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Additional versions of this destination are available

This page is about the Salesforce (Actions) Destination. See below for information about other versions of the Salesforce destination:

☒ [Salesforce \(Classic\)](#)

Segment's Salesforce (Actions) destination allows you to create, update or upsert records for any object type. Segment sends data to the [Salesforce REST API](#).

Benefits of Salesforce (Actions) Destination vs Salesforce Destination Classic

The Salesforce (Actions) destination provides the following benefits over the classic Salesforce destination:

- **Fewer settings.** Data mapping for actions-based destinations happens during configuration, which eliminates the need for most settings.
- **Clearer mapping of data.** Actions-based destinations enable you to define the mapping between the data Segment receives from your source, and the data Segment sends to Salesforce.
- **OAuth 2.0 support.** Authentication with Salesforce uses OAuth 2.0 instead of a username/password.
- **Flexible match keys.** Upsert and update records based on any match key, including external IDs, record IDs, email and other object fields.
- **Batch support.** Reduce Salesforce overages and rate-limit errors by batching your Segment data to Salesforce's Bulk API 2.0.

Getting started

Before you connect Segment to Salesforce, please ensure you have a Salesforce account with REST API access.

- 1 From the Segment web app, click **Catalog**, then click **Destinations**.
- 2 Search for **Salesforce** in the Destinations Catalog, and select the destination.
- 3 Click **Configure Salesforce** in the top-right corner of the screen.
- 4 Select the source that will send data to Salesforce, follow the steps to name your destination, and select **Actions** as the destination framework.
- 5 On the **Settings** tab, authenticate with Salesforce using OAuth.
- 6 Follow the steps in the Destinations Actions documentation on [Customizing mappings](#). You must select which Event Types and/or Event Names will trigger each mapping.
- 7 Enable the destination and configured mappings.



Salesforce (Actions) authentication limitations

You must authenticate with the Salesforce (Actions) destination using OAuth. A single user can connect up to 5 Salesforce destinations, but upon connecting a 6th instance of the Salesforce (Actions) destination, Salesforce revokes the oldest destination's authorization. If the same user reauthorizes that same destination, this same behavior occurs on the next oldest destination that was authorized, and so on. To prevent this behavior, ensure that a different user with the same Salesforce permissions connects any additional Salesforce destinations.

For additional information on these limitations, see the Salesforce [Manage OAuth-Enabled Connected Apps Access to Your Data](#) documentation.

Actions v2

Segment's Actions v2 provide you with access to the following features:

- **Sync modes:** Control how Segment updates Salesforce by selecting a [sync mode](#), or a strategy for updating your downstream data.
- **Dynamic dropdowns:** When creating or updating a mapping in the Segment app, the dropdown auto-populates all of the available properties directly from Salesforce.
- **Create and modify data:** Use Sync modes to create objects in your downstream destination without having to leave the Segment app.



You might need to reauthorize your Salesforce account to use all of the features associated with Actions v2.

The following Actions support the Actions v2 functionality:

- Account v2
- Custom Object v2
- Case v2
- Opportunity v2
- Lead v2
- Contact v2

Sync modes

Sync modes allow users to define how Segment should update the data in your destination.

Available sync modes for the Salesforce (Actions) destination include:

- Add:** Add a new record when the specified identifier doesn't exist. If it does exist, Segment skips the record.
- Update:** Update a record if a match with the specified identifier is found. Segment does nothing if the record doesn't exist.
- Upsert:** If a record with the specified identifier is found, it is updated. If not, Segment creates a new record
- Delete:** Remove the record associated with a specified identifier. Not available when using batching.

