Oracle® Cloud

Sync Salesforce Accounts with Workday Customers

ORACLE®

Oracle Cloud Sync Salesforce Accounts with Workday Customers,

G12650-01

Primary Author: Oracle Corporation

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

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`.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

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.

ORACLE®

1
About This Recipe

Use this recipe to synchronize Salesforce accounts with Workday customers.

> ✏ **Note:**
>
> This recipe is available as **Salesforce — Workday | Sync Accounts and Customers** in Oracle Integration. 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 or updates a customer in Workday whenever an account is created or updated in Salesforce. In addition, it creates a Workday invoice for the closed Salesforce opportunity and posts a Slack notification if the invoice is in unpaid status.

To use the recipe, you must install the recipe project and configure the connections and other resources within it. When an account is created or updated in Salesforce, the application-driven integration flow **Oracle Salesforce Workday AccountToCustomer Sync** is triggered and it creates or updates a corresponding customer in Workday. Subsequently, whenever a Salesforce opportunity is closed, the application-driven integration flow **Oracle Salesforce Workday OpportunityToInvoice Syn** is triggered and it creates an invoice for the corresponding account in Workday. Further, you can run the scheduled integration flow **Oracle Workday Slack SendMessage** of the recipe manually or specify an execution schedule for it. When triggered, the **Oracle Workday Slack SendMessage** integration flow posts a message in Slack if the status of the invoice is unpaid.

In the **Oracle Salesforce Workday AccountToCustomer Sync** integration flow, basic data such as account name, account Id, account type, billing address, billing city, billing state/province, billing zip/postal code, and billing country are synchronized between the Salesforce and Workday platforms. Similarly, in the **Oracle Salesforce Workday OpportunityToInvoice Syn** integration flow, basic data such as customer reference, opportunity Id (customer PO number in Workday), company reference, sales item reference and so on are mapped between the Salesforce and Workday platforms.

System and Access Requirements

- Oracle Integration, Version 24.08 or higher
- Salesforce
- An account on Salesforce with the Administrator role
- Workday
- An account on Workday with the Administrator role
- Slack

- An account on Slack with the Administrator role

2
Before You Install the Recipe

You must perform the following configuration tasks on your Salesforce, Workday and Slack instances to successfully connect to these external systems using Oracle Integration, and synchronize Salesforce accounts with Workday customers.

Configure Salesforce

To access Salesforce using Oracle Integration and retrieve information about the Salesforce accounts, you must perform certain configuration tasks 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, configure change data capture to generate change event notifications on the default standard channel.

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.

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 action.

- In the **Accounts** row, leave the **Read**, **Create**, **Edit**, and **Delete** boxes checked. Additionally, select the **ViewAll** check box.

   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.

      iii. The email address you enter is automatically populated in the **Username** field. Note down this username.

      iv. In the **User License** field, select **Salesforce**.

      v. In the **Profile** field, select the profile you created previously, that is, **API Enabled**.

      vi. Scroll to the end of the page, ensure that the **Generate new password and notify user immediately** check box is selected, and click **Save**.

      vii. 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 down the same.

   Subsequently, you're signed into the Salesforce instance with the new account.

> **Note:**
>
> If you're shown the Lighting Experience UI, switch to the Salesforce Classic UI.

   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 username 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.

    vi. A new security token is sent to the email address associated with the account. Note down the security token.

