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# Sync to a Secondary Salesforce Organization

Salesforce, Spring '17





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# SYNC TO A SECONDARY SALESFORCE ORGANIZATION

With Organization Sync, you can set up a secondary, synced Salesforce organization which users can access whenever your primary organization is experiencing downtime or maintenance.

## IN THIS SECTION:

### [Organization Sync](#)

At Salesforce, we recognize that you need to access your data at a moment's notice—even during our downtimes and maintenance. With Organization Sync, you can set up a secondary, synced Salesforce organization where users can work on your most business-critical processes and data whenever your primary organization is experiencing downtime or maintenance.

### [Considerations for Setting Up Organization Sync](#)

Before you start to set up Organization Sync, review this essential information. The way you currently use auto-numbered fields, Apex triggers, audit fields, and other Salesforce features determines how you approach your implementation.

### [Set Up the Organization Sync Environment](#)

As an Organization Sync administrator, you have a primary and a secondary Salesforce organization, each with a different administrator username and password. Before you can add data to the secondary organization, you must complete a few setup tasks and create a replication connection between the two organizations.

### [Define the Organization Sync User Experience](#)

Understand the options and limitations behind user rerouting, logins, and data in Organization Sync.

### [Publish and Subscribe to Objects in Organization Sync](#)

Once the primary and secondary organizations are connected via the Organization Sync connection, it's time to perform a publish and subscribe process that allows record inserts, updates, and deletes to flow between the organizations.

### [Perform a Bulk Sync](#)

A bulk sync triggers the copying of any new record whose object type is published and subscribed, making the record available in both organizations. A bulk sync copies records in one direction, so performing a bulk sync in the primary organization copies new records to the secondary organization.

### [Managing Organization Sync](#)

Stay informed about the health of your Organization Sync environment.

## EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

# Organization Sync

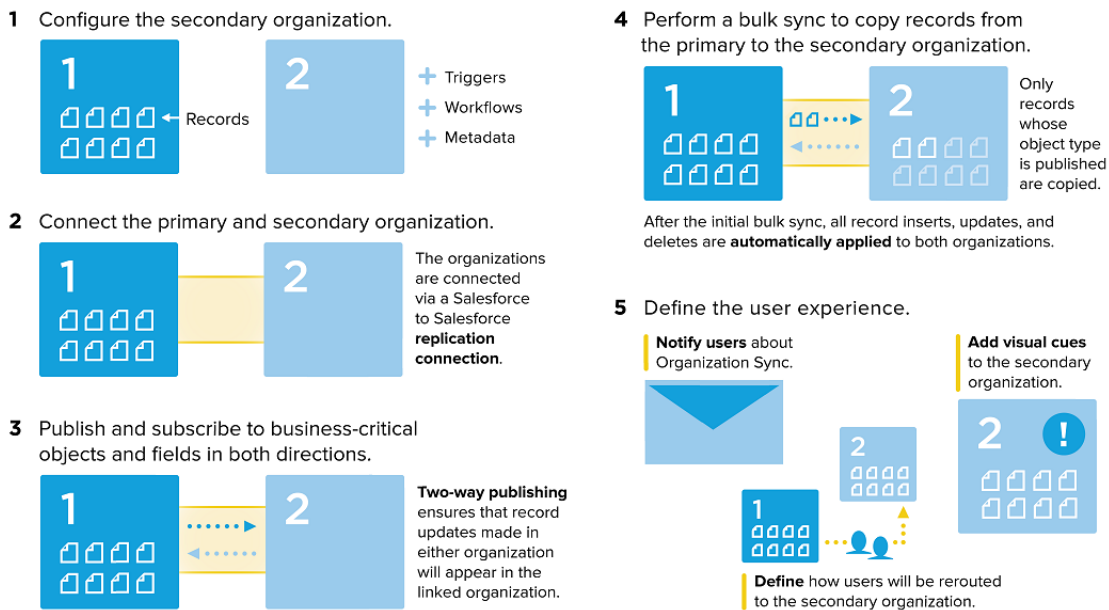
At Salesforce, we recognize that you need to access your data at a moment’s notice—even during our downtimes and maintenance. With Organization Sync, you can set up a secondary, synced Salesforce organization where users can work on your most business-critical processes and data whenever your primary organization is experiencing downtime or maintenance.

Organization Sync is ideal for companies whose users need access to Salesforce at all times. For example, representatives in a 24/7 call center can continue to serve customers during maintenance windows with minimal disruption.

Organization Sync uses the framework of Salesforce to Salesforce, a feature that lets customers share records with other companies that use Salesforce. To set up Organization Sync, the Salesforce administrator establishes a secondary Salesforce organization with matching metadata and creates a data replication connection between the primary and secondary organizations. The administrator specifies which types of data can be copied to the secondary organization by mapping essential objects and fields to the secondary organization through a publish and subscribe process. Then, records are copied to the secondary organization in a way that ensures that they remain synced.

When the primary organization is down for maintenance, users are redirected to the secondary organization until the maintenance is complete. All actions (creating a case, deleting an attachment, and more) that users perform in one organization are automatically applied to the other organization. The administrator can also choose to redirect users at any time if he or she needs to make updates to the primary organization.

This graphic shows the steps the Salesforce administrator follows to implement Organization Sync:



## EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To set up a replication connection:

- “Manage Connections”

SEE ALSO:

- [Considerations for Setting Up Organization Sync](#)
- [Which Objects Can Be Published?](#)

## Considerations for Setting Up Organization Sync

Before you start to set up Organization Sync, review this essential information. The way you currently use auto-numbered fields, Apex triggers, audit fields, and other Salesforce features determines how you approach your implementation.

### IN THIS SECTION:

#### [Organization Sync Limitations](#)

Learn about Organization Sync's limitations.

#### [Syncing Feeds and Audit Fields](#)

Syncing feeds and audit fields on connected records makes it easier for users working in the secondary organization to quickly assess a record's history.

#### [Configuring Triggers](#)

If you have Apex triggers in place in your primary Salesforce organization, they aren't automatically duplicated to the secondary organization in Organization Sync. This is because it may not make sense for a trigger to be active in both organizations. However, you can adapt your primary organization triggers to meet your needs in both organizations.

#### [Configuring Auto-Numbered Fields](#)

Fields with auto-generated numbers such as case numbers aren't synced in Organization Sync, but you can develop a workaround to keep the user experience consistent in the primary and secondary organization.

#### [Choosing a Syncing Approach](#)

Though Organization Sync is designed to support a direct two-way sync between the primary and secondary organization, it can also support a one-way sync scenario. Before beginning the publish and subscribe process, decide which approach best meets your business needs.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

## Organization Sync Limitations

Learn about Organization Sync's limitations.

### Organizational Limitations

- To use Organization Sync, you must purchase a secondary Salesforce org and its accompanying user licenses.
- The primary and secondary orgs must be the same organization type (for example, production or sandbox) and edition.
- To avoid inconsistent behavior, both orgs must have the same limits and settings. If the limits of the primary org have been adjusted, contact Salesforce to have the same changes made in the secondary org.
- To avoid Duplicates Detected errors, we recommend turning off duplicate management in secondary orgs.
- Organization Sync can be configured to work for more than two orgs, but it is designed to support a two-org setup.

### Unsupported Fields

- Auto-numbered fields aren't synced, but you can implement a workaround. To learn more, see [Configuring Auto-Numbered Fields](#).
- If you've enabled the option to sync feeds and audit fields, audit fields don't appear in the list of publishable fields because they're automatically synced. Audit fields are only synced when a record is copied from one org to another (for example, during a bulk sync). If an audit field on a synced record is updated, that update is not reflected in the linked org.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

- Rich text area (RTA) fields aren't synced.
- Formula fields and roll-up summary fields can't be published because their values are determined by other fields' values. As a workaround, make sure that the input fields for a formula or summary roll-up field are published. Then, create an identical formula or roll-up summary field in the secondary organization that refers to those input fields to calculate its value.
- Lookup fields to unpublished objects aren't automatically published because publishing such fields can cause syncing errors. For example, if a field on the Contact object includes a lookup to accounts and the Account object hasn't yet been published, that field can only be published manually.
- Callout fields such as geolocation fields aren't synced.

### Unsupported Objects and Features

- Only certain objects can be published in Organization Sync. For a list, see [Which Objects Can Be Published?](#).
- Certain types of metadata aren't supported. For a list, see [Which Types of Metadata Are Synced?](#).
- Supported metadata is only synced in one direction, from the primary to the secondary org.
- LiveAgent, Salesforce Knowledge, Portals, and Communities aren't supported.
- Managed packages aren't synced. If you wish, you can install a package on both organizations to keep the user experience consistent.
- Chatter file posts larger than 2 GB aren't synced.
- Chatter topics, groups, and likes aren't synced.
- In synced Chatter posts, user mentions aren't clickable.
- Chatter file versions aren't supported.