Destination Settings

SETTING	DESCRIPTION
Password	The password of the Salesforce account you want to connect to. When all three of username, password, and security token are provided, a username-password flow is used to authenticate. This field is hidden to all users except those who have opted in to the username+password flow.
Sandbox Instance	Enable to authenticate into a sandbox instance. You can log in to a sandbox by appending the sandbox name to your Salesforce username. For example, if a username for a production org is user@acme.com and the sandbox is named test, the username to log in to the sandbox is user@acme.com.test. If you are already authenticated, please disconnect and reconnect with your sandbox username.
Security Token	The security token of the Salesforce account you want to connect to. When all three of username, password, and security token are provided, a username-password flow is used to authenticate. This value will be appended to the password field to construct the credential used for authentication. This field is hidden to all users except those who have opted in to the username+password flow.
Username	The username of the Salesforce account you want to connect to. When all three of username, password, and security token are provided, a username-password flow is used to authenticate. This field is hidden to all users except those who have opted in to the username+password flow.

Available Actions

Build your own Mappings. Combine supported [triggers](#) with the following Salesforce-supported actions:



Mapping limits per destination

Individual destination instances have support a maximum of 50 mappings.

- Lead
- Custom Object
- Case

- Opportunity
- Account
- Contact
- Account V2
- Custom Object V2
- Case V2
- Opportunity V2
- Lead V2
- Contact V2

Lead

Create, update, or upsert leads in Salesforce.

Lead is a **Cloud** action. The default Trigger is: `type = "identify"`

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: <code>STRING</code> The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Company	Type: <code>STRING</code> The lead’s company. This is required to create a lead.
Last Name	Type: <code>STRING</code> The lead’s last name. This is required to create a lead.
First Name	Type: <code>STRING</code> The lead’s first name.
Email	Type: <code>STRING</code> The lead’s email address.
City	Type: <code>STRING</code> City for the lead’s address.

FIELD	DESCRIPTION
Postal Code	Type: <code>STRING</code> Postal code for the lead's address.
Country	Type: <code>STRING</code> Country for the lead's address.
Street	Type: <code>STRING</code> Street number and name for the lead's address.
State	Type: <code>STRING</code> State for the lead's address.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>__c</code> appended.

Custom Object

Create, update, or upsert records in any custom or standard object in Salesforce.

Custom Object is a **Cloud** action.

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: <code>STRING</code> The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the "OR" operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to "AND".
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce's Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Salesforce Object *	Type: <code>STRING</code> The API name of the Salesforce object that records will be added or updated within. This can be a standard or custom object. Custom objects must be predefined in your Salesforce account and should end with <code>__c</code> .
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>__c</code> appended.

Case

Create, update, or upsert cases in Salesforce.

Case is a **Cloud** action.

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: STRING The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Record Matchers Operator	Type: STRING This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: BOOLEAN If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: OBJECT The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: OBJECT The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: STRING The record id value to use for bulk update.
Description	Type: STRING A text description of the case.
Other Fields	Type: OBJECT Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have __c appended.

Opportunity

Create, update, or upsert opportunities in Salesforce.

Opportunity is a **Cloud** action.

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: STRING The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Record Matchers Operator	Type: STRING This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: BOOLEAN If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.

FIELD	DESCRIPTION
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Close Date	Type: <code>STRING</code> Date when the opportunity is expected to close. Use yyyy-MM-dd format. This is required to create an opportunity.
Name	Type: <code>STRING</code> A name for the opportunity. This is required to create an opportunity.
Stage Name	Type: <code>STRING</code> Current stage of the opportunity. This is required to create an opportunity.
Amount	Type: <code>STRING</code> Estimated total sale amount.
Description	Type: <code>STRING</code> A text description of the opportunity.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>_c</code> appended.

Account

Create, update, or upsert accounts in Salesforce.

Account is a **Cloud** action. The default Trigger is: `type = "group"`

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: <code>STRING</code> The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce's Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the "OR" operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to "AND".
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.

