# Salesforce Data Integration: How to Get Started

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Using Salesforce to handle your company's data gives you access to multiple tools and integrations to harness this data. At the same time, Salesforce data integration with a third-party application can endanger your company's sensitive data if you don't follow the appropriate precautions.

And since your success and growth as a business depends massively on data, you need to ace every stage of the integration process.

So, this article will cover the best practices for smooth Salesforce data integration. We'll also cover how to set up a successful Salesforce third-party integration using an integration solution called Exalate.

Here's what is covered in this blog post:

- What is Salesforce Data Integration?
- How to Natively Implement Salesforce Data Integration
- Salesforce 3rd-Party Integrations
- Benefits of Salesforce Data Integration
- Salesforce Data Integration Best Practices

## What is Salesforce Data Integration?

Salesforce is a cloud-based platform that offers a suite of customer relationship management (CRM) solutions to businesses. The Salesforce CRM comes with various sales, marketing, development, and customer service tools.

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Data integration involves assembling and arranging all the existing data sets into a central view. In Salesforce, data integration means gathering information from all Salesforce tools, as well as from other third-party apps.

Integrating your data in Salesforce is straightforward because you only need to monitor the incoming and outgoing data. Besides, some integrations use automated no-code triggers to sync your data without manual entries.

Salesforce data integration usually involves one or all of the following:

- Importing and storing customer contact information
- Importing, storing, and updating payment details
- Importing and saving support service data
- Updating and accessing Salesforce data records.
- Exchanging data between Salesforce and other tools.

The ability of any data-driven company to successfully implement these tasks depends on the integration plan as well as the software solution facilitating the exchange.

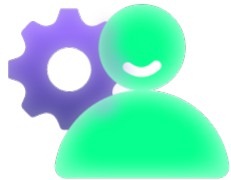## How to Natively Implement Salesforce Data Integration

Salesforce allows multiple methods of natively syncing, sharing, and integrating data with external systems. These data exchange methods allow Salesforce users to integrate their data with the CRM platform without needing 3rd-party tools.

Some of them include:

- Apex Actions
- Change Data Capture
- Custom Apex (REST and SOAP Web Services)

- External Services
- Generic Events
- MuleSoft Composer
- OmniStudio Integration Procedure
- Platform Events
- Salesforce Connect/External Objects
- Heroku Connect
- MuleSoft Anypoint

However, these data transfer protocols come with several drawbacks that could affect the quality and completion of the data transfer.

For instance, Apex is bound by governor limits, which hampers its integration capabilities. Besides, these native tools offer little security, necessitating the addition of 3rd-party integrations for better data integration security and reliability.

## Salesforce 3rd-Party Integrations

Salesforce seamlessly integrates data with 3rd-party apps, using inbound and outbound messages. This process follows the ETL (Extract, Transform, Load) protocol in AppExchange tools like Lightning Web Components, Data Import Wizard and Data Loader, and Dataloader.io—a tool that helps to maintain historical context and improve the accuracy of the process.

But the drawback to using Dataloader.io is that it only works when you already have a Salesforce account. Besides this ETL tool is too complicated to implement, even for data engineers with technical experience.

## How to Integrate Salesforce Data with Jira

Jira is an Atlassian product that helps teams manage their work on a central, multi-view dashboard. In the modern workplace, Jira helps global teams increase productivity by allowing fast-paced data sharing between teammates and colleagues.

Due to Jira's central role in teams within the workplace, data clusters can form within remote and hybrid teams—which often leads to the formation of data silos in an organization, and that's why businesses need Jira Salesforce integration.

Let's see how such integration can be set up in detail.

## How to Integrate your Data in Salesforce Using Exalate

Now that you have the information for Salesforce data integration, let's explore how to do this in real life.

We can integrate data between apps like Github, Zendesk, and Jira with Salesforce using Exalate, a decentralized integration solution that gives you autonomous control over both outgoing and incoming information.

Exalate provides independent control over incoming and outgoing processes at both ends of the integration. As a result, the systems are more secure, flexible, scalable, and less dependent on each other.

