Oracle® Cloud

Import Documents from Salesforce to Adobe Sign

ORACLE®

Oracle Cloud Import Documents from Salesforce to Adobe Sign,

F80227-02

Primary Author: Oracle Corporation

Contents

Preface

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

Topics:

- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

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.

1

About This Recipe

Use this recipe to import quote attachments from Salesforce to Adobe Sign.

> ✎ **Note:**
>
> This recipe is available as **Salesforce — Adobe Sign | Import Quote Attachments** 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 is an application-driven recipe that sends Salesforce quote attachments as agreements to Adobe Sign for electronic signing. Also, once the agreements are electronically signed, the recipe uploads the agreement back to the respective quote in Salesforce.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When a Salesforce quote state is set to In-Review, the integration flow of the recipe is triggered, and it loads all the attachments in the quote. Further, the recipe uploads the quote attachments as individual agreements in Adobe Sign. An email notification is sent to the individual agreement participants to sign the document. Once the agreements are signed, the recipe then uploads the agreements back as attachments in the respective Salesforce quote.

Recipe Schema

This section provides an architectural overview of the recipe.
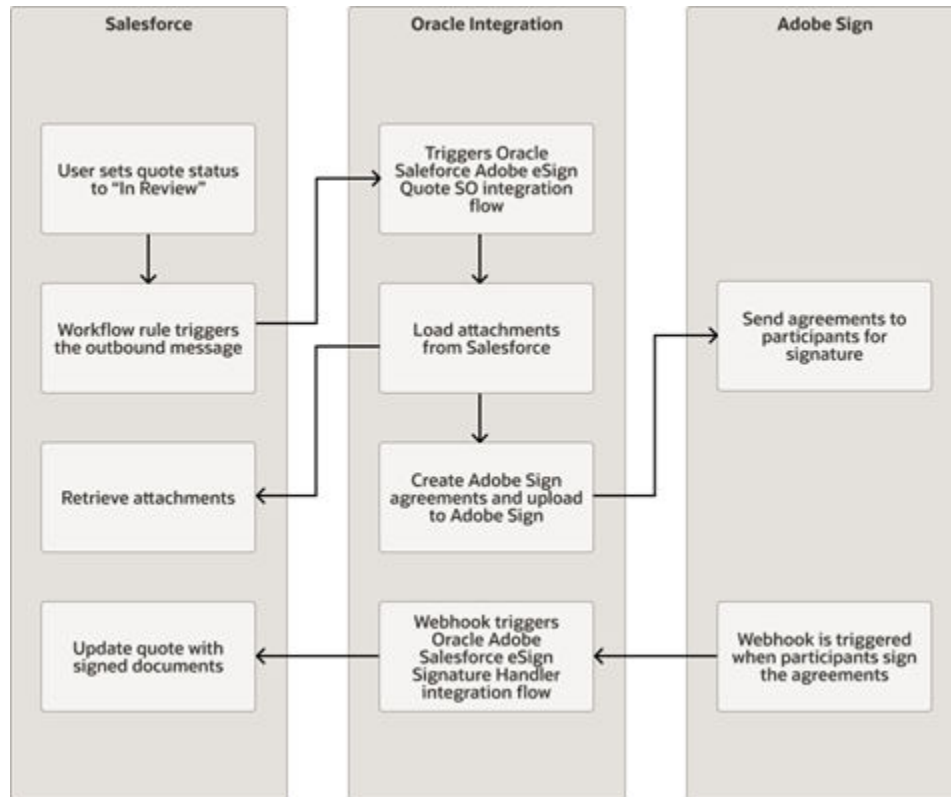
This recipe has the following integration flows:

*   **Oracle Salesforce Adobe Sign Quote SO:** This integration flow is triggered when the status of a quote in Salesforce is set to In-Review. It retrieves the attachments from the quote and uploads the quote attachments as individual agreements in Adobe Sign.

*   **Oracle Adobe Salesforce eSign Signature Handler:** This integration flow is triggered when the participants have signed the agreements. It updates the Salesforce quote with the signed documents.

System and Access Requirements

*   Oracle Integration, Version 21.2.1.0.0 or higher
*   Salesforce
*   An account on Salesforce with the Administrator role
*   Adobe Sign
*   An account on Adobe Sign with the Administrator role

2

Before You Install the Recipe

You must perform the following configuration tasks on your Salesforce and Adobe Sign instances in order to successfully connect to these external systems using Oracle Integration and import quote attachments.