### Automation and Data Structure

- Multi-level lookups with more than one level are only synced during bulk syncs.
- Apex triggers, processes, and workflows aren't duplicated from one org to the other because duplicate automation can lead to looping updates or errors. You may need to adapt your existing triggers, processes, and workflows for the secondary org.

### Syncing Limitations

- Users are only synced in one direction, from the primary to the secondary org. For more information, see [Managing User Data in Organization Sync](#).
- A bulk sync can only copy records that were last created or modified no more than *one year* before the bulk sync date.
- If the secondary org contained records before you established a connection between the two orgs, those pre-existing records in the secondary org aren't auto-connected to matching records in the primary org. In this situation, bulk syncing entities that already exist in both orgs will cause duplicate alerts if duplicate management is enabled.
- Salesforce does not recommend using a two-way sync for some objects and fields and a one-way sync for others.

## Syncing Feeds and Audit Fields

Syncing feeds and audit fields on connected records makes it easier for users working in the secondary organization to quickly assess a record's history.

Records and feed posts in Salesforce contain four audit fields:

- CreatedBy
- CreatedDate
- LastModifiedBy
- LastModifiedDate

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions



If you opt to sync audit fields, keep in mind that audit fields are only synced when a record is copied from one org to another (for example, during a bulk sync). If an audit field on a synced record is updated, that update is not reflected in the linked org. We recommend syncing audit fields to give users as consistent an experience as possible.

To sync feeds and audit fields, select the `Sync Feeds and Audit Fields` option when sending your connection invitation. If you're using a two-way sync, selecting this option syncs audit fields in both directions. You can also edit this option from your Organization Sync connection's detail page.

### Important:

- If you don't see the `Sync Feeds and Audit Fields` checkbox when sending the connection invitation, the Salesforce admin must enable audit field creation in your organization. To enable this preference, from Setup, enter **User Interface** in the Quick Find box and click **User Interface**. Then, select `Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions`.
- Enabling this user interface preference also lets users manually edit audit fields in Salesforce. If your business doesn't allow manual editing of audit fields, you may not be able to sync feeds and audit fields in Organization Sync. In that case, you can still set up feed tracking for records in the secondary organization, but that feed only shows updates made in the secondary organization.


## Configuring Triggers

If you have Apex triggers in place in your primary Salesforce organization, they aren't automatically duplicated to the secondary organization in Organization Sync. This is because it may not make sense for a trigger to be active in both organizations. However, you can adapt your primary organization triggers to meet your needs in both organizations.

To adapt your current triggers for use in Organization Sync, reference the `Connection Type` and `Replication Role` fields. These fields appear as columns on the Connections page. The `Connection Type` indicates whether the connection is a standard or replication (Organization Sync) connection, while the `Replication Role` indicates whether the organization is the primary or secondary organization.

All triggers should be configured before you begin the publish and subscribe process. You'll need to decide which trigger-related behaviors you want to see in the secondary organization. Here are some possible approaches:

- If you'd like an existing trigger to work in both organizations, set up an identical trigger in the secondary organization.
- If an existing trigger isn't needed in the secondary organization, just leave it as is; it will continue to function in the primary organization.
- If you'd like to see different behavior in each organization, set up a trigger that references both organizations.

 **Example:** The following trigger changes all case descriptions to "Case in Primary" in the primary organization, and "Case in Secondary" in the secondary organization.

```
trigger CaseTrigger_UpdateDesc on Case (before insert, before update) {
    boolean isPrimary = true;
    for (PartnerNetworkConnection conn : [select ReplicationRole from
PartnerNetworkConnection where ConnectionType = 'Replication' and ConnectionStatus =
'Accepted']) {
        if (conn.ReplicationRole == 'Secondary') {
            isPrimary = false;
        }
    }

    for (Case c : Trigger.new) {
```

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

```

    if (isPrimary) {
        c.Description = 'Case in Primary';
    } else {
        c.Description = 'Case in Secondary';
    }
}
}
}

```

## Configuring Auto-Numbered Fields

Fields with auto-generated numbers such as case numbers aren't synced in Organization Sync, but you can develop a workaround to keep the user experience consistent in the primary and secondary organization.

When a case in the primary organization is copied to the secondary organization, Salesforce views it as a new case and assigns a new case number. However, you can set up a custom field configuration that allows cases to display the same identifying number across both organizations. This lets support agents quickly locate a case by number, regardless of which organization they're working in. While the following example relates to the Case Number field, the same approach can be used for any auto-generated number field in Salesforce.

**Important:** If your company already uses a custom field to represent case numbers, you don't need to complete these steps.

To configure case numbers for Organization Sync:

1. In the primary organization, create a custom text field named "[Your Company] Case Number."
2. Update the case page layout:
  - a. Add the custom case number field that you just created.
  - b. Remove or hide the system-generated case number field.
3. Apply a trigger that copies the system-generated case number to the custom case number field, but only runs for cases that already existed or are newly created (rather than copied). This prevents the "false" case number assigned during replication from being copied to the custom case number field. Use the following trigger:

```

trigger UpdateCaseNumber on Case (after insert) {
    List<Case> cases = new List<Case>();
    for (Case c : Trigger.new) {
        if (c.CustomCaseNumber__c == null) {
            Case caseToUpdate = new Case(Id=c.Id);
            caseToUpdate.CustomCaseNumber__c = c.CaseNumber;
            cases.add(caseToUpdate);
        }
    }
    database.update(cases);
}

```

4. Repeat the previous steps in the secondary organization.
5. In the secondary organization, adjust the case number display setting so auto-assigned case numbers begin with "2-". This ensures that system-assigned case numbers won't match existing primary organization case numbers. To change this setting:

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To add fields to a published object:

- "Manage Connections"

To create or change custom fields:

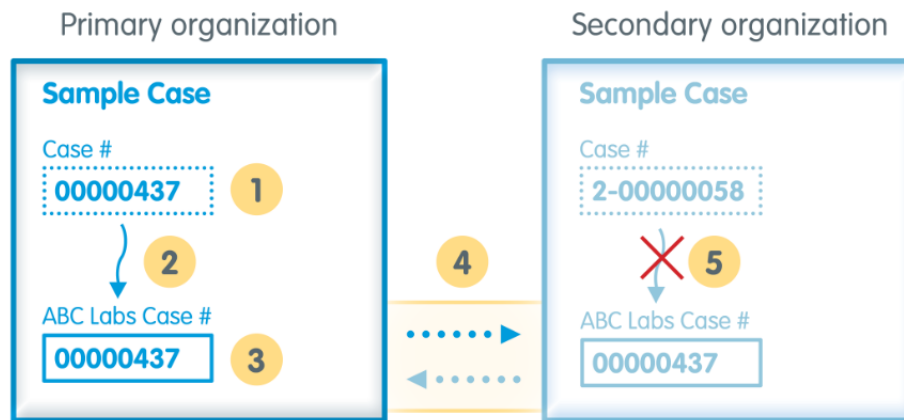
- "Customize Application"

To create, edit, and delete page layouts:

- "Customize Application"

- a. From the object management settings for cases, go to the fields area.
- b. Click **Edit** next to the Case Number field.
- c. Enter the following text in the Display Format field: **2-{00000000}**.
- d. Click **Save**.

The following graphic illustrates the case number configuration. If a two-way sync is implemented, the process remains the same whether the case is created in the primary or the secondary organization.




**1: Standard case number field (hidden from case page layout)**

**2: Trigger**

**3: Custom case number field**

**4: Publish and subscribe process**


**5: Trigger suppressed for replicated cases**

 **Note:** For best results, complete these steps before you publish and subscribe to objects and fields; this way, you can publish and subscribe to the custom field you created at the same time as your other business-critical objects and fields. If you have already completed the publish-and-subscribe process, you must publish and subscribe to the custom case number field to make it visible in both organizations.

## Choosing a Syncing Approach

Though Organization Sync is designed to support a direct two-way sync between the primary and secondary organization, it can also support a one-way sync scenario. Before beginning the publish and subscribe process, decide which approach best meets your business needs.

If you'd like users to be able to make transactions in both the primary and secondary organizations and have those transactions be reflected in both environments, use a two-way sync. However, if you'd like the secondary organization to merely serve as an up-to-date reference to your primary organization's data, you may prefer a one-way sync for its simplicity. This table provides details about each approach.