FIELD	DESCRIPTION
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Name	Type: <code>STRING</code> Name of the account. This is required to create an account.
Account Number	Type: <code>STRING</code> Account number assigned to the account. This is not the unique, Salesforce-generated ID assigned during creation.
Number of employees	Type: <code>INTEGER</code> Number of employees working at the company represented by the account.
Billing City	Type: <code>STRING</code> City for the billing address of the account.
Billing Postal Code	Type: <code>STRING</code> Postal code for the billing address of the account.
Billing Country	Type: <code>STRING</code> Country for the billing address of the account.
Billing Street	Type: <code>STRING</code> Street address for the billing address of the account.
Billing State	Type: <code>STRING</code> State for the billing address of the account.
Shipping City	Type: <code>STRING</code> City for the shipping address of the account.
Shipping Postal Code	Type: <code>STRING</code> Postal code for the shipping address of the account.
Shipping Country	Type: <code>STRING</code> Country for the shipping address of the account.
Shipping Street	Type: <code>STRING</code> Street address for the shipping address of the account.
Shipping State	Type: <code>STRING</code> State for the shipping address of the account.

Contact

Create, update, or upsert contacts in Salesforce.

Contact is a **Cloud** action.

Click to show / hide fields

FIELD	DESCRIPTION
Operation *	Type: <code>STRING</code> The Salesforce operation performed. The available operations are Create, Delete, Update or Upsert records in Salesforce.
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the "OR" operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to "AND".
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce's Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.

FIELD	DESCRIPTION
Record Matchers	Type: OBJECT The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: OBJECT The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: STRING The record id value to use for bulk update.
Last Name	Type: STRING The contact's last name up to 80 characters. This is required to create a contact.
First Name	Type: STRING The contact's first name up to 40 characters.
Account ID	Type: STRING The ID of the account that this contact is associated with. This is the Salesforce-generated ID assigned to the account during creation (i.e. 0018c00002CDThnAAH).
Email	Type: STRING The contact's email address.
Mailing City	Type: STRING City for the contact's mailing address.
Mailing Postal Code	Type: STRING Postal Code for the contact's mailing address.
Mailing Country	Type: STRING Country for the contact's mailing address.
Mailing Street	Type: STRING Street number and name for the contact's mailing address.
Mailing State	Type: STRING State for the contact's mailing address.
Other Fields	Type: OBJECT Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have _c appended.

Account V2

Create, update, or upsert accounts in Salesforce.

Account V2 is a **Cloud** action. The default Trigger is: `type = "group"`

Click to show / hide fields

FIELD	DESCRIPTION
Use Salesforce Bulk API	Type: BOOLEAN If true, events are sent to Salesforce's Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Name	Type: <code>STRING</code> Name of the account. This is required to create an account.
Account Number	Type: <code>STRING</code> Account number assigned to the account. This is not the unique, Salesforce-generated ID assigned during creation.
Number of employees	Type: <code>INTEGER</code> Number of employees working at the company represented by the account.
Billing City	Type: <code>STRING</code> City for the billing address of the account.
Billing Postal Code	Type: <code>STRING</code> Postal code for the billing address of the account.
Billing Country	Type: <code>STRING</code> Country for the billing address of the account.
Billing Street	Type: <code>STRING</code> Street address for the billing address of the account.
Billing State	Type: <code>STRING</code> State for the billing address of the account.
Shipping City	Type: <code>STRING</code> City for the shipping address of the account.
Shipping Postal Code	Type: <code>STRING</code> Postal code for the shipping address of the account.
Shipping Country	Type: <code>STRING</code> Country for the shipping address of the account.
Shipping Street	Type: <code>STRING</code> Street address for the shipping address of the account.
Shipping State	Type: <code>STRING</code> State for the shipping address of the account.

Custom Object V2

Create, update, or upsert records in any custom or standard object in Salesforce.

Custom Object V2 is a **Cloud** action.

[Click to show / hide fields](#)

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Salesforce Object *	Type: <code>STRING</code> The API name of the Salesforce object that records will be added or updated within. This can be a standard or custom object. Custom objects must be predefined in your Salesforce account and should end with “__c”.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have __c appended.

Case V2

Create, update, or upsert cases in Salesforce.

