How to Sync Any Entity in Exalate for Salesforce

Last Modified on 06/20/2025 6:01 am EDT

Using Exalate you can sync any entity from Salesforce. This article describes examples of how to sync various objects. Scripts below use objects and field names from the Salesforce database. You can find out the field and object names of any entity in Salesforce.

Outgoing Sync

On the outgoing sync, you define which objects you want to send. Use the variable **entity.entityType** to define the entity you are executing the script for. With this script, you can sync fields from the **Case** and **Task** entities. This script shows how to sync the following fields from the Case object:

- Id
- Subject
- Description
- Comments
- Attachments
- Status

This script shows how to sync the following fields from the Task object:

- Id
- Subject
- Description
- Status

Script Variables

entity.entityType

A variable used to know what object to sync. Assign the name of the Salesforce object name to this variable. This example shows how to sync data from two objects: case and task. You can sync any entity within the if condition. For example, with the replica.key = entity.ld line, you sync the key field from the case object. You can add more fields, like description or comments.

Incoming Sync

This script shows how to set up incoming sync for Salesforce entities. This example script shows how to sync issues between Salesforce and Jira.

On the first synchronization, it's important to define what Salesforce entities you want to create after receiving data from Jira. This is done with the <code>[if(firstSync)]</code> variable. In this example, **Case** is used as the default entity, where all data is synced. The fields from the Task object are synced in the Task entity.

```
if(firstSync){
//Decide on the first sync, which entity you want to create based on the remote issue type
if(replica.type.name == "Task"){
  entity.entityType = "Task"
}else{
  entity.entityType = "Case"
}
}
if(entity.entityType == "Case") {
  entity.Subject = replica.summary
  entity.Description = replica.description
 entity.comments = commentHelper.mergeComments(entity, replica)
  entity.attachments = attachmentHelper.mergeAttachments(entity, replica)
  Jira Custom Field to Salesforce Field
  Apply the value from a Jira custom field to the Business Hours
  This works for all other entity types as well
  entity.BusinessHoursId = replica.customFields."Jira CF Name".value
  Status Synchronization
  Sync status according to the mapping [remote issue status: local case status]
  If statuses are the same on both sides don't include them in the mapping
  def statusMapping = ["Open":"New", "To Do":"Escalated"]
  def remoteStatusName = replica.status.name
  entity.Status = statusMapping[remoteStatusName] ?: remoteStatusName
}
//any other entity can be synced using the object name and the entity variable
if(entity.entityType == "Task") {
 entity.Subject = replica.summary
 entity.Description = replica.description
}
```

Script variables

if(firstSync)

A condition where that defines the objects used to store incoming data in Salesforce. With this script, you can store data in the Case and Task objects.

```
entity.entityType
```

A variable used to know what object you can sync. Assign the name of the Salesforce object to this

variable. In this example, you can sync data into two objects: Case and Task. You can sync any entity within the if condition. For example, with the entity.Subject = replica.summary line, you sync the summary field from Jira issues into the Subject field from Case object. You can add other fields, like Description.

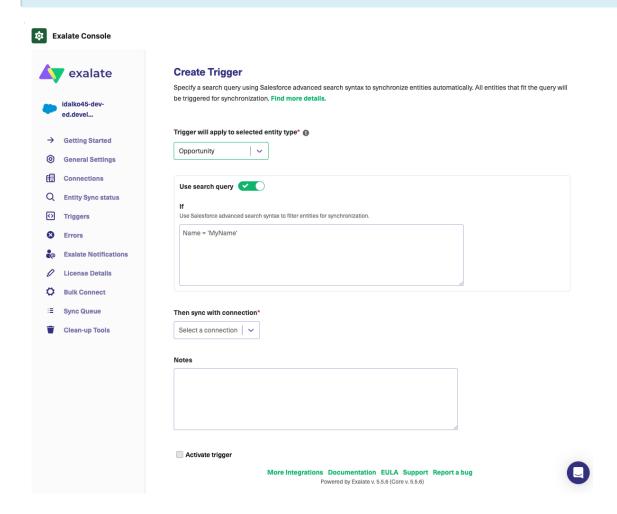
def statusMapping

Sets mapping for statuses according to the following template [remote issue status: local case status]. If you set the mapping from the example in Salesforce, the New status in Salesforce is displayed as Open in Jira.

Creating a Trigger

If you want an entity to be synced automatically when it matches a Salesforce query, you need to create a trigger for it in the Triggers tab. To create a trigger for any entity (object) on your Salesforce ticket, start typing the object name on the entity select field:

Note: If there is only one entity type available, the select dropdown menu is disabled.



Video Tutorial

ON THIS PAGE

Product Outgoing Sync About Us ?

Redeasing iStyrry ?

Glossary ? Creating a Trigger API Reference ?

Vedgot Typtorial

Pricing and Licensing 2

Resources

Subscribe for a weekly Exalate hack 2

Academy ?

Blog ?

YouTube Channel 2

Ebooks ?

Still need help?

Join our Community ?

Visit our Service Desk ?

Find a Partner ?