

# Oracle® Cloud

## Import Segments from Oracle Unity to Salesforce Marketing Cloud



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Oracle Cloud Import Segments from Oracle Unity to Salesforce Marketing Cloud,  
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# Preface

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

**Topics:**

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

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	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 import segments from Oracle Unity to data extensions in Salesforce Marketing Cloud.



### Note:

This recipe is available as **Oracle Unity — Salesforce Marketing Cloud | Import Segments** 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 imports segments from Oracle Unity to data extensions in Salesforce Marketing Cloud, according to 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 fetches a segment (multiple records) from Oracle Unity and exports it to a specific location in FTP. Subsequently, the recipe reads the segment from the FTP location and imports it to a data extension in Salesforce Marketing Cloud.



### Note:

This recipe synchronizes any segment from Oracle Unity to Salesforce Marketing Cloud. If you require to specifically synchronize Customer segments from Oracle Unity to Salesforce Marketing Cloud, you can use a different recipe available in the Integration Store. See [Sync Customer and Campaign Data Between Oracle Unity and Salesforce Marketing Cloud](#).

## System and Access Requirements

- Oracle Integration, Version 21.4.3.0.0 or higher
- Oracle Unity
- An account on Oracle Unity with the Administrator role
- Salesforce Marketing Cloud
- An account on Salesforce Marketing Cloud with the Administrator role
- An account on the Salesforce Marketing Cloud FTP server
- An FTP client to access the Salesforce Marketing Cloud FTP server

# 2

## Before You Install the Recipe

You must perform the following configuration tasks on your Oracle Unity and Salesforce Marketing Cloud instances in order to successfully connect to these external systems using Oracle Integration and import segments.

### Configure Oracle Unity

Complete the following tasks in your Oracle Unity instance to successfully connect to it from Oracle Integration and export segments.

1. Obtain the client ID and client secret. See [Prerequisites for Creating a Connection](#).
2. Create segments. See [Creating Segments](#).
3. Add personalization attributes to your segments. See [Managing Personalization Attributes](#).
4. Create a destination to export segments from Oracle Unity. See [Creating destinations](#).
5. Create a campaign and set up an export of a segment to a marketing orchestration platform. See [Creating campaigns](#).

 **Note:**

Ensure that the file name in the campaign is the same as the name of the segment.

6. Run the campaign. See [Managing Campaigns](#).

 **Note:**

Ensure that the campaign job is complete. See [Managing the Jobs dashboard](#).

### Configure Salesforce Marketing Cloud

To access Salesforce Marketing Cloud from Oracle Integration and import segments, you must perform certain configurations on your Salesforce Marketing Cloud instance.

1. Add a user account to the Salesforce Marketing Cloud SFTP Accounts.
2. Create an FTP location for the Salesforce Marketing Cloud files.
3. Obtain the SOAP WSDL endpoint, username, and password.

Log in to your Salesforce Marketing Cloud instance as an **Administrator** and execute the following tasks.

1. Add a user account to the Salesforce Marketing Cloud SFTP Accounts.

- a. Hover over your name in the app switcher and click **Setup**.
  - b. Click **Data Management**.
  - c. Click **FTP Accounts**.
  - d. Click **Add FTP User**. By default, the username is the MID number for your current Marketing Cloud MID, including the current parent account or child business unit.
  - e. Enter an email address for the new FTP user.
  - f. Enter an initial password for the user. Password complexity requirements combine Marketing Cloud password policy and server-side FTP password requirements. These policies require a minimum of 12 characters and no reuse of the most recent password.
  - g. Reenter the initial password for the user.
  - h. Select **Full** for User Permissions.
  - i. To restrict account access to specific IP addresses, enter each address in the **Whitelist Ips** field and click **Add**.  

