39	View Details	View Report
1 ACT With Re.	Harsh Patel	05-09-2024 23:14:28	Synced	05-09-2024 23:14:53	View Details	View Report
1 ACT With Re.			Scanned	05-09-2024 23:07:14		View Report
1 ACT With Re.			Scanned	05-09-2024 23:05:17		View Report

The interface includes a search bar, navigation menu, and various action buttons like 'Template Details', 'Template Lines', 'Preview', 'Execute', and 'History'.



The screenshot shows the iSyncSF interface with the 'Template Details' modal open. The 'Sync History' table lists two entries:

Template Line	Object Name	Error Count	View Errors
Account	SF2SF_Student__c	11	Show Error Details
Account	SF2SF_Projects__c	20	Show Error Details

A yellow arrow points to the 'Show Error Details' link for the first entry. At the bottom right of the modal are buttons for 'Rollback Data Insert' and 'Close'.

Error Details -> Account -> SF2SF_Student__c

Status	Error Detail
Error IN Insert	INVALID_TYPE:: sObject type 'SF2SF_Student__c' is not supported::
Error IN Insert	INVALID_TYPE:: sObject type 'SF2SF_Student__c' is not supported::
Error IN Insert	INVALID_TYPE:: sObject type 'SF2SF_Student__c' is not supported::

Rollback Data Insert:

- Rollback data in Salesforce refers to the process of reverting changes made to records in the org to a previous state. This is typically done to correct errors or to undo changes that were made in error.

The screenshot shows the iSyncSF interface with the 'Sync History' table. It contains one entry:

Template Line	Object Name	Error Count	View Errors
Account	BusinessHours	1	Show Error Details

A yellow arrow points to the 'Rollback Data Insert' button at the bottom right of the modal.



How to Create Named Credential

In Summer '25, Salesforce has disabled the traditional Connected App by default and recommends using the **External Client App** for connecting two Salesforce orgs.

We are providing two options below for establishing a connection between two Salesforce orgs via **Named Credential**:

Option 1: Connect via Connected App (Deprecated in Summer '25)

Option 2: Connect via External Client App (Recommended for Summer '25 and beyond)

Note:

- Create a Connected App (Only 1 in each source org) **OR** External Client App (Only 1 in each **Target org**)
- Create Authorization Provider (Only 1 in each source org)
- Define Named Credential (Multiple named credential based on # of destination org which users want to connect with this source org)

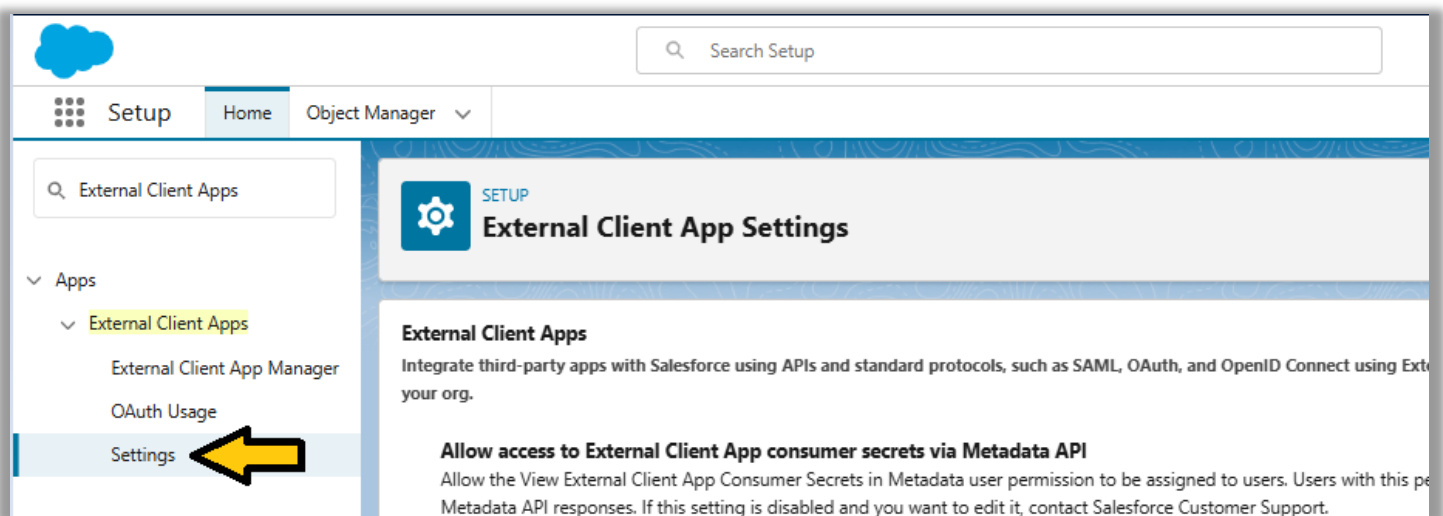
Option 1:

Create a Connected App in the Source Org.

If you still prefer to use a Connected App for org-to-org integration, follow these steps:

To enable the Connected App functionality in your org, follow these steps:

- Enable Connected Apps: From Setup, enter “**External Client Apps**” in the Quick Find box.
- Select Settings in the External Client App section.
- Turn on Allow creation of connected apps, if it's off.
- Click on “**New Connected App**” button.



Connected Apps
Use connected apps to integrate third-party apps with Salesforce through APIs and standard protocols, such as SAML, OAuth, and OpenID.

