



Americas Virtual Meetup #12

Key Tips to Ensure a Smooth M&A
Integration Process & SFDC Platform
Events

December 21, 2022

Agenda

Meetup Agenda

- 1 Welcome & Introductions**
- 2 Meetup Format / Schedule**
- 3 Outline of Today's Session**
- 4 Technical Presentation**
- 5 Q&A / Feedback**

Schedule

Previous Virtual Meetup available on Success Central:

- Advanced Resources >> [Jitterbit Customer Workshops](#)

Agenda for December 21:

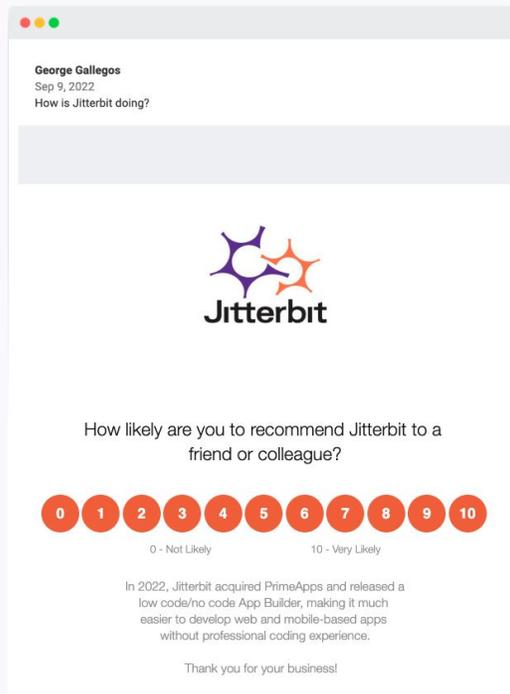
- **M&A Tips - with Jeremy Parker - COO**
- **SFDC Platform Events / Change Data Capture - with Jaime Delgado (CSA)**

Event Schedule:

- Next: March 15, 2023
 - **What should we cover? What would be valuable?**
 - **Interacting with Messaging solution?**

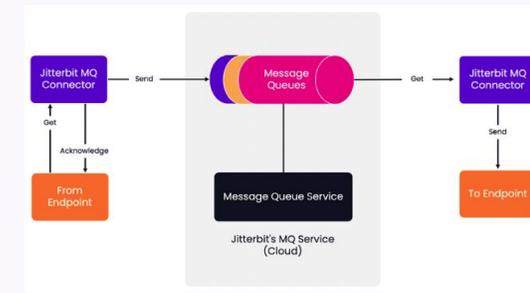
Topics/Themes:

- Enablement, Best Practice & Top Tips
- Product Demos
- Cloud Studio & API's
- Real-time Dashboards
- System Monitoring



Jitterbit Message Queue (MQ) Service

Beta Program



What is Jitterbit MQ:

Jitterbit's MQ Service is a cloud-based multi-tenant messaging queue service made available on the Harmony Platform. The service provides customers with the tools to manage their queues to support asynchronous processing, which helps to efficiently manage system workloads and resources.

Who is the Beta Program For:

We're looking for a small group of Harmony customers and partners to participate in our Beta Program. Beta participants will get the opportunity to fully try the functionality and usability of Jitterbit's Message Queue (MQ) Service capability, and provide feedback to our Product Management team to inform improvements in the offering.

Who to contact for nomination:

Please reach out to Tomydas Pall (tomydas.pall@jitterbit.com) for nomination or any other questions you may have on the Beta program. CC your CSM.

TODAY'S SPEAKERS

Profile

Jeremy Parker COO

Parker is a seasoned results-oriented operations executive with more than 20 years of experience and a passion for developing and collaborating with cross-functional teams to grow businesses.

“One of our investors helped us identify a need for an internal operations leadership role, and once we did, we realized Jeremy would be the right person for the job,” said George Gallegos, CEO at Jitterbit. “As we look to ramp up our M&A activity, Jeremy’s extensive experience will guide us and help ensure that the processes we’ve put in place work toward making sure everyone is perfectly aligned.”

“I’ve been a part of more than 25 mergers and acquisitions, and it’s always done by aligning people, data and processes, which is something I really enjoy,” Parker said. “Being in a growing marketplace with a growing company is always a situation that I have thrived in, and I’m excited to join Jitterbit at the current point in its growth trajectory.”

