

Oracle® Cloud

Create Salesforce Accounts for SAP ERP Customers



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Primary Author: Oracle Corporation

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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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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.

Convention	Meaning
<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.

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About This Recipe

Use this recipe to create Salesforce accounts for SAP ERP customers.

Note:

This recipe is available as **SAP ERP — Salesforce | Create Accounts for Customers** 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 is an application-driven recipe that creates an account in Salesforce whenever a customer record is created in SAP ERP.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When a customer-create event is generated in the SAP instance, the integration flow of the recipe is triggered, and it creates a corresponding account in the Salesforce instance. Basic data such as account name, account number, billing city, billing country, and postal code are synchronized between the SAP ERP and Salesforce platforms.

System and Access Requirements

- Oracle Integration, Version 21.2.1 or higher
- An SAP logon client
- An SAP program ID
- Salesforce
- An account on Salesforce with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on your SAP ERP and Salesforce instances in order to successfully connect to these external systems using Oracle Integration and transfer customer records between them.

Configure SAP ERP

To configure SAP ERP, see Prerequisites for Creating a Connection.

Configure Salesforce

To access Salesforce from Oracle Integration and create accounts for SAP ERP customer records, you must perform certain configurations on your Salesforce instance.

Create a user account on Salesforce for Oracle Integration. You'll use the credentials of this user account while configuring the Salesforce connection in Oracle Integration.

Log in to your Salesforce instance as an **Administrator** and perform the following tasks.



Note:

The steps provided here apply to the Salesforce Classic UI. If you're using the Lightning Experience UI on your Salesforce instance, switch to the Classic UI. See [Toggle or switch between Lightning Experience and Salesforce Classic](#).

1. Create an API-enabled custom role. You'll assign this role to the user account you'll subsequently create for Oracle Integration.
 - a. On the Salesforce Setup page:
 - i. Expand **Manage Users** under the Administer section in the left navigation pane.
 - ii. Click **Profiles**.
 - b. On the Profiles page, click **New Profile**.
 - c. On the resulting page:
 - i. In the **Existing Profile** field, select **Standard User**.
 - ii. Enter a name for the new profile, for example, `API Enabled`, and click **Save**.
The new profile is now saved, and the Profile Detail page of the new profile is displayed.
 - d. Click **Edit** on the Profile Detail page.
 - e. On the Profile Edit page:
 - i. Scroll to the Administrative Permissions section and ensure that the **API Enabled** check box is selected.

- ii. Scroll to the Standard Object Permissions section and perform the following actions.
 - In the **Accounts** row, leave the **Read**, **Create**, **Edit**, and **Delete** boxes checked. Additionally, select the **ViewAll** check box.
 - In the **Contacts** row, leave the **Read**, **Create**, **Edit**, and **Delete** boxes checked. Additionally, select the **ViewAll** check box.
 - In the **Price Books** row, leave the **Read** box checked. Additionally, select the **Create**, **Edit**, and **Delete** check boxes.
 - In the **Products** row, leave the **Read** box checked. Additionally, select the **Create**, **Edit**, and **Delete** check boxes.
 - iii. Scroll to the end of the page and click **Save**.
2. Create a user account for Oracle Integration and assign the custom role created previously to this account.

 **Note:**

If you have already created a user account for Oracle Integration, you can assign the API-enabled custom role to the existing account.

- a. On the Profile Detail page of the **API Enabled** profile, click **View Users**.
- b. Click **New User** in the resulting page.
- c. On the New User page:
 - i. Enter a first name and last name for the user. For example, `Integration User05`.
 - ii. In the **Email** field, enter a valid email address. The email address you enter is automatically populated in the **Username** field. Note this username.
 - iii. In the **User License** field, select **Salesforce**.
 - iv. In the **Profile** field, select the profile you created previously, that is, **API Enabled**.
 - v. Scroll to the end of the page, ensure that the **Generate new password and notify user immediately** check box is selected, and click **Save**. The user account is now created, and a verification email is sent to the email address you provided for the account.
- d. Log in to the corresponding email account and click the **Verify Account** button in the email message from Salesforce. You're redirected to the Salesforce instance to set a password for the new user account.
- e. Set a password and note the same.

Subsequently, you're signed in to the Salesforce instance with the new account.

 **Note:**

If you're shown the Lightning Experience UI, switch to the Salesforce Classic UI.

- f. Generate a security token for the new user account. You'll need this security token along with the password to access Salesforce using Oracle Integration.

