Oracle® Cloud

Send WhatsApp Notifications to Oracle ERP Cloud Lead Owners Using Twilio

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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

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Access to Oracle Support

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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 in the Oracle Cloud Library 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 send a WhatsApp notification message to an Oracle ERP Cloud lead's new owner when the owner is changed.

> **✎ Note:**
>
> This recipe is available as **Oracle ERP Cloud — Twilio | Send Notifications to Lead Owners** 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 sends a WhatsApp notification message to the newly-assigned owner of an Oracle ERP Cloud sales lead using Twilio.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When a lead's owner changes in Oracle ERP Cloud, the integration flow of the recipe is triggered. The recipe then receives the lead information and creates a notification message. Subsequently, Twilio is invoked by the recipe to send a notification message in WhatsApp to the newly-assigned lead owner's mobile number. Note that for the recipe to work, you must ensure that a mobile number is associated with the newly assigned lead owner.

System and Access Requirements

- Oracle Integration, Version 21.1.2.0.0 (210129.2200.39447)
- Oracle ERP Cloud
- Twilio
- An account on Oracle ERP Cloud with the Administrator role
- An account on Twilio

2

Before You Install the Recipe

You must perform the following configuration tasks on your Oracle ERP Cloud and Twilio instances in order to successfully connect to these external systems using Oracle Integration and send messages to Oracle ERP Cloud users.

Configure Oracle ERP Cloud

To access Oracle ERP Cloud using Oracle Integration and retrieve information about Oracle ERP Cloud leads, you must perform certain configuration tasks on your Oracle ERP Cloud instance.

You'll require a separate user account on Oracle ERP Cloud to access it from Oracle Integration. 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, see Assign Required Roles to an Integration User.

   - `Integration Specialist`

   - `Oracle ERP Cloud-specific data access to the integration user`

Additionally, configure the following prerequisite tasks on your Oracle ERP Cloud instance.

1. Navigate to Application Composer.

2. Expand **Standard Objects** and then expand **Sales Lead**.

3. Click **Server Scripts**.

4. Under the **Triggers** tab, select **Action** and then select **Add for Field Triggers**.

5. In the **Trigger** field, select **Before Update in Database**.

6. In the **Trigger Name** field, enter `Lead Assign`.

7. In the Trigger Definition section, enter the following script in the expression text box:

   ```
   if (isAttributeChanged('OwnerId')) {
    return true;}
     else{
   return false}
   ```

8. Click **Validate**.
   You'll get a confirmation message that the script is parsed successfully.

9. Click **OK**.

Configure Twilio

To connect to Twilio from Oracle Integration and send messages through it, you must obtain the credentials associated with your Twilio account.

1. Log in to the Twilio console at https://console.twilio.com/.

2. Obtain the credentials associated with your Twilio account.

    a. Click **Account** in the title bar, and select **General settings**.

    b. Under **API Credentials**, note the values in the **ACCOUNT SID** and **AUTH TOKEN** fields. You'll need these values to configure the Twilio connection in Oracle Integration. Click **Show** to reveal the AUTH TOKEN number.

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, 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 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
User Name	Enter the user name of the account created for Oracle Integration on the Oracle ERP Cloud instance. See Configure Oracle ERP Cloud.
Password	Enter the password of the account created for Oracle Integration on the Oracle ERP Cloud 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 Oracle Twilio Connection

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

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

Field	Information to Enter
AccountSID	Enter the Account SID of the Twilio account. See Configure Twilio.
Auth Token	Enter the Auth Token of the Twilio account.

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** .

Set Up WhatsApp with Twilio

After you've configured the Twilio connection in Oracle Integration, you've to set up WhatsApp with Twilio in order to send WhatsApp notification messages with Twilio.

For details, see how to set up WhatsApp Business API with Twilio.

While you wait for WhatsApp to formally approve your account, you can try Twilio Sandbox for WhatApp to quickly test your recipe in a developer environment.

To send or receive WhatsApp messages to an end user from the Sandbox, you must first have any user join the Sandbox.

To join a Twilio Sandbox, send the message `join <your Sandbox keyword>` to your Sandbox number in WhatsApp.

- Twilio Sandbox is pre-provisioned with a Twilio phone number (For example, +1-415-523-8886). You can send the message to this number for testing.

- The `Sandbox keyword` is a unique string that you can get from the Twilio Console.

Update the Integration Property

Update the integration property with an appropriate value.

The recipe's integration flow contains the following property:

- **From**: This integration property holds the phone number to which the WhatsApp notification message is sent. Enter the mobile number of the newly-assigned owner of a Oracle ERP Cloud sales lead.

> ✎ **Note:**
>
> For the purpose of testing, you can enter the free number that you received while joining a Twilio Sandbox. See Set Up WhatsApp with Twilio.

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

> **Note:**
>
> This is an app-driven integration, and you can update the property values only before activating the recipe.

4

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.

    a. Log in to your Oracle ERP Cloud instance with the Sales role.

    b. Click **Sales** in the navigator.

    c. Select and open an existing lead.

        Optionally, click **Leads** and then click **+** to create a new lead. Enter the required details such as Lead Name, Contact Email, Owner, and so on, and then click **Save**.

    d. Select a new owner for the lead from the drop-down list in the **Owner** field.

    e. Click **Save**.

        You've now successfully submitted the integration for 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.

        The recipe fetches information about the newly assigned lead owner along with the lead ID, and invokes Twilio to send a WhatsApp message to the mobile number associated with the new lead owner.

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

4. On the mobile phone of the newly-assigned lead owner, check for the WhatsApp notification message from the Twilio account. The message notifies the user about the Oracle ERP Cloud lead assignment, and also contains the lead ID using which the user can check details about the newly-assigned lead in Oracle ERP Cloud.

Related Documentation

*   *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*
*   *Using the Twilio Adapter with Oracle Integration 3*