

# Salesforce push flow configuration

## Apex Class to configure Connect All push flow

## Connect All Push flow

Connect All salesforce adapter supports syncing the records between applications using "Poll" and "Push" strategies. In **Poll** strategy, the Connect All server will query the salesforce database at scheduled intervals to find any updates for syncing, while in **Push** flow the user will invoke the request from salesforce to sync a particular record to other applications.

**Push** flow will help in reducing the no. of calls to salesforce database, and gives control to the user on what records to be synced to the configured applications.

## Steps to configure push flow in salesforce

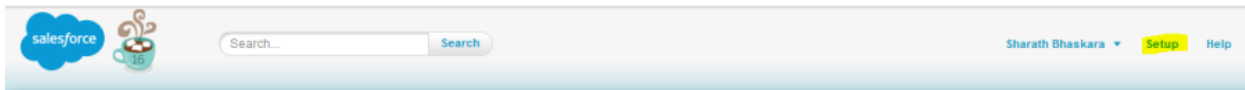
- Create an Apex class to invoke the Connect All rest service
- Create a custom button/link in salesforce to configure in the Page layout
- Customize the action of the custom button to invoke the apex class with parameters

## Prerequisites

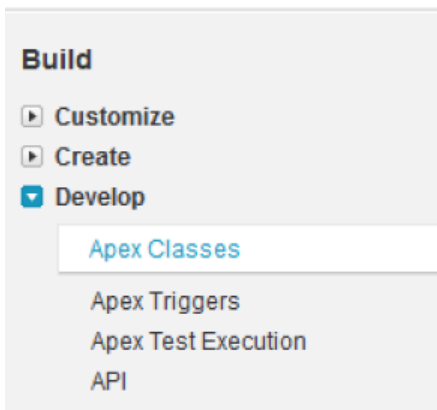
- Connect All server to be hosted on a machine, that is publicly available on Internet
- Port 7070 should be open on server, to receive the data from salesforce
- Last but not the least the Connect All Mule server should be up and running.

## Creating an Apex Class

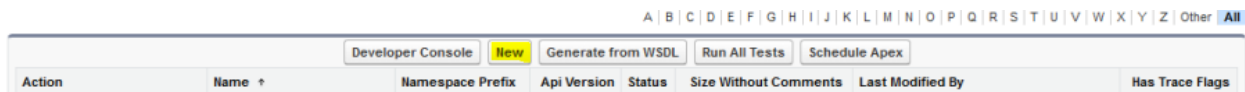
- Login to salesforce, click on "Setup"



- From the left side navigation menu choose Develop -> Apex Classes under "Build" section



- In the page opened, Click on "New" button to create a new class



- In the textarea paste the code given below.

```

global with sharing Class ConnectAllPushResource{

    webservice static String syncRecord(String recordId){
        return pushRecord(recordId);
    }

    global static String pushRecord(String recordId){
        String SERVER = 'connectallserver.domain.com';
        String APPLINK = 'SForceCase2MSDynamicsCaseClone';
        String ORIGIN = 'source';
        String USERNAME = 'admin';
        String PASSWORD = 'welcome';

        String METHOD = 'POST';
        String ENDPOINT = 'http://'+SERVER+'/SyncService/push';
        String CONTENTTYPE = 'application/json';
        Blob headerValue = Blob.valueOf(USERNAME+':'+PASSWORD);
        String authHeader = 'Basic ' + EncodingUtil.base64Encode(headerValue);
        String REQUEST_BODY = '{"appLinkName":"' + APPLINK +
'" ,"origin":"' +ORIGIN+ '" ,"id":"' +recordId+'"}';

        HttpRequest request = new HttpRequest();
        request.setMethod(METHOD);
        request.setEndpoint(ENDPOINT);
        request.setHeader('Authorization',authHeader);
        request.setHeader('Content-Type',CONTENTTYPE);
        request.setHeader('Accept',CONTENTTYPE);
        request.setBody(REQUEST_BODY);

        Http http = new Http();
        HttpResponse response = http.send(request);
        System.debug('Push record '+recordId+' to ConnectAll returned status:
'+response.getStatus());
        return response.getBody();
    }
}

```

- Change the below values as required based on your setup

```
1 global with sharing Class ConnectAllPushResource{
2
3     webservice static String syncRecord(String recordId){
4         return pushRecord(recordId);
5     }
6
7     global static String pushRecord(String recordId){
8         String SERVER = 'https://go2group.com';
9         String APPLINK = 'SForceCase2MSDynamicsCaseClone';
10        String ORIGIN = 'source';
11        String USERNAME = 'admin';
12        String PASSWORD = 'welcome';
13
14        String METHOD = 'POST';
15        String ENDPOINT = 'http://'+SERVER+'/SyncService/push';
16        String CONTENTTYPE = 'application/json';
17        Blob headerValue = Blob.valueOf(USERNAME+'_'+PASSWORD);
18        String authHeader = 'Basic ' + EncodingUtil.base64Encode(headerValue);
19        String REQUEST_BODY = '{"appLinkName":"' + APPLINK + '", "origin":"' + ORIGIN + '", "id":"' + recordId + '"}';
20    }
```

- Click on "Save" above the textarea



**Apex Class Edit** Save Quick Save Cancel

Apex Class Version Settings

```
1 global with sharing Class ConnectAllPushResource{
2
3     webservice static String syncRecord(String recordId){
4         return pushRecord(recordId);
5     }
```

## Creating a custom link and linking it to Apex class

- In the Quick search box on the left side navigation menu type "button" and select the "Buttons, Links and Actions" menu on the entity where you want to create a custom button.