M&A Integration Approaches

*A business merger or an acquisition is an effective strategy for company expansion and / or improving bottom-line profitability. Success is defined as **Time to Value**.*

The “Bolt-on”



The “Hybrid”



The “Integrated”



Integration Readiness Questions

To capture the positive benefits of any acquisition or merger, businesses need to implement the right strategy to meet the company's defined objectives.

1. What is your integration approach and is there broad alignment on your integration strategy and priorities?
2. Do you have dedicated and skilled integration resources in the organization? Or do the current teams have the bandwidth to work on integration related projects while continuing to perform their day-to-day responsibilities?
3. Do you have system integration tools in place and can they be leveraged to support your migration strategy?
4. What is your process and/or cadence for reviewing integration milestones and who needs to attend and assist with specific decisions, risks or issues that arise?
5. What is your communication plan for keeping all employees and stakeholders informed about integration progress, upcoming activities and changes to business processes as a result of an integration?

It is essential to ensure a successful post-merger or acquisition integration, this is fundamental to enabling efficiencies, profitable growth, and deal valuation.

TODAY'S SPEAKERS

Profile

Jaime Delgado
SENIOR CUSTOMER
SUCCESS ARCHITECT

Jaime has 15 years of experience in the cloud application and integration technology space helping organizations through digital transformation and automation of processes. Jaime's interests are in advising organizations maximize their use of APIs to drive innovation and value for their customers.