- i. Stay signed in as the new user and click the user name at the top of the page to open a menu.
 - ii. Click **My Settings** in the menu.
 - iii. On the My Settings page, in the **Quick Links** section, click **Edit my personal information**.
 - iv. On the resulting page, click **Reset My Security Token** in the left navigation pane.
 - v. Click the **Reset Security Token** button.
A new security token is sent to the email address associated with the account.
Note the security token.
 - vi. On the Salesforce instance, click the user name again and select **Logout** from the menu. Log back in as the **Administrator**.
3. Identify your current Salesforce API version. See Find Your Current Salesforce API Version in *Using the Salesforce Adapter with Oracle Integration 3*.
4. Identify your Salesforce instance type. See Identify the Instance Type of Your Salesforce Organization in *Using the Salesforce Adapter with Oracle Integration 3*.


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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 **Get started** section, click **Browse store**.
2. Find the recipe you want to install, then click **Get**.

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

3. Click **Configure**  on the recipe to configure its resources.

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 SAP Connection

1. In the Connections section, click the connection name.
2. In the Properties section, upload the JCO connection properties file.
You must upload the following type of JCO file:
 - – Adapter inbound properties file: To configure the SAP Adapter for both trigger and invoke connections (for example, the `Adapter_inbound_Direct.properties` file).
3. In the Security section, enter the username and password to connect to the SAP instance.
4. In the Agent Group section, configure an agent group for accessing the service hosted on your premises, behind the firewall.
 - a. Click **Configure Agents**.
The Select an Agent Group page appears.
 - b. Click the name of the agent group.
 - c. Click **Use**.
To configure an agent group, you must download and install the on-premises connectivity agent. See [Downloading and Running the On-Premises Agent Installer](#).
5. Click **Save**. If prompted, click **Save** again.
6. 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.
7. To return to the project workspace, click **Go back** .

Configure the Oracle Salesforce Connection


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

- In the Properties section, enter the following details:


Field	Information to Enter
Select Salesforce.com Instance Type	Select Production or Sandbox based on your Salesforce instance type.
API Version	Enter your current Salesforce API version. To obtain the API version, see Configure Salesforce .

- In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Leave Salesforce Username Password Policy selected.
Username	Enter the username of the account created for Oracle Integration on Salesforce. See Configure Salesforce .
Password	Enter the password of the account created for Oracle Integration on Salesforce.


 **Note:**

To the password, you must also append the security token generated for the same account.

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

Configure the Lookup Table

Edit the lookup table, and enter an email ID to receive error messages.

- In the Lookups section, click the lookup name.
- Against the **EmailTo** cell, enter an email ID of your choice to receive error messages.
- Click **Save**. If prompted, click **Save** again.
- To return to the project workspace, click **Go back** .

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Activate and Run the Recipe

After you've configured the connections and other resources, 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. Run the recipe.

To run the recipe, you must push a customer record to the SAP ERP instance, which requires triggering a DEBMAS IDoc in the SAP ERP instance.

- a. In the SAP ERP system, in the **tcode** field, enter the following code: /nBD12, and then click **Enter**.
- b. Select a customer record.
 - i. In the **Customer** field, click the **Search** icon. The Customer Number window appears.
 - ii. In the window, click **Start Search**, and select the required customer record from the list of available records.
- c. Select the output type as **Customer master data distribution**.
 - i. Click the **Output type** field, and then click the **Search** icon.
 - ii. From the list of message types, select the message type and program ID used in the SAP ERP trigger configuration.
- d. Select the configured logical system.
 - i. Click the **Logical system** field, and then click the **Search** icon.
 - ii. From the list, select the configured logical system.

Note:

Each logical system has a certain number of customers configured. To see the list of variants of the configured systems, in the SAP ERP system UI, navigate to **More > Goto > Variants > Get**.

- e. After you've configured the parameters, click the **Execute** icon to push the customer record. An information dialog appears.
- f. In the dialog, click **Continue**. Click **Continue** again, if prompted, to continue execution.
- g. To check the status of the execution:
 - i. In the **tcode** field, enter the following tcode: /Nwe02, and then click **Enter**.
 - ii. Click the **Execute** icon to view the status.

 **Note:**

Status 3 represents a successful execution, and **Status 29** represents a failed execution.

3. 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*.
4. Log in to your Salesforce instance and check for the new accounts created.
 - a. On the Salesforce Setup page, click the **Accounts** tab.
 - b. On the Accounts Home page, select **All Accounts** in the **View** field. Click **Go** if necessary.

The list of accounts created are displayed.
 - c. To view an account record, click its name.

Related Documentation

- *Using the SAP Adapter with Oracle Integration 3*
- *Using the Salesforce Adapter with Oracle Integration 3*