button |  

[Expand All](#) | [Collapse All](#)

**Build**


- Customize**
  - Activities**
    - Task Buttons, Links, and Actions
    - Event Buttons and Links
    - Activity Buttons
  - Campaigns**
    - Buttons, Links, and Actions
  - Campaign Members**
    - Buttons and Links
  - Leads**
    - Buttons, Links, and Actions
  - Accounts**
    - Buttons, Links, and Actions
  - Contacts**
    - Buttons, Links, and Actions
  - Opportunities**
    - Buttons, Links, and Actions
  - Opportunity Products**
    - Buttons and Links
  - Cases**
    - Buttons, Links, and Actions**
  - Macros**
    - Buttons and Links

- Click on "New Button or Link" button in the opened page

Buttons, Links, and Actions [Help for this Page](#) 

**Case**

Use this page to manage buttons, links, and actions.

**Buttons, Links, and Actions** [New Action](#) [New Button or Link](#) [Default Custom Links](#) [Buttons, Links, and Actions Help](#) 

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
<a href="#">Edit</a>	Accept	Accept			Standard Salesforce.com Page		<input type="checkbox"/>
<a href="#">Edit</a>	Cases Tab	Tab			Standard Salesforce.com Page		<input type="checkbox"/>

- Enter the "Name", "Label", "Description". Choose Display Type as "Detail Page Link" or "Detail Page Button" based on your preference.

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label

Name  [i](#)

Description

Display Type

Detail Page Link [View example](#)

Detail Page Button [View example](#)

List Button [View example](#)

1. In the "Behavior" dropdown select "Execute Javascript" and leave the default option for "Content Source" which will be "On Click Javascript"

Behavior  [View Behavior Options](#)

Content Source

- Now type in the below javascript code in the textarea.

```
{!REQUIRESCRIPT("/soap/ajax/30.0/connection.js")}
{!REQUIRESCRIPT("/soap/ajax/30.0/apex.js")}

var status =
sforce.apex.execute("ConnectAllPushResource","syncRecord",{recordId:"{!Case.Id}"});
alert("Record sent for connectall sync: "+status);
```

- Click on save to save the configuration.

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label

Name  [i](#)

Description

## Adding the Custom button to page layout

- In the quick search above the left side navigation menu, search for "Page layouts" and choose the "Page Layouts" link under the entity you wanted the custom button to be added.

page layout ? 🔍

[Expand All](#) | [Collapse All](#)

**Administer**

- Data.com Administration**
  - Duplicate Management**
    - Duplicate Record Sets**
      - Page Layouts
    - Duplicate Record Items**
      - Page Layouts

**Build**

- Customize**
  - Home**
    - Home Page Layouts
  - Activities**
    - Task Page Layouts
    - Event Page Layouts
  - Campaigns**
    - Page Layouts
    - Campaign Members**
      - Page Layouts
  - Leads**
    - Page Layouts
  - Accounts**
    - Page Layouts

- Depending on the configuration, you might have multiple page layouts. Select the one where you want the "Custom Button" to be added, and click on "Edit"

## Case Page Layout [Help for this Page](#) ?

This page allows you to create different page layouts to display Case data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Case Page Layouts <span style="float: right;"><a href="#">New</a>   <a href="#">Page Layout Assignment</a></span>				
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Marketing) Layout	<a href="#">Sharath Bhaskara</a> , 10/6/2015 10:43 AM	<a href="#">Sharath Bhaskara</a> , 10/30/2015 1:53 PM	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Sales) Layout	<a href="#">Sharath Bhaskara</a> , 10/6/2015 10:43 AM	<a href="#">Sharath Bhaskara</a> , 10/30/2015 1:53 PM	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Support) Layout	<a href="#">Sharath Bhaskara</a> , 10/6/2015 10:43 AM	<a href="#">Sharath Bhaskara</a> , 10/30/2015 1:53 PM	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Case Layout	<a href="#">Sharath Bhaskara</a> , 10/6/2015 10:43 AM	<a href="#">Sharath Bhaskara</a> , 11/2/2015 8:47 AM	✓

- In the page layout editor, choose "custom links" and select the new custom button created to the "Custom Links" section.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Custom Link Name

- Blank Space
- Sync2ConnectAll
- Up-sell / Cross-s...

Date/Time Opened 11/3/2015 8:56 AM Date/Time Closed 11/3/2015 8:56 AM

Additional Information (Header visible on edit only)

Product	Sample Product	Engineering Req Number	Sample Engineering Req Number
Potential Liability	Sample Potential Liability	SLA Violation	Sample SLA Violation

System Information (Header visible on edit only)

Created By Sample User Last Modified By Sample User

Description Information (Header visible on edit only)

- Subject Sample Subject
- Description Sample Description

Internal Comments Sample Internal Comments

Custom Links (Header not visible)

- Up-sell / Cross-sell Opportunity

- Click on "save" to save the changes to the page layout.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Custom Link Name

- Blank Space
- Sync2ConnectAll
- Up-sell / Cross-s...

Additional Information (Header visible on edit only)

Product	Sample Product	Engineering Req Number	Sample Engineering Req
Potential Liability	Sample Potential Liability	SLA Violation	Sample SLA Violation

System Information (Header visible on edit only)

Created By Sample User Last Modified By Sample User

Description Information (Header visible on edit only)

- Subject Sample Subject
- Description Sample Description

Internal Comments Sample Internal Comments

Custom Links (Header not visible)

Sync2ConnectAll	Up-sell / Cross-sell Opportunity
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- Open a case and click on the "Custom button" to push a record for sync in Connect All.