 **Important:** Salesforce does not recommend using a two-way sync for some objects and fields and a one-way sync for others. In addition, Organization Sync can be configured to work for more than two organizations, but it is designed to support a two-organization setup.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Details	Two-Way Sync (Standard)	One-Way Sync
<b>How it works</b>	<p>Objects and fields are published from the primary organization and subscribed to in the secondary organization. The same publish and subscribe process is then repeated in the opposite direction (from the secondary to the primary organization) to complete the sync. Records whose object type has been published are then copied to the secondary organization.</p> <p>Updates made to synced records in either organization are automatically applied to the other organization. “Updates” includes creating, updating, deleting, and undeleting records.</p>	<p>Objects and fields are published from the primary organization and subscribed to in the secondary organization. Records whose object type has been published are then copied to the secondary organization.</p> <p>Updates made to synced records in the primary organization are automatically applied to the secondary organization, but not the other way around. Therefore, the secondary organization serves primarily as a reference for users when the primary organization is unavailable.</p>
<b>Things to consider</b>	<ul style="list-style-type: none"> <li>• Because updates made in the secondary organization are applied to the primary organization, you must account for lookups when setting up Organization Sync to prevent the secondary organization’s data from writing over the data in the primary organization.</li> <li>• Triggers, workflows, and Apex code that are in place in the primary organization may need to be modified or turned off in the secondary organization to avoid data loops.</li> </ul>	<ul style="list-style-type: none"> <li>• If users choose to make updates in the secondary organization, they’ll need to repeat those updates when they return to working in the primary organization.</li> <li>• When a synced record is undeleted from the secondary organization, its connection with the primary organization is severed. To restore the connection, the record must be manually forwarded from the primary to the secondary organization.</li> <li>• Triggers, workflows, and Apex code in place in the primary organization can also be implemented in the secondary organization, assuming that the objects affected by them are published and subscribed.</li> </ul>

## Set Up the Organization Sync Environment

As an Organization Sync administrator, you have a primary and a secondary Salesforce organization, each with a different administrator username and password. Before you can add data to the secondary organization, you must complete a few setup tasks and create a replication connection between the two organizations.

**Important:** Because browsers cache your Salesforce credentials, it’s difficult to log in to two different Salesforce organizations in one browser. For best results, work in two browsers. Designate one browser for each organization. For example, use Google Chrome<sup>®</sup> to access the primary organization and Mozilla Firefox<sup>®</sup> to access the secondary.

### IN THIS SECTION:

#### 1. [Enable Salesforce to Salesforce](#)

Because Organization Sync uses the framework of Salesforce to Salesforce, you need to enable Salesforce to Salesforce in both the primary and secondary organizations. Then, add the Connections tab so you can manage your connection.

## 2. [Duplicate Your Metadata](#)

Some, but not all, metadata can be synced in Organization Sync. To ensure that data syncs correctly between the two organizations, you must customize and maintain the metadata in your secondary organization.

## 3. [Create a Connection Contact](#)

To set up the Organization Sync connection, you must assign yourself as the connection contact of the secondary organization. This ensures that you receive emails about the secondary organization, and lets you easily administrate the two organizations.

## 4. [Connect the Organizations](#)

Once your primary and secondary organizations are configured for Organization Sync, it's time to set up the connection between the primary and secondary organizations. This connection allows updates to flow between the organizations.

## 5. [Explore the Connection Detail Page: Walkthrough](#)

Take a tour of the Connection Detail page, which is the hub of your Organization Sync connection. Learn how to keep an eye on your connection and update your settings.

# Enable Salesforce to Salesforce

Because Organization Sync uses the framework of Salesforce to Salesforce, you need to enable Salesforce to Salesforce in both the primary and secondary organizations. Then, add the Connections tab so you can manage your connection.

Complete these steps in both the primary and secondary organization.

1. Enable Salesforce to Salesforce:
  - a. From Setup, enter *Salesforce to Salesforce Settings* in the Quick Find box, then select **Salesforce to Salesforce Settings**.
  - b. On the Salesforce to Salesforce page, click **Edit**.
  - c. Select **Enable**.
  - d. Click **Save**.
2. Add the Connections tab to the user interface:
  - a. Click the Plus icon that appears to the right of the current tabs. The All Tabs page appears.
  - b. Click **Customize My Tabs**.
  - c. Use the **Add** arrow to move the Connections tab from the Available Tabs list to the Selected Tabs list. If you'd like, use the **Up** and **Down** arrows to change the order of the tabs.
  - d. Click **Save**.

# Duplicate Your Metadata

Some, but not all, metadata can be synced in Organization Sync. To ensure that data syncs correctly between the two organizations, you must customize and maintain the metadata in your secondary organization.

## What is metadata, anyway?

Every time your Salesforce organization is customized, its metadata is modified. For example, editing page layouts, creating a custom field, and creating a record type are all metadata updates. *Data* is information contained in a field, such as a phone number or name. The metadata in

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create a Salesforce to Salesforce replication connection:

- "Manage Connections"

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

your secondary organization must match the metadata in your primary organization. If they don't match, you may not be able to effectively implement Organization Sync.

### How do I keep metadata synced between the primary and secondary organizations?

1. Before creating the Organization Sync connection:
  - a. Perform basic data clean-up in the primary organization so your data syncs correctly. Check the primary organization for the following issues, and resolve any that you find:
    - Blank required fields (these can occur if a field was changed from `Optional` to `Required`)
    - Invalid lookups
    - Duplicate records
  - b. Customize the secondary organization's metadata to match the primary organization's. You can opt to sync some metadata automatically by selecting the **Sync Metadata** checkbox when you send the connection invitation; for a list of supported metadata, see [Which Types of Metadata are Synced?](#). However, if the primary organization has customizations that include unsupported metadata types, you must perform the same customizations or deployments in the secondary organization.
2. After the organizations are connected, develop a business process to ensure that all metadata updates made in one organization are repeated in the other. Remember that if the **Sync Metadata** checkbox is selected, some updates are already synced for you.

### When is metadata synced?

If you select the option to sync metadata, Salesforce begins copying supported metadata to the secondary organization as soon as you accept the Organization Sync connection invitation. The `Connection Status` field on your connection's detail page reads `Metadata Sync in Progress` during this process.

After this initial copying of metadata, updates to supported metadata are synced daily. If you need to trigger an immediate sync of all supported metadata, follow these steps:

1. Navigate to your Organization Sync connection's detail page in the primary organization.
2. In the Connection Detail section, click **Edit**.
3. Deselect the **Sync Metadata** checkbox. Click **Save**.
4. In the Connection Detail section, click **Edit** again.
5. Select the **Sync Metadata** checkbox. Click **Save**.

### What are best practices for keeping metadata synced?

- If you opt to sync metadata, follow these best practices:
  - If you need to *delete* metadata in one organization, delete it in the other organization as well. This is because metadata deletion isn't synced between the organizations.
  - If you need to create or update *unsupported* metadata, perform the action in both organizations.
  - If you need to create or update *supported* metadata, perform the action in the primary organization only. Because supported metadata is synced daily from the primary to the secondary organization, changes to supported metadata types performed in the secondary organization are overwritten in the daily sync.
  - To keep your metadata current and avoid possible syncing failures, leave the **Sync Metadata** checkbox selected except when triggering an immediate sync as described above. Deselecting the checkbox after a connection invitation is accepted pauses the automatic syncing of metadata updates. The checkbox is editable only from the primary organization.
- If you leave the **Sync Metadata** checkbox deselected, ensure that all metadata changes—creating, deleting, and updating metadata—are repeated in both organizations.

### How do integrations and APIs work in Organization Sync?


If you decide that an integration is time-critical to your business operations—for example, an external web form—you must redirect the integration to the secondary organization each time users are redirected there. The same is true for API calls. Any time-critical API calls into Salesforce must be modified to include the secondary organization credentials, or they'll stop processing during the switch to the secondary organization.

## Create a Connection Contact

To set up the Organization Sync connection, you must assign yourself as the connection contact of the secondary organization. This ensures that you receive emails about the secondary organization, and lets you easily administrate the two organizations.

On the Connections page, the primary organization is managed by the user in the `Connection Owner` field, while the secondary organization is managed by the user you assign as the `Contact`.

1. In the primary organization, create a contact:
  - a. Navigate to the Contacts tab.
  - b. Click **New**.
  - c. Enter your name in the `First Name` and `Last Name` fields with text that identifies you as the secondary organization contact. For example, if your name is *Elise Medina*, you can enter *Elise Medina (secondary)*.
  - d. In the `Account Name` field, use the lookup to select your company's account.
  - e. In the `Email` field, enter your own email address.


 **Important:** This is a critical step that ensures that you'll receive emails about the connection.

- f. Click **Save**.

## Connect the Organizations

Once your primary and secondary organizations are configured for Organization Sync, it's time to set up the connection between the primary and secondary organizations. This connection allows updates to flow between the organizations.

1. In the primary organization, navigate to the Connections tab.
2. Click **New**.
3. Select the contact name that you created for setting up the connection. The `Account` field will automatically update to list your company.
4. In the `Connection Owner` field, select the administrator you've assigned to manage the connection.
5. In the `Connection Type` field, select `Replication`.
6. If desired, select the option to sync the feeds and audit fields of all records (recommended).

