Salesforce node documentation

# Salesforce node#

Use the Salesforce node to automate work in Salesforce, and integrate Salesforce with other applications. n8n has built-in support for a wide range of Salesforce features, including creating, updating, deleting, and getting accounts, attachments, cases, and leads, as well as uploading documents.

On this page, you'll find a list of operations the Salesforce node supports and links to more resources.

Credentials

Refer to Salesforce credentials for guidance on setting up authentication.

This node can be used as an AI tool

This node can be used to enhance the capabilities of an AI agent. When used in this way, many parameters can be set automatically, or with information directed by AI - find out more in the AI tool parameters documentation.

## Operations#

• Account  
Add note to an account  
Create an account  
Create a new account, or update the current one if it already exists (upsert)  
Get an account  
Get all accounts  
Returns an overview of account's metadata.  
Delete an account  
Update an account

• Add note to an account

• Create an account

• Create a new account, or update the current one if it already exists (upsert)

• Get an account

• Get all accounts

• Returns an overview of account's metadata.

• Delete an account

• Update an account

• Attachment  
Create a attachment  
Delete a attachment  
Get a attachment  
Get all attachments  
Returns an overview of attachment's metadata.  
Update a attachment

• Create a attachment

• Delete a attachment

• Get a attachment

• Get all attachments

• Returns an overview of attachment's metadata.

• Update a attachment

• Case  
Add a comment to a case  
Create a case  
Get a case  
Get all cases  
Returns an overview of case's metadata  
Delete a case  
Update a case

• Add a comment to a case

• Create a case

• Get a case

• Get all cases

• Returns an overview of case's metadata

• Delete a case

• Update a case

• Contact  
Add lead to a campaign  
Add note to a contact  
Create a contact  
Create a new contact, or update the current one if it already exists (upsert)  
Delete a contact  
Get a contact  
Returns an overview of contact's metadata  
Get all contacts  
Update a contact

• Add lead to a campaign

• Add note to a contact

• Create a contact

• Create a new contact, or update the current one if it already exists (upsert)

• Delete a contact

• Get a contact

• Returns an overview of contact's metadata

• Get all contacts

• Update a contact

• Custom Object  
Create a custom object record  
Create a new record, or update the current one if it already exists (upsert)  
Get a custom object record  
Get all custom object records  
Delete a custom object record  
Update a custom object record

• Create a custom object record

• Create a new record, or update the current one if it already exists (upsert)

• Get a custom object record

• Get all custom object records

• Delete a custom object record

• Update a custom object record

• Document  
Upload a document

• Upload a document

• Flow  
Get all flows  
Invoke a flow

• Get all flows

• Invoke a flow

• Lead  
Add lead to a campaign  
Add note to a lead  
Create a lead  
Create a new lead, or update the current one if it already exists (upsert)  
Delete a lead  
Get a lead  
Get all leads  
Returns an overview of Lead's metadata  
Update a lead

• Add lead to a campaign

• Add note to a lead

• Create a lead

• Create a new lead, or update the current one if it already exists (upsert)

• Delete a lead

• Get a lead

• Get all leads

• Returns an overview of Lead's metadata

• Update a lead

• Opportunity  
Add note to an opportunity  
Create an opportunity  
Create a new opportunity, or update the current one if it already exists (upsert)  
Delete an opportunity  
Get an opportunity  
Get all opportunities  
Returns an overview of opportunity's metadata  
Update an opportunity

• Add note to an opportunity

• Create an opportunity

• Create a new opportunity, or update the current one if it already exists (upsert)

• Delete an opportunity

• Get an opportunity

• Get all opportunities

• Returns an overview of opportunity's metadata

• Update an opportunity

• Search  
Execute a SOQL query that returns all the results in a single response

• Execute a SOQL query that returns all the results in a single response

• Task  
Create a task  
Delete a task  
Get a task  
Get all tasks  
Returns an overview of task's metadata  
Update a task

• Create a task

• Delete a task

• Get a task

• Get all tasks

• Returns an overview of task's metadata

• Update a task

• User  
Get a user  
Get all users

• Get a user

• Get all users

## Templates and examples#

by amudhan

by Tom

by Tom

## What to do if your operation isn't supported#

If this node doesn't support the operation you want to do, you can use the HTTP Request node to call the service's API.

You can use the credential you created for this service in the HTTP Request node:

• In the HTTP Request node, select Authentication > Predefined Credential Type.

• Select the service you want to connect to.

• Select your credential.

Refer to Custom API operations for more information.

## Working with Salesforce custom fields#

To add custom fields to your request:

• Select Additional Fields > Add Field.

• In the dropdown, select Custom Fields.

You can then find and add your custom fields.