



Vena for Salesforce

Bring the cloud down to earth - break down data silos by seamlessly integrating the Salesforce cloud application with Vena. Our direct integration with Salesforce allows you to get timely access to your data in Vena so you can spend less time manually manipulating data and more time telling the story behind your numbers.

Please note: the Salesforce and Vena native connector also applies to organizations using FinancialForce as their ERP solution.

KEY FEATURES

- **Gain confidence in your numbers.** Accelerate time-consuming data integration tasks and gain data integrity by eliminating errors that often occur with manual data manipulation.
- **Get back lost time.** Our fast and secure web-based interface that allows you to automatically load your data into Vena with ease.

- **Stay in the know.** Alerts and notifications on the status and progress of data loads into Vena mean you'll never have to guess if an integration was a success.
- **Say goodbye to rigidity and hello to flexibility.** You can tailor the Salesforce and Vena integration to synchronize relevant relationships, data and hierarchies.

HOW DOES IT WORK?

Vena's native integration with Salesforce can be set up by logging into Salesforce directly from Vena. Once the credentials are provided, automated data transmission can be triggered and controlled completely from the Vena side.

There is also a web interface provided to customize the data extract from Salesforce and schedule data loads on-demand. The Vena connector is built right on top of the Salesforce API infrastructure to ensure a seamless and accurate data streaming experience.





HOW VENA PARTNERS WITH YOU

Vena works with your team to configure your data integration and provide best practices around data integration and the validation of data.

Vena will work with your team to:

- Review Vena and Salesforce integration requirements
- Configure the Vena Salesforce connector
- Load data into Vena
- Guide you through best practices to validate source data

What we will need your team to do:

- Provide a resource with knowledge and understanding of Salesforce who can identify objects and tables required for integration and provide queries to bring over the required data
- Provide necessary Salesforce access and permissions
- Validate completeness and integrity of data

STANDARD INTEGRATION FIELDS AND OBJECTS

This Salesforce data pull can be customized as needed.

Salesforce Objects

Opportunity		
OpportunityID	OwnerID	CloseDate
Name	StageName	LastActivityDate

Opportunity Line Item		
Description	ProductCode	Account.Name
Quantity	AccountId	ProductId
ListPrice		

Account		
Id	Description	Parent.Name
Name	Industry	OwnerId
Type	ParentId	

FinancialForce Objects

Transaction Line Item		
ID	Transaction Period	Home Currency
GL Account Code	Transaction Year	Home Value
GL Account Name	Transaction Date	Dual Currency
Owner Company	Dimension 1 (2, 3, etc.)	Dual Value
Transaction Type	Line Description	

ADDITIONAL DETAILS

- The Salesforce connection into Vena is built with SOQL and queries directly against Salesforce APIs
- Integration will require read permissions to the above standard objects in Salesforce/ FinancialForce - Vena specific Salesforce account recommended
- Transformations to the incoming Salesforce data will be handled in Vena (i.e. aggregation, normalization, simple mappings)