 **Note:** If you don't see this option, ask your Salesforce admin to enable audit field creation in your organization.

7. If desired, select the option to sync supported metadata (recommended).

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create contacts:

- "Create" on contacts

To view contacts:

- "Read" on contacts

### EDITIONS

Available in: Salesforce Classic



Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create a Salesforce to Salesforce replication connection:

- "Manage Connections"

8. If desired, select the option to sync users (recommended).
9. Click **Save & Send Invite**.
10. Check your inbox for an email invitation to approve the connection. Click the link in the email to accept the invitation and be redirected to the Salesforce login page.
11. Log in with the secondary organization username and password. You'll see the detail page for your Organization Sync connection. In the Connection Detail section, click **Accept** to complete the connection.

 **Tip:** The Connection Detail page is the hub of your Organization Sync connection. After you establish the connection, take a moment to get comfortable with this page via an interactive walkthrough.  **Walk Through It:** [Explore the Connection Detail Page](#). Before you begin, make sure to add the Connections tab to your Salesforce environment.

SEE ALSO:

- [Syncing Feeds and Audit Fields](#)
- [Managing User Data in Organization Sync](#)
- [Choosing a Syncing Approach](#)

## Which Types of Metadata Are Synced?

If you opt to sync metadata by selecting the **Sync Metadata** checkbox on your Organization Sync connection's detail page, certain types of metadata changes are synced daily from the primary to the secondary organization.

### Supported Metadata

When the option to sync metadata is selected, *inserts* (adding new metadata) and *updates* (modifying existing metadata) of the following types of metadata are synced daily in one direction—from the primary to the secondary organization.

Supported Metadata	Exceptions
Apex classes, components, and pages	Reports aren't synced in Organization Sync. If an Apex page references a report and you've opted to sync metadata, you must do the following for the Apex page to sync correctly: <ul style="list-style-type: none"> <li>• Create an identical report in the secondary organization</li> <li>• Update the Apex page to reference the new report ID</li> </ul>
Custom fields	
Custom objects	
External objects	
Layouts	Feed item layouts and Salesforce1 settings on layouts aren't synced.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions



Supported Metadata	Exceptions
Permission sets	Custom tabs and applications on permission sets aren't synced.
Record types	If an object without any record types was published and subscribed in Organization Sync, and record types are then created for the object, you must re-publish the object for the record types to appear in the secondary organization.
Roles	
User profiles	Custom tabs and applications on user profiles aren't synced.

### Unsupported Metadata

The following actions on supported metadata aren't synced.

- Adding and updating metadata in the secondary organization
- Deleting metadata in either organization

For example, if a user in the primary organization creates or updates a permission set, that change is applied to the secondary organization within 24 hours. However, if the permission set is updated in the secondary organization, the update isn't sent back to the primary organization, and the update in the secondary organization will be overwritten in the next sync.



**Warning:** Renaming supported metadata—for example, renaming a custom field—may break references to that metadata within each organization. To avoid errors, if you need to rename metadata, clone the metadata in question and give the clone your preferred name. Top-level metadata such as roles, profiles, and permission sets can be renamed in the normal way, and the name change is synced as expected.

### SEE ALSO:

[Duplicate Your Metadata](#)

[Managing User Data in Organization Sync](#)

## Explore the Connection Detail Page: Walkthrough

Take a tour of the Connection Detail page, which is the hub of your Organization Sync connection. Learn how to keep an eye on your connection and update your settings.

### Greetings, Organization Sync admin!

This is a tour of the Connection Detail page, which is the hub of your Organization Sync connection. There, you can keep an eye on your connection and update your settings.



Walk through it: [Explore the Connection Detail Page](#)

1. This walkthrough is for admins who have already set up a replication connection. If that's not you, see [Configure the Organization Sync Environment](#) for instructions.
2. Click the name of your Organization Sync connection. (Hint: It's the connection whose Connection Type is Replication.) This takes you to the Connection Detail page, your one-stop shop for your connection.
3. The Connection Detail section shows general connection settings. View the connection status and type, this organization's replication role—primary or secondary—and the contact for each organization.
4. The Published Objects section shows objects that are published to the linked organization. When you publish an object, all updates made in this organization to records of that object type are synced with the linked organization.
5. The Subscribed Objects section shows objects that you've subscribed to from the linked organization. This section is only visible if you've subscribed to objects. When you subscribe to an object, all updates made in the linked organization to records of that object type are synced with this organization.
6. The Connection History section shows changes to the connection settings. These include connection status updates, email notifications, and publishing and subscribing actions.
7. The Record Queue shows record updates that are being sent to the linked organization. When a user updates a shared record, the update appears in the queue until the linked organization receives it. The queue only lists outgoing updates, so it's different in each organization.
8. The Organization Sync Log lists syncing failures. If an update can't be sent to the linked organization, it's added to this log so you can investigate further. The full log is available in the Org Sync Log tab.

### Way to go!

You've finished your tour of the Connection Detail page. To learn more, check out [Organization Sync](#).

#### EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

#### USER PERMISSIONS

To create a replication connection:

- "Manage Connections"

To complete the walkthrough:

- Existing Salesforce to Salesforce replication connection

AND

Connections tab added to your list of tabs

## Define the Organization Sync User Experience

Understand the options and limitations behind user rerouting, logins, and data in Organization Sync.

### IN THIS SECTION:

#### [Rerouting Users in Organization Sync](#)

You can define the way users are rerouted to the secondary organization in Organization Sync, and also set up automatic user notifications to let them know when a maintenance period has started.

#### [Managing User Data in Organization Sync](#)

In Organization Sync, user records in the primary organization are mapped to identical user records in the secondary organization. It's important to understand how user-related updates flow between the organizations in case you need to update your configuration.

#### [Managing Secondary Organization Logins](#)

Organization Sync users are given separate login credentials to access the secondary organization. User logins for the secondary organization can be set up and managed just as they are in the primary organization.

#### [How Chatter Works in Organization Sync](#)

While Chatter functions as expected in the secondary organization, some Chatter features aren't synced between the primary and secondary organization.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

## Rerouting Users in Organization Sync

You can define the way users are rerouted to the secondary organization in Organization Sync, and also set up automatic user notifications to let them know when a maintenance period has started.

### Notifying Users About Organization Sync

Since Organization Sync will affect the user experience during maintenance, it's a good idea to notify them about it ahead of time. Let your users know what to expect during a maintenance period, and remind them that they must use different login credentials for the secondary organization. Consider setting up a forum (like a Chatter group) where they can ask questions.

### Rerouting Users to the Secondary Organization

When a maintenance window starts, your users will need to be rerouted to the secondary organization URL. Depending on your preference, you can:

- Set up an automatic mass email that tells users to switch to the secondary organization and provides the secondary organization URL.
- Create a URL that reroutes users to the secondary organization during maintenance.
- Set up a Single Sign On solution that reroutes users to the secondary organization during maintenance.

The Salesforce Trust website lists upcoming maintenance windows. You can reroute users to the secondary organization at any time and for any length of time.

### Creating Visual Cues

Your users may notice that the secondary organization only contains objects that are supported in Organization Sync. Optionally, you can also create visual cues to let users know that they're working in the secondary organization. For example, add a message to the home page or sidebar.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

## Managing User Data in Organization Sync

In Organization Sync, user records in the primary organization are mapped to identical user records in the secondary organization. It's important to understand how user-related updates flow between the organizations in case you need to update your configuration.

### How do I add users to the secondary organization?

If you select the **Sync Users** checkbox when sending your Organization Sync connection invitation (recommended), all users with standard Salesforce user licenses are automatically copied to the secondary organization as soon as the connection invitation is accepted. Selecting this option also ensures that user-related updates are synced between your organizations.

If you prefer to add user records to the secondary organization manually, leave the **Sync Users** checkbox deselected when you send the connection invitation. Then, add the user records to the secondary organization using your preferred approach.

#### Important:

- If you decide to add user records to the secondary organization manually, do so *before* copying your data to the secondary organization via a bulk sync. If a record in the secondary organization references a user that doesn't yet exist in that organization, the field listing the user automatically updates to list the connection owner, and that field value then overwrites the correct value in the primary organization.
- If you've opted to sync users but need to manually trigger the replication of all users, navigate to your Organization Sync connection's detail page in the primary organization. In the Connection Detail section, click **Edit**, deselect the **Sync Users** checkbox, and click **Save**. Then, click **Edit** again, re-select the **Sync Users** checkbox, and click **Save**.

### How do users log in to the secondary organization?

Users log in to the secondary organization with a modified version of their primary organization username and a custom password.