Case V2 is a **Cloud** action.

Click to show / hide fields

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Description	Type: <code>STRING</code> A text description of the case.

FIELD	DESCRIPTION
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>__c</code> appended.

Opportunity V2

Create, update, or upsert opportunities in Salesforce.

Opportunity V2 is a **Cloud** action.

[Click to show / hide fields](#)

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Close Date	Type: <code>STRING</code> Date when the opportunity is expected to close. Use yyyy-MM-dd format. This is required to create an opportunity.
Name	Type: <code>STRING</code> A name for the opportunity. This is required to create an opportunity.
Stage Name	Type: <code>STRING</code> Current stage of the opportunity. This is required to create an opportunity.
Amount	Type: <code>STRING</code> Estimated total sale amount.
Description	Type: <code>STRING</code> A text description of the opportunity.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>__c</code> appended.

Lead V2

Create, update, or upsert leads in Salesforce.

Lead V2 is a **Cloud** action. The default Trigger is: `type = "identify"`

[Click to show / hide fields](#)

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have <code>_c</code> appended.
Company	Type: <code>STRING</code> The lead’s company. This is required to create a lead.
Last Name	Type: <code>STRING</code> The lead’s last name. This is required to create a lead.
First Name	Type: <code>STRING</code> The lead’s first name.
Email	Type: <code>STRING</code> The lead’s email address.
City	Type: <code>STRING</code> City for the lead’s address.
Postal Code	Type: <code>STRING</code> Postal code for the lead’s address.
Country	Type: <code>STRING</code> Country for the lead’s address.
Street	Type: <code>STRING</code> Street number and name for the lead’s address.
State	Type: <code>STRING</code> State for the lead’s address.

Contact V2

Create, update, or upsert contacts in Salesforce.

Contact V2 is a **Cloud** action.

[Click to show / hide fields](#)

FIELD	DESCRIPTION
Record Matchers Operator	Type: <code>STRING</code> This field affects how Segment uses the record matchers to query Salesforce records. By default, Segment uses the “OR” operator to query Salesforce for a record. If you would like to query Salesforce records using a combination of multiple record matchers, change this to “AND”.
Use Salesforce Bulk API	Type: <code>BOOLEAN</code> If true, events are sent to Salesforce’s Bulk API 2.0 rather than their streaming REST API. Once enabled, Segment will collect events into batches of 5000 before sending to Salesforce.
Record Matchers	Type: <code>OBJECT</code> The fields used to find Salesforce records for updates. This is required if the operation is Delete, Update or Upsert. Any field can function as a matcher, including Record ID, External IDs, standard fields and custom fields. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. If multiple records are found, no changes will be made. Please use fields that result in unique records.
Bulk Upsert External Id	Type: <code>OBJECT</code> The external id field name and mapping to use for bulk upsert.
Bulk Update Record Id	Type: <code>STRING</code> The record id value to use for bulk update.
Last Name	Type: <code>STRING</code> The contact’s last name up to 80 characters. This is required to create a contact.
First Name	Type: <code>STRING</code> The contact’s first name up to 40 characters.
Account ID	Type: <code>STRING</code> The ID of the account that this contact is associated with. This is the Salesforce-generated ID assigned to the account during creation (i.e. 0018c00002CDThnAAH).
Email	Type: <code>STRING</code> The contact’s email address.
Mailing City	Type: <code>STRING</code> City for the contact’s mailing address.
Mailing Postal Code	Type: <code>STRING</code> Postal Code for the contact’s mailing address.
Mailing Country	Type: <code>STRING</code> Country for the contact’s mailing address.
Mailing Street	Type: <code>STRING</code> Street number and name for the contact’s mailing address.
Mailing State	Type: <code>STRING</code> State for the contact’s mailing address.
Other Fields	Type: <code>OBJECT</code> Additional fields to send to Salesforce. On the left-hand side, input the Salesforce field API name. On the right-hand side, map the Segment field that contains the value. This can include standard or custom fields. Custom fields must be predefined in your Salesforce account and the API field name should have __c appended.