Follow these steps to install Exalate on Salesforce:

Exalate needs to be installed as a dedicated app on both Jira and Salesforce instances. Let's start by installing it on your Salesforce instance.

1. Go to the Salesforce search bar and type "Exalate."
2. On the product page, click "Get It Now"
3. Choose the "Install in Production" option. The "Install in Sandbox" option tests the package in a simulated installation environment.

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4. Verify the data and accept the term and conditions. Then click "Confirm and Install".
5. You will be redirected to the ExalateBridgeApp page.
6. Choose who you want to install Exalate for (you can install it for admins, users, or specific profiles).
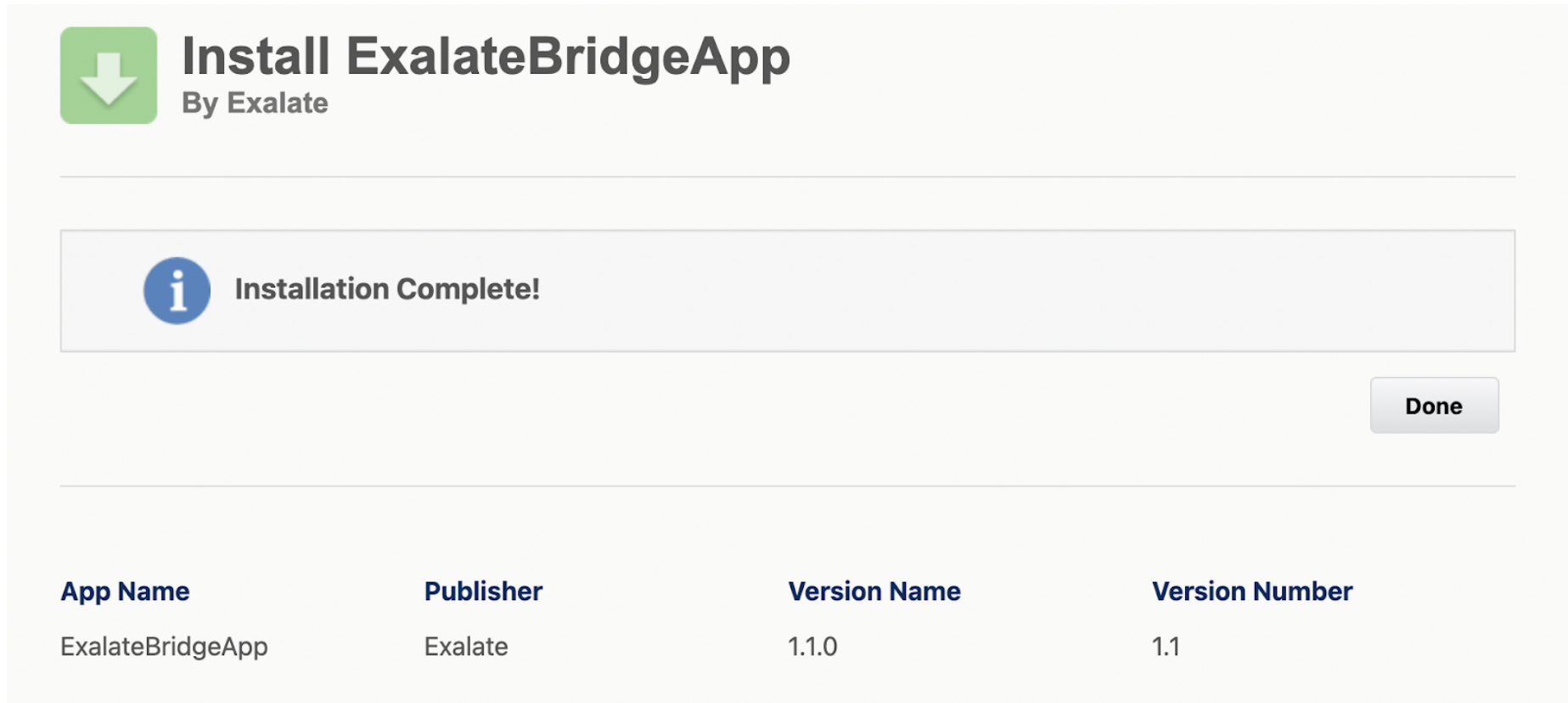
7. Select "Install for Admins Only" > Click "Install".