This field accepts matching, wildcard, range, and mask values. To allow all IP addresses, enter \*.\*.\*.\*
  - j. Click **Next**.
  - k. Choose the authentication option for the SFTP account.
    - Password
    - SSH Key
    - SSH Key or Password
    - SSH Key and Password

To use any of the SSH key options, ensure that you upload an SSH key in Key Management.
  - l. Choose the SSH key you want to use in the **SSH Keys** field.
  - m. Save your changes. By default, this process creates an enabled, active user as unlocked with a valid current password.
2. Create an FTP location for the Salesforce Marketing Cloud files.
    - a. Hover over your name and click **Setup**.
    - b. In the Data Management section, click **File Locations**.
    - c. Click **Create**.
    - d. Complete the information in the Properties section.
      - **Name**: Enter a unique name that's recognizable when creating an activity in Marketing Cloud.
      - **External key**: Enter a unique key that identifies the file location while using the API.
      - **Description**: Enter details that help further identify the file location when creating an activity in Marketing Cloud.
    - e. Select the location type as **Enhanced FTP Site Import Directory** which is a standard directory for file imports.





# 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 REST Unity Connection

Use the following steps to configure the **Oracle REST Unity Connection**.

1. In the Connections section, click **Actions**  on the connection, then select **Edit**.
2. In the Properties section, enter the following details:


Field	Information to Enter
<b>Connection Type</b>	Select <b>REST API Base URL</b> .
<b>Connection URL</b>	Enter the URL for connecting to Oracle Unity. For example, <code>https://XXXXXX.cxunity.ocs.oraclecloud.com</code> . The URL is provided when you subscribe to Oracle Unity.

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

Field	Information to Enter
<b>Security Policy</b>	Select <b>OAuth Custom Two-Legged Flow</b> . See Configure Connection Security.


4. Click **OK**.
5. Click **Save**. If prompted, click **Save** again.
6. Click **Test** to ensure that your connection is successfully configured. A dialog prompts you to select the type of connection testing to perform:
  - **Validate and Test**: Performs a full validation of the WSDL, including processing of the imported schemas and WSDLs. Complete validation can take several minutes

depending on the number of imported schemas and WSDLs. No requests are sent to the operations exposed in the WSDL.

- **Test:** Connects to the WSDL URL and performs a syntax check on the WSDL. No requests are sent to the operations exposed in the WSDL.
7. Wait for a message about the results of the connection test.
    - If the test was successful, then the connection is configured properly.
    - If the test failed, then edit the configuration details you entered. Check for typos, verify URLs and credentials, and download the diagnostic logs for additional details. Continue to test until the connection is successful.
  8. When complete, click **Save**.
  9. To return to the Configuration Editor, click **Go back** .

## Configure the Oracle FTP SFMC Connection


Use the following steps to configure the **Oracle FTP SFMC Connection**.

1. In the Connections section, click **Actions**  on the connection, then select **Edit**.
2. In the Properties section, enter the following details:

Field	Information to Enter
<b>FTP Server Host Address</b>	Enter the host address of your sFTP server.
<b>FTP Server Port</b>	Enter 22.
<b>SFTP Connection</b>	Select <b>Yes</b> from the list.


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

Field	Information to Enter
<b>Security Policy</b>	Select <b>FTP Server Access Policy</b> .
<b>User Name</b>	Enter the user name to connect to your sFTP server.
<b>Password</b>	Enter the password to connect to your sFTP server.


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 Configuration Editor, click **Go back** .

## Configure the Oracle SOAP SFMC Connection



Use the following steps to configure the **Oracle SOAP SFMC Connection**.

1. In the Connections section, click **Actions**  on the connection, then select **Edit**.
2. In the Properties section, enter the SOAP WSDL URL in the **WSDL URL** field. See [Configure Salesforce Marketing Cloud](#).
3. In the Security section, enter the following details:

Field	Information to Enter
<b>Security Policy</b>	Select <b>Username Password Token</b> .
<b>Username</b>	Enter the Username. See <a href="#">Configure Salesforce Marketing Cloud</a> .
<b>Password</b>	Enter the Password.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. A dialog prompts you to select the type of connection testing to perform:
  - **Validate and Test:** Performs a full validation of the WSDL, including processing of the imported schemas and WSDLs. Complete validation can take several minutes depending on the number of imported schemas and WSDLs. No requests are sent to the operations exposed in the WSDL.
  - **Test:** Connects to the WSDL URL and performs a syntax check on the WSDL. No requests are sent to the operations exposed in the WSDL.
6. To return to the Configuration Editor, click **Go back** .

