

Getting Started with S4S



MA1 S4S

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1. Overview

The following sections outline, at high level, the installation and setup of the S4S connector.

2. About Salesforce.com

Salesforce® offer several editions having different capabilities at different [pricing](#). The accessory market for Salesforce® is called the [AppExchange](#).

The [data model](#) for Salesforce® is extensive and objects can be modified easily. Data can be accessed through the user interface or through the API “back door”. The two SOAP based API’s are:

- **Enterprise API** is specific to your installation. It has strong types for your custom fields but any changes to the objects require the WSDL to be regenerated.
- **Partner API** is generic for out-of-the-box Salesforce® and allows you to discover and interact with objects and attributes that you don’t know about at compile time. You still have access to custom fields.

The S4S connector uses the Partner API.

To support deployment processes, Salesforce® customers have the following organization/instance types:

- **Developer Edition:** Out-of-the-box Enterprise version of Salesforce®.
- **Developer Sandbox:** This is the most basic sandbox. It is free, stores 10 MB of data and can be refreshed every day.
- **Configuration-only Sandbox:** This is a paid sandbox, cost around 10% of production environment and has a subset of production data. This sandbox can be created directly from the production environment and refreshed every day. This sandbox has the 500MB data limit.
- **Full Copy Sandbox:** This is a paid sandbox costing around 15% to 20% of production environment. It is an exact replica of the production environment and stores the real business data. This sandbox can be created from the production environment and refreshed after every 28 days. Full copy sandboxes have the same data limit as the production environment.
- **Production Editions:** Professional, Enterprise or Unlimited is required for S4S.

Note that Salesforce Professional Edition does not have sandboxes. For more information about the minimum requirements, please see the FuseIT [website](#).

3. Starting with Salesforce.com

The best way to [learn](#) Salesforce is to get a free Salesforce Developer Edition at <http://developer.force.com/>. This Developer Edition equates to the Enterprise Edition and has the required API access enabled so it works well with S4S.

The best way to develop against Salesforce is to use a Sandbox. These will contain a mirror of the customizations made in production so better reflect your real environment.

4. Downloading S4S

To download S4S, please [email us](#) and we will provide a download link to the latest S4S release. This will be a full, but unlicensed version of S4S. It will work as follows:

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- Ten years against a Salesforce Developer Edition. After this time, please download the latest version.
- Up to 30 days in production after the S4S build date.

You can determine the licensing status by looking at the Sitecore log file usually saved in the websites data directory. Alternatively check the [S4S Status Page](#).

5. S4S Documentation

More information is available on our [online wiki](#).

6. S4S Starter Kit

You can install S4S into your development environment and map it against your customers Salesforce Sandbox, or install the S4S Starter Kit in a blank Sitecore instance and map it to a Developer Edition.

The Starter Kit includes the basic S4S functionality plus exposes the code required to implement the features demonstrated in the kit. It does not include the S4S EXM module.

Note that the Starter Kit installs the optional Security Connector that lets you log into the Sitecore website using credentials saved in the individuals Salesforce contact record. You may not need this functionality on your live site.

FuseIT recommends you use Sitecore Certified developers to install the Starter Kit. No in-depth Salesforce knowledge is required other than the ability to log into Salesforce and configure an API user via the graphical user interface.

7. S4S EXM Module

This section is only relevant if you have purchased the S4S EXM Module. Installing the module is significantly more complex than installing S4S alone as it has a number of Salesforce and Sitecore packages. FuseIT recommend the S4S EXM module only be installed after developers have a clear understanding of S4S and how it works. If you have purchased the S4S EXM module, please contact FuseIT at s4s@fuseit.com and we will make it available to you.

8. S4S Licensing

S4S does not need licensing to work against a Salesforce Sandbox or Developer Edition but you will need to license it before you install and run it against a Salesforce production instance. Licensing requires the following steps:

1. Complete the "FuseIT - S4S License and Maintenance Agreement" document and return it to FuseIT.
2. Complete the "FuseIT - S4S Purchase Order" form and return it to FuseIT.
3. FuseIT will immediately invoice according to the Order Form. The invoice will include details for payment by international wire transfer.
4. Complete the relevant "FuseIT - S4S Technical Submission" form and return it to FuseIT.
5. License will be issued after payment is received.

Licensing requires the following information:

- Salesforce Organisation Id of the Salesforce instance.

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- Salesforce Organisation Edition of the Salesforce instance e.g. Enterprise, Unlimited or Performance.
- Depending on the licensing, the domain names of your Sitecore servers.

These details must be exact as the license keys are generated from them. Please see the “S4S Finding the Licensing Detail” document for more information on how to find this information.

Important: After adding licenses always check the log files to see if the keys are valid and accepted. If the details are no shown in the log the logging level will need to be [reset](#).

9. Contact Information

FuseIT are committed to supporting S4S. If you cannot find answers in this document or the installation documents please email us at s4s@fuseit.com or call during New Zealand business hours.

For accounting enquiries please email acccounts@fuseit.com

For technical and license key enquiries please email s4s@fuseit.com