



School of Computer Science and Engineering

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			Semester : 5 th
Assignment Details:			
Title:	Creating a Synchronization Task between a Flat File and Salesforce Connection.		
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Content

Setting up the Environment.....	2
Creating Connections.....	5
Creating Data	10
Synchronization Task.....	11
Results.....	15

1. Setting up the Environment

Note: In case the administrator password is not known follow the below steps

Step 1.1: Create an Administrator Account

1. Open **Settings → Accounts**.
2. Add a new account and give it a suitable name.
3. Change the account type to **Administrator**.
4. Log in to the new administrator account.
5. Complete the setup and **note down the passkey** for future use.

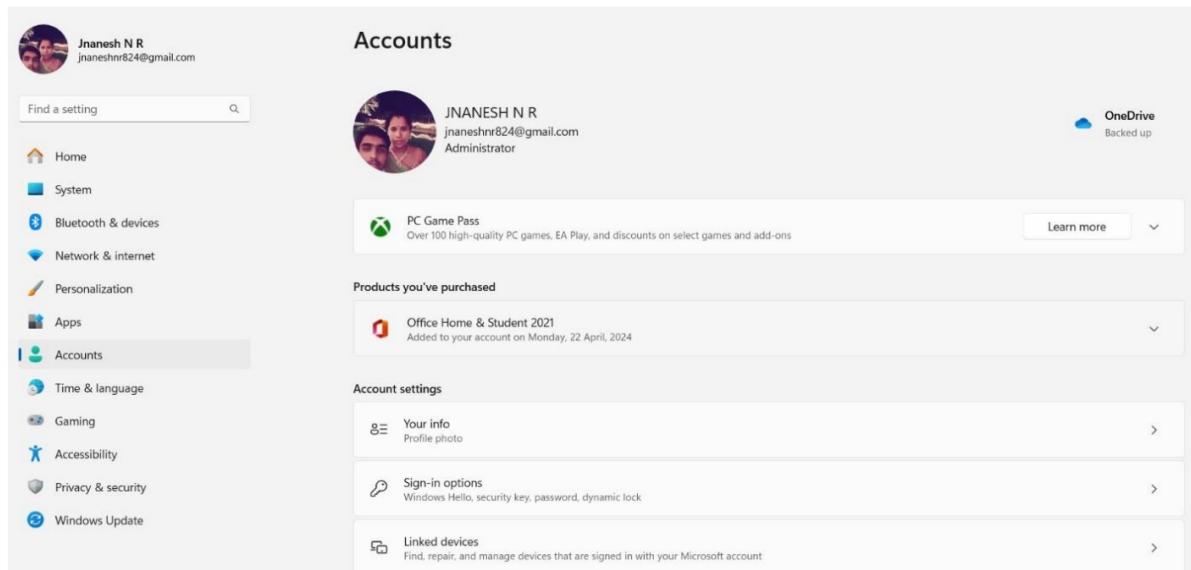
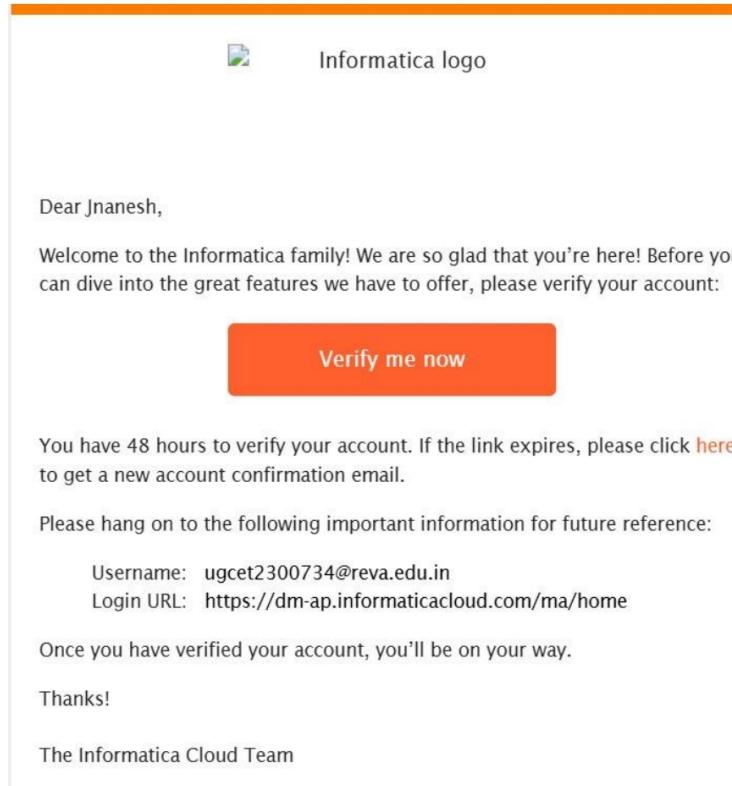


Fig 1 : Creating a user

Step 1.2: Create an Informatica Trial Account

1. Go to the Informatica website and fill out the trial registration form.
2. Check your email for the **confirmation mail**.
3. Use the link in the email to set a password and **log in** to your account.
4. Each time you log in, use the **URL provided in the confirmation mail**.