### How do I know that all users have been added to the secondary organization?

Check the `Connection Status` field on your Organization Sync connection's detail page in the primary organization. As soon as you accept the connection invitation, the connection status reads `Metadata Sync in Progress` if you opted to sync metadata, which signifies that supported metadata is being copied to the secondary organization. The connection status then changes to `User Sync in Progress` while users are copied to the secondary organization. When the connection status changes to `Active`, all user records are available in the secondary organization. User replication failures are listed in the Organization Sync Log.

### How long does it take for the user sync to complete?

The length of time required depends on the amount of user data in your primary organization.

### Which types of users are synced?

All users with standard Salesforce user licenses are synced. For details about which users fall into this category, see [Standard User Licenses](#).

### Are user-related updates synced?

Yes. These updates are synced in real time in both directions between the organizations:


- Adding, updating, or deactivating a user
- Assigning or reassigning a role, user profile, or permission set to a user (as long as the role, user profile, or permission set exists in both organizations)

If you opt to sync metadata, other user-related metadata changes such as creating and updating user profiles are also synced for you.

#### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

 **Note:** If you want user updates to only sync in one direction—from the primary to the secondary organization—log in to the secondary organization and deselect the **Sync Users** checkbox on your Organization Sync connection’s detail page. This prevents user updates from being sent from the secondary to the primary organization.

### What if I choose to sync users but not metadata?


To minimize syncing issues, we recommend selecting both the **Sync Users** and the **Sync Metadata** options when you send the connection invitation. However, if you choose to sync users but not metadata, don’t accept the connection invitation until you’ve updated the metadata in the secondary organization to match the primary organization’s metadata. If user-related metadata such as user profiles are missing from the secondary organization, the bulk user sync will fail and will need to be repeated. User syncing failures are listed in the Organization Sync Log.

## Managing Secondary Organization Logins

Organization Sync users are given separate login credentials to access the secondary organization. User logins for the secondary organization can be set up and managed just as they are in the primary organization.

Users log in to the secondary organization with a modified version of their primary organization username and a custom password. Secondary organization usernames end with **.dr**, which ensures that user records map correctly between the two organizations. For example, if a user’s username in the primary organization is *tmiller@mycompany.com*, their username in the secondary organization is *tmiller@mycompany.com.dr*.

The **.dr** suffix is automatically added to usernames when a user record is copied to the secondary organization. However, if a new user is created within the secondary organization, the person creating the user must add **.dr** to the username. If **.dr** is not added, the user record won’t be copied to the primary organization. The Organization Sync Log in the secondary organization lists username errors.

 **Note:** If a user is locked out of the primary organization after exceeding the maximum number of password attempts, the user can still log in to the secondary organization.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

## Setting Up User Logins

After the user sync is complete, the Salesforce administrator must log in to the secondary organization and reset all user passwords. This sends an email to all users with a temporary password. Let your users know that this email provides their secondary organization password, which is used with their secondary organization username (their regular Salesforce username with **.dr** appended).

Users can log in to either organization from the Salesforce login page using their corresponding login credentials. Manage user logins for the secondary organization just as you would for the primary organization.

Temporary passwords for new users expire in six months, and users must change their password the first time they log in. The login link in the email can only be used once. A user who follows the link without setting a password must have an administrator reset their password before they can log in.


## How Chatter Works in Organization Sync

While Chatter functions as expected in the secondary organization, some Chatter features aren't synced between the primary and secondary organization.

If you've enabled a two-way sync, here's what to expect from Chatter in Organization Sync:

### Posts

Text, link, and file posts and comments are synced between the organizations, so a post made in one organization is also visible in the other. File posts up to 2 GB are supported.

 **Note:** The organizations must be configured to support synced feeds.

### Likes

Users can like posts and comments in the secondary organization just as they would in the primary. However, likes given in one organization aren't visible in the other. Users still receive email notifications about activity on posts or comments that they liked, regardless of whether they liked the post in the primary or the secondary organization. For example, suppose Rita is working in the secondary organization and likes a post. When she returns to working in the primary organization, her like isn't visible on that post. However, if someone in either organization comments on the post she liked, she'll still receive an email notification.

### Shares

Users can click **Share** on posts in the secondary organization just as they would in the primary.

### Groups

Users can create and edit Chatter groups in the secondary organization just as they would in the primary, but groups aren't synced between the two organizations. This means a group that exists in the primary organization isn't visible in the secondary organization, and vice versa.

### Mentions

Users can mention other users and groups in the secondary organization just as they would in the primary. However, mentions made in one organization aren't clickable in the other. For example, suppose a user makes the following comment in the primary organization: "@Ella Roberts, you may be interested in this." In the secondary organization, the comment is visible, but "@Ella Roberts" won't link to Ella's profile.

### Topics

Users can add topics to posts in the secondary organization just as they would in the primary, but topics aren't synced between the two organizations. This means a post with topics added to it in the primary organization won't list any topics in the secondary organization.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

## Publish and Subscribe to Objects in Organization Sync

Once the primary and secondary organizations are connected via the Organization Sync connection, it's time to perform a publish and subscribe process that allows record inserts, updates, and deletes to flow between the organizations.

In the publish and subscribe process, objects and their fields are published to the primary organization and subscribed to in the secondary organization. Then, to ensure that record updates flow both directions, the same process is repeated from the secondary to the primary organization.



Publishing an object doesn't copy any records to the secondary organization; it simply creates a path where you can then perform a bulk sync to copy records of that object type from the primary to the secondary organization. For example, once you publish the Account object, you can perform

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

a bulk sync to copy all accounts to the secondary organization. After the initial bulk sync, all record inserts, updates, and deletes of that object type are automatically synced across both organizations.

 **Tip:** The Connection Detail page is the hub of your Organization Sync connection. After you establish your connection, take a moment to get comfortable with this page via an interactive walkthrough.  **Walk Through It:** [Explore the Connection Detail Page](#). Before you begin, make sure to add the Connections tab to your Salesforce environment.

## IN THIS SECTION:

### [Which Objects Can Be Published?](#)

Only certain objects can be published in Organization Sync. Think carefully about which objects you want to publish. Focus on publishing business-critical objects.

### [Understanding Lookup Relationships in Organization Sync](#)

Before you begin the publish-and-subscribe process, make sure that you understand the role that lookups play in Organization Sync. Organization Sync automatically preserves most relationships for standard lookup relationships. However, you must publish objects and their fields in a way that reflects the hierarchy of your data model.

### [Publish Objects to the Secondary Organization](#)

Once you've set up the Organization Sync connection, you can publish objects of your choice to the secondary organization.

### [Edit Published Fields](#)

When you publish an object in Organization Sync, you can also control which fields you publish on that object. All supported fields are published by default when you publish their parent object, but you can unpublish fields if you wish. If a field isn't published, it won't appear in the linked organization.

### [Subscribe to Objects in the Secondary Organization](#)

Once you publish an object in Organization Sync, you must subscribe to it in the secondary organization. When you subscribe to an object, you map the object to itself to ensure that records of that object type appear in the secondary organization.

### [Edit Subscribed Fields](#)

When you subscribe to an object in Organization Sync, its fields are automatically subscribed to by default. Fields are auto-mapped to themselves to ensure that your data is synced.

### [Complete the Publishing Process](#)

Publishing objects in the primary organization and subscribing to them in the secondary organization allows record updates for those object types to be sent from the primary to the secondary organization. If you want updates to be sent both directions, you must publish and subscribe to the same objects in the opposite direction—from the secondary to the primary organization.

## Which Objects Can Be Published?

Only certain objects can be published in Organization Sync. Think carefully about which objects you want to publish. Focus on publishing business-critical objects.

When deciding which objects to publish, consider the relationships between objects. If one object is a child of another (for example, Contact is a child of Account), publish both objects to ensure that Contact's lookup to Account functions in the secondary organization.

You can publish the following objects in Organization Sync.

### EDITIONS

Available in: **Salesforce Classic**

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

**Any custom object that has been deployed****Account****Attachment (Private and Public)****Case****Case Comment (Private and Public)****Case Team Member**

This includes predefined case team members, but only applies to case team members that are users. Case team members that are contacts aren't supported.

**Contact**

If person accounts are enabled in your organization, publish Contact and Account together for best results.

**Email Message**

Email drafts and inline images aren't supported.

**Feed Comment****Feed Item**

If you select the option to Sync Feeds and Audit Fields when you establish the Organization Sync connection, the Feed Item and Feed Comment objects must still be published for feeds to be synced between the two organizations. Only text, link, and file posts under 50 MB are supported.

**Lead****Opportunity**

For best results, update opportunity stages from the opportunity's record detail page. Global find and replace actions for opportunity stages aren't supported in Organization Sync, and won't be synced between the primary and secondary organization.

**Product****Task**

## SEE ALSO:

[Understanding Lookup Relationships in Organization Sync](#)

[Publish and Subscribe to Objects in Organization Sync](#)

## Understanding Lookup Relationships in Organization Sync

Before you begin the publish-and-subscribe process, make sure that you understand the role that lookups play in Organization Sync. Organization Sync automatically preserves most relationships for standard lookup relationships. However, you must publish objects and their fields in a way that reflects the hierarchy of your data model.