Allow creation of connected apps
[Learn more about Connected Apps and External Client Apps.](#)

[New Connected App](#)   

- Provide all necessary information
- Check “Enable OAuth Settings” checkbox to use OAuth

API (Enable OAuth Settings)

Enable OAuth Settings ☐

- In “Callback URL” enter the temporary Salesforce URL. (We need to modify this later on)

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL  <https://login.salesforce.com/>

Temporary URL: <https://login.salesforce.com/>

- **We will come back again on this step later to provide Callback URL**
- Select the scope :-
 - Full access (full)
 - Perform requests at any time (refresh_token, offline_access)

Selected OAuth Scopes	Available OAuth Scopes	Selected OAuth Scopes
	Access Pardot services (pardot_api) Access and manage your Chatter data (chatter_api) Access and manage your Eclair data (eclair_api) Access and manage your Wave data (wave_api) Access and manage your data (api) Access custom permissions (custom_permissions) Access your basic information (id, profile, email, address, phone) Allow access to your unique identifier (openid) Provide access to custom applications (visualforce) Provide access to your data via the Web (web)	Full access (full) Perform requests on your behalf at any time (refresh_token, offline_access)

- Finally click on Save.

“Consumer Key” and “Consumer Secret” will be provided once you save this. We need this information for the next step.



Screenshot:

New Connected App Help

Save Cancel

To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.

Basic Information

Connected App Name Required

API Name

Contact Email

Contact Phone

Logo Image URL [Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL [Choose one of our sample logos](#)

Info URL

Description

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access unique user identifiers (openid)
- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)
- Manage Pardot services (pardot_api)
- Manage user data via APIs (api)
- Manage user data via Web browsers (web)
- Perform ANSI SQL queries on Data Cloud data (cdp_query_api)
- Perform segmentation on Data Cloud data (cdp_segment_api)

Add Remove

Selected OAuth Scopes

- Full access (full)
- Perform requests at any time (refresh_token, offline_access)

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows ☒

Mobile App Settings

Canvas App Settings

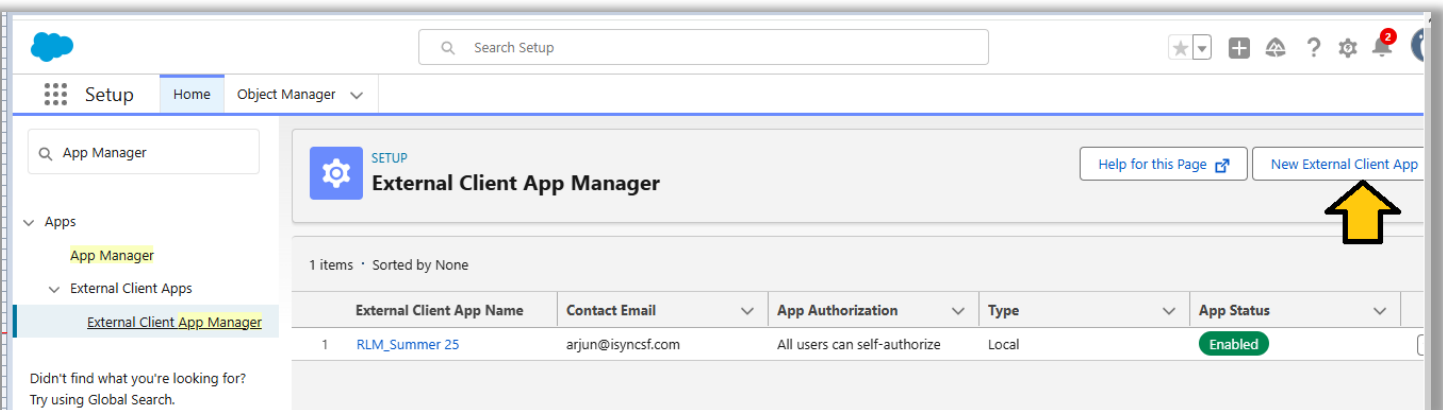
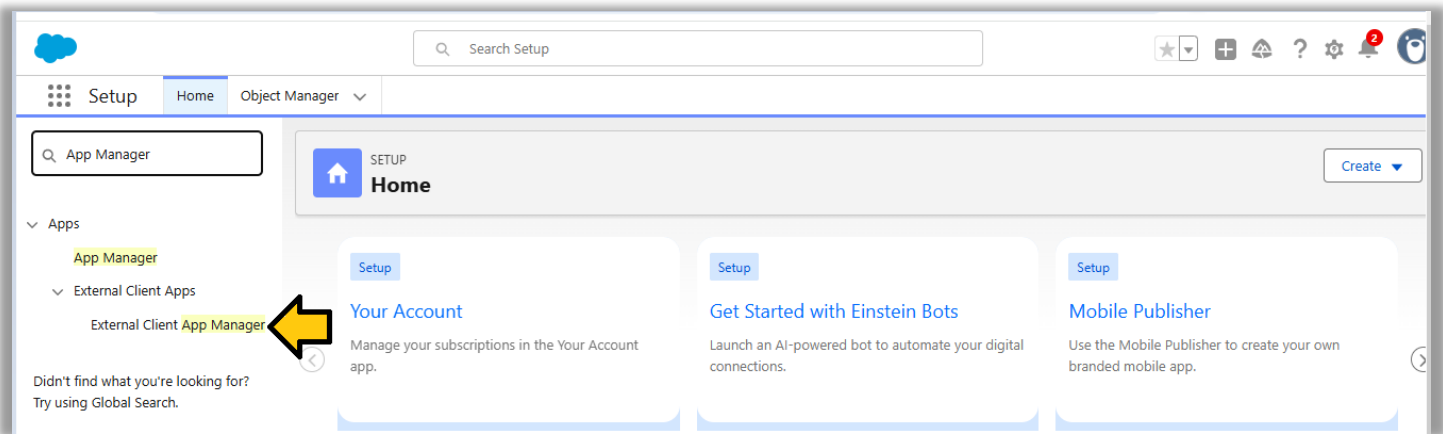
Save Cancel

Option 2:

Create External Client App in the Target Org.