Configure Salesforce

To access Salesforce from Oracle Integration, 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.

Also, identify your Salesforce instance type and your current Salesforce API version. In addition, create an outbound message to trigger the integration flow of the recipe, and create a workflow rule to send the outbound message when Salesforce quote attachments are signed.

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 Lighting 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*.

5. On your Salesforce instance, create an outbound message to trigger an integration flow of this recipe.

    a. On the Salesforce Setup page:

        i. Scroll to the Build section in the left navigation pane.

        ii. Expand **Create**, then **Workflow & Approvals**, and then click **Outbound Messages**.

        If you're shown the Understanding Workflow page, click **Continue**.

    b. Click **New Outbound Message** in the resulting page.

    c. On the New Outbound Message page:

        i. Select **Quote** in the **Object** field, and click **Next**.

        ii. Enter the following details for the new outbound message:

            • Enter the name for the outbound message as `Oracle SFDC Adobe Esign Quote SO`. Note that the **Unique Name** field is automatically populated based on the name you enter.

            • Optionally, enter a description for the message.

            • In the **Endpoint URL** field, enter `https://<OIC_FQDN:OIC_SSL_PORT>/ic/api/integration/v2/flows/rest/project/ORCL-R-SFDC_ADOBE_ESIGN_SO/ORCL-R-SFDC_ESIGN_SIGN_HANDLER/1.0/` Where `OIC_FQDN` and `OIC_SSL_PORT` are the fully-qualified domain name and port of your Oracle Integration instance.

For example: `oicinstance.example.com:443`

- In the **User to send as field**, select the user account using which you want to send the message.

- Under **Quote fields to send**, select all the fields and click **Add**.

- Click **Save**.

The new outbound message is created and displayed on your browser.

6. Now, create a workflow rule to send the outbound message (created previously) when a Salesforce quote is created.

   a. On the Salesforce Setup page:

      i. Scroll to the **Build** section in the left navigation pane.

      ii. Expand **Create**, then **Workflow & Approvals**, and then click **Workflow Rules**.

      If you're shown the Understanding Workflow page, click **Continue**.

   b. Click **New Rule** in the resulting page.

   c. On the New Workflow Rule page:

      i. Select **Quote** in the **Object** field, and click **Next**.

      ii. Enter the following details for the new workflow rule:

         - Enter the rule's name. For example, `Oracle SFDC Adobe Esign Quote SO`.

         - Optionally, enter a description for the rule.

         - In the **Evaluation Criteria** section, select the **created, and every time it's edited** radio button.

         - In the **Rule Criteria** section, select the **criteria are met** option, and define the following rule criteria:

            – In the **Field** drop-down, select **Quote: Status**

            – In the **Operator** drop-down, select **equals**

            – In the **Value** drop-down, select **In Review**

         - Click **Save & Next**.

      iii. On the next page, click the **Add Workflow Action** button and choose **Select Existing Action**.

      iv. On the Select Existing Actions page:

         - Select **Outbound Message** in the **Search** field.

         - In the **Available Actions** box, select the outbound message you created previously. For example, `Oracle Adobe Sign Quote Message`.

         - Click **Add** to move your selection to the **Selected Actions** box.

         - Click **Save**.

      v. Click **Done**.

      The new workflow rule is created and displayed on your browser.

   d. Click **Activate** to activate the rule.

7. Create custom fields to hold document ID and status.

    a. On the Salesforce Setup page:

        i. Scroll to the **Build** section in the left navigation pane.

        ii. Expand **Customize**, then **Quote**, and then click **Fields**.

    b. On the Quote Fields page, scroll to the **Quote Custom Fields & Relationships** section and click **New**.

    c. On the New Custom Field page:

        i. Find and select the **Text** radio button, and click **Next**.

        ii. Enter the following details for the new custom field:

            • Enter `AdobeAggreementID` as the field label. Note that the field name is automatically populated based on the label you enter.

            • Enter `50` as the length.

            • Optionally, enter a description for the new field.

            • Click **Next**.

        iii. On the Establish field-level security page, select the **Visible** check box in the header row to grant edit access to the new field for all profiles. Click **Next**.

        iv. Leave all the layout check boxes selected and click **Save**.

