

Create a Salesforce dynamic share

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In order to ensure that case records are shared out to your shared queue and then eventually on to ServiceNow, you will need to create a dynamic share on the Salesforce side.


Prerequisites

- ⚠ Install the [Perspectium Package for Salesforce](#)
- ⚠ [Configure your Salesforce remote site settings](#)
- ⚠ [Configure Perspectium Replicator as a Salesforce connected app](#)
- ⚠ [Configure Perspectium properties for Salesforce](#)
- ⚠ [Create a custom case field](#)
- ⚠ [Create a Salesforce shared queue](#)

Procedure

To create a dynamic share in Salesforce, follow these steps:

1

Log into your Salesforce organization and click the  icon in the upper left-hand corner of the screen. Then, click the **Perspectium Replicator** app.

2

In the navigation bar near the top of the screen, click **Dynamic Shares**. In the upper left-hand corner of the resulting page, click **New Dynamic Share**.

3

From the Table dropdown, choose **Case**. Then, check the **Active** box to start sharing out case records dynamically.

4

Check the **Create** box to dynamically share Salesforce case record data that is newly created. Check the **Update** box to dynamically share Salesforce case record data that is updated. Finally, check the **Delete** button to ensure that deleted Salesforce case records no longer appear in your ServiceNow instance. Optionally, you can check **Include Attachments** if you want to dynamically share out attachments that are added to your Salesforce case records. You also have the option to create **Filters** here for your Salesforce dynamic share if you wish.

5

Choose **AES-128** or **AES-256** as an encryption cipher, or choose **Base64** to have base 64 encoding only for your dynamically shared data.

6

For the Target Queue, choose **psp.in.siam.provider.salesforce**.

7

Scroll down to the bottom of the Dynamic Share form and click **Save**. All other required fields will then be created automatically. To complete the configuration of your Salesforce dynamic share, click **Save Trigger**.

Similar topics

- [Install the Perspective Package for Salesforce](#)
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- [Configure Perspective Replicator as a Salesforce connected app](#)
- [Configure Perspective properties for Salesforce](#)
- [Create a custom case field](#)

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