Oracle® Cloud

Sync Accounts in Salesforce with Zendesk Organizations

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Preface

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

Topics:

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Documentation Accessibility

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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 accounts in Salesforce with Zendesk organizations.

> **✎ Note:**
>
> This recipe is available as **Salesforce — Zendesk | Sync Accounts and Organizations** 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 a bidirectional recipe. It creates a corresponding organization record in Zendesk when an account record is created in Salesforce. In addition, it creates corresponding account records in Salesforce for Zendesk organizations.

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

When an account is created in Salesforce, the app-driven integration flow (Oracle Salesforce Zendesk Acc2Org Sync) of the recipe is triggered, and it creates a corresponding organization record in Zendesk. Further, you can run the scheduled integration flow (Oracle Zendesk Salesforce Organization2Acc Sync) of the package manually or specify an execution schedule for it. When triggered, this integration flow reads the organization records from the Zendesk instance and, in turn, creates corresponding accounts in your Salesforce instance. Basic data, such as organization ID, name, domain name, account name, account description, and website, are synchronized between the two platforms.

System and Access Requirements

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

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Before You Install the Recipe

You must perform the following configuration tasks on your Salesforce and Zendesk instances in order to successfully connect to these external systems using Oracle Integration and synchronize records between them.

Configure Salesforce

To access Salesforce from Oracle Integration and create/read account records, 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, identify your Salesforce instance type and your current Salesforce API version. In addition, create an outbound message to trigger the **Oracle Salesforce Zendesk Acc2Org Sync** integration flow of the recipe, and create a workflow rule to send the outbound message when a Salesforce account is created. Finally, create a custom field for Salesforce account records to store Zendesk organization IDs.

> ✎ **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. 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 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. On your Salesforce instance, create an outbound message to trigger the **Oracle Salesforce Zendesk Acc2Org Sync** integration flow of this recipe.

On the Salesforce Setup page:

   a. Select **Account** in the **Object** field, and click **Next**.

   b. Enter the following details for the new outbound message:

     • Enter a name for the outbound message. Note that the **Unique Name** field is automatically populated based on the name you enter.

     • Optionally, enter a description for the message.

     • In the **Endpoint URL** field, enter the following URL:

```
https://<OIC_FQDN:OIC_SSL_PORT>/ic/ws/integration/v1/flows/
salesforce/ORCL-R-SFDC_ACC_SYN_TO_ZEN_ORG/1.0/
```

       Where `OIC_FQDN` and `OIC_SSL_PORT` are the fully-qualified domain name and port of your Oracle Integration instance (for example, `oicinstance.example.com:443`).

     • In the **User to send as** field, select the user account using which you want to send the message.

     • Under **Account fields to send**, select all the fields and click **Add**.

     • Click **Save**.

The new outbound message is created and displayed on your browser.

6. Now, create a workflow rule to send the outbound message (created previously) when a Salesforce account is created.

   a. On the Salesforce Setup page:

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

      ii. Expand **Create**, then **Workflow & Approvals**, and then click **Workflow Rules**.

      If you're shown the Understanding Workflow page, click **Continue**.

   b. Click **New Rule** in the resulting page.

   c. On the New Workflow Rule page:

      i. Select **Account** in the **Object** field, and click **Next**.

      ii. Enter the following details for the new workflow rule:

         • Enter the rule's name.

         • Optionally, enter a description for the rule.

         • In the **Evaluation Criteria** section, select the **created** radio button.

         • In the **Rule Criteria** section, select the **formula evaluates to true** option, and define the following rule criteria:

         ```
         (Account: Account Name NOT EQUAL TO null) AND (Account:
         Description NOT EQUAL TO null) AND (Account:
         Zendesk_Org_Id EQUALS null)
         ```

         • Click **Save & Next**.

      iii. On the next page, click the **Add Workflow Action** button and choose **Select Existing Action**.

      iv. On the Select Existing Actions page:

         • Select **Outbound Message** in the **Search** field.

         • In the **Available Actions** box, select the outbound message you created previously. For example, `Outbound Message:` *name of your outbound message*.

         • Click **Add** to move your selection to the **Selected Actions** box.