## Configure the Lookup Tables

1. In the Lookups section, click **Actions**  on the lookup table, then select **Edit**.
2. Enter the field names and corresponding values. Refer to the details provided for each table below.
3. Click **Save**. If prompted, click **Save** again.
4. To return to the project workspace, click **Go back** .

The recipe contains the following four lookup tables. Edit them as necessary.

- **ORACLE-BRT-UNITY\_SFMC\_SEG\_TO\_DE\_IMPORT\_PROPERTIES:** Used to map properties between Oracle Unity and Salesforce Marketing Cloud instances.

Key	Description	Example
<b>IsSendable</b>	Stores the flag to identify if the data extension can be used to send marketing emails.	True
<b>IsTestable</b>	Stores the flag to identify if the data extension can be used to test marketing emails.	True
<b>UpdateType</b>	Stores the behavior type of import. For example: AddAndUpdate, AddAndDoNotUpdate, UpdateButDoNotAdd, and OverWrite	AddAndUpdate
<b>InboundDirectory</b>	Stores the location of the FTP directory that stores the files from Oracle Unity.	/Import/Inbound
<b>FileNamePattern</b>	Stores the naming pattern of the file.	*.csv
<b>OutboundDirectory</b>	Stores the location of the FTP directory that stores the files before being imported to Salesforce Marketing Cloud.	/Import

Key	Description	Example
<b>UnityTenantId</b>	Stores the tenant ID of the Oracle Unity instance.	100046
<b>DefaultFieldType</b>	Stores the default field data type in Salesforce Marketing Cloud.	Text
<b>DefaultFieldLength</b>	Stores the maximum field length.	50
<b>AllowErrors</b>	Stores the flag to identify whether to continue the import operation if any error occurs during operation.	True
<b>FieldMappingType</b>	Stores the strategy to map fields from CSV file to the data extension.	InferFromColumnHeadings
<b>FileTransferLocation</b>	Stores the name of the file location created in Salesforce Marketing Cloud.	Name of the file location created in SFMC

- **ORACLE-BRT-SFMC\_SEG\_TO\_DE\_FIELD\_TYPE** Used to map the field names in Oracle Unity with field type and field length in Salesforce Marketing Cloud.

FieldName	FieldType	FieldLength
<b>Email</b>	EmailAddress	254
<b>Phone</b>	Phone	50

# 4

## Activate and Run the Recipe


After you've configured the connections and other resources, activate the recipe package and run it.

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

Integration Property	Description
<b>emailSubjectFailure</b>	Specify the subject of the email sent when the import from Oracle Unity to Salesforce Marketing Cloud is unsuccessful.
<b>emailFrom</b>	Specify the email address from which run-time exception emails are sent. Enter an email address of your choice.
<b>emailTo</b>	Specify the email address to which run-time exception emails are sent. Enter an email address of your choice.
<b>retryLimit</b>	Specify the number of possible retries if any invoke fails at run time.
<b>emailSubjectSuccess</b>	Specify the subject of the email sent when the import from Oracle Unity to Salesforce Marketing Cloud is successful.

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*.
- Ensure that the CSV file is created in the FTP location inbound directory.

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*.

5. Log in to Salesforce Marketing Cloud and check for the new segments.
  - a. Click **Contact Builder**.
  - b. Click **Data Extensions**. In the search field, search for new segments created.

**Related Documentation**

- *Using the Oracle Unity Adapter with Oracle Integration 3*
- *Using the FTP Adapter with Oracle Integration 3*