Salesforce preserves hierarchical lookup relationships for one levels of lookups. For example, the lookups between the child object Contact and the parent object Account would be preserved.

When a parent entity is deleted in Salesforce, its child entities (such as attachments) are deleted as well. This remains true for Organization Sync. For example, if a case with several attachments is synced, soft deleting the case in either organization causes the case and its attachments to be soft deleted in both organizations. Similarly, undeleting the case in either organization restores the case and its attachments in both organizations.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions



To make sure that the lookup relationships of entities being published in the Organization Sync connection stay intact, follow these guidelines:

- Both entities must be selected for publishing and subscribing.
- Publish the parent entity to the secondary organization before or at the same time as the child entity. If the child entity in a lookup relationship is published first, the lookup field is blank; if that lookup field is required, the record replication will fail. For best results, publish all objects together to keep lookups intact.
- There must be no circular dependencies in the data model.

## Publish Objects to the Secondary Organization

Once you've set up the Organization Sync connection, you can publish objects of your choice to the secondary organization.

When you publish and subscribe to an object, you create a link between the primary and secondary organization that allows record inserts, updates, and deletes for that object to be synced across both organizations.

To publish objects from the primary to the secondary organization:

1. Log in to the primary organization.
2. Navigate to the Connections tab.
3. In the Connection Name column, click the name of the Organization Sync connection.
4. In the Published Objects section, click **Publish/Unpublish**.
5. Select all of the objects that you want to publish to the secondary organization.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit published objects:

- "Manage Connections"

**Add or Remove Published Objects** [Help for this Page](#)

Select objects to publish. After objects and their fields are published and subscribed to, you can share records with your connection. Updates to shared records are sent automatically.

- Account
- Attachment
- Case
- Case Comment
- Case Team Member
- Contact
- Lead
- Opportunity
- Predefined Case Team Record
- Product
- Task

6. Click **Save**. The objects you published appear in the Published Objects section.

## Edit Published Fields

When you publish an object in Organization Sync, you can also control which fields you publish on that object. All supported fields are published by default when you publish their parent object, but you can unpublish fields if you wish. If a field isn't published, it won't appear in the linked organization.

To edit an object's published fields:

1. Navigate to the Connections tab.
2. In the Connection Name column, click the name of the Organization Sync connection.
3. In the Published Objects section, click **Edit** next to an object's name.

### EDITIONS

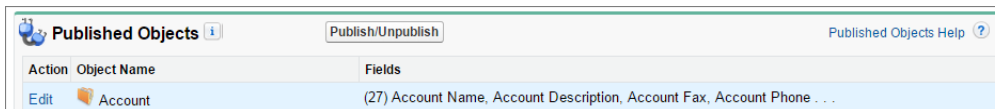
Available in: Salesforce Classic

Organization Sync is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS

To edit published fields:

- "Manage Connections"



The list of fields related to that object appears. All supported fields are selected by default.



#### Note:

- Audit fields don't appear in the list of publishable fields because they're automatically synced.
- Rich text area (RTA) fields can't be published.
- Formula fields and roll-up summary fields can't be published because their values are determined by other fields' values. As a workaround, make sure that the input fields for a formula or summary roll-up field are published. Then, create an identical formula or roll-up summary field in the secondary organization that refers to those input fields to calculate its value.
- Lookup fields to unpublished objects aren't automatically published because publishing such fields can cause syncing errors. For example, if a field on the Contact object includes a lookup to accounts and the Account object hasn't yet been published, that field can only be published manually.

4. Deselect any fields you do not want to publish. Before publishing a field, consider which lookup relationships will be affected.
5. Click **Save**.
6. If a two-way sync is implemented and you are unpublishing the field after it was already published and subscribed to, repeat the previous steps in the linked organization.



**Warning:** When you perform any of the following actions to a field in one organization, the field is automatically unsubscribed in the linked organization:

- Delete the field
- Change the field type
- Change the size or precision of a long text area, text, percent, number, or currency field

The field stays published, but you must re-subscribe to it in the linked organization.



**Note:** When you need to add a field to an object that is already published in Organization Sync, publish and subscribe to the field to ensure that updates to it are synced. Don't update the field value in existing records until you publish and subscribe to the field.

## Subscribe to Objects in the Secondary Organization

Once you publish an object in Organization Sync, you must subscribe to it in the secondary organization. When you subscribe to an object, you map the object to itself to ensure that records of that object type appear in the secondary organization.

To subscribe to objects in the secondary organization:

1. Log in to the secondary organization.
2. Navigate to the Connections tab.
3. In the Connection Name column, click the name of the Organization Sync connection.
4. In the Subscribed Objects section, click **Subscribe/Unsubscribe**.
5. Select **Auto-Map Objects** to map each object to itself. For example, `Account` would map to `Account`.
6. Click **Save**. The objects you subscribed to now appear in the Subscribed Objects section.

When you subscribe to an object in Organization Sync, all of its fields are automatically mapped and subscribed to. If you don't want a particular field to be synced, unpublish it.

## Edit Subscribed Fields

When you subscribe to an object in Organization Sync, its fields are automatically subscribed to by default. Fields are auto-mapped to themselves to ensure that your data is synced.

To view the subscribed fields on an object:

1. Log in to the subscribing organization.
2. Navigate to the Connections tab.
3. Click the name of the Organization Sync connection.
4. In the Subscribed Objects section, click **Edit** next to the object's name.  
A field is subscribed to if the Your Fields column contains a mapping value other than `--None--`. Fields should be mapped to themselves (for example, the Account Description field maps to Account Description).

### Note:

- If the Your Fields column reads **None Available** for a field, this means the field is a lookup to an object that hasn't yet been subscribed to. After the object in question is subscribed to, fields that look up to it are automatically subscribed to as well.
- If you don't want a particular field to be synced, just unpublish it; there's no need to unsubscribe to it.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit subscribed objects:

- "Manage Connections"

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit subscribed fields:

- "Manage Connections"

## Complete the Publishing Process

Publishing objects in the primary organization and subscribing to them in the secondary organization allows record updates for those object types to be sent from the primary to the secondary organization. If you want updates to be sent both directions, you must publish and subscribe to the same objects in the opposite direction—from the secondary to the primary organization.

**Important:** If you are implementing a one-way sync, skip this process.

1. In the secondary organization, publish all objects to the primary organization.
2. In the primary organization:
  - a. Subscribe to and map all published objects.
  - b. If needed, edit the objects' subscribed fields.

Once you have published and subscribed to objects in both directions—from the primary to the secondary organization, and from the secondary to the primary—you can perform a bulk sync to copy records to the secondary organization. After the initial bulk sync, all record inserts, updates, and deletes are automatically synced across both organizations.

SEE ALSO:

[Choosing a Syncing Approach](#)

[Perform a Bulk Sync](#)

## Perform a Bulk Sync

A bulk sync triggers the copying of any new record whose object type is published and subscribed, making the record available in both organizations. A bulk sync copies records in one direction, so performing a bulk sync in the primary organization copies new records to the secondary organization.

To perform a bulk sync:

1. Click **Bulk Sync** on your Organization Sync connection's detail page. The bulk sync page appears with a list of all published objects.
2. Specify a number of entities to sync, or choose a cutoff date within the past year to control which records are synced.

**Important:** The cutoff date defaults to one year before the current date. For the initial bulk sync, consider syncing your records in groups based on date to minimize the amount of data being processed at once.

For example, you might first perform a bulk sync with a cutoff date of three months ago, and then perform a second bulk sync with a start date of six months ago. Grouping records doesn't take extra time because the system doesn't re-sync records that have already been synced.

3. Click **Start Sync**.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To publish and subscribe to objects:

- "Manage Connections"

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To perform a bulk sync:

- "Manage Connections"

## IN THIS SECTION:

[Bulk Sync Guidelines](#)

A bulk sync triggers the copying of any record whose object type is published and subscribed, making the record available in both organizations. Once a record is copied in a bulk sync, any future updates to it are synced.

[Manually Forward Records](#)

Though you'll primarily use the bulk sync function to copy records to the secondary organization in Organization Sync, it's worth noting that you can also forward individual records from the record detail page in Salesforce.

[Unpublish Objects and Fields](#)

To stop an object or field from being synced, you can unpublish it from your organizations in Organization Sync. Be aware of any lookup relationships that are associated with the objects or fields that you unpublish.

## SEE ALSO:

[Bulk Sync Guidelines](#)

## Bulk Sync Guidelines

A bulk sync triggers the copying of any record whose object type is published and subscribed, making the record available in both organizations. Once a record is copied in a bulk sync, any future updates to it are synced.