Configuration options

Operations

When configuring a mapping, you must select the Operation that will be performed on the record. The Salesforce (Actions) destination supports the following operations:

-  **Create.** Pushes new records to Salesforce. This operation is good for the following scenarios:

-  Push records into Salesforce, but don't need data within each row to remain up to date

Push records into Salesforce, but don't need data within each row to remain up to date.

Static data where each row is never updated, such as events.

Upsert. Pushes new records to Salesforce and updates fields on existing records in Salesforce. This operation is good for the following scenarios:

Push records into Salesforce and keep the data up to date.

Update. Updates fields on existing records in Salesforce. This operation is good for the following scenarios:

You have records in Salesforce that you want to add new information/fields to.

You want to update fields on existing records in Salesforce.

Delete. Deletes existing records in Salesforce. This operation is good for the following scenarios:

You have records in Salesforce that you want to remove.

Record Matchers

When using the `delete`, `update` and `upsert` operations, you must specify the match key(s) that will be used to query Salesforce for the record. You can do this within the Record Matchers object. Any field can be used as a record matcher, including:

External IDs. To map an External ID, the Salesforce API name should have `__c` appended to it.

Record IDs. To map a Record ID, the Salesforce API name is `Id`.

Standard fields. To map a standard field, the Salesforce API name should match what is in Salesforce for the given field, for example `Email`.

Custom fields. To map a custom field, the field needs to be predefined in Salesforce and the Salesforce API name should have `__c` appended to it.

If multiple fields are provided in the Record Matchers object, Segment uses an “OR” operator to query Salesforce for a record. If multiple records are returned upon query, no updates will be made. Segment will instead record a 300 error status for the request, and the request will not be retried. **Please use fields that result in unique records.**

Please note Salesforce only allows querying on fields that have the “Filter” property. For example, Segment doesn’t query on the Case `Description` because it is not a filterable property. You can lookup the standard field properties in [Salesforce’s API documentation](#) to determine if a field is available for querying.

CreatorSmallImageUrl	Type string Properties Filter , Group, Nillable, Sort Description URL of the user’s thumbnail photo from the feed. Chatter Answers must be enabled to view this field. This field is available in API version 26.0 and later.
Description	Type textarea Properties Create, Nillable, Update Description A text description of the case. Limit: 32 KB.

Migrate from Salesforce (Classic)

To migrate from Salesforce (Classic), complete the following steps before May 31, 2023:

- 1 Log in to your Segment workspace and review the copied settings in each new Salesforce (Actions) instance to ensure their accuracy.
- 2 Authenticate Segment with Salesforce with OAuth.
- 3 Enable the Salesforce (Actions) destination & disable the Classic destination.



Authenticate with Salesforce

Salesforce (Actions) requires OAuth based authentication while Salesforce Classic uses tokens and credentials. Because of this, Segment can't migrate authentication credentials. Your workspace owner must login and configure OAuth Authentication for each Salesforce (Actions) destinations that were migrated.

If you have more than one Salesforce instance connected to Segment, repeat these three steps for each instance.

Keep the following in mind as you begin to use Salesforce (Actions):

- Salesforce (Actions) supports batching. The workspace owner can edit the enabled-batching field manually for any of the mappings. This setting is disabled by default.
- Sending Identify events to Salesforce (Classic) results in a create or update operation for Leads, and maps properties from `event.traits` Salesforce (Actions) does not support this behavior. By default, the automatic migration maps only a subset of the most used Lead properties as mentioned below. The workspace owner must map any additional Salesforce properties or Custom properties manually.

Review the tables below to see how settings from Salesforce (Classic) were migrated to Salesforce (Actions).

