Oracle® Cloud

Sync Contacts Between Salesforce and Oracle B2C Service

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Contents

Preface

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

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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`.

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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.
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.

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About This Recipe

Use this recipe to synchronize contact records between Salesforce and Oracle B2C Service.

> ✎ **Note:**
>
> This recipe is available as **Salesforce — Oracle B2C Service | Sync Contacts** 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 creates a corresponding contact in Oracle B2C Service when a new contact record is created in Salesforce. After successful creation of contact, the Oracle B2C Service contact Id will be saved in the custom field of the Salesforce contact.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When a Salesforce contact is created, the integration flow of the recipe is triggered via platform events configured in Salesforce, and it creates a corresponding contact record in Oracle B2C Service. Basic data such as first name, last name, address, and so on, are synchronized between the two platforms.

System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 or higher
- Salesforce
- Oracle B2C Service
- An account on Salesforce with the Administrator role
- An account on Oracle B2C Service 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 B2C Service instances in order to successfully connect to these external systems using Oracle Integration and synchronize contact records between Salesforce and Oracle B2C Service.

Configure Salesforce

To access Salesforce using Oracle Integration and retrieve data about Salesforce contacts that are created or updated, 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.

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 Instance Type of Your Salesforce Organization.

5. Create a custom field to store the Oracle B2C Service contact id.

    a. On the Salesforce Setup page:

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

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

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

    c. Select the **Text** radio button, and click **Next**.

    d. Enter the following details for the new custom field and click **Next**.

Field	Information to Enter
Field Label	Enter the field name. For example, `RNContact_Id`.
Length	Enter the maximum length for the text field. For example, `255`.
Field Name	This field is automatically populated.
Description	Enter a description for the custom field.

    e. On the Establish field-level security page, select **Visible** and click **Next**.

    f. Leave all check boxes selected in the next page, and click **Save**.

6. Configure the Salesforce platform event. The platform event notifies external systems about changes to the Salesforce contact records.

   a. In the left navigation pane of the Salesforce Setup page, scroll to the Build section, expand **Develop** and then click **Platform Events**.

   b. On the Platform Events page, click **New Platform Event**.

   c. On the New Platform Event page, enter the following information:

Field	Information to Enter
Label	Enter a label for the field. For example, `ContactCreate_PE`.
Plural	Enter the plural form of the label field.
Object Name	This field is automatically populated.
Description	If required, enter a description for the new platform event.
Publish Behavior	Select one of the following options: • – **Publish After Commit:** The event message is published only after a transaction commits successfully. Subsequently, the subscriber receives the event message after the data is committed. If the transaction fails, the event message isn't published. – **Publish Immediately:** The event message is published when the publish call executes, irrespective of whether the transaction succeeds or not. Subsequently, the subscriber receives the event message before the data is committed.

   d. In the Deployment Status section, select **Deployed**.

   e. Click **Save**.

7. Create custom fields to store Oracle B2C Service contact record details.

   a. In the Custom Fields & Relationships section of the Platform Event page, click **New**.

   b. On the resultant New Custom Field page, select the **Text** radio button, and click **Next**.

   c. Enter the following details for the custom field:

Field	Information to Enter
Field Label	Enter the field name. For example, `ContactId_PE`.
Field Name	This field is automatically populated.
Length	Enter the maximum length of the text field. For example, `255`.
Description	Enter a description for the custom field.

   d. Click **Save**.

    e. Create as many custom fields as required by repeating steps a-d. For example, you can create custom fields such as `FirstName_PE`, `LastName_PE`, `MailingCity_PE`, `PostalCode_PE` and so on.

8. Create and activate a process that triggers the platform event.

    a. In the left navigation pane of the Salesforce Setup page, scroll to the Build section. Expand **Create** and then **Workflow and Approvals**, and click **Process Builder**.

    b. Create a process.

        i. On the Process Builder page, click **New**.

        ii. Enter the following details in the New Process dialog:

Field	Information to Enter
Process Name	Enter a name for the process.
API Name	This field is automatically populated.
Description	If required, enter a description for the process.
The process starts when	Select **A record changes**.

        iii. Click **Save**.

    c. Configure the process trigger.

        i. Click the **Add Object** in the process flowchart.

        ii. From the Choose Object and Specify When to Start the Process pane that opens, select the following and click **Save**.

Field	Information to Enter
Object	Select **Contact**.
Start the process	Select **When a record is created or edited**.

    d. Add the process criteria. You can specify the criteria that must be true for the process to execute associated actions.

        i. Click **Add Criteria** in the decision box.

        ii. In the Define Criteria for this Action Group pane that opens, provide the following information.

Field	Information to Enter
Criteria Name	Enter a name for the criteria.
Criteria for Executing Actions	Select **Conditions are met**.

        iii. Create a condition to restrict the integration user from triggering the process.

Field	Information to Enter
Field	Search for `Contact.FirstName` and select it.
Operator	Select **Is null**.
Type	Select **Boolean**.
Value	Select **False**.

        iv. Create another condition to restrict the integration user from triggering the process.

Field	Information to Enter
Field	Search for `Contact.LastName` and select it.
Operator	Select **Is null**.
Type	Select **Boolean**.
Value	Select **False**.

    v. From the **Conditions** options list, select **All of the conditions are met (AND)**

    vi. Expand the **Advanced** drop-down list, and for **Do you want to execute the actions only when specified changes are made to the record?** select **Yes**.

e. Add action to the process.

    i. In the **Immediate Actions** box beside the **TRUE** arrow, click **Add Action**. Enter a name for the action. For example, `CreateContact_Trigger`.

    ii. In the Create a Record pane, under **Record Type**, select the Platform event that you created earlier in step 6.

    iii. In the Set Field Values section, create rows for all the custom fields that you created earlier in step 7.
To create a row for a custom field:

- Under **Fields**, type the name of the custom field.

- Under **Type**, select **Field Reference**.

- Under **Value**, select the corresponding value of the custom field.

Repeat the above steps to create rows for all the custom fields.

    iv. Click **Save**.

f. Activate the process.

    i. On the top right of the Process Builder page, click **Activate**.

    ii. In the Activate Version dialog, click **Confirm**.

Configure B2C Service

To access Oracle B2C Service using Oracle Integration and create corresponding contact records for Salesforce contacts, you must log in to your Oracle B2C Service as an **Administrator** and complete certain prerequisite tasks. See Prerequisites for Creating a Connection.

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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 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 B2C Service Connection

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

2. In the Properties section, specify the WSDL to use. See Prerequisites for Creating a ConnectionPrerequisites for Creating a Connection.

3. In the Security section, enter the username and password that you obtained. See Prerequisites for Creating a Connection.Note that only the Username Password Token security policy is supported.

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** .

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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 a contact in Salesforce.

   a. Log in to your Salesforce instance.

   b. On the Salesforce Setup page, click the **Contacts** tab.

   c. On the Contacts Home page, click **New**.

   d. On the New Contact page, enter the contact details such as first name, last name, address, and so on, and then click **Save**.

   You've now successfully triggered the recipe by creating a contact in Salesforce.

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. Check for the new contact created in Oracle B2C Service.

   a. Log in to your Oracle B2C Service instance.

   b. Search for the new contact created.

   c. Open the contact and check if the basic data matches that of the new contact created in Salesforce, and the Oracle B2C Service contact id got updated in the custom field (RNContact_Id).

Related Documentation

- *Using the Salesforce Adapter with Oracle Integration 3*
- *Using the Oracle Service Cloud (RightNow) Adapter with Oracle Integration 3*