**Fig 2 : Screenshot of mail message**

Step 1.3: Install and Configure Secure Agent

1. Navigate to **Administrator → Environment Variables → Download Secure Agent**.

Environments (2)					
Name	Version	Status	Description	Type	Last Updated
Informatica Cloud ...		✓ Running		Hosted Agent	22 Oct 2025, 20:48
LAPTOP-NLP9US7...				Agent Group	22 Oct 2025, 08:44
LAPTOP-NLP9...	75.14	✓ Running		Secure Agent	22 Oct 2025, 21:21

Fig 3 : Downloading the Securing Agent

2. Install the Secure Agent on your system.
3. Register the agent using your **Informatica username** and **security token**.
4. Go to **Services**, select Informatica, log in again, and **restart the Secure Agent**.

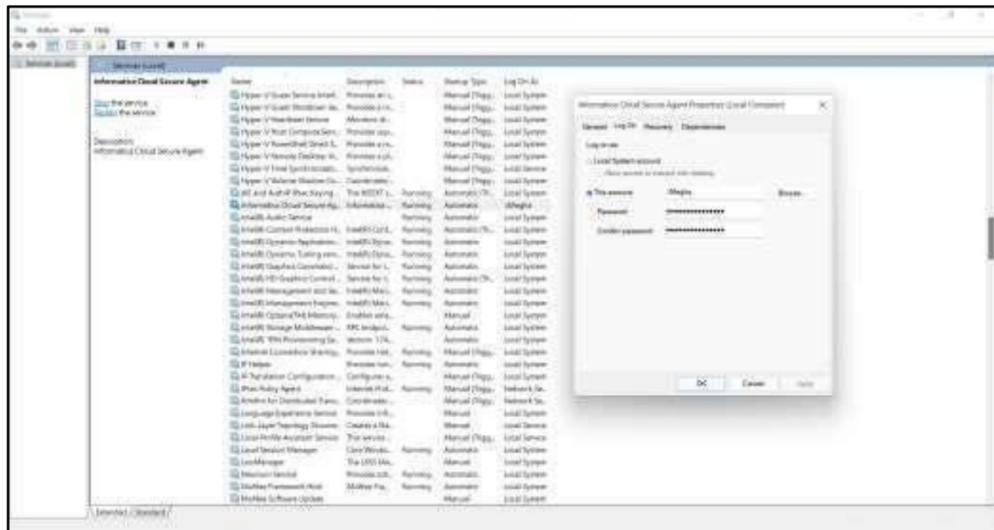


Fig 4 : Configuring the Securing Agent

5. After setup, log in to your Informatica account to start building connections.

2. Creating Connections

You need to create two connections: a **Source (Flat File)** and a **Target (Salesforce)**.

Step 2.1: Create Flat File (Source) Connection

1. Go to **Administrator → Connections**.
2. Click **Add Connection** and choose **Flat File**.
3. Provide the required details such as name and file path.
4. Select **Comma Delimiter (CSV)** format for the data.
5. Click **Test** to check the connection.
6. If successful, click **Save**.
7. Click **Test** to check the connection.
8. If successful, click **Save**.

Connection Details

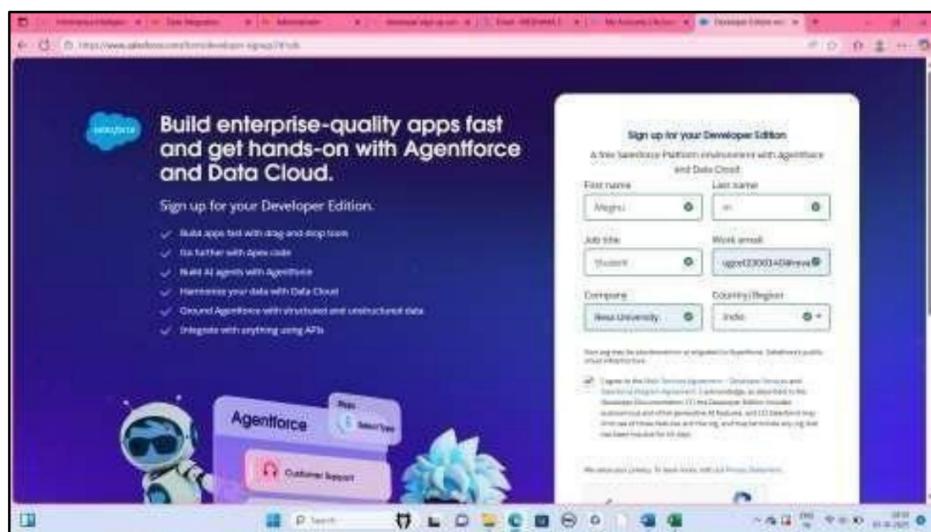
Connection Name: [*]	Source_SF
Description:	
Type: [*]	Flat File