         • Click **Save**.

      v. Click **Done**.

      The new workflow rule is created and displayed on your browser.

   d. Click **Activate** to activate the rule.

7. Create a custom field for account records.

   This recipe uses unique IDs associated with organization records in Zendesk to synchronize Zendesk organizations with Salesforce accounts. Create a custom field for Salesforce account records to hold the Zendesk 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 `Zendesk_Org_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 Account Fields page, you can see the new field added under the **Account Custom Fields & Relationships** section.

Configure Zendesk

To access Zendesk from Oracle Integration and create or read organization records, you'll need to create an OAuth client on your Zendesk instance. See Create an OAuth Client in *Using the Zendesk Adapter with Oracle Integration Generation 2*.

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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 Zendesk Connection

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

2. In the Connection Properties section, enter the Zendesk 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
Client Id	Enter the client ID of the OAuth application created in Zendesk. See Configure Zendesk.
Client Secret	Enter the client secret of the OAuth application created in Zendesk.
Scope	Enter `write`.

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

5. Click **Provide Consent**.

6. In the resulting Sign in dialog, enter your Oracle Integration user name and password, and click **Sign in**. You'll be redirected to the Zendesk login page.

7. Enter your Zendesk account credentials and click **Sign in**.

8. After you see an access allowed message, switch back to the Zendesk Connection window of Oracle Integration to test your connection.

9. 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.

10. To return to the Configuration Editor, click **Back** . Click **Save** again if prompted.

Update the Integration Property for the App-Driven Flow

Update the integration property for the **Oracle Salesforce Zendesk Acc2Org Sync** integration flow.

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*.

Configure Data Mapping for the Scheduled Integration Flow

Edit the **Oracle Zendesk Salesforce Organization2Acc Sync** integration flow, and define the mapping for the **Map to createAccountInSalesforce** element.

1. In the Configuration Editor, select the **Oracle Zendesk Salesforce Organization2Acc Sync** integration flow, then click **Edit** ✎.

2. On the integration canvas, click the **Map to createAccountInSalesforce** element, and then click **Edit** ✎ to open the mapper.

3. In the Target pane, find the **External ID Field Name** element. Click the element to open the expression editor at the bottom.

4. In the editor, click the **Switch to Developer View** icon, and enter the following expression: `"Zendesk_Org_Id__c"`.

5. Click **Save**, then **Validate**.

6. Click **Close** to return to the integration canvas, then click **Close** again to return to the Configuration Editor.

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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 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.

   > ✏️ **Note:**
   >
   > Update the following property of the scheduled integration flow (**Oracle Zendesk Salesforce Organization2Acc Sync**). You can update the integration property for this flow only after activating it.
   >
   > - **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*.

2. Run the recipe to create Zendesk organizations for new Salesforce account records.

   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, click **New**.

   d. On the New Account page, enter the account details, such as name, description, and so on, and ensure that the `Zendesk_Org_Id` field is blank. Click **Save**.

   You've now successfully triggered the recipe, which creates a corresponding organization record in Zendesk.

3. Run the recipe to create accounts in Salesforce for Zendesk organization records..

   a. In the Configuration Editor, select the scheduled integration flow (**Oracle Zendesk Salesforce Organization2Acc Sync**).

   b. Click **Run** ▶, then click **Submit Now**.

   c. In the resulting dialog, click **Confirm**.

   The Schedule Parameters page is displayed, where you can specify a value for the `LastRunTime` 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 Zendesk organization records created 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`. To fetch all the organization records from the beginning, set the value as `zero`.

   d. On the Schedule Parameters page, click **Submit**.

> ✎ **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 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.

5. Log in to your Zendesk instance and check for the new organizations created.

   a. On the Zendesk home page, click **Organizations** in the left navigation pane.

   b. Search for the required organization records on the Organizations page.

6. Log in to your Salesforce instance and check for the new accounts created.

   a. On the Salesforce Setup page (in the Classic UI), click the **Accounts** tab.

   b. On the Accounts Home page, select **All Accounts** in the **View** field. Click **Go!** if necessary.
   The list of accounts is displayed.

   c. To view an account record, click its name.

Related Documentation

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