    vii. On the Salesforce instance, click the username 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:

```
CopySalesforce.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. On your Salesforce instance, select an entity (**Accounts** in this case) to which change event notifications has to be generated. To select the entity,

    a. On the Salesforce Setup page:

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

        ii. Expand **Develop**, then click **Change Data Capture**.

    b. On the Change Data Capture setup page, from the list of available entities, click **Accounts**, then click the right arrow icon.

    c. After selecting the entity, click **Save**.

6. Create a custom field for Salesforce to store Workday_Customer_ID.

This recipe uses unique IDs associated with Workday and Salesforce instances to synchronize accounts/customers.

    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 `Workday_Customer_ID` as the field label. Note that the field name is automatically populated based on the label you enter.

- Specify the character length.

- Optionally, enter a description for the new field.

- Select the checkbox next to **Set this field as the unique record identifier from an external system**.

- Click Next.

  d. 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**.

  e. 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.

7. Create custom fields under Salesforce opportunity object to store the **WorkdayInvoiceId**.

    To create a custom field for Salesforce opportunities.

    a. On the Salesforce Setup page:

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

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

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

    c. On the New Custom Field page:

      i. Enter the following details for the new custom field:

        - Enter `Workday_Invoice_Id` as the field label. Note that the field name is automatically populated based on the label you enter.

        - Specify the character length.

        - Optionally, enter a description for the new field.

        - Click the checkbox next to **Set this field as the unique record identifier from an external system**.

        - Click **Next**.

        - 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**.

        - Leave all the layout check boxes selected and click **Save**.
          On the Opportunity Fields page, you can see the new field added under the Opportunity Custom Fields & Relationships section.

8. Create custom fields for the platform events and update the apex trigger code in Salesforce for the integration **Oracle Salesforce Workday OpportunityToInvoice Syn**.

    To create the custom fields for platform events:

    a. On the Salesforce setup page, in the left navigation pane, navigate to **Build**, then **Develop**, then **Lightning Components**, and then to **Platform Events**.

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

    c. In the New Platform Event page, complete the standard fields, and optionally add a description.

    d. For Publish Behavior, choose when the event message is published in a transaction.

- **Publish After Commit** to have the event message published only after a transaction commits successfully. Select this option if subscribers rely on data that the publishing transaction commits. For example, a process publishes an event message and creates a task record. A second process that is subscribed to the event is fired and expects to find the task record. Another reason for choosing this behavior is when you don't want the event message to be published if the transaction fails.

- **Publish Immediately** to have the event message published when the publish call executes. Select this option if you want the event message to be published regardless of whether the transaction succeeds. Also choose this option if the publisher and subscribers are independent, and subscribers don't rely on data committed by the publisher. For example, the immediate publishing behaviour is suitable for an event used for logging purposes. With this option, a subscriber might receive the event message before data is committed by the publisher transaction.

    e. Click **Save**.

    f. To add a field, in the Custom Fields & Relationships related list, click **New**.

    g. In the New Custom Field page, select the required **Data Type**, then click **Next**.

    h. Enter the following details for the new custom field:

      i. Enter the field label. Note that the field name is auto populated based on the label you enter.

      ii. Specify the character length.

      iii. Optionally, enter a description for the new field.

      iv. Click the checkbox next to **Always require a value in this field in order to save a record**.

      v. Enter the additional details required for the respective fields, then click **Save**.
You can see the new field added under the Custom Fields & Relationships section.

    i. Update the custom fields created for platform events in the apex trigger code.

Download and view the code: ApexCode.

Configure Workday

To configure Workday, see Prerequisites for Creating a Connection.

Configure Slack

To configure Slack, see Prerequisites for Creating a Connection.

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 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. 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.

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 Workday Connection

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

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

Field	Information to Enter
Hostname	Enter the Workday host name. For example: `https://wd2-impl-services1.workday.com`.
Tenant Name	Enter the tenant name of the account created for Oracle Integration on Workday. See Configure Workday.

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

Field	Information to Enter
Security Policy	Select **Workday Username Token Policy**.
Workday Integration User	Enter the user name of the account created for Oracle Integration on Workday. See Configure Workday.
Password	Enter the password of the account created for Oracle Integration on Workday.

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 Slack Connection

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

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

Field	Information to Enter
Client ID	Enter the client ID obtained while configuring Slack. See Configure Slack.
Client Secret	Enter the client secret obtained while configuring Slack.
Scope	Enter the permission scopes you configured while creating and configuring a Slack app.

3. Click **Provide Consent**.