Flat File Connection Properties

Runtime Environment: [*]	LAPTOP-NLP9US7T
Directory: [*]	C:\Users\jname\Documents\Documents
Date Format: [*]	MM/dd/yyyy HH:mm:ss
Code Page: [*]	UTF-8

Fig 6: Testing the Source connection**Step 2.2: Create Salesforce (Target) Connection**

1. Ensure you have a **Salesforce Developer Account**.
 - o If not, sign up here: <https://developer.salesforce.com/signup>
 - o Only **Developer Edition** works with Informatica IICS (not free trial accounts).

**Fig 7: Creating Salesforce Account.**

2. Once registered, check your email for a **confirmation message**.

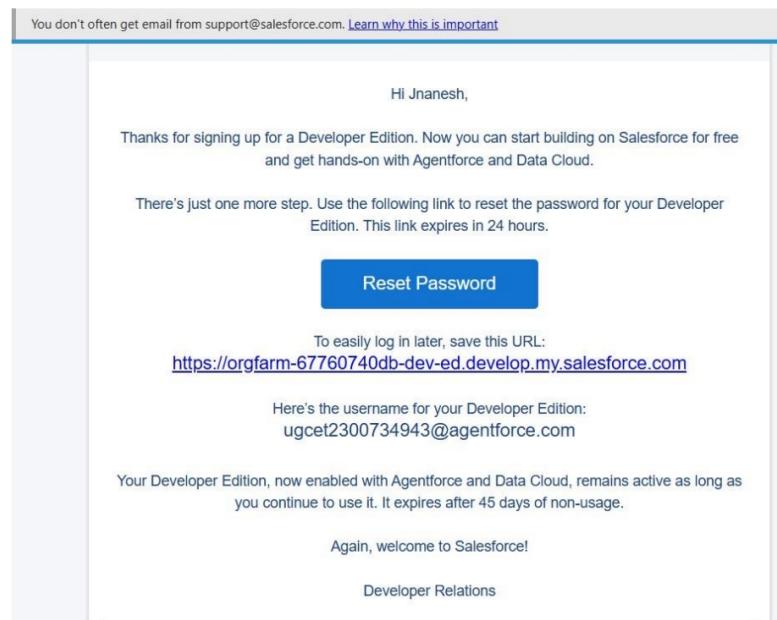


Fig 8: Getting email confirmation by Salesforce

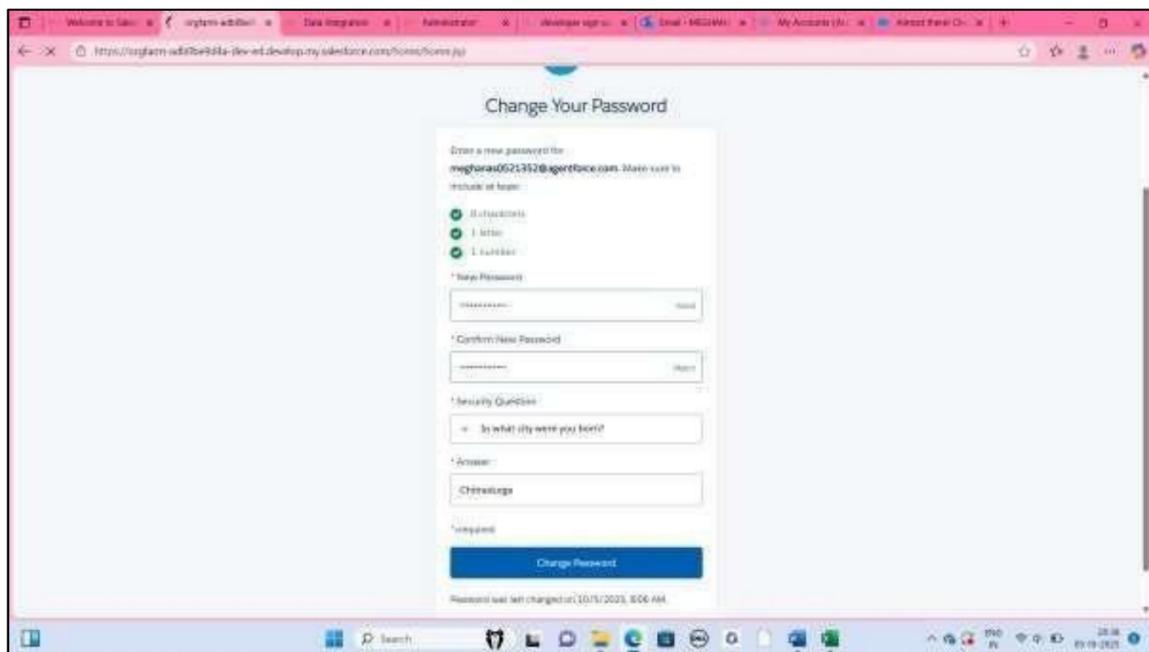


Fig 9 : Salesforce Password Setting

4. Go to Personal Settings → Reset My Security Token.

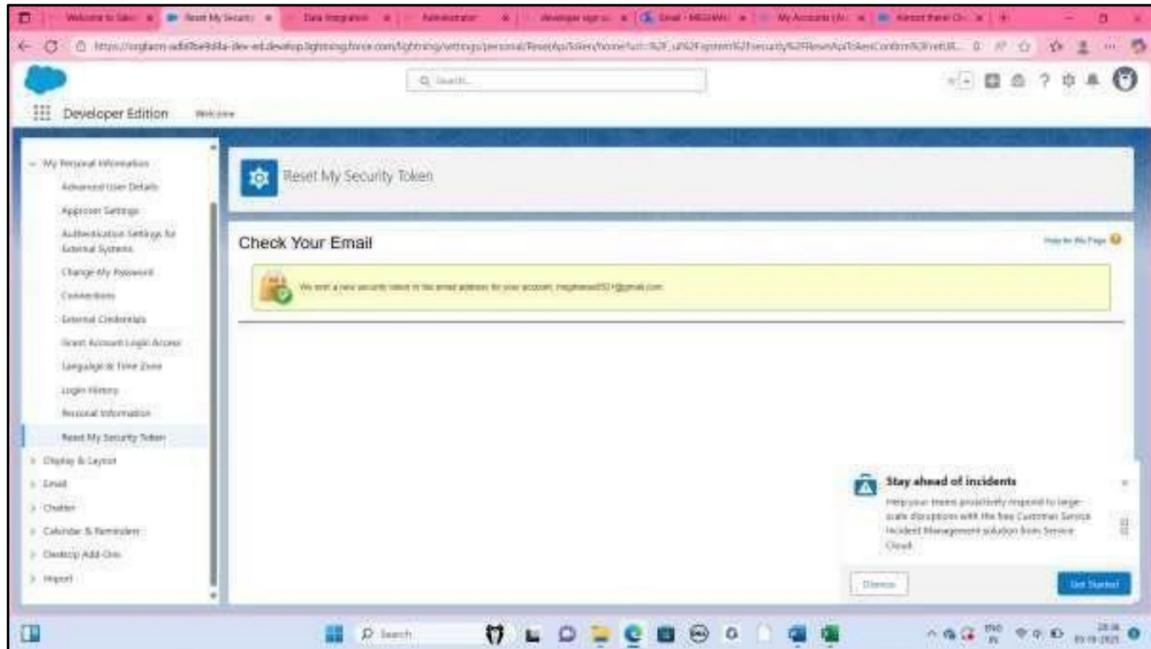


Fig 10 : Salesforce Token page

5. Click the Reset button and check your email for the new token.

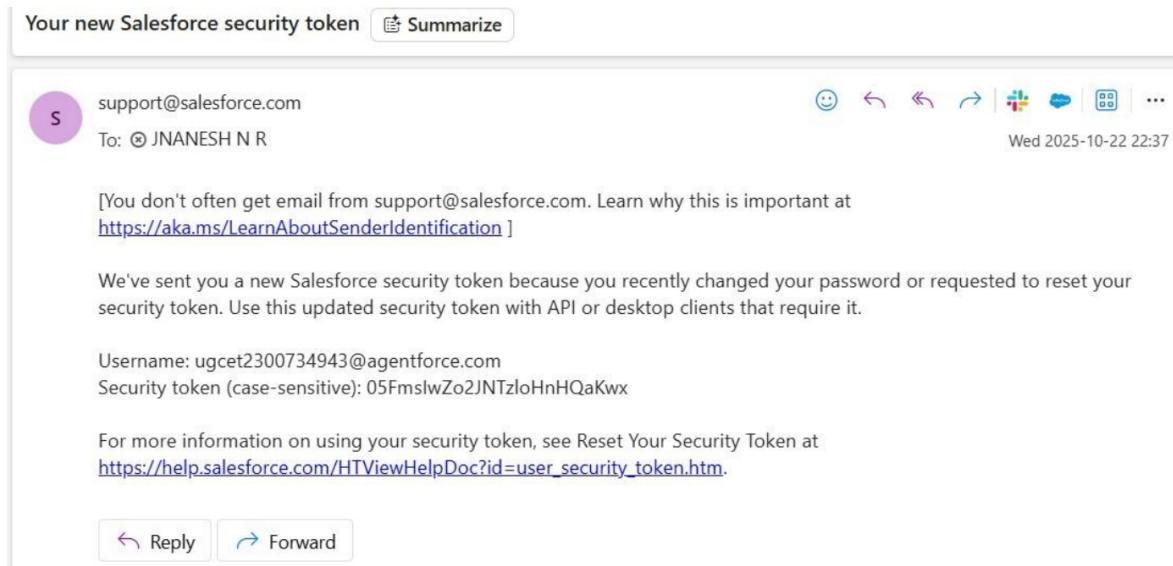


