Informatica® Application Integration
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Salesforce Connector Guide

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Preface

Read the *Salesforce Connector Guide* to learn how organization administrators and business users can use Salesforce Connector to connect to Salesforce objects and services. Learn how to create Salesforce event sources and event targets, and use them in a process.

C H A P T E R 1

Introduction to Salesforce Connector

This chapter includes the following topics:

Salesforce overview

Salesforce is a cloud-based Customer Relationship Management (CRM) solution for sales teams to manage contacts and sales activities. Use Salesforce to store and manage contacts and data of the sales activities of your organization.

Salesforce provides a Streaming API that enables streaming of events using the push technology. You can use the Streaming API to subscribe to Salesforce platform events, PushTopic queries, and change events. You can also publish messages to Salesforce platform events in near real time.

Salesforce Connector overview

Use Salesforce Connector to securely perform actions on Salesforce objects. You can subscribe to Salesforce custom platform events, PushTopic queries, and change events. You can also publish messages to Salesforce custom platform events.

With Salesforce Connector, you can create a Salesforce connection and use it in an Application Integration process. You can create connections to the following Salesforce editions:

- Professional Edition
- Enterprise Edition
- Unlimited Edition

Application Integration supports the OAuth and Password methods by which you can authenticate the Salesforce connection.

You can create an Application Integration process to perform the following tasks:

- Read, update, or delete Salesforce objects.
- Subscribe to events from Salesforce streaming channels such as custom platform events, PushTopic queries, and change events.
- Publish messages to Salesforce custom platform events.

  Note: You cannot use Salesforce Connector to subscribe to or publish messages to standard platform events.

Salesforce Connector processes can be triggered upon an event such as an insertion, update, or deletion of a record in Salesforce.

Administration of Salesforce Connector

Before you use Salesforce Connector, you must perform the following tasks in Salesforce:

- Install the Informatica Cloud Real Time Salesforce Managed Package in your Salesforce environment.
- Assign object permissions to the Salesforce user for the custom platform event. You must perform this task to subscribe to or publish messages to a Salesforce custom platform event.

Installing the Informatica Cloud Real Time Salesforce Managed Package

Before you create a Salesforce connection, you must install the Informatica Cloud Real Time Salesforce Managed Package in your Salesforce environment similar to how you install other Salesforce applications and plugins. The managed package provides connectivity between a Salesforce organization and an Informatica Cloud organization.

For more information about the installation, see the *Installing the Managed Package* topic in the *Salesforce and Application Integration Guide*.

After you install the Informatica Cloud Real Time Salesforce Managed Package, if your organization has enabled IP restrictions in Salesforce, you must whitelist all the Cloud Application Integration IP address ranges for the specific POD in your user profile or organization IP address ranges. This enables Application Integration connected apps to communicate with Salesforce and consume platform events.

For information about the Cloud Application Integration IP address ranges that you must whitelist, see Knowledge Base article 524982.

Assigning object permissions to the Salesforce user for the custom platform event

To subscribe to or publish messages to Salesforce custom platform events, you must configure permissions in your Salesforce environment.

1. Log in to Salesforce.
2. Under **Administer** on the left pane, click **Manage Users** > **Profiles**, and click on the user profile name for which you want to assign permissions.
3. Edit the profile to assign object permissions to the Salesforce custom platform event that you created.

CHAPTER 2

Salesforce Connections

This chapter includes the following topics:

Salesforce connections overview

Create a Salesforce connection to connect to Salesforce objects and services. You can configure an event source in a Salesforce connection to subscribe to Salesforce custom platform events, PushTopic queries, and change events. You can configure an event target to publish messages to Salesforce custom platform events.

After you create a Salesforce connection, you can validate and save the connection. You can then publish the Salesforce connection and click the **Metadata** tab to view the generated process objects for the connection.

