

Oracle® Cloud

Create Customer Records in Oracle ERP Cloud



F83267-01
June 2023



Oracle Cloud Create Customer Records in Oracle ERP Cloud,

F83267-01

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Preface

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

Topics:

- [Documentation Accessibility](#)
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- [Conventions](#)

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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.
<i>italic</i>	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.

1

About This Recipe

Use this recipe to create or update a customer record in Oracle ERP Cloud through a REST request from an external application.



Note:

This recipe is available as **REST — Oracle ERP Cloud | Create Customer Records** in the Integration Store. 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 or updates a customer record along with account and profile details in Oracle ERP Cloud when it receives a REST request with the customer data from an external application. It contains an app-driven orchestration integration, which uses the standard REST Adapter and the Oracle ERP Cloud Adapter.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. Subsequently, you can activate the integration flow and send a REST request with the customer data to the integration's endpoint URL from an external application. When triggered, the integration flow checks if the customer already exists based on the `SourceSystemReferenceID` field. If the customer exists, the recipe updates the customer record, or else it creates a new customer record and corresponding account, and customer profile based on the request payload data. The customer profile is created if the `customerProfileType` field exists in the payload.



Note:

- If the account creation fails after the customer record has been created, you can use the same payload in the subsequent runs to update the customer record with the account details.
- You can also create multiple accounts for a customer record. If a customer record has an account already associated with it, the incoming payload is checked. If the `customerAccountName` field in the payload is different from the existing account, a new account is created for the customer record.

System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 or higher

- Oracle ERP Cloud
- An account on Oracle ERP Cloud with the Administrator role

Assumptions

- The Oracle ERP Cloud instance has Spoke system for the source system. See [Product Spoke Systems](#).

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Before You Install the Recipe

You must perform the following configuration tasks on your Oracle ERP Cloud instance in order to successfully connect to these external systems using Oracle Integration and create customer records.

Configure Oracle ERP Cloud

To access the Oracle ERP Cloud instance from Oracle Integration, you'll require a separate user account on Oracle ERP Cloud.

Log in to your Oracle ERP Cloud instance as an **Administrator** and perform the following tasks.

1. Create a user account for Oracle Integration. Make a note of the user name and password you set for the account. You'll use the credentials of this user account to connect to Oracle ERP Cloud from Oracle Integration.
2. Assign the following roles to the user account. For more information on these roles, see [Assign Required Roles to an Integration User](#).
 - Integration Specialist
 - Oracle ERP Cloud-specific data access to the integration user

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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 ERP Cloud Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the Oracle ERP Cloud host name. For example: `https://your_domain_name.fa.DC.oraclecloud.com`.
3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select Username Password Token .
User Name	Enter the user name of the account created for Oracle Integration on Oracle ERP Cloud. See Configure Oracle ERP Cloud .
Password	Enter the password of the account created for Oracle Integration on Oracle ERP Cloud.


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 Oracle REST Trigger Connection

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

2. 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.
3. Click **Save**. If prompted, click **Save** again.
4. To return to the project workspace, click **Go back** .

4

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 deployment 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 integration flow. You can update the integration properties only after activating this flow.

Integration Property	Description
SetId	Specify the SetID of the organization. SetIDs enable you to share a set of reference data across organizations. For example, 300000000002169.
Party_Usage_Code	Specify the party usage code that illustrates the usage of parties across applications in business flows. For example, EXTERNAL_LEGAL_ENTITY.
Created_By_Module	Specify the module code. For example, HZ_WS.

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 from an external application.
 - 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 **Endpoint metadata**.
 - c. In the panel that opens, copy the **Endpoint URL** value. This is the integration flow's endpoint URL.
 - d. From the external application, send a `POST` request to this endpoint URL along with the customer data. Provide the customer data in the `POST` request's **Body** field. See the following step for sample customer data.

The integration creates the customer record in Oracle ERP Cloud and returns the internal ID of the newly-created record as a response.

4. Test the recipe in Oracle Integration.
 - 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, in the Request section, click **Body** and enter sample customer data. For example:

```
{
    "sourceSystem": "VBApp",
    "sourceSystemCustomerID": "Acme Corporation",
    "customerName": "Acme Consulting",
```

```

        "customerEmail": "contact@acmecorp.com",
        "customerPhone": "042400000",
        "customerAccountName": "SampleAccountName",
        "customerAddress": [
          {
            "AddressLine": "addr1",
            "City": "Sydney",
            "Postcode": "2102",
            "State": "NSW",
            "Country": "AU",
            "Type": "BillTo"
          },
          {
            "AddressLine": "addr2",
            "City": "Sydney",
            "Postcode": "2102",
            "State": "NSW",
            "Country": "AU",
            "Type": "ShipTo"
          }
        ],
        "customerProfile": {
          "customerProfileType": "DEFAULT",
          "CreditChecking": "Y",
          "CreditHold": "N",
          "DiscountTerms": "N",
          "EffectiveEndDate": "",
          "EffectiveStartDate": "",
          "AutoReceiptsIncludeDisputedItems": "",
          "ConsolidatedInvoice": "",
          "CreditLimit": "1000",
          "CreditCurrencyCode": "USD",
          "CollectorName": "James"
        }
      }
    }
  }
}

```

c. Click Run

The integration now creates the customer record in Oracle ERP Cloud. The Activity Stream pane appears displaying the status of the integration instance's execution.

d. In the Response section of the test page, under the Body tab, you'll find the internal ID of the newly-created customer record in Oracle ERP Cloud.

- 5.** Log in to your Oracle ERP Cloud instance as an Administrator and check for the new customer record.

Navigate to **Billing Work Area**, select **Manage Customers**, and search for the specific customer record.

Related Documentation

- *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*
- *Using the REST Adapter with Oracle Integration 3*