Fig 11 : Salesforce Token reset mail

6. In Informatica Administrator:

- Click **Add-on Connection → Salesforce.**

Add-On Connectors

Install connectors published by Informatica Cloud and our partners, and then use the connectors to create connections.

Salesforce Analytics The Salesforce Analytics Connectivity enables the write of data with Salesforce Analytics. ... As part of Informatica Intelligent Cloud Services, the Salesforce Analytics connectivity provides the ... Learn More	Salesforce Connector Use this Connector to securely read data from or write data to Salesforce. ... Use Salesforce Connector to securely read data from or write data to Salesforce. ... Salesforce is a cloud-based Custo... Learn More
Powered by License Available	Powered by License Available
Microsoft Dynamics 365 Sales Informatica Intelligent Cloud Services Developer Tools Services Trials ... Big Data Management Master Data Management Connectivity ... 	Salesforce-Workday Financial Integration Bundle Paid ... The Salesforce-Workday Financial Integration Bundle includes Informatica Cloud templates that enable customers to integrate common ...

1 - 6 of 6 Items

Page 1 of 1

Fig 12: Target Connection

- Enter your Salesforce **username**, **password**, and the **security token**.

Source_SF

Connection Details

Connection Name: [*]	Source_SF
Description:	
Type: [*]	Flat File

Flat File Connection Properties

Runtime Environment: [*]	LAPTOP-NLP9US7T
Directory: [*]	C:\Users\jname\Documents\Documents
Date Format: [*]	MM/dd/yyyy HH:mm:ss
Code Page: [*]	UTF-8

Fig 13 : Target Connection details

- Test the connection and then save it.

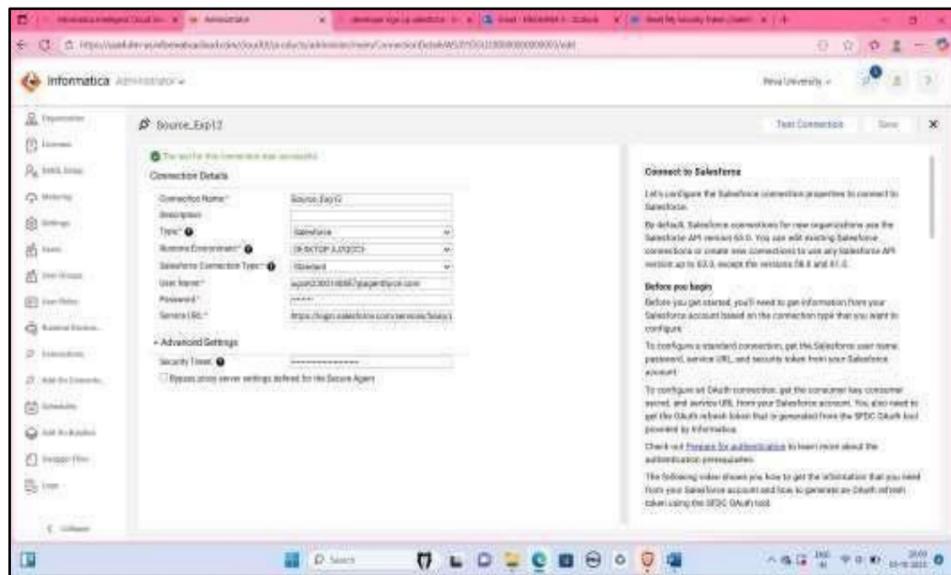


Fig 14 : Testing the Target Connection

3. Creating Data

Step 3.1: Prepare the Data File

1. Create a **CSV (comma-delimited)** file with sample data.
2. Download the sample data file from the provided source link (if applicable).
3. Place the file in the **exact file path** configured in your Flat File connection.
4. You may modify or extend the sample data as needed.