- Go to **Setup** → **App Manager** → **External Client App Manager** → **New External Client App**.





- Provide all necessary information
 - **Label & API Name, Contact Email, and Description**
 - Choose **Distribution State** = *Local*
 - **Optionally**, set app logo/icon
- Under **Enable OAuth**, configure:
 - In “Callback URL” enter the temporary Salesforce URL. (We need to modify this later on)
- Select OAuth scopes:
 - Full access (full)
 - perform requests at any time (refresh_token, offline_access)
- Finally click on Create.

“Consumer Key” and “Consumer Secret” will be provided once you create this. We need this information for the next step.

Screenshot:





SETUP

External Client App Manager

Basic Information

* External Client App Name

Summer 25

* API Name

Summer_25

* Contact Email

arjun@isyncsf.com

* Distribution State

Local

Contact Phone

Enter a phone number...

Info URL

Enter a URL...

Logo Image URL

Enter a URL...

Icon URL

Enter a URL...

[Choose one of our sample logos.](#)[Choose one of our sample logos.](#)

Description

API (Enable OAuth Settings)

☒ Enable OAuth

App Settings

* Callback URL

<https://login.salesforce.com/?>

* OAuth Scopes

Available OAuth Scopes

Access the identity URL service (id, profile, email, address,...)

Manage user data via APIs (api)

Manage user data via Web browsers (web)

Access Connect REST API resources (chatter_api)

Access Visualforce applications (visualforce)

Selected OAuth Scopes

Full access (full)

Perform requests at any time (refresh_token, offline_access)

Security

- ☒ Require secret for Web Server Flow
- ☒ Require secret for Refresh Token Flow
- ☒ Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- ☐ Enable Refresh Token Rotation
- ☐ Issue JSON Web Token (JWT)-based access tokens for named users

> Web App (Enable SAML Settings)

> Mobile App Settings (Beta)

> Push Notification Settings (Beta)

