

Oracle® Cloud

Import Orders from Shopify to Salesforce



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Preface

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

Topics:

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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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	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 import orders from Shopify to Salesforce.



Note:

This recipe is available as **Shopify — Salesforce | Import Orders** 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 creates an order in Salesforce whenever an order is created in Shopify.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When an order is created in Shopify, the integration flow of the recipe is triggered, and it creates a corresponding order in Salesforce.

Basic data such as billing city, postal code, province, billing street, and so on are synchronized between the Shopify and Salesforce platforms.

System and Access Requirements

- Oracle Integration, Version 21.4.3.0.0 or higher
- Shopify
- An account on Shopify with the Administrator role
- 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 Shopify and Salesforce instances in order to successfully connect to these external systems using Oracle Integration and transfer orders between them.

Configure Shopify

To configure Shopify, see [Prerequisites for Creating a Connection](#).

Configure Salesforce

To access Salesforce from Oracle Integration and create orders, you must perform certain configurations on your Salesforce instance.

You must 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.

In addition, you must identify your Salesforce instance type and your current Salesforce API version. Finally, you must create a custom field for order and account records.

Log in to your Salesforce instance as an Administrator and complete 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. Select **Standard User** in the **Existing Profile** field.
 - 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 **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.
 - In the **Orders** 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 down 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 it down.

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. See [Toggle or switch between Lightning Experience and Salesforce Classic](#).

- 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 down 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.
 - a. On the Salesforce Setup page:
 - i. Scroll to the Build section in the left navigation pane.
 - ii. Expand **Develop**, and then click **API**.
 - b. On the API WSDL page, click the **Generate Enterprise WSDL** link. The WSDL is displayed in a new browser tab, and your current API version is present in the second line. For example:

```
Salesforce.com Enterprise Web Services API Version 52.0
```
 - c. Note down the API version.
4. Identify your Salesforce instance type.
 - a. If you use the URL `https://login.salesforce.com` to log in to your Salesforce account, your instance type is **Production**.
 - b. If you use the URL `https://test.salesforce.com` to log in to your Salesforce account, your instance type is **Sandbox**.
5. Create a custom field in Salesforce to store the Shopify Order ID.

This recipe uses unique IDs associated with Shopify and Salesforce instances to synchronize orders and customer records. Create a custom field in Salesforce to store Shopify Order ID.

 - a. On the Salesforce Setup page:
 - i. Scroll to the Build section in the left navigation pane.

- ii. Expand **Customize**, then **Orders**, and then click **Fields**.
 - b. On the Order Fields page, scroll to the Order 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 `ShopifyOrderId` 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.
 - Select the **External ID** check box.
 - 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 Order Fields page, you can see the new field added under the Order Custom Fields & Relationships section.

6. Similarly, create a custom field in Salesforce to store the Shopify Customer ID.
 - a. On the Salesforce Setup page:
 - i. Scroll to the Build section in the left navigation pane.
 - ii. Expand **Customize**, then **Accounts**, and then click **Fields**.
 - b. On the Account Fields page, scroll to the Account 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 `ShopifyCustomer_id` 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.
 - Select the **External ID** check box.
 - 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 Account Fields page, you can see the new field added under the Account Custom Fields & Relationships section.

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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, 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 Shopify Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

Field	Information to Enter
Host Name	Enter the Shopify host name. The Shopify host name appears in the Shopify home URL. For example: <code>https://hostname.myshopify.com</code> .
Shopify REST API Version	Enter the REST API version.

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

Field	Information to Enter
Security Policy	Leave Shopify Security Policy selected.
Username	Enter the API key obtained earlier. See Configure Shopify .
Password	Enter the password obtained earlier.
Shared secret	Enter the shared secret obtained earlier.

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 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 API key obtained earlier. 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** .

Update the Integration Property

Update the integration property with an appropriate value.

The recipe's integration flow contains the following property:

- **EmailTo:** This integration property holds the email address to which error notifications are sent. Enter an email address of your choice.

For the procedure to update the integration property, see Steps 7 to 9 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.

Configure the Lookup Table

Edit the lookup table to map the price book names.

1. In the Lookups section, click the lookup name.
2. In the **Property** column, enter the name of the property. For example, `Salesforce_PriceBook_Name`.
3. In the **Value** column, enter the name of the price book to which the property name has to be auto mapped.
4. Click **Save**. If prompted, click **Save** again.
5. 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 create an order in Shopify.

Note:

Ensure that all the products in Shopify are available in Salesforce and are listed under a price book.

- a. Log in to the Shopify instance.
- b. On the left navigation pane, click **Orders**.
- c. To create a new order, click **Create Order**.
- d. Enter the following details:
 - In the **Customer** field, select the customer for whom the order has to be created.
 - In the **Product** field, select the required product.
 - Modify the quantity as required, and click **Collect Payment**. A pop-up window appears.
- e. Click **Create Order**.

You've now created an order record in Shopify and triggered the recipe.

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 orders created.
 - a. On the Salesforce instance, click the **Orders** tab.
 - b. On the Orders Home page, select **All Activated Orders** in the **View** field. Click **Go** if necessary. The list of orders is displayed.
 - c. To view an order record, click its name.

Related Documentation

- *Using the Shopify Adapter with Oracle Integration 3*

- *Using the Salesforce Adapter with Oracle Integration 3*