Basic connection properties

The following table describes the basic properties that you can configure on the **Properties** tab of the connection creation page:

Property	Description
Name	Required. A name for the Salesforce connection that identifies it in the Process Designer. The name must start with an alphabet and can contain only alphabets, numbers, or hyphens (-). The name must be unique within the project or folder where you create the connection.
Location	Optional. The location of the project or folder where you want to save the connection. Click **Browse** to select a location. If the **Explore** page is currently active and a project or folder is selected, the default location for the connection is the selected project or folder. Otherwise, the default location is the location of the most recently saved asset.
Description	Optional. A description of the connection.
Type	Required. The type of connection that you want to use for the connector or service connector. Select **Salesforce**.
Run On	Required. The runtime environment for the connection. You can run the connection on the Cloud Server, a Secure Agent group, or a Secure Agent machine. To subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events, you must select a Secure Agent group or a Secure Agent machine. You cannot run a Salesforce connection on the Cloud Server if you want to create and use an event source or an event target.
Connection Test	Not supported for Salesforce Connector.
OData-Enabled	Optional. Specifies whether OData feeds are enabled for the connection. Select **Yes** to enable OData feeds. If you select **Yes**, you must specify either the allowed users or the allowed groups that can access the connection at design time. You can also enable or disable Cloud access to the OData endpoint URL. Default is **No**. For more information about the OData endpoint URL, see "Endpoint URL for OData-enabled connections" on page 19.
OData Cloud Access Enabled	Optional. Specifies whether you can access data from the OData service by using the Cloud endpoint URL or the Secure Agent endpoint URL. If you enable OData and configure the connection to run on a Secure Agent machine or a Secure Agent group, you can choose to disable access to the Cloud endpoint URL for security purposes. Select **No** to disable access to the Cloud endpoint URL. If you select **No**, you cannot access data from the OData service by using the Cloud endpoint URL. You can access data only by using the Secure Agent endpoint URL. Select **Yes** to access data from the OData service by using both the Cloud endpoint URL and the Secure Agent endpoint URL. Default is **Yes**. **Note:** If you set the **OData-Enabled** option to **No**, the value that you set for the **OData Cloud Access Enabled** option does not apply because Application Integration does not generate the OData endpoint URL. For more information about the OData endpoint URL, see "Endpoint URL for OData-enabled connections" on page 19.

Property	Description
Allowed Users for OData	Optional. The users that have access to the connection at design time. You can specify more than user. After you specify the first value, press the Enter key or the Comma key, and then specify the next value.
Allowed Groups for OData	Optional. The user groups that have access to the connection at design time. You can specify more than one user group. After you specify the first value, press the Enter key or the Comma key, and then specify the next value.

After you configure the basic properties, you must also define the following properties:

- The authentication properties for the Salesforce connection
- The event source properties for the Salesforce connection
- The event target properties for the Salesforce connection

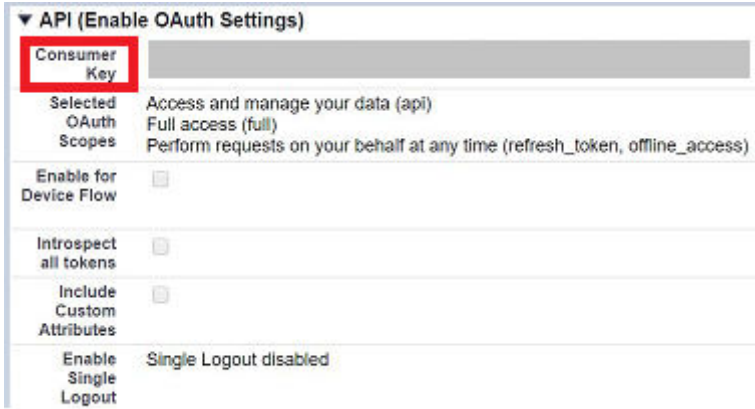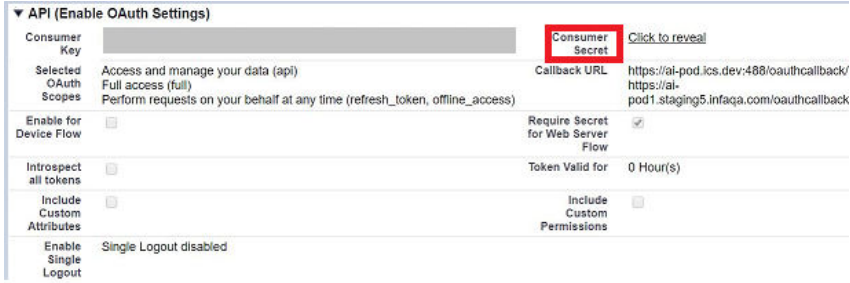# Salesforce connection authentication properties