**Install ExalateBridgeApp**
By Exalate

ℹ **Installation Complete!**

Done

| App Name | Publisher | Version Name | Version Number |
|---|---|---|---|
| ExalateBridgeApp | Exalate | 1.1.0 | 1.1 |

8. Go to Salesforce and search for the "Exalate Console" tab.
9. Click the blue "Request Node" button.
10. On the next screen, "Allow" access to Exalate with the necessary permissions.

11. Specify the user permissions and roles. Click "Continue."
12. Enter your details and click "Agree and Submit".
13. Click "Verify Exalate Instance" to authenticate the instance.



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And Exalate is installed on your Salesforce instance.

Once the verification is complete, you can now install Exalate on Jira.

1. On the toolbar in Jira, click "Apps" > Click on "Explore More Apps."
2. Type "Exalate" in the search bar.
3. Select the "Exalate Jira Issue Sync & more" option.
4. Click on "Try it free" and add it to Jira.

Jira / Marketplace apps                                    Feedback

# Discover apps and integrations for Jira

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Sort ⌄        ☐ Free for all teams    More Filters ⌄    Categories ⌄

10 results

| Exalate Jira Issue Sync & more | Exalate: ServiceNow to Jira Integration | Exalate: Zendesk to Jira Integration |
|---|---|---|
| Two-way Jira sync tool. Supports Jira to Jira Integration, ServiceNow, Github, Zendesk, Salesforce, Azure DevOps integration... | Experience a seamless, real-time and two-way ServiceNow Jira Integration | Experience a seamless, real-time and two-way Zendesk Jira Integration |
| IT & helpdesk, Integrations, Tasks, Workflow | Admin tools, Continuous integration, IT & helpde... | Admin tools, Continuous integration, IT & helpde... |
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And that's it! You installed Exalate on Jira.

Now let's connect Jira to Salesforce. You can initiate the connection on either instance, I will start from the Salesforce side.

1. Open the Exalate Console from Salesforce.
2. Click "Initiate connection."

3. Enter a Destination Instance URL in the search bar that appears.
4. Select the Basic mode or Script mode. We have selected the Basic mode here.
5. Click "Next" to continue.

**Initiate connection** ✕

**Destination instance URL** ⓘ

https://idalkoplay.atlassian.net ✓

I don't have a URL

**Choose the configuration type**

✦ **Basic**

- Automatic configuration of basic fields
- Sync rules cannot be edited
- Only Cases can be synced
- Recommended for use cases of basic complexity

</> **Script**

- Groovy-based scripting
- Configure each side of the connection separately
- Recommended for use cases of basic to advanced complexity

Next

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6. A prompt will ask for your admin access to the destination instance. Click "Yes, I have admin access" > Click "Initiate."
7. You'll be redirected to choose the project you want to create issues for. Select the project and click "Confirm."
8. Click "Exalate" to sync your first case or issue,

**Exalate**                                                             ✕

# Connection established successfully ✔

Sync your first case to see how it works.

Please enter an entity key to proceed

5007Q00000KR2YvQAL

**Exalate**

9. After a few minutes, the sync will be completed.

Congratulations! You've just synced your data from Jira with Salesforce using the Exalate Basic Mode.

If you want more control over your data—with custom configurations like triggers, rules, and statistics—consider using the advanced Script Mode.