Implementation of Salesforce Platform Events in Jitterbit

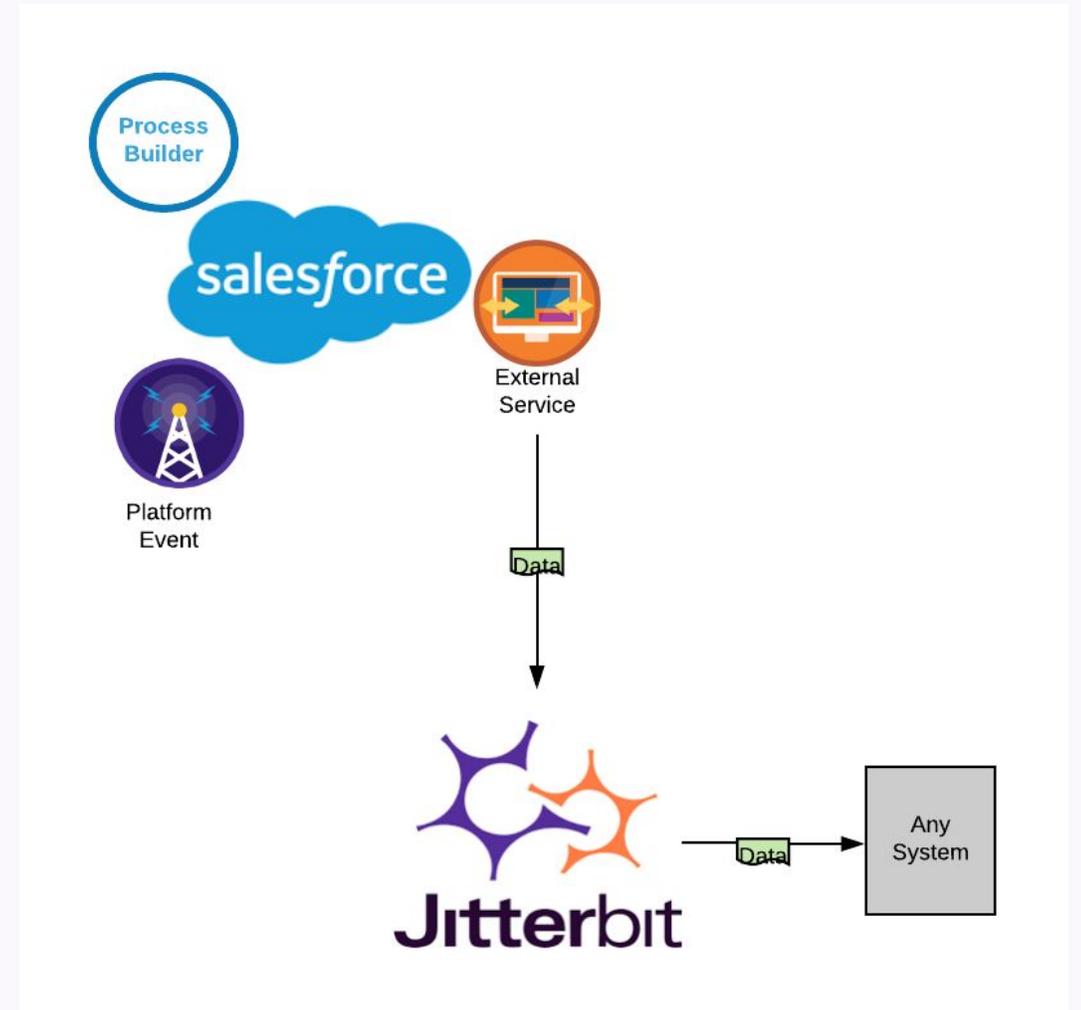
Learnings

Implementation of Salesforce Platform Events in Jitterbit

1. Real Time with Platform Events - A look back in time
2. Introducing Platform Events Support in Jitterbit
3. Anatomy of Salesforce Events(Beta)
4. Salesforce Events(Beta) Connector Options in Implementation
5. Show and Tell
6. Differences between Salesforce OBM and PE
7. Scenarios for Implementing
8. Additional Information

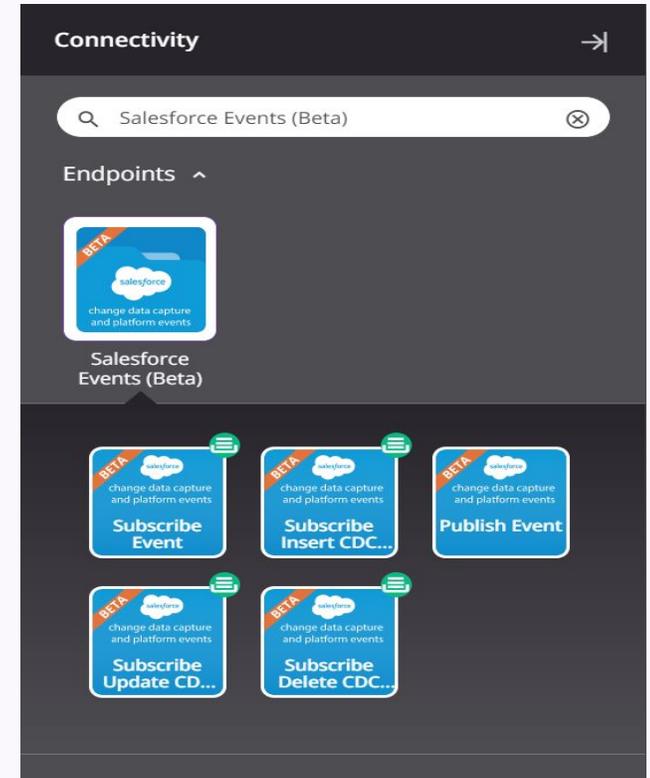
(A look back)Real Time with Platform Events

1. Another good real time integration option
2. Jitterbit Components
 - a. Order Upsert Operation
 - b. API Configured
3. Salesforce Components
 - a. External Services/Platform Events in Lightning Experience
 - i. Editions- Enterprise, Performance, Unlimited and DE
 - ii. Check your editions for limits on these features events allowed, clients, subscriptions, etc
 - b. Named Credentials
 - c. Process Builder
4. Benefits
 - a. *Security via named credentials*
 - b. PE lets you define the structure of your message
 - c. You can pull data from related objects
 - d. You receive intermediate changes because the change event is decoupled from the notification



Introducing Platform Events Support in Jitterbit

- Event Driven Architecture / Change Data Capture(CDC)
 - Ability to receive notification of Events
- New Connector Salesforce Events(beta)
 - Currently in Beta
 - Available in Cloud Studio
- Activities
 - Subscribe Event
 - Subscribe Insert CDC Event
 - Publish Event
 - Subscribe Update CDC Event
 - Subscribe Delete CDC Event
- Limitations
 - Currently only support for newly created events in Salesforce
 - This Beta connector will only run on a Private Agent (10.61 or later).