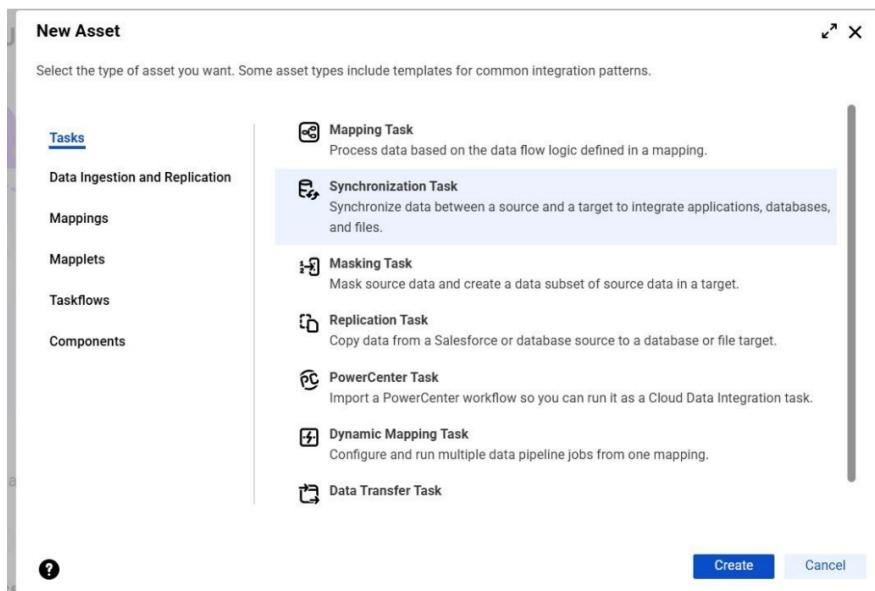
A	B	C	D	E	F	G	H
Outlet_Name	Phone_Number	Street	City	State	ZipCode	Country	Employees
Outlet A	9876543210	123 Main St	Bangalore	Karnataka	560001	India	15
Outlet B	9123456789	456 Park Ave	Pune	Maharashtra	411001	India	12
Outlet C	9988776655	789 MG Road	Chennai	Tamil Nadu	600001	India	20
Outlet D	9123451234	321 Brigade Rd	Bangalore	Karnataka	560025	India	18
Outlet E	9876509876	654 Ring Rd	Hyderabad	Telangana	500081	India	22
Outlet F	9009009000	987 5th Ave	Mumbai	Maharashtra	400001	India	14
Outlet G	9345678901	555 Hill St	Delhi	Delhi	110001	India	19
Outlet H	9111111111	777 Lake Side	Pune	Maharashtra	411014	India	25
Outlet I	9222222222	234 Sunset Blvd	Chennai	Tamil Nadu	600018	India	17
Outlet J	9333333333	890 Ocean Dr	Kolkata	West Bengal	700001	India	13
Outlet K	9444444444	123 Mountain Rd	Gurgaon	Haryana	122001	India	20
Outlet L	9555555555	654 River Rd	Noida	Uttar Pradesh	201301	India	23
Outlet M	9666666666	789 Hilltop	Ahmedabad	Gujarat	380009	India	16
Outlet N	9777777777	321 Oak St	Bengaluru	Karnataka	560034	India	21
Outlet O	9888888888	456 Pine Rd	Jaipur	Rajasthan	302001	India	18
Outlet P	9999999999	555 Forest Lane	Chandigarh	Chandigarh	160017	India	24
Outlet Q	9001234567	789 Birch St	Lucknow	Uttar Pradesh	226001	India	14
Outlet R	9112345678	123 Maple Ave	Surat	Gujarat	395003	India	19
Outlet S	9223456789	456 Cedar St	Mysore	Karnataka	570001	India	22
Outlet T	9334567890	789 Elm St	Bhubaneshwar	Odisha	751001	India	20