When you create a Salesforce connection, configure the connection using Password or OAuth authentication properties. Default is **Password** authentication.

Password Authentication

To authenticate the Salesforce connection using Password authentication, select **Password** in the **Authentication Type** list and configure the following properties:

Connection Property	Description
User name	Required. Salesforce developer account user name.
Password	Required. Salesforce developer account password.
Security Token	Required. Salesforce security token. This is a case-sensitive alphanumeric code used as a second level of authentication.
Service URL	Required. The SOAP service URL of the Salesforce endpoint. For example, enter: `https://login.salesforce.com/services/Soap/c/40.0` To subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events, the supported version for the soap service URL for Salesforce login is 40.0. Enter the following value: `https://login.salesforce.com/services/Soap/c/40.0`

To subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events, you must configure the following properties in the **Event API Settings** section:

Connection Property	Description
Consumer Key	The consumer key associated with the Salesforce user account for API access. This field is required to subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events. To know the consumer key, perform the following steps: - Log in to Salesforce. - Click **Create** > **Apps**. The connected apps are displayed. - Click the connected app. The **API** section displays the consumer key as shown in the following image:
Consumer Secret	The consumer secret associated with the Salesforce user account for API access. This field is required to subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events. To find the consumer secret, perform the following steps: - Log in to Salesforce. - Click **Create** > **Apps**. The connected apps are displayed. - Click the connected app. The **API** section displays the consumer secret as shown in the following image:

OAuth Authentication

Use OAuth to connect to Salesforce through an API. If you choose OAuth authentication, you enter your Salesforce developer account credentials in a Salesforce window that opens when you authenticate the connection. You do not enter your Salesforce developer account credentials in the Application Integration UI.

For more information about using OAuth to authorize external applications, see the Salesforce documentation.

To authenticate the Salesforce connection using OAuth authentication, select **OAuth** in the **Authentication Type** list and configure the following properties:

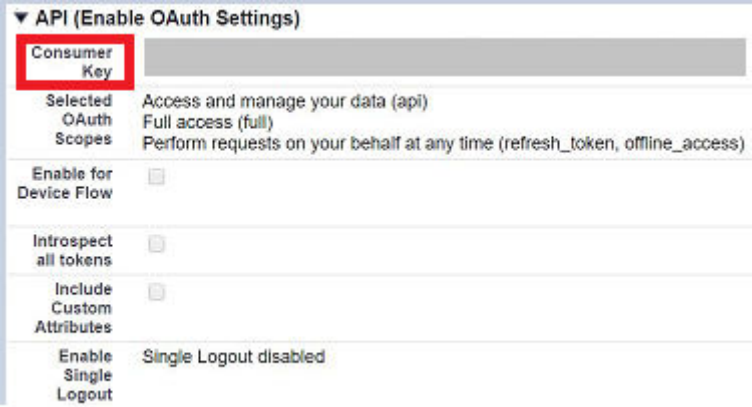| Connection Property	Description
Authorization URL	Required. Endpoint used to make OAuth authorization requests to Salesforce. The following URLs are the default production and sandbox authorization URLs: - https://login.salesforce.com/services/oauth2/authorize - https://test.salesforce.com/services/oauth2/authorize
Token Request URL	Required. Endpoint used to make OAuth token requests to Salesforce. The following URLs are the default production and sandbox token request URLs: - https://login.salesforce.com/services/oauth2/token - https://test.salesforce.com/services/oauth2/token
Session Duration	Optional. Number of minutes after which the OAuth token expires. When this duration ends, the connection makes a token request and performs authorization again. You do not need to manually authorize the connection when the session times out. Default is 60 minutes.
Authorization Status	The current authorization status. The name of the last user who authorized the connection and the time of authorization appears, if applicable.
Authorize Access	Required. Starts the OAuth authentication process. Perform the following tasks: 1. Click **Authorize** next to **Authorize Access**. 2. In the Salesforce window that appears, enter your Salesforce developer account credentials. 3. Click **Allow** next to the message that prompts you to authorize access.