   A new browser window opens to approve access to Slack.

4. Click **Allow**.

5. Click **Save**. If prompted, click **Save** again.

6. 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.

7. To return to the project workspace, click **Go back** .

Configure the Lookup Table

Edit the lookup tables of the recipe and enter appropriate values.

1. In the Lookups section, click the lookup name.

2. The recipe contains the following two lookup tables. In the lookup tables, enter appropriate values to which the property names must be mapped.

    a. Edit the **ORACLE-BRT-SFDC_WD_Lookup** table.

SFDC	WD
Customer - Direct	CUSTOMER_CATEGORY-3
USA	USA
CAN	CAN
New York	USA-NY
Canada	CAN-BC

    b. Edit the **ORACLE-BRT-SFDC_WORKDAY_COMPANY_LOOKUP** table.

Property	WD	Description
CompanyReferenceID	GMS_USA_company	Represents the unique identifier for a company reference.
WorktagsID	10000	Represents the unique identifier for worktags used to categorize and track transactions.
PaymentTermsID	NET_30	Represents the terms of payment.
PaymentTypeID	EFT	Represents the method of payment.
TxCodeID	TAX_CODE-2	Represents the tax code identifier used for taxation purposes.
TenantBillingID	COMMUNICATION_USAGE_ BEHAVIOR_TENANTED-16-1 0	Represents the billing identifier for tenant communications usage behavior.
TenantShippingID	COMMUNICATION_USAGE_ BEHAVIOR_TENANTED-16-1 1	Represents the shipping identifier for tenant communications usage behavior.

3. Click **Save**. If prompted, click **Save** again.

4. To return to the project workspace, click **Go back** .

Update Integration Properties

1. In the Integrations section, click **Actions** ... on the integration flow, then select **Update property values**.

2. In the Update property values panel, update the integration properties with appropriate values.

a. **User**: This integration property holds the user Id of the Salesforce account user to avoid recurring updates.

    This property has to be updated in the **Oracle Salesforce Workday AccountToCustomer Sync** integration flow.

b. **Email**: This integration property holds the email id to which error notifications have to be sent.

    This property has to be updated in the **Oracle Salesforce Workday AccountToCustomer Sync** and **Oracle Salesforce Workday OpportunityToInvoice Syn** integration flows.

3. Click **Submit**.

    A message confirms that the integration properties have been updated successfully.

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. Update the integration property for the **Oracle Workday Slack SendMessage** integration flow.

    a. In the Integrations section, click **Actions** ••• on the integration flow, then select **Update property values**.

    b. In the Update property values panel, update the following integration property with appropriate value.

        •   **ChannelName**: This integration property holds the name of the Slack channel to which invoice status notifications must be sent.

    c. Click **Submit**.

        A message confirms that the integration properties have been updated successfully.

3. Run the recipe.

    a. Run the **Oracle Salesforce Workday AccountToCustomer Sync** integration flow.

        To run the integration flow, you have to create or update an account in your Salesforce instance.

        Create a new Salesforce account:

        i.   Log in to your Salesforce instance.

        ii.   On the Salesforce Setup page, click the **Accounts** tab.

        iii. To create a new account, click **New**.

        iv.   In the New Account window, enter the account details such as account name, billing address, billing city, billing state/province, billing zip/postal Code, billing country, and any additional data if required. Click **Save**.

        You've successfully created an account in Salesforce and triggered the **Oracle Salesforce Workday AccountToCustomer Sync** integration flow. The integration now creates a corresponding customer in Workday for the newly created Salesforce account.

    b. Run the **Oracle Salesforce Workday OpportunityToInvoice Syn** integration flow.

        To run the integration flow, you have to close a Salesforce opportunity.

        i.   Log in to your Salesforce instance.

        ii.   On the Salesforce Setup page, click the **Opportunities** tab.

        iii. On the Opportunities Home page, select **All Opportunities** in the **View** field and click **Go!**.

iv. Find a sample opportunity record that hasn't been closed and click its name to open it.

v. In the Opportunity Detail section at the top, click **Edit**, then select **Closed Won** in the **Stage** field, and click **Save**.

You've successfully closed a Salesforce opportunity and triggered the **Oracle Salesforce Workday OpportunityToInvoice Syn** integration flow. The integration now creates an invoice in Workday for the corresponding Salesforce account.

c. Run the **Oracle Workday Slack SendMessage** integration flow to post a Slack notification if the status of the Workday invoice is unpaid.

i. In the Integrations section of the project workspace, click **Actions** ⋯ on the integration flow, then select **Run**.

The Configure and run page is displayed, where you can specify a value for the **InvoiceDate** parameter. This parameter stores the date and time of the most-recent successful run of the integration flow. The parameter's value is automatically updated after each successful run, and only the invoices with unpaid status after the date-time stamp stored as the parameter's **Current Value** are processed by the integration in each run. If you want to change the date-time stamp for a specific scenario, enter the date and time of your choice in the **New Value** field in the format, `yyyy-MM-dd HH:mm`.

ii. 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.

4. 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.

5. Log in to your Workday instance and check for the new customer and the invoice created.

a. To view the customer created:

i. In the search field, type `View Customer`, then press **Enter**. A pop-up with the search field against customer appears.

ii. In the search field enter the **Workday_Customer_ID** copied from the Salesforce Accounts page, then click **OK**.

The customer details are displayed.

b. To view the invoice created:

i. In the search field, type the **Invoice Id** starting with `wid:` (Example: `wid:invoicid123`).

ii. Press **Enter**.

The invoice details appear.

Related Documentation

- *Using the Salesforce Adapter with Oracle Integration 3*
- *Using the Workday Adapter with Oracle Integration 3*
- *Using the Slack Adapter with Oracle Integration 3*