

Quick Start Guide

Get Started in 5 Minutes

Prerequisites Checklist

- [] CollaborateMD API credentials (username, password, customer #)
- [] CollaborateMD Report Seq ID and Filter Seq ID
- [] Salesforce credentials (username, password, security token)
- [] AWS account with CLI configured
- [] Python 3.11+ installed

Step 1: Configure Credentials (2 minutes)

```
cd /home/ubuntu/collaboratemd-salesforce-middleware
cp .env.example .env
nano .env # Edit with your credentials
```

Step 2: Deploy to AWS (2 minutes)

```
# One command to create everything
./scripts/create_lambda.sh

# Update environment variables
aws lambda update-function-configuration \
--function-name collaboratemd-salesforce-sync \
--environment Variables="{
    COLLABORATE_MD_USERNAME=YOUR_USERNAME,
    COLLABORATE_MD_PASSWORD=YOUR_PASSWORD,
    COLLABORATE_MD_CUSTOMER=10001001,
    COLLABORATE_MD_REPORT_SEQ=10001234,
    COLLABORATE_MD_FILTER_SEQ=10004321,
    SALESFORCE_INSTANCE_URL=https://your-instance.salesforce.com,
    SALESFORCE_USERNAME=YOUR_SF_USERNAME,
    SALESFORCE_PASSWORD=YOUR_SF_PASSWORD,
    SALESFORCE_SECURITY_TOKEN=YOUR_SF_TOKEN,
    BATCH_SIZE=200,
    LOG_LEVEL=INFO
}" \
--region us-east-1
```

Step 3: Test (1 minute)

```
./scripts/test_lambda.sh
```

Step 4: Schedule Automatic Sync

```
# Run daily at 2 AM UTC
aws events put-rule \
--name "collaboratemd-daily-sync" \
--schedule-expression "cron(0 2 * * ? *)" \
--region us-east-1

aws events put-targets \
--rule "collaboratemd-daily-sync" \
--targets "Id=""1"",Arn=""arn:aws:lambda:us-
east-1:ACCOUNT_ID:function:collaboratemd-salesforce-sync" \
--region us-east-1
```

What Happens During Sync?

1. **Fetch:** Lambda fetches claims from CollaborateMD Reports API
2. **Filter:** Only new/modified claims since last sync (incremental)
3. **Transform:** Maps CollaborateMD fields to Salesforce Claims_c
4. **Upsert:** Sends to Salesforce in batches of 200 records
5. **Track:** Updates DynamoDB with sync timestamp

Monitor Your Sync

View logs in CloudWatch:

```
https://console.aws.amazon.com/cloudwatch/home?region=us-east-1#logsV2:log-groups/log-group/\$252Faws\$252Flambda\$252Fcollaboratemd-salesforce-sync
```

Check sync statistics in DynamoDB:

```
aws dynamodb get-item \
--table-name collaboratemd-sync-state \
--key '{"sync_id": {"S": "default"}}' \
--region us-east-1
```

Troubleshooting

Lambda times out

- Increase timeout: `--timeout 900` (15 minutes max)
- Increase memory: `--memory-size 1024`

Authentication errors

- Verify credentials in environment variables
- Check CollaborateMD API access is enabled
- Ensure Salesforce security token is correct

No claims fetched

- Verify Report Seq and Filter Seq IDs

- Check report has data in CollaborateMD UI
- Try force full sync: `{"full_sync": true}`

Pro Tips

1. **Test locally first:** Use `python lambda_handler.py` before deploying
2. **Start with small date range:** Narrow filter to test with less data
3. **Monitor costs:** Check AWS billing for Lambda, DynamoDB usage
4. **Enable alarms:** Set up CloudWatch alarms for failures

Need Help?

Refer to the main [README.md](#) (README.md) for detailed documentation.