Fig 15 : Source data

4. Creating a Synchronization Task

Step 4.1: Define the Task

1. Go to **Data Integration** → **New** → **Synchronization Task**.

**Fig 16 : Synchronization Task**

2. Fill in the **Name, Location, and Description.**

3. Set the **Operation to INSERT.**

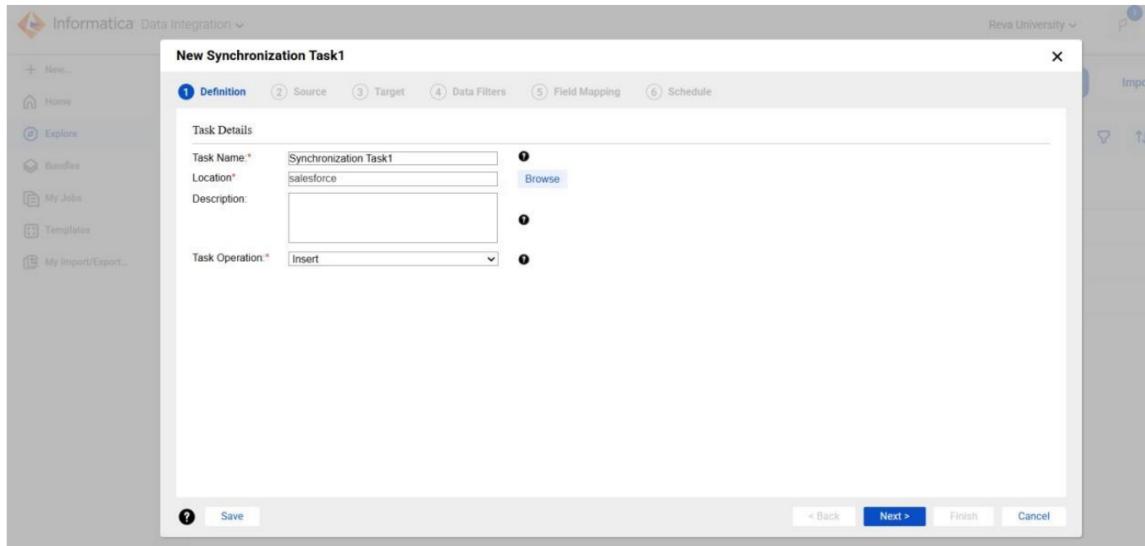


Fig 17 : Synchronization Definition wizard

Step 4.2: Configure Source

1. Select the source connection (e.g., Source_SF).
2. Set the **Source Type to Single.**
3. Choose the **Source Object** (e.g., input_csv).

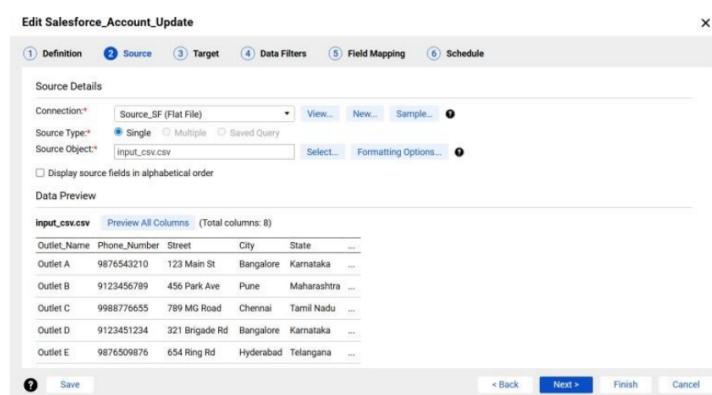


Fig 18 : Synchronization Source wizard

Step 4.3: Configure Target

1. Select the **Salesforce target connection**.
2. Set the **Target Object to Account**.

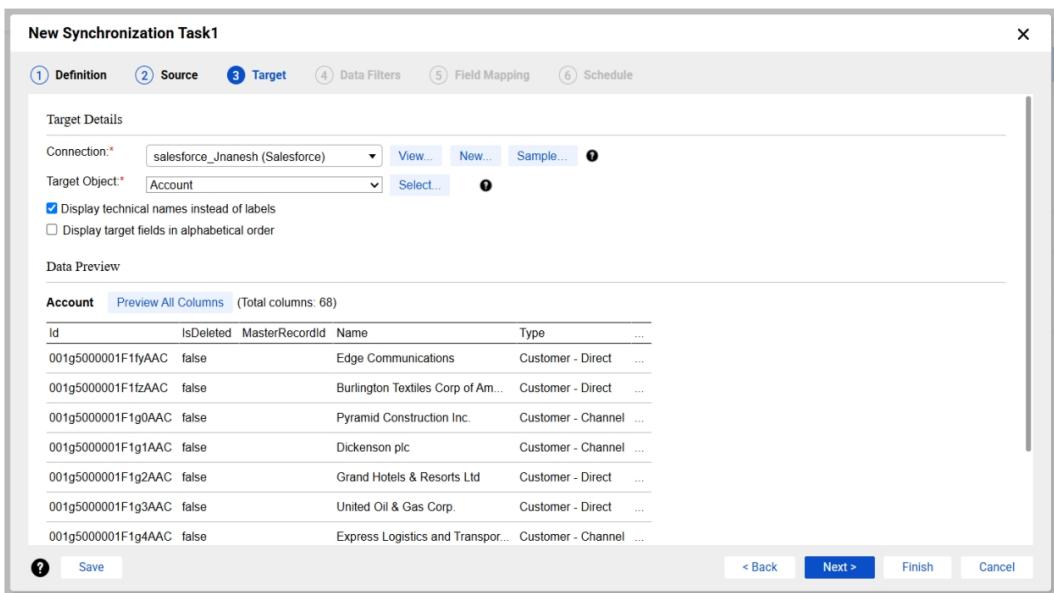


Fig 19: Synchronization Target Wizard

Step 4.4: Field Mapping

1. Skip the **Data Filter** step.
2. In the **Field Mapping** section, map each source field to its corresponding target field.
3. Validate the mapping to avoid errors.