OAuth JWT Authentication

You can configure OAuth JSON Web Token (JWT) authentication in a Salesforce connection to connect to Salesforce.

Use OAuth JWT authentication to authorize servers to access data without logging in each time the servers exchange information. The OAuth JWT authentication uses a certificate to sign the JWT request and does not require explicit user interaction.

Before you configure OAuth JWT authentication, ensure that you have the keystore file and password.

To authenticate the Salesforce connection using OAuth JWT authentication, select **OAuth JWT** in the **Authentication Type** list and configure the following properties:

Connection Property	Description
User Name	Required. Salesforce user name that has access to the connected app.
Keystore File	Required. Select a keystore file of the PKCS12 format.
Keystore Password	Required. Enter the keystore password.

Connection Property	Description
Session Duration	Optional. Number of minutes after which the session expires. When this duration ends, the connected app makes a token request and performs authorization again. You do not need to manually authorize the connection when the session times out. Default is 60 minutes.
Consumer Key	Required. The consumer key associated with the Salesforce connected app. This field is required to subscribe to Salesforce custom platform events, PushTopic queries, and change events, or publish messages to Salesforce custom platform events. To find the consumer key, perform the following steps: - Log in to Salesforce. - Click **Create** > **Apps**. The connected apps are displayed. - Click the connected app. The **API** section displays the consumer key as shown in the following image: ▼ API (Enable OAuth Settings) Consumer Key Selected OAuth Scopes — Access and manage your data (api) / Full access (full) / Perform requests on your behalf at any time (refresh_token, offline_access) Enable for Device Flow Introspect all tokens Include Custom Attributes Enable Single Logout — Single Logout disabled
Token Request URL	Required. Endpoint used to make OAuth token requests to Salesforce. The following URLs are the default production and sandbox token request URLs: - https://login.salesforce.com/services/oauth2/token - https://test.salesforce.com/services/oauth2/token
Audience	Required. Endpoint of the authorized servers of the intended audience for the token. The following URLs are the default production, sandbox, and Experience Cloud site token request URLs: - https://login.salesforce.com - https://test.salesforce.com - https://site.force.com/customers

Note: To use a platform event-based Salesforce connection with OAuth JWT authentication in a process, ensure that the platform event is in the same Salesforce organization and the event is enabled. Otherwise, in the input fields of the process, instead of the connection event type, you might see the type as `$any`.

While configuring the Salesforce connection with OAuth JWT authentication, you might encounter the following errors:

- `invalid_grant : user has not approved this consumer`
  To resolve this issue, you must change the OAuth policy of the connected app from **All users may self-authorize** to **Admin approved users are pre-authorized** in Salesforce.

- `invalid_app_access : user is not admin approve to access this app`
  To resolve this issue, you must provide the connected app access to the user's profile in Salesforce.

For more information about OAuth JWT authentication, see the Salesforce documentation.

Salesforce object filter

When you create a Salesforce connection, you can configure an object filter to add conditions to filter the objects. You can specify multiple object names separated by a comma.