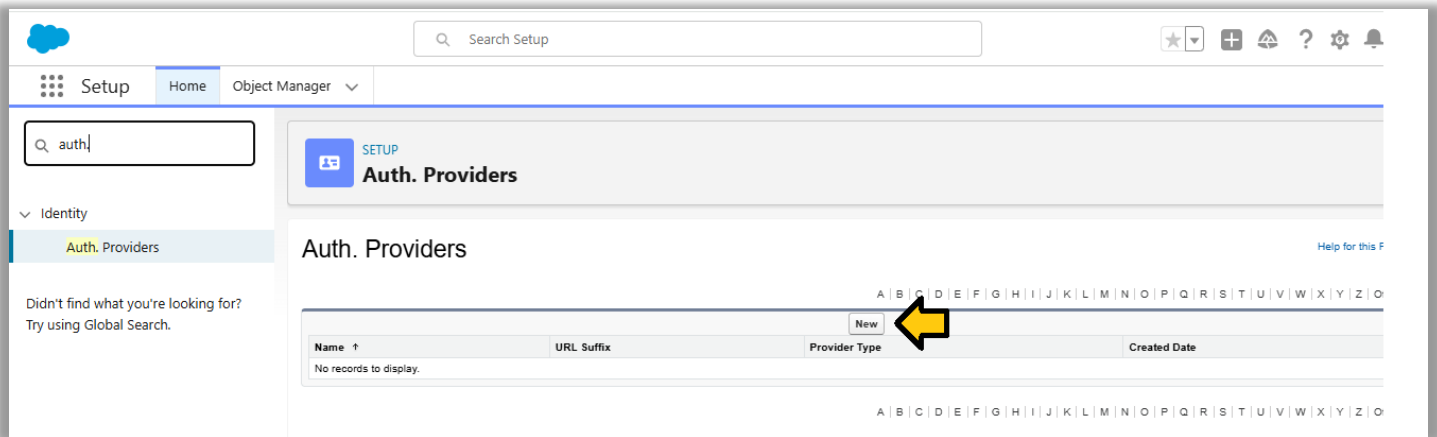
Cancel

Create

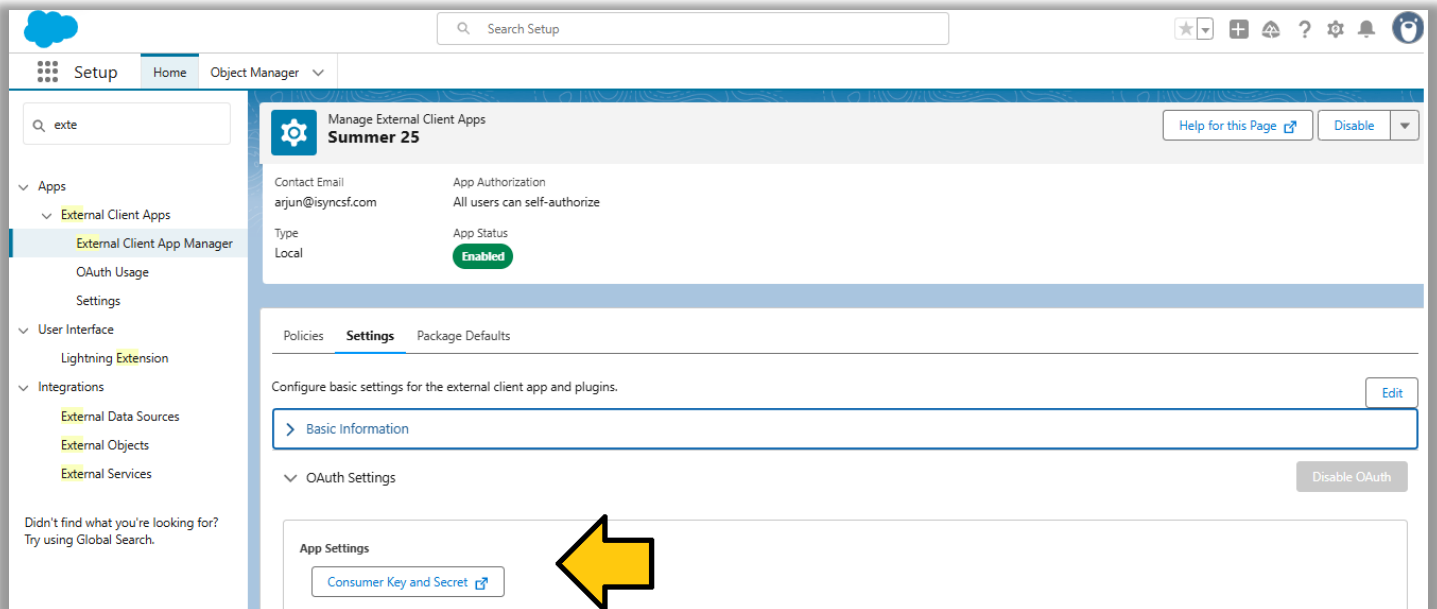


Create Authorization Provider in the Source Org:

- Navigate to Setup → Identity → Auth. Providers → click on New.



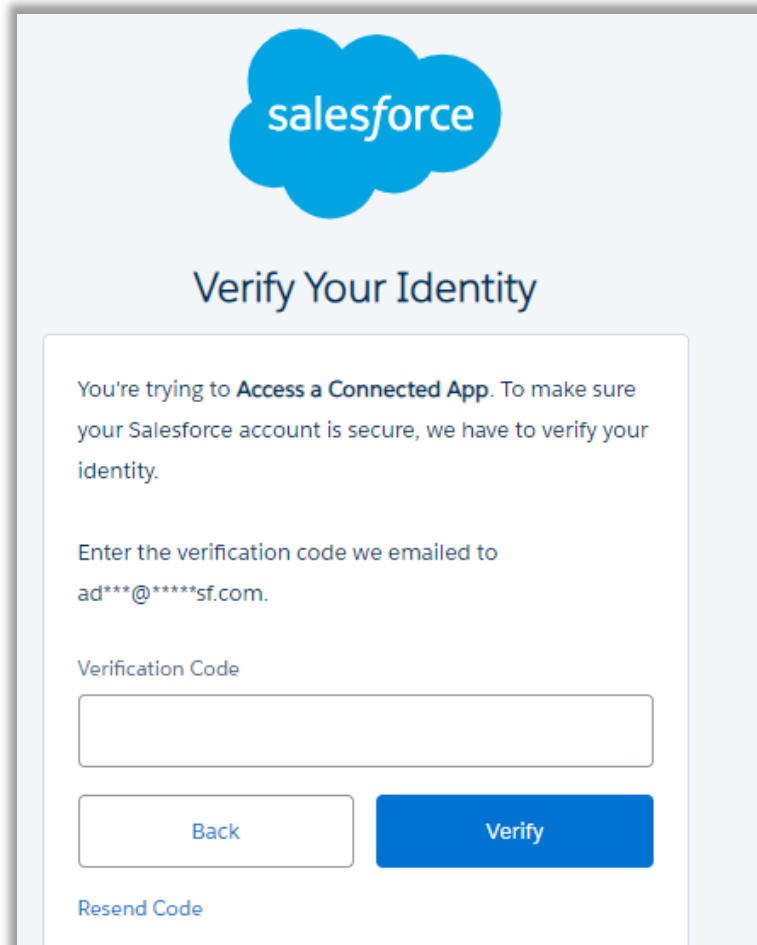
- Select “Salesforce” as Provider Type
- Provide all necessary information
 - Provide “Consumer Key” and “Consumer Secret” from the previous step (**Follow Below steps**)
 - Open the External Client App Manager which you have created in the Previous step in **Target org**.
 - Navigate to Settings and go to OAuth Settings section Click on Consumer Key and Secret.



- Then provide Verify Your Identity.
- Enter the verification code when received in your registered email id.
- Provide Verification Code

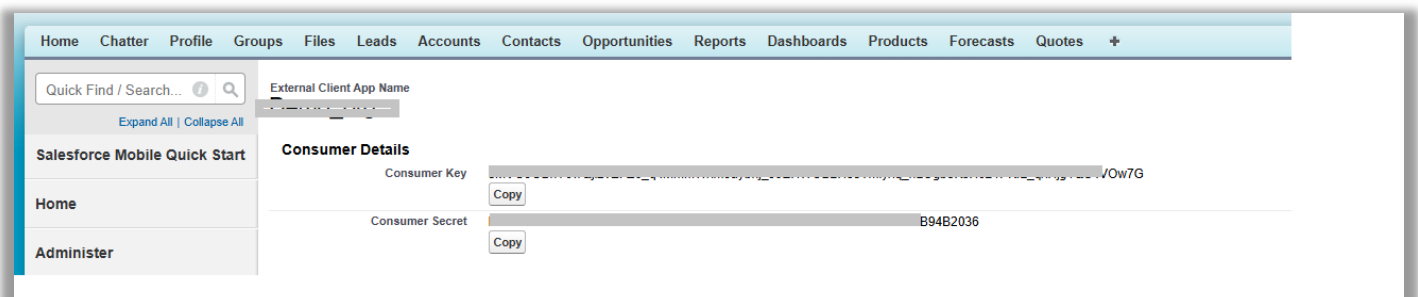


- Click on Verify.



