Oracle® Cloud

Sync Salesforce Accounts with Oracle CX Sales and Oracle ATP

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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.

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Documentation Accessibility

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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 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
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 synchronize Salesforce accounts with Oracle CX Sales and Oracle ATP.

> **Note:**
>
> 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 demonstrates how to use events to publish and subscribe account data from Salesforce to Oracle CX Sales and Oracle ATP.

To publish and subscribe data using **Events**:

- A JSON-formatted or XML schema event is created.
- The **Publish event** action is used to publish the event created.
- The **Event** integration pattern is used to create integrations that subscribes to the published events. The subscribing integration event is triggered when the integration publishing the event is run. Multiple integrations can subscribe to the same published event.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When an account is created in Salesforce, the first integration flow **Subscribe Accounts from SFDC** gets triggered. The integration subscribes to the outbound message from Salesforce and publishes the account event using the publish event action. This in turn triggers the following integration flows: **CX Subscription for Accounts** and **ATP Subscription for Accounts**. These integrations are created using the event integration pattern that subscribes to the published event. Subsequently, the integration flows creates a corresponding account in Oracle CX Sales and Oracle ATP respectively.

If required, you can add more integrations that subscribe to the account create event. In this way, you can synchronize account data from a source application to multiple target applications.

System and Access Requirements

- Oracle Integration 3
- Salesforce
- Oracle CX Sales
- Oracle ATP
- An account on Salesforce with the Administrator role
- An account on Oracle CX Sales with the Administrator role

- An account on Oracle ATP with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on your Salesforce and Oracle ATP instances to connect to these external systems using Oracle Integration and sync accounts.

Configure Salesforce

To access Salesforce from Oracle Integration and retrieve information about Salesforce accounts, 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 a Salesforce account with active as **Yes** is created.

Log in to your Salesforce instance as an **Administrator** and execute 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 **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 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 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. 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. See Find Your Current Salesforce API Version.
4. Identify your Salesforce instance type. See Identify the Instance Type of Your Salesforce Organization.
5. Create an outbound message. The outbound message triggers the 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. In the **Object** field, select **Account** and click **Next**.

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

      - Enter a name for the outbound message. 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 the following URL: `https://<OIC_FQDN:OIC_SSL_PORT /ic/ws/integration/v2/flows/salesforce/project/ORCL-R-PUB-SUB-SOURCE-TARGET/SUBSCRIB_ACCOUNTS_FROM_SFDC/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 **Account 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 account 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 **Account** in the **Object** field, and click **Next**.
    ii. Enter the following details for the new workflow rule:
        - Enter the rule's name.
        - 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 **formula evaluates to true** option, and define the following rule criteria:

          ```
          Account: Active EQUALS Yes
          ```
        - 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,

          ```
          Outbound Message: <name of your outbound 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.

Configure Oracle ATP

To successfully connect to Oracle ATP using Oracle Integration, and synchronize account data from Salesforce to Oracle ATP you must perform certain configurations on your Oracle ATP instance.

1. Perform the general configuration tasks for creating a connection. See Prerequisites for Creating a Connection.

2. Run the following script to create the necessary objects:

```
CREATE TABLE "ADMIN"."XX_ACCOUNTS"
   (    "ACCOUNT_ID" VARCHAR2(200 BYTE) COLLATE "USING_NLS_COMP",
    "NAME" VARCHAR2(200 BYTE) COLLATE "USING_NLS_COMP",
    "TOTAL_EMPLOYEES" NUMBER(*,0),
    "CONTACT_NUMBER" VARCHAR2(20 BYTE) COLLATE "USING_NLS_COMP",
    "SOURCE" VARCHAR2(20 BYTE) COLLATE "USING_NLS_COMP"
   )  DEFAULT COLLATION "USING_NLS_COMP" ;

CREATE UNIQUE INDEX "ADMIN"."XX_ACCOUNTS_PK" ON "ADMIN"."XX_ACCOUNTS"
("ACCOUNT_ID")
  ;

ALTER TABLE "ADMIN"."XX_ACCOUNTS" ADD CONSTRAINT "XX_ACCOUNTS_PK" PRIMARY
KEY ("ACCOUNT_ID")
  USING INDEX  ENABLE;
```

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 **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 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. 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 user name 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 ATP Connection

1. In the Connections section, click the connection name.
2. In the Properties section, specify the database service name in the **Service Name** field. See Configure Oracle ATP.
3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select **JDBC Over SSL**.
Wallet	Select the check box, then click **Upload** to upload the wallet file. See Configure Oracle ATP.
Wallet Password	Enter the wallet password.
Database Service Username	Enter the database service username to connect to the ATP database. The database service username is the schema username for the user to log in to the database. The database service username is not the same as the database service name that you specify in the connection Properties section.
Database Service Password	Enter the database service password to connect to the ATP database.

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 CX Sales Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the Oracle CX Sales 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
Security Policy	Select **Username Password Token**.
Username	Enter the username of the account created for Oracle Integration on the Oracle CX Sales instance.
Password	Enter the password of the account created for Oracle Integration on the Oracle CX Sales 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** .

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 integrations have been activated. Refresh the page to view the updated status of the integrations.

2. Run the recipe.

   To run the recipe, create an account on your Salesforce instance.

   a. Log in to your Salesforce instance.

   b. On the Salesforce Setup page (in the Classic UI), click the **Accounts** tab and choose **+ New Account**.

   c. On the New Account dialog box, enter the relevant details such as Account Name, Phone, Account Number, Employees and so on, and then click **Save**.

      You've successfully triggered the integration flows of the recipe. The recipe now creates corresponding accounts in Oracle CX Sales and Oracle ATP for the new account created on Salesforce.

3. Monitor the running of the integration flows in Oracle Integration.

   a. In the project workspace, click **Observe**. You'll see the integration flows being triggered and running successfully.

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

4. Log in to your Oracle CX Sales instance and check if a new account corresponding to the new Salesforce account is created.

5. Log in to your Oracle ATP instance and check the XX_ACCOUNTS table for the new account.

Related Documentation

- *Using the Salesforce Adapter with Oracle Integration 3*
- *Using the Oracle CX Sales and B2B Service Adapter with Oracle Integration 3*
- *Using the Oracle Autonomous Transaction Processing Adapter with Oracle Integration 3*