

Oracle® Cloud

Sync Stripe Customers with Salesforce Accounts



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Preface

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

Topics:

- [Documentation Accessibility](#)
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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.
<i>italic</i>	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 customers in Stripe with Salesforce accounts.



Note:

This recipe is available as **Stripe — Salesforce | Sync Customers and Accounts** 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 account in Salesforce when a new customer is created in Stripe. Also, whenever a customer in Stripe is updated, the recipe updates the corresponding account in Salesforce.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. When a customer is created or updated in Stripe, the integration flow of the recipe is triggered, and it creates or updates the corresponding account record in Salesforce.

System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 or higher
- Stripe
- An account on Stripe 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 Stripe and Salesforce instances in order to successfully connect to these external systems using Oracle Integration and synchronize customers and accounts.

Configure Stripe

To access the Stripe instance from Oracle Integration, you must perform certain configurations on your Stripe instance.

1. Register a webhook endpoint. See [Add a webhook endpoint](#).
 - a. In the **Endpoint URL** field, enter your Oracle Integration endpoint URL. For example, `https://<username>:<password>@<host>/ic/api/integration/v2/flows/rest/project/ORCL-R-STIPRE_SFDC_CUST_ACC_SYNC/ORCL-R-STRIPE_SFDC_CUST_ACC_SYNC/1.0/createCustomer`.
 - b. In the **Select events** field, select **customer.created** and **customer.updated**.

Configure Salesforce

To access Salesforce using Oracle Integration, 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 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.
 - 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. 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 for account records.

This recipe uses unique IDs associated with customer records in Stripe to synchronize Stripe customers with accounts in Salesforce. Create a custom field for Salesforce account records to hold the Stripe IDs.

- 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 `Account_Ext_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 Accounts 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.

3. Hover over the recipe, then click **Install** .

A message confirms that the recipe was successfully installed, and the recipe card shows **INSTALLED**.

4. Hover over the recipe again, and click **Configure**  to configure the resources of the recipe.

The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.


Configure the Stripe REST Trigger Connection

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

Field	Information to Enter
Security Policy	Leave OAuth2.0 Or Basic Authentication .

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** .

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.

Field	Information to Enter
API Version	Enter your current Salesforce API version. To obtain the API version, see Configure Salesforce .

- 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.

- Click **Save**. If prompted, click **Save** again.
- 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.
- 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.
Create a customer in Stripe. See [Create a customer](#).
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 if new accounts are created in your Salesforce instance.
 - a. Log in to your Salesforce instance.
 - b. On the Salesforce Setup page (in the Classic UI), click the **Accounts** tab.
 - c. On the Accounts Home page, select **All Accounts** in the View field, and click **Go!**. All the accounts in your Salesforce instance are displayed.

Related Documentation

- [Using the REST Adapter with Oracle Integration 3](#)
- [Using the Salesforce Adapter with Oracle Integration 3](#)