The image shows the Salesforce 'Verify Your Identity' screen. At the top is the Salesforce logo. Below it, the heading 'Verify Your Identity' is centered. The main content area contains the following text: 'You're trying to **Access a Connected App**. To make sure your Salesforce account is secure, we have to verify your identity.' Below this, it says 'Enter the verification code we emailed to ad***@*****sf.com.' There is a text input field labeled 'Verification Code'. At the bottom, there are two buttons: 'Back' and 'Verify'. A link 'Resend Code' is located below the 'Back' button.

- Now “Consumer Key” and “Consumer Secret” information available
- Copy “Consumer Key” and “Consumer Secret”



The image shows the Salesforce 'Consumer Details' screen. The top navigation bar includes links for Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, Forecasts, and Quotes. A search bar is on the left. The main content area is titled 'External Client App Name' and 'Consumer Details'. It displays two fields: 'Consumer Key' with a value ending in 'VOW7G' and 'Consumer Secret' with a value 'B94B2036'. Both fields have a 'Copy' button next to them.



- Authorize Endpoint URL & Token Endpoint URL.

- If you are creating in a **Production org**.

Authorize Endpoint URL	https://login.salesforce.com/services/oauth2/authorize	
Token Endpoint URL	https://login.salesforce.com/services/oauth2/token	

- Authorize Endpoint URL : <https://login.salesforce.com/services/oauth2/authorize>
- Token Endpoint URL : <https://login.salesforce.com/services/oauth2/token>

- If you are creating in a **Sandbox org**.

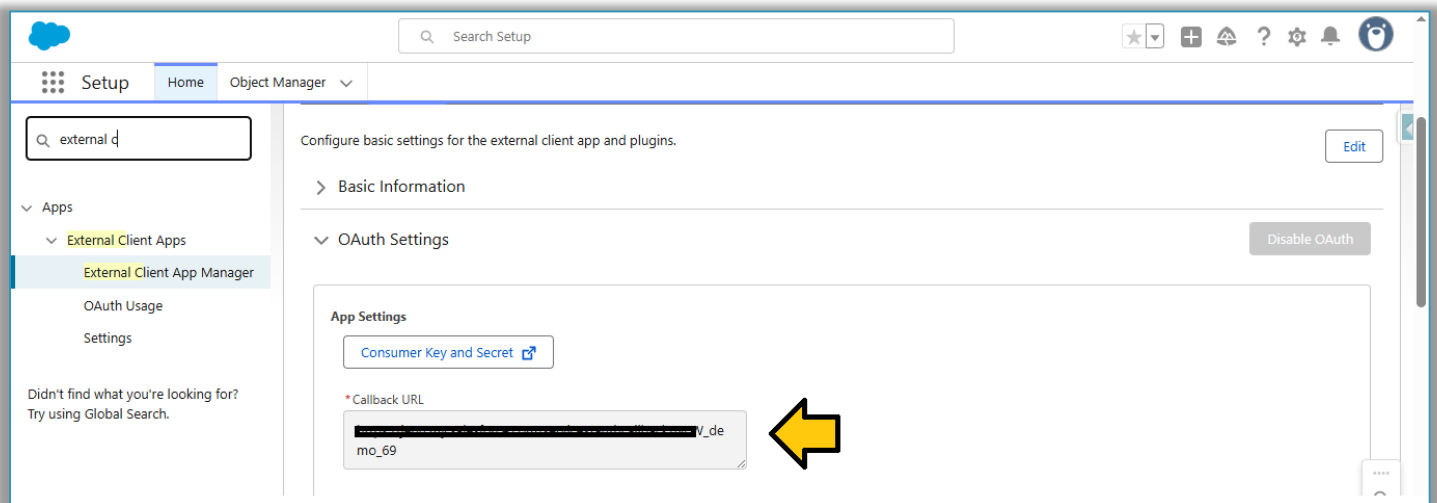
Authorize Endpoint URL	https://test.salesforce.com/services/oauth2/authorize
Token Endpoint URL	https://test.salesforce.com/services/oauth2/token

- Authorize Endpoint URL : <https://test.salesforce.com/services/oauth2/authorize>
- Token Endpoint URL : <https://test.salesforce.com/services/oauth2/token>

- **Default Scope:** - enter the value as “refresh_token full”
- Click on Save.

Please Note:

“Once you save, it will provide you the set of URLs in ‘Salesforce Configuration’ section on the same page.” “Copy ‘Callback URL’ and edit the Connected_App which we have created in the previous step in (Target Org) and set this URL as Callback URL.”



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'External Client App Manager' is selected under 'External Client Apps'. The main content area is titled 'Configure basic settings for the external client app and plugins.' It includes sections for 'Basic Information' and 'OAuth Settings'. Under 'App Settings', there is a 'Consumer Key and Secret' link and a 'Callback URL' field. The 'Callback URL' field contains the text 'mo_69' followed by a partially visible URL ending in 'v_de'. A yellow arrow points to the 'Callback URL' field.