### When should I perform a bulk sync?

When you complete the publish-and-subscribe process as part of the Organization Sync setup, the secondary organization doesn't yet contain any records. Perform an initial bulk sync to quickly populate the secondary organization with records so users can access their data during downtime. In addition, perform a bulk sync whenever you publish and subscribe to new objects.

### How do I select a cutoff date on the Bulk Sync page?

A bulk sync triggers the copying of any records that were created or modified after a certain date within the last year. Select this date on the Bulk Sync page. For the initial bulk sync, consider syncing your records in groups based on date to minimize the amount of data being processed at once.

For example, you might first perform a bulk sync with a cutoff date of three months ago, and then perform a second bulk sync with a start date of six months ago. Grouping records doesn't take additional time because the system doesn't recopy records that have already been synced.

### How do I monitor the progress of a bulk sync?

View the total number of records remaining to be synced in the Organization Sync Record Queue on your Organization Sync connection's detail page. While the sync is in progress, the **Bulk Sync** button is disabled. Logging out of Salesforce won't affect the sync, and when the sync completes, the **Bulk Sync** button is clickable again.

### Can a bulk sync fail?

If a record included in a bulk sync has an issue—for instance, an invalid lookup—that record and its child records are not copied, but records that are unrelated to failed records will still be copied in the bulk sync. Replication failures are logged in the Organization Sync Log, while metadata-related failures are logged in the Connection History log.

### How long does a bulk sync take?

The length of a bulk sync depends on the number of records being copied. A bulk sync may take hours or days.

## SEE ALSO:

[Perform a Bulk Sync](#)

## EDITIONS

Available in: Salesforce Classic


Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

## Manually Forward Records

Though you'll primarily use the bulk sync function to copy records to the secondary organization in Organization Sync, it's worth noting that you can also forward individual records from the record detail page in Salesforce.

First, add the External Sharing related list to the page layout of each object type that is published in Organization Sync. The External Sharing related list shows you the sharing status of each record and the connections that the record has been shared with.

1. To forward a record and its related records to the secondary organization:
  - a. Navigate to the record's detail page.
  - b. In the External Sharing Related List, click **Forward this [object type]**.
2. To forward multiple records to the secondary organization:
  - a. Select the tab of the type of record you want to forward.
  - b. Select a list view from the **View** drop-down list, then click **Go!**
  - c. In the list view, select the records you want to forward. To select all records, select the checkbox in the column header.
  - d. Click **Forward to Connections**.
3. Select the Organization Sync connection in the Available Connections list.
4. Click the **Add** arrow to move the connection to the Selected Connections list.
5. Optionally, select related records you want to forward.
 

 **Note:** When you forward a case to the secondary organization, you won't see the option to forward its user case team members, feed items, feed comments, or predefined case team because those items are automatically forwarded with the case. Contact case team members are not supported.
6. Click **Save**.

## Unpublish Objects and Fields

To stop an object or field from being synced, you can unpublish it from your organizations in Organization Sync. Be aware of any lookup relationships that are associated with the objects or fields that you unpublish.

When you unpublish an **object** in Organization Sync, any synced records of that object type are disconnected between the two organizations. For example, if you unpublish the Account object and then edit a synced account record in the primary organization, that edit will not carry over to the secondary organization because accounts are no longer synced.

When you unpublish an object's **field** in Organization Sync, synced records of that object type will no longer sync that field. For example, if you unpublish the `Amount` field from the Opportunity object, synced opportunity records will stay synced, but any edits made to the `Amount` field of an opportunity record will not carry over to the other organization. If an opportunity record is created after the `Amount` field is unpublished, it will still be automatically forwarded to the secondary organization, but it won't display the `Amount` field in the secondary organization.

1. To unpublish an object:

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To see the external sharing status of a record:

- "Read" on the record

To manage the Organization Sync connection:

- "Manage Connections"

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit published objects:

- "Manage Connections"

- a. Log in to the primary organization.
  - b. Navigate to the Connections tab.
  - c. In the Connection Name column, click on the Organization Sync connection.
  - d. In the Published Objects section, click **Publish/Unpublish**.
  - e. Deselect the object you want to unpublish.
  - f. Click **Save**.
  - g. If a two-way sync is implemented, complete the previous steps in the secondary organization.
2. To unpublish a field:
- a. Log in to the primary organization.
  - b. Navigate to the Connections tab.
  - c. In the Connection Name column, click on the Organization Sync connection.
  - d. In the Published Objects section, click **Edit** next to the name of the object whose field you want to unpublish.
  - e. Deselect the field you want to unpublish.
  - f. Click **Save**.
  - g. If a two-way sync is implemented, complete the previous steps in the secondary organization.

## Managing Organization Sync

Stay informed about the health of your Organization Sync environment.

### IN THIS SECTION:

#### [Monitor the Organization Sync Environment](#)

The connection detail page includes important information that can keep you up-to-date on the status of your Organization Sync connection.

#### [Actions in the Organization Sync Record Queue](#)

When a record update is being sent between the primary and secondary organization, you'll see the record in the Organization Sync record queue on your connection detail page. The **Action** column in the queue lists the replication action that is taking place for a record.

#### [Track Syncing Failures with an Organization Sync Log Trigger](#)

You can write Apex triggers for the Organization Sync Log to stay informed about syncing progress and keep track of failures.

#### [Reporting on the Organization Sync Log](#)

As an Organization Sync administrator, you can create custom report types for the Organization Sync Log to stay informed about syncing failures.

#### [Diagnosing Syncing Issues](#)

Organization Sync users may encounter issues when working between the primary and secondary organization. To pinpoint the cause and resolve the problem, follow the troubleshooting steps.

#### [Suspend Your Organization Sync Connection](#)

If you're experiencing repeated syncing failures or need to make significant changes in your organization, you can suspend the connection between your primary and secondary organizations. Updates made while the connection is suspended aren't synced until you resume the connection.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

## Monitor the Organization Sync Environment

The connection detail page includes important information that can keep you up-to-date on the status of your Organization Sync connection.

When a record update is being sent between the organizations, the update appears in the Organization Sync Record Queue on your Organization Sync connection's detail page until the linked organization receives it. The queue shows outgoing syncing actions, so if an update is in the progress of being sent to the secondary organization, it appears in the primary organization queue.

If an update fails to be synced, the system retries it. The `Next Retry Date` column in the queue shows when the system will try again. After multiple retries, the update is logged in the Organization Sync Log, and no longer appears in the queue. The log displays one entry when an update is retried for the first time, and another when the update either fails in the final retry or succeeds. (The user sync and metadata sync don't go through the retry process; if they fail, they'll appear immediately in the Organization Sync Log.)

The Organization Sync Log section on the connection detail page displays the most recent log entries and a link to the full log, which is located in the Org Sync Log tab in Salesforce. Each log entry lists the affected record, the type of update, the time it was logged, the status, and (for errors) an error code. The `Status` field displays `Retrying` when an update fails to sync upon the first attempt, and either `Failed` or `Resolved` after it has been retried multiple times.



### Tip:

- If you don't see the event status, add the `Status` field to the Organization Sync Log page layout.
- Click the event number to view the event details and (for errors) a description of the error.

Replication failures are commonly caused by unresolved lookup relationships. If the issue is fixed, the record is re-added to the record queue the next time it is updated. The `Action` column in the queue can offer insight into which operations are failing.

## Actions in the Organization Sync Record Queue

When a record update is being sent between the primary and secondary organization, you'll see the record in the Organization Sync record queue on your connection detail page. The `Action` column in the queue lists the replication action that is taking place for a record.

Records in the queue will list one of the following actions.

Action	Definition
<code>Bulk Sync</code>	Records created or updated after the specified bulk sync date are being copied to the linked organization.
<code>Bulk Sync Users</code>	User records are being copied to the linked organization.
<code>Connection Admin Resumed</code>	The Organization Sync connection was resumed by a user.
<code>Connection Admin Suspended</code>	The Organization Sync connection was suspended by a user. Updates are added to the Organization Sync Record Queue and processed when a user resumes the connection.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions



Action	Definition
Connection Deactivate	The Organization Sync connection was deactivated.
Connection Resumed	The Organization Sync connection was automatically resumed because both organizations are now available.
Connection Suspended	The Organization Sync connection was automatically suspended because one of the linked organizations is unavailable. Updates are added to the Organization Sync Record Queue and processed when the connection is resumed.
Connection Update	The Organization Sync connection owner was updated, and that update is now being sent to the linked organization.
Field Map Delete	A field was unpublished, and is now being unpublished in the linked organization.
Field Map Name Update	A field name was updated, and that update is now being sent to the linked organization.
Field Map Update	A field definition was updated for this record, and that update is now being sent to the linked organization.
Generic Insert	The record is being copied to the linked organization.
Generic Update	The record was updated, and that update is now being sent to the linked organization.
Map Update Email	The mapping of a type, field, or value was updated, and the Salesforce administrator is now being notified by email.
Missing Partner ID	The Partner Entity ID for the record was missing, and is being located (no action needed).
Replication Delete	The record was deleted, and is now being deleted in the linked organization.
Replication Undelete	The record was undeleted, and is now being undeleted in the linked organization.
Type Map Delete	A type mapping (such as a custom object definition) was deleted, and is now being deleted in the linked organization.
Type Map Name Update	A type mapping name was updated, and that update is now being sent to the linked organization.
Type Map Set Partner Sub	A published object was subscribed to, and that update is now being sent to the linked organization.
Type Map Update	A type mapping was updated, and that update is now being sent to the linked organization.
User Upsert	A user is being copied to the linked organization.
Value Map Delete	A picklist value mapping was deleted, and is now being deleted in the linked organization.