Follow the steps in this detailed Jira Salesforce integration guide for a buttery smooth integration using the Exalate Script Mode. Or watch this video tutorial to learn all about it.

https://youtu.be/syCwqpCCdfE

## Benefits of Salesforce Data Integration

Merging your data with Salesforce comes with the following benefits for your business:

- Salesforce data integration allows you to sync all forms of data, including fields, attachments, descriptions, comments, and custom fields. This will help your business to fill in knowledge gaps and improve customer experience.
- Your business will gain control over all incoming, outgoing, and in-processing data. You can manage and visualize your data directly from the Salesforce CRM.
- Salesforce provides strict admin controls, which offer maximum security when sharing data between systems. The exchange portal also has fail-safe mechanisms to protect your data if the integration is unsuccessful.
- Businesses can connect an unlimited number of instances from multiple sources. This will help your business dismantle silos and form a centralized data platform to improve decision-making and serve as a single source of truth (SSOT).
- Integrating your business data with Salesforce makes it easier to visualize your company's data on a single interface using tools like Tableau CRM and Einstein Discovery.
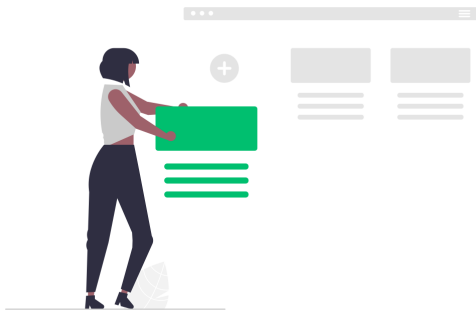
- Salesforce reflects changes quickly—which will benefit businesses that rely on real-time, fast-paced data processing to maximize sales and boost customer satisfaction.

## Salesforce Data Integration Best Practices

Merging your data in Salesforce can go horribly wrong if you don't take the necessary precautions into consideration. Bad data integration practices could lead to permanent data loss or misplacement, which will harm business decisions.

To protect your business and customers' data, here are the best Salesforce data integration practices to follow.
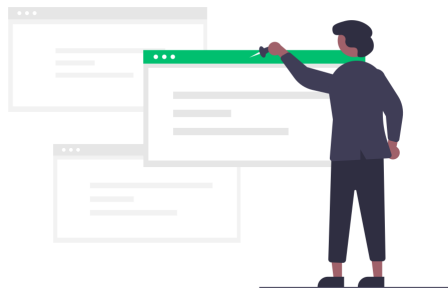
### Tidy your Data



Before you start any integration, you need to arrange your data. By doing so, your information will remain intact when it enters the Salesforce environment or vice versa. Otherwise, you will end up with jumbled-up data that will be of no use to your users.

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## Specify the Scope of the Integration

You have to determine if you want to integrate your entire data pool or if you only want to sync a subset of the existing data with Salesforce.

Since data integration takes a lot of time and effort, defining the scope of integration ensures you stay within your budget—and your team members won't waste their time and efforts.

Focus on improving data visibility and transparency across all projects and interdependent teams in order to facilitate a free flow of information. This will give your business a 360 customer view.

## Create Integration Plan

The integration plan should detail how your company wants to organize the data, who is in charge of validating specific data sets, as well as the preferred storage environment.

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You should also decide if you want to store your data on-site or in the cloud. Salesforce offers cloud tools for data storage, but you can also adopt a hybrid strategy to be on the safe side during synchronization.

## Conclusion

Salesforce data integration often goes smoothly when you have a clear scope, a foolproof integration plan, and a robust backup strategy. When it goes right, you can move all your data from platforms like Jira to the Salesforce CRM to obtain a 360 customer view.

Always sync your data using only trusted third-party applications to keep your sensitive information safe. For this guide, we used a Salesforce third-party integration solution called Exalate.

Ultimately, if you follow the best practices for Salesforce data integration, everything will go smoothly, and your business will make better data-driven decisions.

***Recommended Reads:***

- Salesforce Integrations: Integrate Salesforce and other Tools
- Salesforce Third-Party Integration: Set up a Bidirectional Sync between Salesforce and Other Tools
- How to Integrate Zendesk and Salesforce in 5 Steps
- Jira Salesforce Integration: How to Set up a Two-Way Sync between Different Teams
- Salesforce to Salesforce Integration: Sync Multiple Salesforce Instances Bidirectionally
- How to Set up an Azure DevOps Salesforce Integration
- GitHub Salesforce Integration: How to Set up a Sync in 6 Steps
- How to Set up a Salesforce ServiceNow Integration
- Salesforce Zendesk Integration