When you define an object filter in a Salesforce connection and publish it, Application Integration populates the metadata only for the specified objects and their related objects.

Use the **Publish** option to publish a Salesforce connection with an object filter. If you choose to skip the metadata refresh when you publish a Salesforce connection, you will see the objects from the previous publish.

Note: If you have a Salesforce connection named Salesforce with an object filter and you synchronize it directly from Salesforce, Application Integration skips the object filter.

Salesforce event source properties

Salesforce Connector supports the Salesforce Streaming API. You can configure an event source in a Salesforce connection to subscribe to Salesforce custom platform events, PushTopic queries, and change events. You can use the event source in a process to consume changes in near real time.

After you define an event source for a Salesforce connection, you can publish the connection on a Secure Agent Group or a Secure Agent machine. You can then access the event source in a process and deploy the process on a Secure Agent Group or a Secure Agent machine to consume the process objects generated by the event source downstream.

After the connection is published for the first time, Salesforce assigns a default replay ID of -1. When the event is delivered to the subscribers, the replay ID is auto-generated based on the position of the event in the event stream. The Process Server persists the Replay IDs and uses them to process subsequent requests. In case of a connection failure, the Process Server uses the persisted Replay ID to retrieve missed events and avoid message loss.

Salesforce retains messages for 24 hours. If the replay ID points to a message older than 24 hours, the replay ID is reset to -1 and only the recent events are processed.

To create event sources for a Salesforce connection, click **Add Event Source** on the **Event Sources** tab. Select the event source type as **Event Source**. You can add one or more event sources for each Salesforce connection that you create.

The following table describes the basic event source properties that you can configure:

Property	Description
Name	Required. The event source name that appears in the Process Designer. The name must be unique for the connection. The name must start with an alphabet and can contain only alphabets, numbers, or hyphens (-).
Description	Optional. A description for the Salesforce event source that appears in the Process Designer.
Enabled	Select **Yes** to make the event source available immediately after it is published. Select **No** to disable the event source until you are ready to use it. Default is **Yes**.

You can configure the following properties for an event source:

Enable Load Balancing

Required. Determines whether the connection must be deployed on all the Secure Agents in a group or on the selected Secure Agent for load balancing. You must enable this option only if the Process Server uses a Secure Agent Cluster configuration.

When you enable this option, the Process Server distributes the routes across different Secure Agent machines in a Secure Agent Cluster to ensure load balancing.

Default is **No**.

Note: After you publish a connection and run a process, if you toggle the load balancing option, you might see duplicate messages. To avoid this issue, Informatica recommends that you create a new connection for load balancing.

Event Consumer

Required. Name of the Salesforce custom platform event, PushTopic query, or change event that you want to subscribe to.

Use one of the following ways to configure the property based on the type of event that you want to subscribe to:

Subscribing to Salesforce custom platform events

To subscribe to platform events, enter the API name that you defined for the custom platform event in Salesforce, prefixed by the term **/event/**.

For example, consider a Salesforce custom platform event with the API name set to **CS_PlatformEvent_e** as shown in the following image:

For this Salesforce custom platform event, enter the following value in the **Event Consumer** field:

```
/event/CS_PlatformEvent_e
```

Subscribing to Salesforce PushTopic queries

To subscribe to PushTopic queries, enter the streaming push topic name that you defined for the PushTopic query in Salesforce, prefixed by the term **/topic/**.

For example, consider a Salesforce PushTopic query with the push topic name set to **AccountTopic** as shown in the following image:

For this Salesforce PushTopic query, enter the following value in the **Event Consumer** field:

```
/topic/AccountTopic
```

Subscribing to change events

You can use Salesforce Connector to subscribe to change events in Salesforce and synchronize the corresponding data in an external data store.

Change events represent the changes that have been made to a record. Changes include creating a new record, updating an existing record, deleting a record, and undeleting a record.