## Track Syncing Failures with an Organization Sync Log Trigger

You can write Apex triggers for the Organization Sync Log to stay informed about syncing progress and keep track of failures.

Here are some ways you might use triggers for the Organization Sync Log:

- Write a trigger that emails the administrator if more than 10 new entries appeared in the log in the past 24 hours.
- If an entry appears in the log for an account, trigger a workflow rule that flags the account with a “Needs Review” flag.

To create triggers for the Organization Sync Log, from Setup, enter *Org Sync Log* in the Quick Find box, then select **Triggers**.

 **Example:** The following trigger emails the administrator when a new entry has appeared in the log. Replace the text in **boldface** with your email address.

```
trigger NotifyOrgSyncEntry on PartnerNetworkSyncLog (after insert) {
    Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
    mail.setToAddresses(new String[] { 'test@salesforce.com' });
    mail.setReplyTo(' test@salesforce.com' );
    mail.setSubject('New Org Sync Log Entry');
    mail.setPlainTextBody('There is a new entry in the Org Sync Log. ');
    mail.setUseSignature(false);
    Messaging.sendEmail(new Messaging.SingleEmailMessage[] {mail});
}
```

SEE ALSO:


[Reporting on the Organization Sync Log](#)

## Reporting on the Organization Sync Log

As an Organization Sync administrator, you can create custom report types for the Organization Sync Log to stay informed about syncing failures.

When you create a custom report type, the Org Sync Log object can serve as the primary object or as the secondary object to any object supported in Organization Sync (for example, Accounts or Contacts). Here are some ways that you can use reporting to monitor the health of your Organization Sync environment:

- Create a custom report on the Org Sync Log object that shows all log entries from a particular date range.
- Create a custom report on the Case object that shows all log entries for records related to a case in the last month.
- Create a dashboard with reports that show:
  - The number of log entries in the past 24 hours
  - The number of log entries by field type

 **Note:** Because the log displays outgoing syncing events, the same report will show different results depending on which organization you’re working in.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions.

### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

 **Example:** Robert, a Salesforce administrator, wants to create a custom report type that shows all log entries for records related to an account in the last week:

- He creates a custom report type called Org Sync Log Account Entries and saves it in the Other Reports folder.
- He sets Account as the top-level object in the report type and Org Sync Log as the child object, using the **Each "A" record must have at least one related "B" record** relationship.
- Under Fields Available for Reports, he selects fields to add to the report type.
- He creates a report using his new custom report type, and selects **Last week** as the range.

## Diagnosing Syncing Issues

Organization Sync users may encounter issues when working between the primary and secondary organization. To pinpoint the cause and resolve the problem, follow the troubleshooting steps.

### If a Synced Record is Missing from the Linked Organization...

Potential Reason	What to Do
The record is in the process of being copied to the linked organization.	<p>In the organization where the record was created, check the Organization Sync Record Queue on the connection detail page. If the record is listed in the queue, it's being copied to the linked organization.</p> <p>The record disappears from the queue after it is successfully copied or the copying fails. If it fails, it's added to the Organization Sync Log. Consult the log for details.</p>
The record's object type is not published and subscribed to.	<ol style="list-style-type: none"> <li>1. Publish and subscribe to the object.</li> <li>2. Perform a bulk sync to copy the records of that object type to the linked organization.</li> </ol>
The record's parent record wasn't copied to the linked organization.	<ol style="list-style-type: none"> <li>1. Confirm that the parent record's object type is published and subscribed to.</li> <li>2. Manually forward the parent record to the linked organization via the External Sharing Related List on the record detail page.</li> </ol> <p>Once the parent record is forwarded, child-only records such as case comments are auto-forwarded, but other child records (such as contacts) must be manually forwarded.</p>
The metadata for the record's object does not match between the primary and secondary organization. For example, a field or record type is missing from one organization.	Update the metadata of the organizations to match.

#### EDITIONS

Available in: Salesforce Classic

Organization Sync is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

**Potential Reason**

The record was not modified or created after the cutoff date that you selected when performing a bulk sync.

**What to Do**

The bulk sync only copied records that were created or modified after the date that you select when performing a bulk sync. The earliest cutoff date that you can select is one year before the current date. If needed, you can manually forward the record to the linked organization via the External Sharing Related List.

## If the Secondary Organization is Unavailable...

**Potential Reason**

When the secondary organization undergoes maintenance, all record updates being sent from the primary organization are paused, and the Organization Sync Record Queue may accumulate a large number of items.

**What to Do**

Wait for the maintenance to end. Once the secondary org is available again, the primary organization resumes sending record updates.

## If a New User Isn't Being Copied to the Linked Organization...

**Potential Reason**

A new profile was assigned to the user, and the profile hasn't been created in the linked organization.

**What to Do**

The Organization Sync Log lists the user as a failed replication. To add the user to the linked organization, first add the profile assigned to the user:

1. Create the profile in the linked organization, making sure that it has the same name in both organizations.
2. In the organization where the user was created, navigate to the user record. In the user record, select **Edit** and click **Save** to trigger its replication.

The user doesn't have a [standard Salesforce user license](#).

Only users with standard Salesforce user licenses are synced.

## SEE ALSO:

[Manually Forward Records](#)

## Suspend Your Organization Sync Connection

If you're experiencing repeated syncing failures or need to make significant changes in your organization, you can suspend the connection between your primary and secondary organizations. Updates made while the connection is suspended aren't synced until you resume the connection.


To suspend the connection between your organizations:

1. Navigate to your Organization Sync connection's detail page.
2. At the top of the page, click **Suspend**.
3. Click **OK**.
4. If you're using a two-way sync and want to suspend updates in both directions (recommended), complete the previous steps in the linked organization as well. Suspending a connection in only one direction may lead to syncing errors.

To resume the connection between your organizations:

1. Navigate to your Organization Sync connection's detail page.
2. At the top of the page, click **Resume**.
3. If you suspended updates in both directions, complete the previous steps in the linked organization as well.

When the connection is resumed, Salesforce sends updates in the queue to the linked organization. The time needed to process all the queued updates varies depending on how full the queue is.

 **Important:** As the queue fills up, it'll take longer to get your two organizations back in sync. To minimize syncing issues, resume the connection as soon as possible.

SEE ALSO:

[Before You Suspend Your Organization Sync Connection](#)

## Before You Suspend Your Organization Sync Connection

If needed, you can temporarily suspend the Organization Sync connection between your primary and secondary Salesforce organizations. Before suspending the connection, take a moment to learn how the process works.

### When should I suspend the connection?

Here are some reasons you may want to suspend the connection:

- You're experiencing a very high volume of sync failures, and need to diagnose and correct the issue.
- You need to make significant changes in one or both organizations that will prevent data from syncing successfully.

### How does suspending the connection affect users?

For most users, nothing changes when the connection is suspended. Users with the "Manage Connections" permission will notice some changes on the detail page for the Organization Sync connection:

- A **Resume** button appears in place of the **Suspend** button.
- The Connection History log shows a recent `Connection Admin Suspended` event.
- The `Connection Owner` field and the options to sync metadata, users, and audit fields are updateable, but updates aren't sent to the linked organization until the connection is resumed.
- Depending on how long the connection has been suspended, the queue may contain more updates than usual.

### EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS

To suspend and resume the Organization Sync connection:

- "Manage Connections"

### EDITIONS


Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- The Published Objects and Subscribed Objects related lists are hidden.

In addition, the Connection Owner and the user who suspended the connection receive an email twice per day that provides the number of events in the queue.

**What happens when the connection is suspended?**

All updates made while the connection is suspended are added to the Organization Sync Record Queue. Queued updates aren't sent to the linked organization until the connection is resumed.

 **Important:** As the queue fills up, it'll take longer to get your two organizations back in sync. To minimize syncing issues, resume the connection as soon as possible.

## SEE ALSO:

[Suspend Your Organization Sync Connection](#)

[Diagnosing Syncing Issues](#)

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