        On the Quote Fields page, you can see the new field added under the **Quote Custom Fields & Relationships** section.

    Similarly, create a custom field to store agreement status. Enter `Oracle_Adobe_eSign_Agreement_Status` as the field label.

Configure Adobe Sign

To access Adobe Sign using Oracle Integration and send agreements, you must perform certain configuration tasks on your Adobe Sign instance.

1. Create an OAuth application on your Adobe Sign instance and obtain access keys for the application. See Prerequisites for Creating a Connection.

2. Create a webhook. See Configure webhooks.
   Enter the following details while configuring the webhook.

Field	Information to Enter
Name	Enter the name of the webhook.
Scope	Select **Account**.
URL	Enter `https://<username>:<password>@<OIC_Host_Name>/ic/api/integration/v2/flows/rest/project/ORCL-R-SFDC_ADOBE_ESIGN_SO/ORCL-R-SFDC_ESIGN_SIGN_HANDLER/1.0/.` Here, replace <username> and <password> with the username and password of your Adobe instance.
Events	Click the hamburger icon and select **Agreement participant Complete**.

Field	Information to Enter
Notifications Parameters	Select the following check boxes: **Agreement Info**, **Agreement Document Info**, **Agreement Participant Info**, **Agreement Signed Document**.

Click **Save**.

3

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 Salesforce Connection

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

2. 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.

3. 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.

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 Adobe REST Connection

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

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

Field	Information to Enter
Connection Type	Select **REST API Base URL**.
Connection URL	Specify your Adobe URL. For example: `https://api.<domain_name>.adobesign.com/api/rest/v6`. Where `<domain_name>` indicates your domain such as in, us, eu, and so on.

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

Field	Information to Enter
Security Policy	Select **OAuth Custom Three Legged Flow**.
Authorization Request	The client application URL that the recipe must redirect you to when you provide consent.
	See Configure the REST Adapter to Consume a REST API protected with 3-legged OAuth token based authentication. For example: `https://secure.<domain_name>.adobesign.com/public/oauth/v2?response_type=code&client_id=<client_id_of_adobe_app>&redirect_uri=<OIC_Hostname>/icsapis/agent/oauth/callback&scope=user_login:self agreement_read:account agreement_write:account agreement_send:account`
Access Token Request	The access token request to use to fetch the access token.
	For example, `-X POST -H 'Content-Type: application/x-www-form-urlencoded' -d 'code=${auth_code}&grant_type=authorization_code&redirect_uri=${redirect_uri}&client_id=<client_id_of_adobe_app>&client_secret=<client_secret_of_adobe_app>' https://secure.<domain_name>.adobesign.com/oauth/v2/token`

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 Adobe Sign login page.

7. Enter your Adobe Sign account credentials and click **Continue** to log in.

   You are now displayed a page that prompts you to authorize the connection to the Adobe Sign application created previously.

8. On the Adobe Sign web page, click **ACCEPT**.

   You're informed that access to Adobe Sign is allowed. You can now switch back to the Adobe Sign 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 REST Trigger Connection

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

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

Field	Information to Enter
Security Policy	Select **OAuth 2.0 or Basic Authentication**.

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

4. 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.

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

Configure the Lookup Table

Edit the **ORACLE-BRT-SFDC_ADOBE_ESign_Constants** lookup table to map the fields related to documents in Salesforce with agreements in Adobe Sign.

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

2. In the **Domain_Name_1** column, enter the name of the Salesforce field you want to map.

3. In the **Domain_Name_2** column, enter the name of the field in Adobe Sign to which the Salesforce field has to be mapped or enter the default value for the property.

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

5. 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 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. Run the recipe. To run the recipe, you must create and set the status of a quote in Salesforce as **In-Review**.

    a. Create a quote in Salesforce. See Create and Manage Quotes. Ensure that you upload relevant documents in the Notes and Attachments section of the quote.

    b. Mark the status of the quote as In-Review.

        You've now triggered the recipe.

3. Monitor the running of the integration flows 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 now imports quote attachments from Salesforce as agreements in Adobe Sign.

4. Verify if an email notification is received by the individual agreement participants to sign the documents imported from Salesforce. Once the documents are signed by the participants, they are updated in the respective quote.

Related Documentation

*   *Using the Salesforce Adapter with Oracle Integration 3*
*   *Using the Adobe Sign Adapter with Oracle Integration 3*