# Oracle® Cloud

## View Orders from Oracle ERP Cloud in Oracle CX Sales and B2B Service

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Oracle Cloud View Orders from Oracle ERP Cloud in Oracle CX Sales and B2B Service,

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# 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`.

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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 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. |
| *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 view details of an order from Oracle ERP Cloud in Oracle CX Sales and B2B Service.

> **Note:**
>
> This recipe is available as **Oracle ERP Cloud — Oracle CX Sales and B2B Service | View 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 recipe creates a custom object `OrderManagementPOC` in Oracle CX Sales and B2B Service when an order is created in Oracle ERP Cloud. The details of the order created can be viewed in the Oracle CX Sales and B2B Service custom object in real time.

To use the recipe, you must install the recipe and configure connections and other resources within the recipe. When an order is created in Oracle ERP Cloud, the integration flow of the recipe is triggered, and the recipe creates a custom object `OrderManagementPOC` in Oracle CX Sales and B2B Service. It is assumed that the Oracle ERP Cloud Account is already synced with the Oracle CX Sales and B2B Service Account and the custom object `OrderManagementPOC` is created as child object of Account. The details (such as Item Name, Item Description, Order Status, Quantity Purchased, and so on) of the order created in Oracle ERP Cloud can be viewed real time on the `OrderManagementPOC` custom object created in Oracle CX Sales and B2B Service.

## System and Access Requirements

- Oracle Integration, Version 21.2.1 or higher
- Oracle ERP Cloud
- Oracle CX Sales and B2B Service
- An account on Oracle ERP Cloud with the Administrator role
- An account on Oracle CX Sales and B2B Service with the Administrator role

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# Before You Install the Recipe

You must perform the following configuration tasks on your Oracle ERP Cloud instance and Oracle CX Sales and B2B Service instance in order to successfully connect to these external systems using Oracle Integration.

1. Configure Oracle ERP Cloud
2. Configure Oracle CX Sales and B2B Service

## Configure Oracle ERP Cloud

To access the Oracle ERP Cloud instance from Oracle Integration, you'll require a separate user account on Oracle ERP Cloud.

Log in to your Oracle ERP Cloud instance as an **Administrator** and perform the following tasks.

1. Create a user account for Oracle Integration. Make a note of the user name and password you set for the account. You'll use the credentials of this user account to connect to Oracle ERP Cloud from Oracle Integration.
2. Assign the following roles to the user account. For more information, see Assign Required Roles to an Integration User in *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*.
   - `Integration Specialist`
   - `Oracle ERP Cloud-specific data access to the integration user`
3. Enable the business event `Sales Order Notification`.

   See Supported SCM and Procurement Business Events.

   For information on subscribing to events in Oracle ERP Cloud, see Configure Oracle ERP Cloud for Event Subscriptions.

## Configure Oracle CX Sales and B2B Service

To access the Oracle CX Sales and B2B Service instance from Oracle Integration, you'll have to create a separate user account on Oracle CX Sales and B2B Service, and assign the required roles to the user account.

In addition, perform the following tasks to configure Oracle CX Sales and B2B Service for this recipe.

1. Create the `OrderManagementPOC` custom object as child object of Account with necessary fields.
   a. Create `OrderManagementPOC` custom object.
      i. In the Navigator, select **Application Composer**.
      ii. In the Custom Objects list, click **Create a New Object**.

        **iii.** In the Create Custom Object dialog, enter the object information (`OrderManagementPOC`), and then click **OK**.

        The custom object appears in the Custom Objects list in the Objects menu.

    **b.** Add fields to the `OrderManagementPOC` custom object.

        **i.** In the Objects menu, expand the `OrderManagementPOC` custom object's node in the Custom Objects list.

        **ii.** Click **Fields**.

        **iii.** On the Fields page, click **Create a custom field**.

        **iv.** In the Select Field Type dialog, select the appropriate field type, and then click **OK**.

        **v.** Repeat the above steps to create as many fields as required.

**2.** Ensure Registry ID value of account object in Oracle CX Sales and B2B Service matches with `BuyingPartyNumber` of order object in Oracle ERP Cloud.

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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 ERP Connection

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

2. In the Properties section, enter the Oracle ERP Cloud 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**. |
| **User Name** | Enter the user name of the account created for Oracle Integration on the Oracle ERP Cloud instance. See Configure Oracle ERP Cloud. |
| **Password** | Enter the password of the account created for Oracle Integration on the Oracle ERP Cloud 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** .

## Configure the Oracle CX Sales and B2B Service Connection

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

2. In the Properties section, enter the Oracle CX Sales and B2B Service 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**. |
| **User Name** | Enter the user name of the account created for Oracle Integration on the Oracle CX Sales and B2B Service instance. See Configure Oracle CX Sales and B2B Service. |
| **Password** | Enter the password of the account created for Oracle Integration on the Oracle CX Sales and B2B Service 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** .

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# Activate and Run the Recipe

After you've configured the connections, 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.

    a.  Log in to your Oracle ERP Cloud instance.

    b.  Open the Order Management module.

    c.  Create an order by selecting the Account that is synced to Oracle CX Sales and B2B Service.

    d.  Click **Submit**.

    You've now successfully 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.  Check if you can view in Oracle CX Sales and B2B Service the details of the order that was created in Oracle ERP Cloud.

    a.  Log in to your Oracle CX Sales and B2B Service instance.

    b.  Open the `OrderManagementPOC` custom object that was created as child object of Account.

    c.  Check if you can view the details of the order that was created in Oracle ERP Cloud on the `OrderManagementPOC` custom object.

**Related Documentation**

*   *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*
*   *Using the Oracle CX Sales and B2B Service Adapter with Oracle Integration 3*