

Documentation for SFDC → WP Sync

This document aims to describe the TERMINOLOGY, OVERVIEW, METHODOLOGY, and CONFIGURATION settings of the **one-way sync** from SFDC → WP.

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Terminology

- **PLL:** Project Legal Link
- **SF / SFDC:** Salesforce/Salesforce.com
- **WP:** WordPress
- **Referral Organization:** These are the accounts that PLL may make referrals for (and thus want available for the website). Any account that is a "referral organization" must have one or more referral programs associated with it. Where the account info will store the organization's basic info (location, main phone number, website, etc.), the "referral program" will store the information for clients who are actually trying to access services from the organization
- **Referral Program:** a list of program services for which an organization may make referrals. If there is only one way to access a referral organization for services, there will only be one referral program. However, when different processes exist to access an org (such as a different phone number and hours for BayLegal's "Health Consumer Center" than its number and hours for all other services) then there will be a referral program for each one.
- **PLL Sync App:** The application described in this document, that lives on Heroku.
- **PLL Sync Plugin:** The plugin described in this document, that is embedded into the WordPress site.

Useful Links

- Query debugging:
https://legallink.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
- Object manager / field listing:
<https://legallink.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/view>
- JSForce documentation: <https://jsforce.github.io/>

Overview

PLL has all of their core data in Salesforce for tracking organizations, referrals, etc. Their WordPress website uses this data to suggest referral programs to the case worker or end user. Rather than querying directly from WP → SFDC every page load or call, we sync a *copy* of the SFDC relevant data (referral orgs & referral programs) to the WP database on a regular basis. We store SFDC IDs inside the WP post meta such that we can relate a SFDC object to a WP_Post object through the SFDC ID. This allows us to make changes, such as adding additional metadata and tagging, on WP to the orgs and referral programs *without* the need to make these changes or pollute the data inside SFDC.

In particular, to support this process, two core components are required:

1. An application built using JSForce residing on Heroku to initiate the syncs (the “PLL Sync App”).
2. A handler plugin in WP to provide custom REST endpoints and processing in WP (the “PLL Sync Plugin”).

Configuration

Heroku

The Heroku App (<https://dashboard.heroku.com/apps/project-legal-link/settings>) has several configuration variables. These should match 1-1 with the examples shown in the .env.example file in the source code root.

Local

You **must** configure the local environment before running this app locally. To do so, copy the .env.example file to .env (first-time setup only), and then update the environmental variables. You can get the API information from Salesforce. You must be a privileged user to have API access. Contact the SFDC site administrator if you need privileged access. To initialize or reset the security token, see:

https://help.salesforce.com/apex/HTViewHelpDoc?id=user_security_token.htm

Methodology

This section describes the steps the PLL Sync App takes to sync the data.

Connections

This section summarizes the connection processes for the *PLL Sync App* \longleftrightarrow *SFDC* and for the *PLL Sync App* \longleftrightarrow *WP*.

Connection to Salesforce

The PLL Sync App will use the configuration settings described in the configuration section to connect to the application. It does not utilize OAuth nor does it save connection details between each session. This avoids the need for any manual involvement and is still a fully secured approach supported by JSForce.

Connection to WordPress

@todo discuss WP connection

Referral Orgs

This section summarizes the process of syncing *Referral Organizations*.

Getting all Referral Organizations from SFDC

Once a connection has been established between *PLL Sync App* \longleftrightarrow *SFDC*, the App will query SFDC to get a list of all Referral Organizations. This list will be processed into a collection of objects that are described below and then sent to WP.

Sending Referral Organizations to WP

@todo discuss how app will sends orgs to WP

Referral Organization Model

The PLL Sync App serves as middleware between SFDC and WP, and thus also wraps the SFDC objects into a standardized WP-centric model. This model looks like:

```
{
  post_title: "Sample organization",
  post_type: "pll_organization",
  meta: {
    sfdc_id: "The string ID for this organization in SFDC",
```

```

    type: "",
    website: "",
    phone: "",
    description: "",
    languages: [],
    address: {
      street: "",
      city: "",
      state: "",
      postal_code: "",
      country: ""
    }
  }
}

```

WP: Handle new Referral Organizations

WordPress will iterate over each post within the collection and add or update them to WP using `wp_insert_post()`. The fields above have a 1-1 correlation with WP fields and meta

WP: Handle existing Referral Organizations

Same as new organizations.

Referral Programs

This section summarizes the process of syncing *Referral Programs*.

Getting all Referral Programs from SFDC

Once a connection has been established between *PLL Sync App* \longleftrightarrow *SFDC*, the App will query SFDC to get a list of all Referral Programs. This list will be processed into a collection of objects that are described below and then sent to WP.

Sending Referral Programs to WP

@todo discuss how app will sends programs to WP

Referral Program Model

The PLL Sync App serves as middleware between SFDC and WP, and thus also wraps the SFDC objects into a standardized WP-centric model. This model looks like:

```

{
  post_title: "Sample program",
  post_type: "pll_program",

```

```
meta: {
  sfdc_id: "The string ID for this program in SFDC",
  sfdc_title: "The program title without org name as a prefix",
  ways_to_contact: "",
  process: "",
  pll_tip: "",
  notes: "",
  description: "",
  languages: [],
  eligibility: "",
  counties_served: [],
  other_counties_served: [],
  website: "",
  ref_org_sfdc_id: "The string SFDC ID representing the owning org"
}
}
```

WP: Handle new Referral Programs

WordPress receives these programs in the exact same method as orgs, except the program will link itself to the referring organization after.

WP: Handle existing Referral Programs

Same as new programs.