To subscribe to change events, use one of the following formats:

- `/data/ChangeEvents` to subscribe to the change events of all the Salesforce CDC-enabled entities
- `/data/<standard_object_name>ChangeEvent` to subscribe to the change events of a specific standard object
- `/data/<custom_object_name>__ChangeEvent` to subscribe to the change events of a specific custom object
- `/data/<custom_channel_name>__chn` to subscribe to the change events of a custom channel

If you update the list of CDC-enabled entities in Salesforce, you must republish the Salesforce connection and process to listen to the new or updated CDC-enabled entities.

By default, Salesforce Connector listens to all the change events of all the entities in an organization that are enabled for Change Data Capture (CDC) in Salesforce. To filter the change events, you can define specific CDC-enabled entities that you want to listen to in the **Event Filter** field.

Event Filter

In the **Event Filter** field, enter a comma-separated list of names of the Salesforce CDC-enabled entities for which you want to filter the change events.

You can view the status of each event source in the published connection. If the status of the event source is stopped, you can republish the connection and restart the event source. When you republish the connection, all the event sources in the connection start by default.

For more information about starting and stopping event sources in a listener-based connection, see *Connectors for Cloud Application Integration and Monitor*.

Note: The Salesforce event source must be unique across multiple Salesforce connections that run on the same Secure Agent group or Secure Agent machine.

Include the eventUUID field in Salesforce platform event messages

The EventUUID field is a universally unique identifier (UUID) that identifies a platform event message. To include the EventUUID field in a platform event message, you must use Salesforce API version 56.0 in the Salesforce connection and configure the JVM properties.

1. Enter the following Salesforce URL in the **Service URL** field of the Salesforce connection properties:

   ```
   https://login.salesforce.com/services/Soap/c/56.0
   ```

2. Configure the JVM property `-Dae.sf.enable.event.uuid=true` in Administrator. For more information about Process Server, see the Application Integration Process Server section in the Administrator help.

3. Restart the Process Server and republish the Salesforce connection.

Salesforce event target properties

Salesforce Connector supports the Salesforce Streaming API. You can configure an event target in a Salesforce connection to publish messages to Salesforce custom platform events. You can use the event target in a process to publish mesages in near real time.

Note: You cannot configure an event target to publish messages to Salesforce PushTopic queries.

After you define an event target for a Salesforce connection, you can publish the connection on a Secure Agent Group or a Secure Agent machine. You can then access the event target in a process and deploy the process on a Secure Agent Group or a Secure Agent machine to consume the process objects generated by the event target downstream.
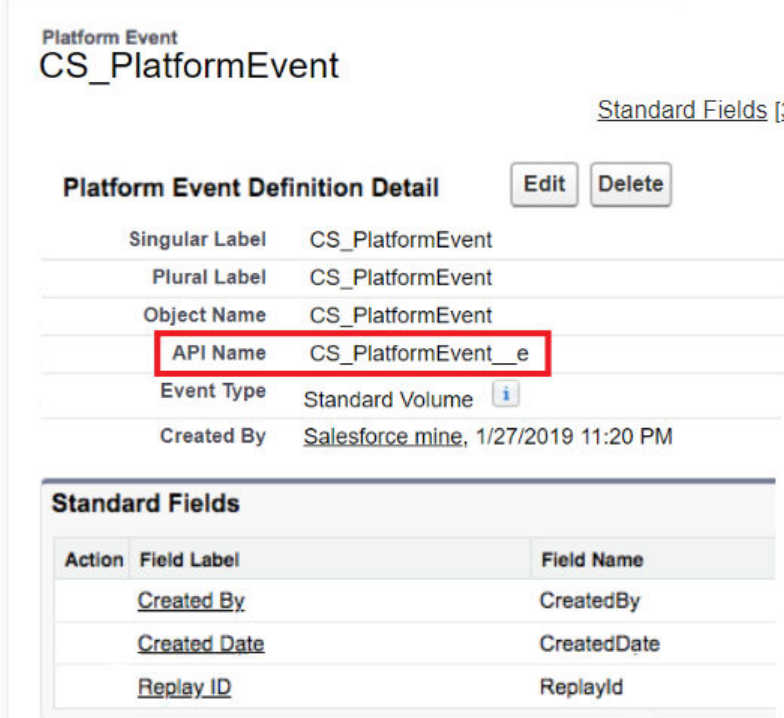
To create event targets for a Salesforce connection, click **Add Event Target** on the **Event Targets** tab. Select the event target type as **Event Target**. You can add one or more event targets for each Salesforce connection that you create.

