

Create a Salesforce bulk share

Fluorine+

Setting up a **Salesforce bulk share** allows a Salesforce organization to share a pre-filtered range of data in a table data at once. The consumer or subscriber of this data can be a ServiceNow instance or DataSync Agent.


Prerequisites

⚠ First, get started with [SalesInsight](#).

Procedure

To create a bulk 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 **Perspecti**
um Replicator app.

2

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

3

Type a name for your Bulk Share. From the Table dropdown, choose **Case**.

4

Check the **Insert Only** box if your target (i.e. database) does not contain any of the records to be shared. Selecting this option will share out all records as "insert" and skip querying your target to see if records exist. This option should only be chosen if you know for sure the records don't exist, otherwise it is recommended to leave it not selected. Optionally, you can also check **Include Attachments** if you want to share out attachments that are added to your Salesforce case records.

5

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

6

For the Target Queue, choose **psp.in.siam.provider.salesforce**. You also have the option to create Filters here for your Salesforce bulk share if you wish.

7

Scroll down to the bottom of the Bulk Share form and click **Save**. All other required fields will then be created automatically.

8

Click **Execute Now** to start running the bulk share to share out records.

Similar topics

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

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