Screenshot:

Auth. Provider

[Help for](#)

Auth. Provider Edit

SaveSave & NewCancel

Provider Type

Salesforce

Name

Auth Sandbox

URL Suffix

Auth_Sandbox

Consumer Key

i

Consumer Secret

i

Authorize Endpoint URL

https://login.salesforce.com/services/oauth2/authorize

i

Token Endpoint URL

https://login.salesforce.com/services/oauth2/token

i

Default Scopes

refresh_token full

i

Include Consumer Secret in API Responses

☒ i

Custom Error URL

Custom Logout URL

i

Registration Handler

[Automatically create a registration handler template](#)

Execute Registration As

Portal

--None--

Icon URL

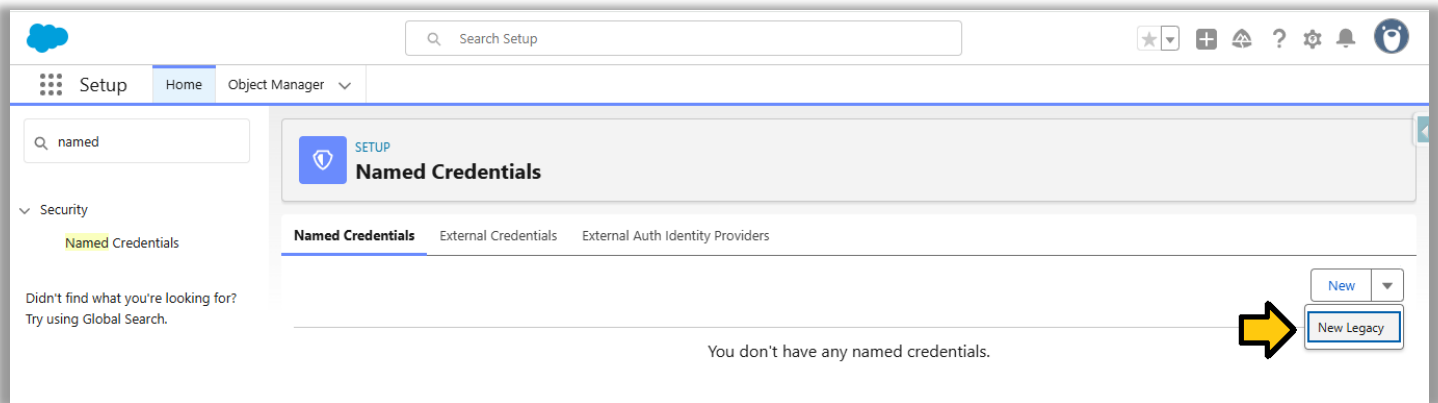
[Choose one of our sample icons](#)

SaveSave & NewCancel

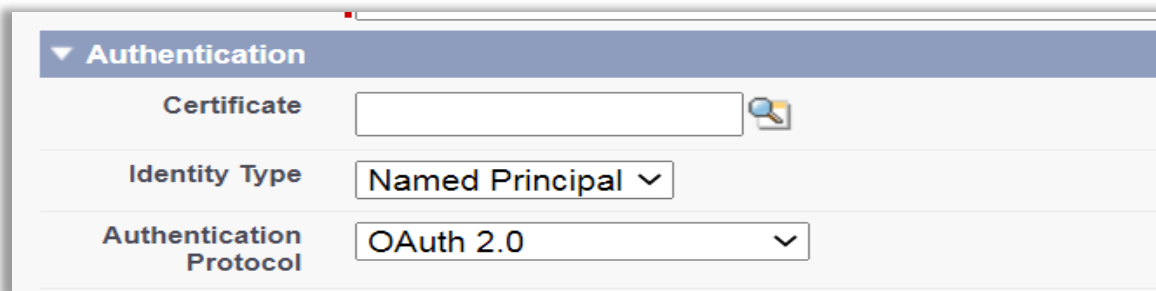


Define Named Credential:

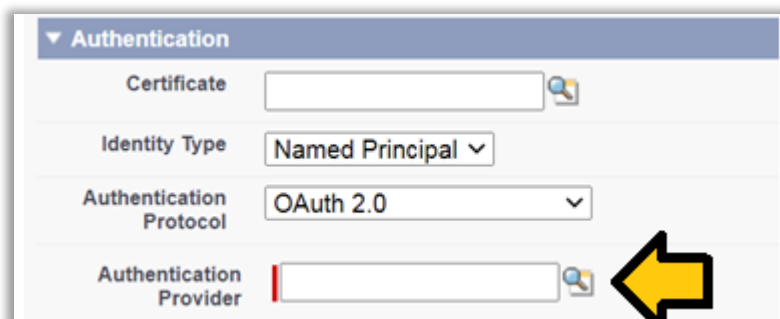
- Navigate to Setup → Security → Named Credentials → Click on Drop-down and select **New Legacy**.



- Provide the name (label)
- **URL:** - Provide the Destination ORG's instance URL (Copy from home page of Salesforce Classic **Not** from lightning)
- **Example:** <https://isyncsfdemo-dev-ed.my.salesforce.com/>
- Select "Named Principal" as Identity Type. And "OAuth 2.0" as Authentication Protocol.



- **Authentication Provider:** - Select the Auth provider which we've just created in the 2nd step.



- **Scope:** - enter the value as "refresh_token full"
- Check "Start Authentication Flow on Save" (this is important) and save.



Screenshot:

New Named Credential Help

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce callouts to the remote system.

Label ⓘ

Name ⓘ

URL

▼ **Authentication**

Certificate ⓘ

Identity Type ▼

Authentication Protocol ▼

Authentication Provider ⓘ

Scope

Authentication Status

Start Authentication Flow on Save ☐

▼ **Callout Options**

Generate Authorization Header ⓘ ☒

Allow Merge Fields in HTTP Header ⓘ ☒

Allow Merge Fields in HTTP Body ⓘ ☒

Outbound Network Connection ⓘ ⓘ

- That's it. We are all set to use Named credential to create new Org Master.



