Oracle® Cloud

Create Accounts in Oracle CX Sales and B2B Service for HubSpot Companies

Oracle Cloud Create Accounts in Oracle CX Sales and B2B Service for HubSpot Companies,

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Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

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Documentation Accessibility

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Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to create sales accounts in Oracle CX Sales and B2B Service for companies in HubSpot.

> **Note:**
>
> This recipe is available as **HubSpot — Oracle CX Sales and B2B Service | Create Accounts for Companies** in Oracle Integration. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

Overview

This recipe creates accounts in Oracle CX Sales and B2B Service for companies in HubSpot as per a schedule specified in Oracle Integration.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. Subsequently, you can activate and run the integration flow of the recipe manually or specify an execution schedule for it. When triggered, the integration flow reads the company records in HubSpot and, in turn, creates corresponding sales accounts in your Oracle CX Sales and B2B Service instance. Additionally, if a company record is updated, the recipe updates the corresponding sales account in Oracle CX Sales and B2B Service.

Basic data associated with companies in HubSpot, such as company domain name, organization name, postal address, phone, and so on are synchronized between the two platforms.

System and Access Requirements

- Oracle Integration, Version 23.2.0.0.0 or higher
- HubSpot
- An account on HubSpot with the Administrator role
- Oracle CX Sales and B2B Service
- An account on Oracle CX Sales and B2B Service with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on your HubSpot and Oracle CX Sales and B2B Service instances in order to successfully connect to these external systems using Oracle Integration and create accounts for companies.

Configure HubSpot

To configure HubSpot, create a company. See Create companies.

Also, add a property in the company record to store the Oracle CX Sales and B2B Service sales account party number. See Create and edit properties. Specify the name of the property as `b2bpartynumber`.

Configure Oracle CX Sales and B2B Service

To access the Oracle CX Sales and B2B Service instance from Oracle Integration, you'll require a separate user account on Oracle CX Sales and B2B Service.

Perform the following tasks to configure Oracle CX Sales and B2B Service for this recipe.

1. Create a new user account for Oracle Integration. You'll use the credentials of this user account to connect to Oracle CX Sales and B2B Service from Oracle Integration.

   For the procedure to create the integration user account, see Creating an Integration User Account in *Using the Oracle CX Sales and B2B Service Adapter with Oracle Integration 3*.

2. Assign the following roles to the user account:

   - `Integration Specialist`

   - `AttachmentsUser`

   - `FND_MANAGE_CATALOG_SERVICE_PRIV`

   For steps to assign roles, see Assign Integration Roles in *Using the Oracle CX Sales and B2B Service Adapter with Oracle Integration 3*.

3. Make a note of the user name and password you set for the account.

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Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Use a recipe/accelerator** section, click **View all**.

2. Find the recipe you want to install.

3. Hover over the recipe, then click **Install** ✛.

   A message confirms that the recipe was successfully installed, and the recipe card shows **INSTALLED**.

4. Hover over the recipe again, and click **Configure** 🔧 to configure the resources of the recipe.

   The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.

Configure the Oracle HubSpot Connection

1. In the Connections section, click the connection name.

2. In the Properties section, enter the following details:

Field	Information to Enter
Site URL	Enter `https://api.hubapi.com`.
REST Version	Enter your HubSpot version. For example, `v3`.

3. In the Security section, enter the following details:

Field	Information to Enter
Client ID	Enter the Client ID obtained when you configured HubSpot. See Configure HubSpot.
Client Secret	Enter the Client Secret obtained when you configured HubSpot.

4. Click **Save**. If prompted, click **Save** again.

5. Click **Provide Consent**.

6. In the resulting Sign in dialog, enter your Oracle Integration user name and password, and click **Sign in**.

   You'll now be redirected to the HubSpot sign in page.

7. Enter your HubSpot account credentials.

   A page is displayed asking for permission to interact with the account.

8.   Click **Yes**.

     You're informed that access is allowed. You can now switch back to the Oracle HubSpot Connection window of Oracle Integration to test your connection.

9.   Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

     A message confirms if your test is successful.

10. To return to the project workspace, click **Go back** ￩.

Configure the Oracle B2B Connection

1.   In the Connections section, click the connection name.

2.   In the Properties section, enter the Oracle CX Sales and B2B Service host name. For example: `CX Sales and B2B Service Host`.

3.   In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select **Username Password Token**.
Username	Enter the user name of the account created for Oracle Integration on the Oracle CX Sales and B2B Service instance. See Configure Oracle CX Sales and B2B Service.
Password	Enter the password of the account created for Oracle Integration on the Oracle CX Sales and B2B Service instance.

4.   Click **Save**. If prompted, click **Save** again.

5.   Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

     A message confirms if your test is successful.

6.   To return to the project workspace, click **Go back** ￩.

Configure the Lookup Table

Edit the **Country_Code_Lookup** lookup table to map the country codes between HubSpot and Oracle CX Sales and B2B Service.

1.   In the Lookups section, click the lookup name.

2.   In the **HubSpot** column, enter the name of the country you want to map.

3.   In the **Oracle CX Sales and B2B Service** column, enter the country code to which the country in HubSpot has to be mapped.

4.   Click **Save**. If prompted, click **Save** again.

5.   To return to the project workspace, click **Go back** ￩.

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Activate and Run the Recipe

After you've configured the connections, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project label selected, choose an appropriate tracing option, then click **Activate**.

   A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Update property values for the integration flow. You can update the integration properties only after activating this flow.

Integration Property	Description
maxPageSize	Specify the maximum number of records per page
notificationMail	Specify the email address to which the error notifications are sent. Enter an email address of your choice

   For the procedure to update the integration properties, see Steps 7 and 8 in Override Design-Time Properties in an Integration.

3. Run the recipe.

   a. In the Integrations section of the project workspace, click **Actions** ⋯ on the integration flow, then select **Run**.

   b. On the Configure and run page, click **Run**.

   You've now successfully submitted the integration for execution.

   > ✎ **Note:**
   >
   > • You can also schedule this integration to run at a date, time, and frequency of your choosing. See Define the Integration Schedule.
   >
   > • If any record fails, an error notification email is sent to the user.

4. Monitor the running of the integration flow in Oracle Integration.

   a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.

   b. To manage errors in your project, see Manage Errors in a Project.

   The recipe creates corresponding sales accounts in Oracle CX Sales and B2B Service for companies in HubSpot. Further, when companies are updated in HubSpot, the recipe updates the corresponding account records.

5. Log in to your Oracle CX Sales and B2B Service instance and check for the new sales accounts created.

   a. Log in to your Oracle CX Sales and B2B Service instance.

    b. From the menu, select **Sales** and then select **Accounts**. You will see the recent sales accounts created.

Related Documentation

- *Using the Oracle CX Sales and B2B Service Adapter with Oracle Integration 3*
- *Using the HubSpot Adapter with Oracle Integration 3*