Source Field	Target Field
Outlet_Name	Account Name (Name)
Phone_Number	Account Phone
Street	BillingStreet
City	BillingCity
State	BillingState
ZipCode	BillingPostalCode
Country	BillingCountry
Employees	Employees (or NumberOfEmployees)

Fig 20: Synchronization Field Mapping Wizard**Step 4.5: Save and Run**

1. Save the synchronization task.
2. Click **Run** to execute the task.
3. Wait for the task to complete and check the status for success.

The screenshot shows the Informatica Mapplet interface. At the top, there are buttons for 'Add Mapplet...', 'Refresh Fields', and a red error message: 'Internal error. Cannot connect to the Salesforce.com web service due to the following error: java.lang.NullPointerException. Contact Informatica Global Customer Support.' Below this, the mapping configuration is displayed:

Source: input_csv.csv		Target: Account		
Edit Types		Actions		
Status	Name	Status	Name	
✓	Outlet_Name	✓	Id	
<input type="text"/> Name or description				
Actions Name Type Runtime Environment Service URL				
🔗	salesforce_jnanesh	Salesforce	LAPTOP-NLP9US7T	https://login.salesforce.com/services/Soap/u/63.0
🔗	Source_SF	Flat File	LAPTOP-NLP9US7T	C:\Users\jnan\Documents\Documents

At the bottom, the task history table shows:

Action	Name	Type	Runtime Environment	Service URL	Start Date	End Date	Duration	Status
🔗	Synchronization Task1-2	salesforce			Oct 22, 2025, 10:35 PM	Oct 22, 2025, 10:35 ...	0	Failed
🔗	Synchronization Task1-1	salesforce			Oct 22, 2025, 9:59 PM	Oct 22, 2025, 10:00 ...	3	Success

Fig 21: Save and Run the Task

5. Results

Step 5.1: Verify Data in Salesforce

1. Log in to your **Salesforce Developer Account** using the registered username and password.

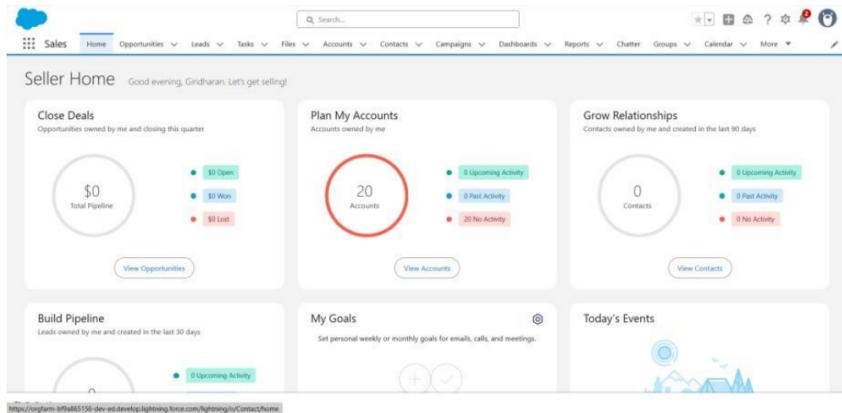


Fig 22 : Salesforce Home Page

2. Navigate to **Accounts** (or **Contacts**) → **My Accounts**, depending on your setup).
3. Check if the records from your CSV file have been successfully inserted.
4. Confirm that the data appears correctly in Salesforce.

Accounts						
My Accounts						
20 Items • Sorted by Account Name • Updated a few seconds ago						
1	Account Name	2	Account Site	3	Billing St...	4
	Outlet A				(987) 654-3210	
2	Outlet B				(912) 345-6789	
3	Outlet C				(988) 877-6655	
4	Outlet D				(912) 345-1234	
5	Outlet E				(987) 650-9876	
6	Outlet F				(900) 900-9000	
7	Outlet G				(914) 567-8901	
8	Outlet H				(911) 111-1111	
9	Outlet I				(922) 222-2222	
10	Outlet J				(933) 333-3333	
11	Outlet K				(944) 444-4444	
12	Outlet L				(955) 555-5555	
13	Outlet M				(966) 666-6666	
14	Outlet N				(977) 777-7777	

Fig 24 : New data inserted into Salesforce My accounts Section

And you can view the data which was saved in csv file reflecting in your salesforce account section