The following table describes the basic event target properties that you can configure:

Property	Description
Name	Required. The event target name that appears in the Process Designer. The name must be unique for the connection. The name must start with an alphabet and can contain only alphabets, numbers, or hyphens (-).
Description	Optional. A description for the Salesforce event target that appears in the Process Designer.
Enabled	Select **Yes** to make the event target available immediately after it is published. Select **No** to disable the event target until you are ready to use it. Default is **Yes**.

The following table describes the event target property that you can configure:

Event Target Property	Description
Event Producer	Required. Name of the Salesforce custom platform event to which you want to publish messages. To publish messages to platform events, enter the API name that you defined for the custom platform event in Salesforce, prefixed by the term **/event/**. For example, consider a Salesforce custom platform event with the API name set to **CS_PlatformEvent_e** as shown in the following image: For this Salesforce custom platform event, enter the following value in the **Event Producer** field: `/event/CS_PlatformEvent_e`

Note: The Salesforce event target must be unique across multiple Salesforce connections that run on the same Secure Agent group or Secure Agent machine.

Salesforce connection metadata

After you create a Salesforce connection, save the connection. You can then publish the Salesforce connection and click the **Metadata** tab to view the generated process objects for the connection.

When publish a Salesforce connection in Application Integration, a list of **Actions** and **Objects** appear in the **Metadata** tab.

Salesforce actions are services that Salesforce exposes. For example, use the Convert Lead action to convert a current Lead object into an Account, Contact, or Opportunity object.

The following image shows the Salesforce actions within the **Metadata** tab of a Salesforce connection:

Action Name	Description
Convert Lead	Used to convert the current Lead into an Account/Contact/Opportunity.
Create SObject	Automated step that creates an SObject
Delete SObject	Automated step that deletes an SObject

Salesforce objects are tables that correspond to tabs and other user interface elements in the Salesforce website. For example, the Account object contains the information that appears in fields on the Salesforce **Account** tab.

The following image shows the Salesforce objects within the **Metadata** tab of a Salesforce connection:

Name	Label	Type
_any	Home	
AcceptedEventRelation	Accepted Event Relation	
Account	Account	
AccountChangeEvent	Account Change Event	
AccountContactRole	Account Contact Role	

When you publish a Salesforce connection, the **Metadata** tab is refreshed by default. You can click **Publish - Skip Metadata Refresh** to skip the metadata refresh and reduce publishing time.

Best practices for metadata refresh

- If you publish a Salesforce connection with event sources or event targets and you do not need the Salesforce metadata, skip the metadata refresh while publishing the connection. This significantly reduces the publishing time, and you don't fetch unnecessary metadata.

- If you want to change credentials in a Salesforce connection but you know that the metadata has not changed, skip the metadata refresh while publishing the connection to apply just the credential changes.

- If you know that the metadata has changed, you must click **Publish** to retrieve the metadata changes.

Endpoint URL for OData-enabled connections

When you publish an OData-enabled connection, Application Integration generates an OData Service URL.

To view the URL, click **Actions** > **Properties Detail**. You can use the OData Service URL to view the details of the REST endpoint.