Anatomy of Salesforce Events (Beta) in Jitterbit

- Enable Listening Services on the Agent
 - Add a line to `jitterbit-agent-config.properties`
 - `agent.sdk_framework.listener.enabled=true`
- Configure a Salesforce Connected App
 - Obtain your Salesforce connected app client credentials
- Configure which Entities (Objects) will generate Events
 - This is found in the Change Data Capture Salesforce configuration
 - eg Account, Object, etc
- Create and configure Salesforce Event (beta) in your Jitterbit Project
 - process your events

Salesforce Events (Beta) Connector Options in Implementation

- Salesforce Out of the Box Change Event Object
 - Receive the object fields in the change event that is sent
 - Filtering is done in Jitterbit
 - can decide if we are interested in the field that was changed
 - process the message accordingly
- Configure a Custom Platform Event
 - Create a Custom event object
 - Publish changes to the base object with process builder based on a rule
 - Filtering is done at the source

Salesforce Events (Beta) Connector Options in Implementation

- Jitterbit Studio Show and Tell
 - Tale of 2 Operations
 - Out of the box Change Event

The image displays two screenshots of the Jitterbit Studio interface, showing connector configurations for Salesforce Events. Both screenshots feature a '2.0 Order Update CDC' title and a '2.1 Custom Order PE' title, with a 'Salesforce E... Subscribe U...' connector icon on the left. The first screenshot shows a 'change order transformation' connector, an 'InOut Write' connector, and a 'Log' connector. The second screenshot shows a 'custom order pe transformation' connector, an 'InOut Write' connector, and a 'Log' connector. Both screenshots include a 'Events Enabled' toggle switch and a top toolbar with various icons.

- Custom Platform Event

Differences between Outbound Messaging and Platform Events

- OBM
 - SOAP/XML based
 - message can only include fields directly on the object
 - built in guaranteed delivery and retry
 - requires Jitterbit API Manager licensing
 - limited in security
 - Salesforce IP Whitelisting
 - Salesforce Certificate
- PE
 - JSON based
 - great option for private agent customers
 - field reference flexibility
 - notifications on record deletion
 - traditional Event Bus Messaging Features
 - producers and consumers(Jitterbit now participates in both)
 - licensing implications within Salesforce - check your edition for availability and limits

Scenarios For Implementing One Approach vs The Other

- OBM
 - tried and true
 - useful in handling one-off event in real time isolated to a single object in Salesforce
 - intermediate changes may be lost
 - the source object might change after a notification is sent but before it is delivered, so the endpoint will only receive the latest data, not any intermediate changes.
https://help.salesforce.com/s/articleView?id=sf.workflow_om_considerations.htm&type=5
 - cloud or private agents
 - Jitterbit API Manager is licensed
- PE
 - you define the structure of your message
 - you can pull data from related objects
 - you receive intermediate changes because the change event is decoupled from the notification
 - can handle higher volumes of messages
 - messages can be encrypted at rest(Salesforce Shield)
 - on private agents

Additional Information

- Platform Events in Salesforce
 - Available in: Performance, Unlimited, Enterprise, and Developer Editions
 - Check your license in Salesforce for availability and limits
 - https://developer.salesforce.com/docs/atlas.en-us.platform_events.meta/platform_events/platform_events_intro.htm
- Jitterbit Salesforce Events(Beta) Connector
 - Prerequisites
 - [https://success.jitterbit.com/cloud-studio/cloud-studio-reference/connectors/salesforce-events-\(beta\)/prerequisites/](https://success.jitterbit.com/cloud-studio/cloud-studio-reference/connectors/salesforce-events-(beta)/prerequisites/)
 - Connector Information
 - [https://success.jitterbit.com/cloud-studio/cloud-studio-reference/connectors/salesforce-events-\(beta\)/connection/](https://success.jitterbit.com/cloud-studio/cloud-studio-reference/connectors/salesforce-events-(beta)/connection/)
 - Contact your CSM for early access, to discuss your use case and provide feedback

Other Ways to Get Help from Jitterbit

Interested in any of the following ⇒ Please reach out to your CSM:

- Learn more about our Solutions (Integration, Automation, App Building, & EDI)
- Best Practices session with Customer Success Architect (CSA)
- Health Check review with CSA
- Architecture assessment with CSA
- Working session with CSA for Jitterbit examples and/or development activities
- CSA office hours every Wednesday @ 10am Pacific Time
- Customer workshops or customized training with CSA or TAM (customized to your use cases)
- **Contact:**
 - <https://success.jitterbit.com/>
 - Unsure who your CSM is ⇒ email Success@jitterbit.com or phil@jitterbit.com



QUESTIONS & FEEDBACK

Rock your workflow!