Leads

SALESFORCE (ACTIONS) PROPERTY	MIGRATED BEHAVIOR
Record Matchers	Uses Custom Lead Lookup fields from Salesforce (Classic), if available, or Email as a fallback value.
Name	Appears within the Other Fields property, defaults to <code>traits.name</code> .
Phone	Appears within the Other Fields property, defaults to <code>coalesce(traits.phone, traits.phoneNumber)</code> .
Title	Appears within the Other Fields property, defaults to <code>coalesce(traits.address.title, traits.position)</code> .
Website	Appears within the Other Fields property, defaults to <code>traits.website</code> .
Description	Appears within the Other Fields property, defaults to <code>traits.description</code> .
Lead Source	Appears within the Other Fields property, defaults to <code>traits.leadSource</code> .

Account

SALESFORCE (ACTIONS) PROPERTY	MIGRATED BEHAVIOR
Billing Street	Created only if the Send Address as Billing Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.street, traits.street)</code> .

SALESFORCE (ACTIONS) PROPERTY	MIGRATED BEHAVIOR
Billing City	Created only if the Send Address as Billing Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.city, traits.city)</code> .
Billing State	Created only if the Send Address as Billing Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.state, traits.state)</code> .
Billing Country	Created only if the Send Address as Billing Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.country, traits.country)</code> .
Billing Postal Code	Created only if the Send Address as Billing Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.postalCode, traits.postalCode)</code> .
Shipping Street	Created only if the Send Address as Shipping Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.street, traits.street)</code> .
Shipping City	Created only if the Send Address as Shipping Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.city, traits.city)</code> .
Shipping State	Created only if the Send Address as Shipping Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.state, traits.state)</code> .
Shipping Country	Created only if the Send Address as Shipping Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.country, traits.country)</code> .
Shipping Postal Code	Created only if the Send Address as Shipping Address property is set in Salesforce (Classic). Defaults to <code>coalesce(traits.address.postalCode, traits.postalCode)</code> .

FAQ

How do I enable a sandbox instance?

To send data to a Salesforce sandbox instance, navigate to **Settings > Advanced Settings**, toggle on the “Sandbox Instance” setting, save the setting and then authenticate. If you are already authenticated, please disconnect and reconnect with your sandbox username.

Your Salesforce sandbox username appends the sandbox name to your Salesforce production username. For example, if a username for a production org is `user@acme.com` and the sandbox is named `test`, the username to log in to the sandbox is `user@acme.com.test`.

How do I add custom fields?

Custom fields can be included in the Other Fields mapping. Custom fields must be predefined in your Salesforce account and should end with `__c` (for example, `My_Custom_Field__c`). Please include the `__c` in your mapping.

You can see Salesforce API names in Salesforce under **Setup > Objects and Fields > Object Manager > Select your object > Fields & Relationships > FIELD NAME**.



Details	Fields & Relationships 26+ Items, Sorted by Field Label	
Fields & Relationships	FIELD LABEL	FIELD NAME
Page Layouts	A Custom Field	A_Custom_Field__c
Lightning Record Pages	Account Name	AccountId
Buttons, Links, and Actions	Amount	Amount
Compact Layouts	Close Date	CloseDate
Field Sets	Contract	ContractId
Object Limits	Created By	CreatedById
Record Types	Current Generator(s)	CurrentGenerators__c
Related Lookup Filters	Delivery/Installation Status	DeliveryInstallationStatus__c
Search Layouts	Description	Description
Search Layouts for Salesforce Classic	Expected Revenue	ExpectedRevenue
Triggers	Forecast Category	ForecastCategoryName
Validation Rules	Last Modified By	LastModifiedById

See Salesforce's [Create Custom Fields](#) for more information on custom fields.

How do I associate a Contact with an Account?

The only way to associate a Contact with an Account is to include the `AccountId` on the Contact record. The `AccountId` is a Salesforce-generated ID assigned to the account during creation (i.e. 0018c00002CDThnAAH). Salesforce only accepts a single `AccountId` as the Contact's primary account; you cannot pass an array of IDs.