If you enable Cloud access to the OData endpoint URL, by default, the OData Service URL is generated for an Informatica Cloud endpoint. The OData Service URL uses the following format:

```
https://<Informatica Intelligent Cloud Services URL>/active-bpel/odata/v4/<connection_name>
```

You can also use the equivalent Secure Agent endpoint URL to access data from the OData service by changing the format as follows:

```
https://<host>:<port>/process-engine/odata/v4/<connection_name>/<schema_name>
```

CHAPTER 3

Salesforce Connector Processes

This chapter includes the following topics:

Salesforce Connector processes overview

After you create a Salesforce connection, you can use it in a process along with the associated event sources and event targets.

You can create an Application Integration process to perform the following tasks:

- Read, update, or delete Salesforce objects.
- Subscribe to events from Salesforce streaming channels such as custom platform events, PushTopic queries, and change events.
- Publish messages to Salesforce custom platform events.

  Note: You cannot use Salesforce Connector to subscribe to or publish messages to standard platform events.

Salesforce Connector processes can be triggered upon an event such as an insertion, update, or deletion of a record in Salesforce.

The Salesforce connection and the Salesforce consumer process must run on the same Secure Agent Group or Secure Agent machine. Similarly, the Salesforce connection and the Salesforce producer process must run on the same Secure Agent Group or Secure Agent machine.

To view a video about publishing and subscribing to Salesforce platform events, and download a sample process, see the following community article:

https://knowledge.informatica.com/s/article/DOC-18453

Process guidelines for subscribing to Salesforce

Use the following guidelines when you create a process to subscribe to Salesforce custom platform events, PushTopic queries, and change events:

1. Create a process and click the Start step.
2. Click the **Start** tab and select the process binding type as **Event**.
3. In the **Event Source Name** field, select the event source that you created in the Salesforce connection. Application Integration creates an input field called **event** to capture the event details. You cannot delete this input field. You also cannot add more input fields.
4. From the **Run On** list, select the Secure Agent group or Secure Agent machine where you configured the Salesforce connection to run.
5. Configure other steps and properties as needed.
6. Validate, save, and publish the process.

When an event occurs for the custom platform event, PushTopic query, or change event that you specified in the Salesforce connection, the process gets invoked.

You can view the process execution details in the Application Integration Console. Click the **Processes** tab and select the agent where you configured the process to run. Click the ID to view details of the process execution.

Process guidelines for publishing to Salesforce

Use the following guidelines when you create a process to publish messages to Salesforce custom platform events:

1. Create a process and click the Start step.
2. Click the **Start** tab and select the process binding type as **REST/SOAP**.
3. From the **Run On** list, select the Secure Agent group or Secure Agent machine where you configured the Salesforce connection to run.
4. Add a Service step and then perform the following steps:
   - From the **Service Type** list, select **Connection**.
   - From the **Connection** list, browse and select the Salesforce connection that you created.
   - From the **Action** list, select the Salesforce event target that you created in the Salesforce connection. Application Integration creates an input field called **event** to capture the event details. You cannot delete this input field. You also cannot add more input fields.
   - Configure the message that you want to publish to the Salesforce custom platform event.
5. Configure other steps and properties as needed.
6. Validate, save, and publish the process.
7. Invoke the process to publish messages to the Salesforce custom platform event.

You can view the process execution details in the Application Integration Console. Click the **Processes** tab and select the agent where you configured the process to run. Click the ID to view details of the process execution.

Rules and guidelines for Salesforce processes

Consider the following rules and guidelines when you create a Salesforce process:

- You cannot use Salesforce Connector to subscribe to or publish messages to Salesforce standard platform events.

- If you add a Wait step to a process to subscribe to Salesforce custom platform events, PushTopic queries, and change events, you must ensure that the wait period is earlier than 40 seconds. If the wait period exceeds 40 seconds, you might encounter a message loss. Add a Milestone step for an early reply and to prevent message loss.

- When a process that consumes Salesforce events fails, the process is incorrectly triggered two more times.

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