Overview - Salesforce.com (Lightning Ready)

QXchange is a powerful and easy to use data integration tool to access, integrate and manage large volumes of data from various systems. Extraction, transformation and loading of data are powered by QXchange with source and target database support.

QXchange helps organizations to bond together all enterprise data and ensures accuracy of data in a timely manner. QXchange is a simple stand-alone application that can be used by novice users with ease.

QXchange can quickly and easily transfer data between many standard data formats and applications, including MS Access, Excel, Comma delimited flat file, MS SQL Server, QuickBooks, Salesforce.com and also supports integration with the salesforce latest release Lightning Ready. It allows simple and clear setup of extraction, transformation and loading instructions to exchange data between different formats.

Salesforce.com is a pioneer in hosted software. It is the most popular hosted Customer Relationship Management (CRM) software used by small and mid-sized businesses in the world today. Salesorce.com has expanded beyond CRM and provides a hosted development platform as well as other applications such as Partner Relationship Management. There are more than 100,000 customers of Salesforce.com. Salesforce.com is available in many countries and used by many industries.

Technology
Salesforce.com API

Salesforce.com, supplies the Force.com API (Application Programming Interface) to allow third party products to work with Salesforce.com.

The API ensures that

- the third-party software complies with security access to the data
- provides strong error recovery and data logging to make sure data is protected
- provides standardization across various upgrades of Salesforce.com

The Force.com API is available for use with Professional, Enterprise, Developer and Unlimited editions of Salesforce.com. Even though the customer may not have API licensing (as in the case of Professional) QXchange can still be used due to a special key available to the application. All applications built on the Salesforce.com platform is accessible using the API. The API uses SOAP and WDSL specifications.

QXchange uses the Force.com API to access Salesforce.com and data objects contained in the platform. The QXchange application is certified by Salesforce.com.

Authentication and Authorization

QXchange uses sign-on information provided by the individual customer to identify itself while communicating through the Salesforce.com API. An existing user id and password can be used. The login information is encrypted and stored locally on the user machines. The application and login information is presented to the Salesforce.com authentication system to allow access to the QXchange application.

Use of the login information allows Salesforce.com to enforce access to various data objects based on the same security profile used within the application for direct access.

Data Access Plug-in

QXchange integration engine uses Data Access Plug-ins (DAPs) for individual application and data format integration. All the DAPs are called using a standard Application Program Interface (API). The Salesforce.com API is wrapped inside one of these DAPs. This allows for a smooth and standard operation across all the various DAPs.

QXchange is installed locally at the customer site so that customer data is directly loaded between customer machines and the Salesforce.com site without any other intervening web sites. QXchange sends a message request to Salesforce.com and Salesforce.com sends back a response message; the communication is managed synchronously.
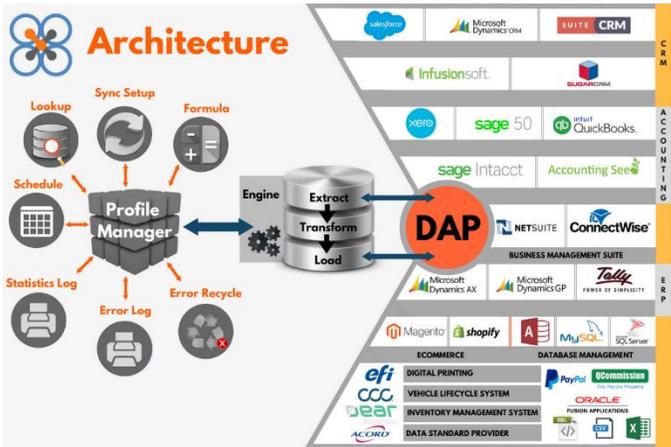
Salesforce.com Data

The Salesforce.com API exposes most (but not all) of the data objects available in the Salesforce.com data file. Some of the various objects available are listed here and there are more objects accessible. Currently there are 130+ objects available for access.

Data formats including notes and activities can be accessed using QXchange.

Custom data objects and custom fields within standard data objects can also be accessed by QXchange.

Objects

The following lists are available for access:

Lists	Objects
Entity	Accounts, Contacts, Users, Group, Territory, Partner, Product2, Pricebook2, Division.
Transactions	Opportunity, Case, Solution, Contract, Lead.
Descriptive	Task, Note, Document, Approval, Email message, Event.

Using QXchange

The QXchange engine works the same for all different DAPs. Every data transfer is set up as a profile, with a source and target data file, which can be of different data formats. Data transfer between specific objects and the mapping of source to target fields are also set up in the profile.

The profile can be executed directly or can be scheduled to be executed later. The process can be run on a local desktop or on a server.

Source Data

Salesforce.com can be defined as source data and the various objects can be accessed. Field level data from the objects can be extracted and mapped to destination objects and fields in different data formats.

Data from multiple objects can be extracted. Multiple profiles can be set up to extract data from various objects.

Source data can also be filtered using various expressions. Prior to executing extract, the source data can be viewed to make sure the right records are getting selected.

Target Data

Salesforce.com can be defined as target data and the various objects can be updated. Data can be updated to multiple objects. In some cases, update may have to affect multiple data objects at the same time, for example: Invoice Header and Line. Data can be updated in various modes: Insert, Update and Upsert. Insert expects the record being updated to be new and unique. Update expects the record to already exist. Upsert, tries to insert first and if that fails tries to update.

Scenarios

The QXchange ability to integrate Salesforce.com allows many uses. Certain limitations in Salesforce.com reporting can be exceeded with this tool. This allows many different scenarios:

- Extract closed opportunities in the last month into Excel
- Extract Account information with company names starting with "A"
- Make a copy of all available Salesforce.com data in a MS SQL Server Database, for use in reporting
- Insert spreadsheet invoice data sent from branch offices into Salesforce.com
- Extract Opportunities from Salesforce.com and create Customer Jobs and Sales orders in QuickBooks.
- Extract Accounts from Salesforce.com and create Customers in QuickBooks.

- Extract Invoices from QuickBooks and update opportunities in Salesforce.com
- Get orders entered from an online e-commerce system and load them into Salesforce.com as Opportunities.
- Get customer data entered online and create Customers in Salesforce.com.

Partner

CellarStone, Inc. is an AppExchange partner with Salesforce.com

Contact Us

To learn more about QXchange, please visit our website and fill out information at the Inquiry link.

www.qxchange.com/inquiry-about-qxchange.html

"The QXchange product was able to take care of my integration needs right out of the box. And the QXchange team solved all the other usual data issues that come up in such a project, very quickly. They worked very closely with me and solved every issue. I am very happy I found QXchange."
- Rich Bartels. Goose Island Corporation