Object Settings

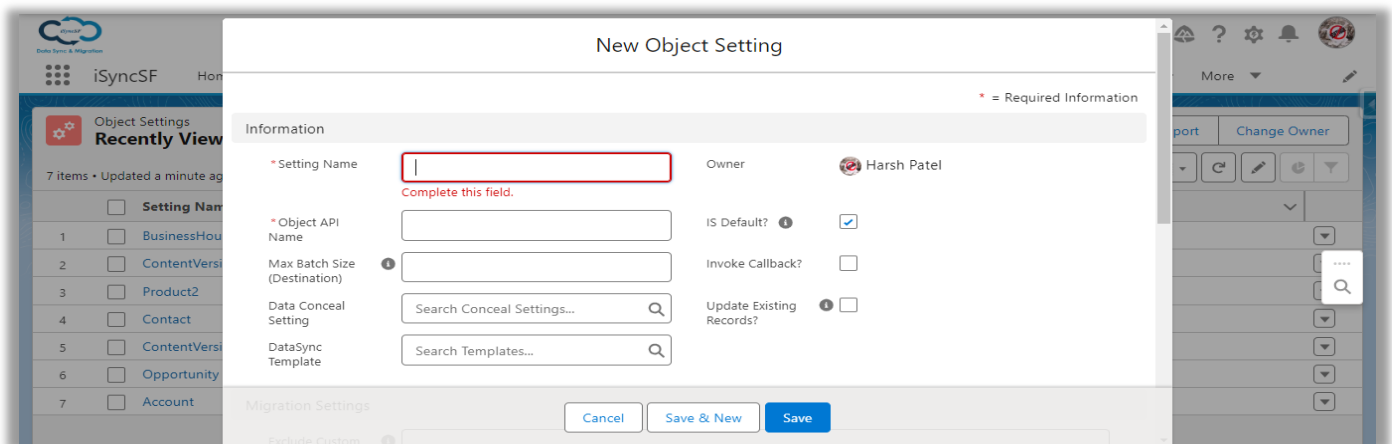
Summary:

Object settings are employed when specific configurations are required during data migration. This feature allows you to define unique parameters such as batch size, virtual key, and inclusion/exclusion of relationships. Utilizing object settings provides a tailored approach to ensure precision and customization in the data migration process.

- Following are the steps for how to Create Object Settings.
- Navigate to  App Launcher ➔ iSyncSF. And select tab's Object settings.
- Click on New Button to create a new Object Settings or click on edit to modify it.

❖ Information Section

- **Setting Name:** Provide predefine name object setting name.
- **Object API Name:** Provide Object API Name which you want object specific setting provide object api name.
- **Max Batch Size (Destination):** # of max records processed in a single transaction.
- **Data Conceal Setting:** Provide conceal setting object name when you created in conceal setting section.
 - If you created any object or custom object's JSON Data (Data masking) for Important and sensitive data in Conceal setting. And that object you defined Data conceal setting in object setting for this object all data are apply in data masking.
- **DataSync Template :** We have created a new field in object setting called Data Sync Template.
 - DataSync templates are used in scenarios where you need to specific objects settings or configuration for the Template base.
- **Update Existing Records? :** If Checked - The system will perform an update operation on Existing records.



❖ Migration Settings Section

- **Exclude Custom Child Relationship Name:** if you want to same exclude data in migration process provide Comma-separated child relationship names.
- **Include Standard Relationships :** comma-separated standard relationship name to include during sync
 - **For Example:** OpportunityLineItems,Quotes
- **Exclude Parent Fields :** Comma-separated relationship field names to exclude during sync
 - Must use when recursive data structure
- **Text Relationship Fields:** This field should contain a comma-separated field (Text field which needs to consider as a relationship field) API names.
- **Child Filter :** This field will store the child relationship name along with the filter condition
- **Unique Key Fields :** Unique key identifier - there has to unique key fields in order to match the records (This fields can be, text/number/date/Boolean)
 - For multi-use Comma-separated field names to work as a unique key to match id in destination org
 - Long text area not supported.
 - **For Example:** Name,IsActive,Fname,Lname
- **Custom External ID:** This field will store the mapping of custom external id, if an external id does not exist, the system will create a destination record with source record id.
 - The value should be: SourceField=DestinationField
 - **For Example:** ID=CustomExternalID__C

The screenshot displays the 'Migration Settings' dialog box within the iSyncSF application. The dialog is a light gray modal with a title bar. It contains the following fields:

- Exclude Custom Child Relationship Name:** A text input field.
- Include Standard Relationships:** A text input field.
- Exclude Parent Fields:** A text input field.
- Text Relationship Fields:** A text input field.
- Child Filter:** A text input field.
- Unique Key Fields:** A text input field.
- Custom External ID:** A text input field.

At the bottom of the dialog are three buttons: 'Cancel', 'Save & New', and 'Save'. The background application interface shows a sidebar with 'Object Settings' and 'Recently Viewed' sections, and a top navigation bar with 'Home' and 'Org Master' links.

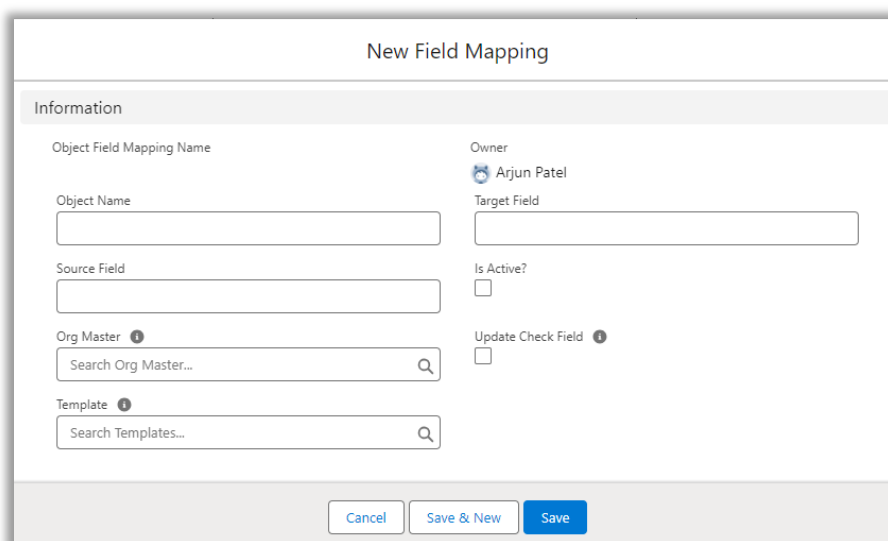


Field Mappings

Summary:

