Oracle® Cloud

Sync Salesforce Accounts with ServiceNow Companies

F58214-02
March 2023

ORACLE®

Contents

Preface

This document describes how to install, configure, and run this recipe in Oracle Integration Generation 2.

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.
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 ServiceNow companies.

> **Note:**
>
> This recipe is available as **Salesforce — ServiceNow | Sync Accounts and Companies** 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 is an application-driven recipe that creates a company in ServiceNow when a new account is created in Salesforce. Also, whenever an account in Salesforce is updated, the recipe updates the corresponding company in ServiceNow.

To use this recipe, you must install the recipe package and configure the connections and other resources within the package.

When a Salesforce account is created or updated, the integration flow of the recipe is triggered, and it creates or updates the corresponding company in ServiceNow. Basic data such as account name, phone, employees, and billing address are synchronized between Salesforce and ServiceNow platforms.

System and Access Requirements

- Oracle Integration, Version 21.4.3.0.0 or higher
- Salesforce
- An account on Salesforce with the Administrator role
- ServiceNow
- An account on ServiceNow with the Administrator role

2

Before You Install the Recipe

You must perform the following configuration tasks on your Salesforce and ServiceNow instances in order to successfully connect to these external systems using Oracle Integration and synchronize Salesforce accounts with ServiceNow companies.

Configure Salesforce

To access Salesforce from Oracle Integration and retrieve data about Salesforce accounts that are created or updated, 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, create a custom field for Salesforce account records to store ServiceNow company IDs, and configure the generation of change-event notifications for the Accounts entity.

> **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.

Log in to your Salesforce instance as an Administrator and perform the following tasks:

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. In the **Existing Profile** field, select **Standard User** .

    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.

         • 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 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.

    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.

    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 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 in *Using the Salesforce Adapter with Oracle Integration Generation 2*.

4. Identify your Salesforce instance type. See Identify the Instance Type of Your Salesforce Organization in *Using the Salesforce Adapter with Oracle Integration Generation 2*.

5. Create a custom field for contact records.

This recipe uses unique IDs associated with company records in ServiceNow to synchronize ServiceNow companies with Salesforce accounts. Create a custom field for Salesforce account records to hold the ServiceNow 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**.

6. Configure the generation of change-event notifications for the Account entity.

With this configuration, when a new account is created or updated in Salesforce, a change-event notification is generated to trigger the recipe.

    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 page, from the list of available entities, select **Accounts**, and then click the right arrow.

    c. Select the account, click **Save**.

Configure ServiceNow

You can use admin account credentials or custom account credentials while configuring the ServiceNow connection in Oracle Integration.

If you do not want to use an admin account, create a custom integration user and assign the required role and permissions to the user. For information about creating a custom user, see Prerequisites for Creating a Connection in *Using the ServiceNow Adapter with Oracle Integration Generation 2*.

3

Install and Configure the Recipe

On your Oracle Integration instance, install the recipe package to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, scroll to the **Accelerators & Recipes** section.

2. Click **Search All**.

   The list of available recipes is displayed.

3. Find and select the recipe package that you want to install, then click **Install** ⊕.

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

4. After the package is installed, click **Configure** 🔧 on the recipe card.

   The Configuration Editor opens, displaying all the resources of the recipe package. Configure the following resources before you activate and run the recipe.

Configure the Oracle Salesforce Connection

1. In the Configuration Editor, click the connection name.

2. In the Connection 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 Configuration Editor, click **Back** . Click **Save** again if prompted.

Configure the Oracle ServiceNow Connection

1. In the Configuration Editor, click the connection name.

2. In the Connection Properties section, enter the ServiceNow host name. For example: `https://instance_name.servicenow.com`.

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

Field	Information to Enter
Username	Enter your ServiceNow username.
Password	Enter your ServiceNow password.

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 Configuration Editor, click **Back** . Click **Save** again if prompted.

Update the Integration Property

Update the integration property with an appropriate value.

This integration flow contains the following property:

• **EmailTo**: This integration property holds the email address to which run-time exception emails are sent. Enter an email address of your choice.

For the procedure to update the integration property, see Steps 7 to 9 in Override Design-Time Properties in an Integration in *Using Integrations in Oracle Integration Generation 2*.

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 Configuration Editor, click **Activate** in the title bar. In the Activate Package dialog, click **Activate** again.

   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 an account in Salesforce.

   a. Log in to your Salesforce instance.

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

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

   d. On the New Account page, enter the account details, such as name, description, and so on. Click **Save**.

   You've now created an account record in Salesforce and triggered the recipe.

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

   a. In the Configuration Editor, select either of the two integration flows.

   b. Click **Run** ▶, then click **Track Instances**.

   On the Track Instances page, observe the integration flow of the recipe being triggered and running successfully. The recipe now creates a corresponding company in ServiceNow for the new account created in Salesforce.

4. Log in to your ServiceNow instance and check if a new company has been created.

   a. In the left navigation pane, under **Organization**, click **Companies**.

   b. On the Companies page, search for the newly created company.

   c. Click the company record's name to view details. Check if the newly created company's data matches with the Salesforce account that you created earlier.

Related Documentation

- *Using the Salesforce Adapter with Oracle Integration Generation 2*
- *Using the ServiceNow Adapter with Oracle Integration Generation 2*