The `AccountId` is different than the `AccountNumber` and `AccountName`. The `AccountId` is auto-generated, whereas the `AccountNumber` and `AccountName` are chosen by you.

How do I send data for Person Accounts?

A [Person Account](#) is a special type of account that represents an individual rather than a business. The requirements for Person Account records differ from what Segment's standard Account action supports. For example, `Name` is required for Accounts, whereas `LastName` is required for Person Accounts. To send data for Person Accounts, you must use the Custom Object action. Hard code the Salesforce Object to `Account` and define other standard and custom fields, such as `LastName` and `FirstName`, in the Other Fields mapping.

3

Select mappings

Define how to map the event fields from your Source to your Destination

Show test event preview

Create new record

→

Operation *

Account

→

Salesforce Object *

Select Object

Edit Object

LastName

=

coalesce(traits.lastName)

FirstName

=

coalesce(traits.firstName)

Enter Key Name

=

Select Event Variable

+ Add Key/Value

→

Other Fields *

Person Accounts are not enabled by default, and the solution above will only work if you have Person Accounts enabled. If you do not have Person Accounts enabled, please use the standard Account action.

How many API calls does Segment make to Salesforce?

For `update` and `upsert`, the query request used to determine whether the record already exists in Salesforce counts as one API call. A second API call is used to update or create that record.

For `create`, no query is executed so one API call is used to create the record.

To check how many API calls you have left in Salesforce, go to **Setup > Company Settings > Company Information**, and you'll find a field labeled: API Requests, Last 24 Hours.

Why do I see duplicate records in Salesforce?

When using the `create` operation, it's possible for duplicate records to be created in Salesforce. This is because Segment retries records once they hit the internal timeout. It's possible Salesforce's REST API eventually processes the original record in addition to the retried record, resulting in duplicates. You may encounter this behavior if Salesforce's REST API throttles your records (for example, due to hitting API limits or complex workflow automation). To prevent duplicates, you can use [Duplicate Rules](#) in Salesforce. See set up information in [Resolve and Prevent Duplicate Data in Salesforce](#).

Please note this is only a concern when using the `create` operation. You can use the `upsert` operation instead to avoid duplicates if `upsert` meets your needs.

Why do I see "undefined traits" error?

This error happens when you use the `update` operation, but no value is provided for the field defined as the Record Matcher. To fix this, make sure your payload includes a value for the Record Matcher field.

How does Salesforce Bulk API work?

When **Use Salesforce Bulk API** is enabled for your mapping, events are sent to [Salesforce's Bulk API 2.0](#) rather than their streaming REST API. If enabled, Segment will collect events into batches of up to 5000 before sending to Salesforce. Bulk support can be used for the `upsert` or `update` operations only.



To monitor Bulk API uploads in Salesforce, search for 'Bulk Data Load Jobs' in the Quick Find box, then select **Bulk Data Load Jobs**. This will redirect you to the [Bulk Data Load Jobs](#) page (Environment > Jobs > Bulk Data Load Jobs), where you can view the progress of current jobs, along with success and error messages for recent Bulk V2 operations.

For bulk update, if a record in a batch is missing a Bulk Update Record ID, Segment will still send it to Salesforce. Salesforce will reject the individual record because it will be unable to find a record to update. Other records in the batch that are valid will still be processed. Please note that Segment's Event Delivery tab will show the entire batch as successful as Segment cannot currently break down Event Delivery stats into individual failed/passed events.

Which fields are supposed to map to Salesforce's required fields for "Bulk Update Record ID" and "Bulk Upsert External ID"?

For "Bulk Update Record ID", see [Salesforce's help documentation](#). For "Bulk Upsert External ID", see [Salesforce's help documentation](#).



The field mapped to Bulk Upsert External Id should **not** be included in the Other Fields mapping. Including it as a custom field will cause an error in Salesforce. Although the Bulk API may return successful responses, the [Bulk Data Load Jobs](#) page in Salesforce will display error messages for failed operations.

This page was last modified: 24 Jan 2025

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