The term "field mapping" encapsulates a pivotal role in the context of data migration, serving as the mechanism that delineates the correlation between fields in the source and destination objects. This mapping acts as a blueprint, dictating how data from one object should be transposed and aligned with the corresponding fields in another. In essence, it is a structured representation that ensures the seamless transfer of information, providing a clear and comprehensible guide for data transformation. The precision and accuracy of field mapping are instrumental in maintaining data integrity throughout the migration process, guaranteeing that information is accurately and coherently transferred from the source to the destination object.

- Following are the steps for how to Create Field Mappings.
- Navigate to  App Launcher → iSyncSF. And select tab's Field Mappings.
- Click on New Button to create a new Field Mappings or click on edit to modify it.
- **Object Name:** provide object name.
- **Source Field:** provide Field name.
- **Org Master:** If Org Master Provided, the system will override field value only for specific Org Otherwise, it will apply to all org.
- **Template:** If Template provided, the system will override field value only for specific Template Otherwise, it will apply to all templates.
- **Target Field:** provide Target Field name.
- **Update Check Field:** Utilize this field when you intend to update the destination record in case the value of this field changes. By default, the system will update the record based on criteria or the last modified date. This is particularly beneficial in a two-way sync scenario where you only wish to initiate a record update based on specific field value change.



New Field Mapping

Information

Object Field Mapping Name

Object Name

Source Field

Org Master ⓘ

Search Org Master...

Template ⓘ

Search Templates...

Owner

Arjun Patel

Target Field

Is Active?

Update Check Field ⓘ

Cancel Save & New Save

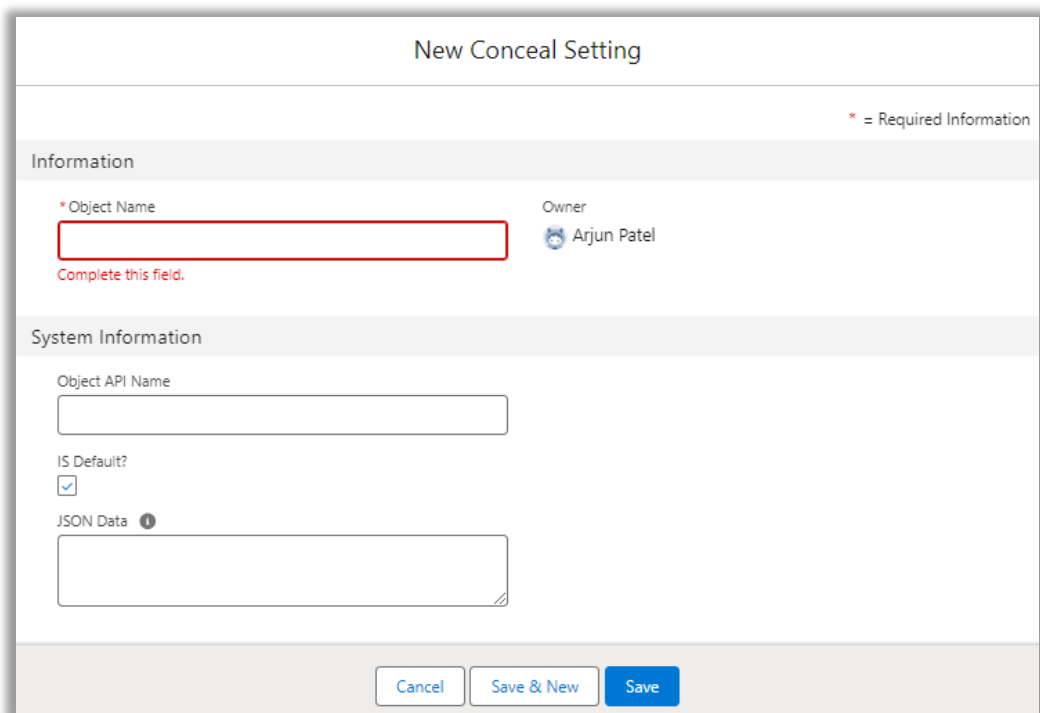


Conceal Settings

Summary:

This JSON-formatted summary encapsulates data masking settings. It defines parameters and configurations for concealing sensitive information. The structure adheres to the JSON format, ensuring seamless integration with systems that utilize or manage data masking functionality.

- Following are the steps for how to Create Conceal Settings.
- Navigate to  App Launcher → iSyncSF. And select tab's Conceal Settings.
- Click on New Button to create a new Conceal Settings or click on edit to modify it.
- **Object Name:** provide object name.
- **Object API Name:** provide object API name.
- **JSON Data:** Store custom JSON, Format {"FieldName":"Mask Format","FIELDNAME2":"Mask Format2"}
 - Example: {
"NumberOfEmployees":"[randomnumber]",
"AnnualRevenue":"[randomdouble]",
"Phone":"[randomtext]",
"Industry":"[randomtext]"
}



New Conceal Setting

* = Required Information

Information

* Object Name Owner  Arjun Patel

Complete this field.

System Information

Object API Name

IS Default? ☒

JSON Data ⓘ

