Leading the **Integration** Revolution

Your business problems have changed.
Why hasn't your integration solution?

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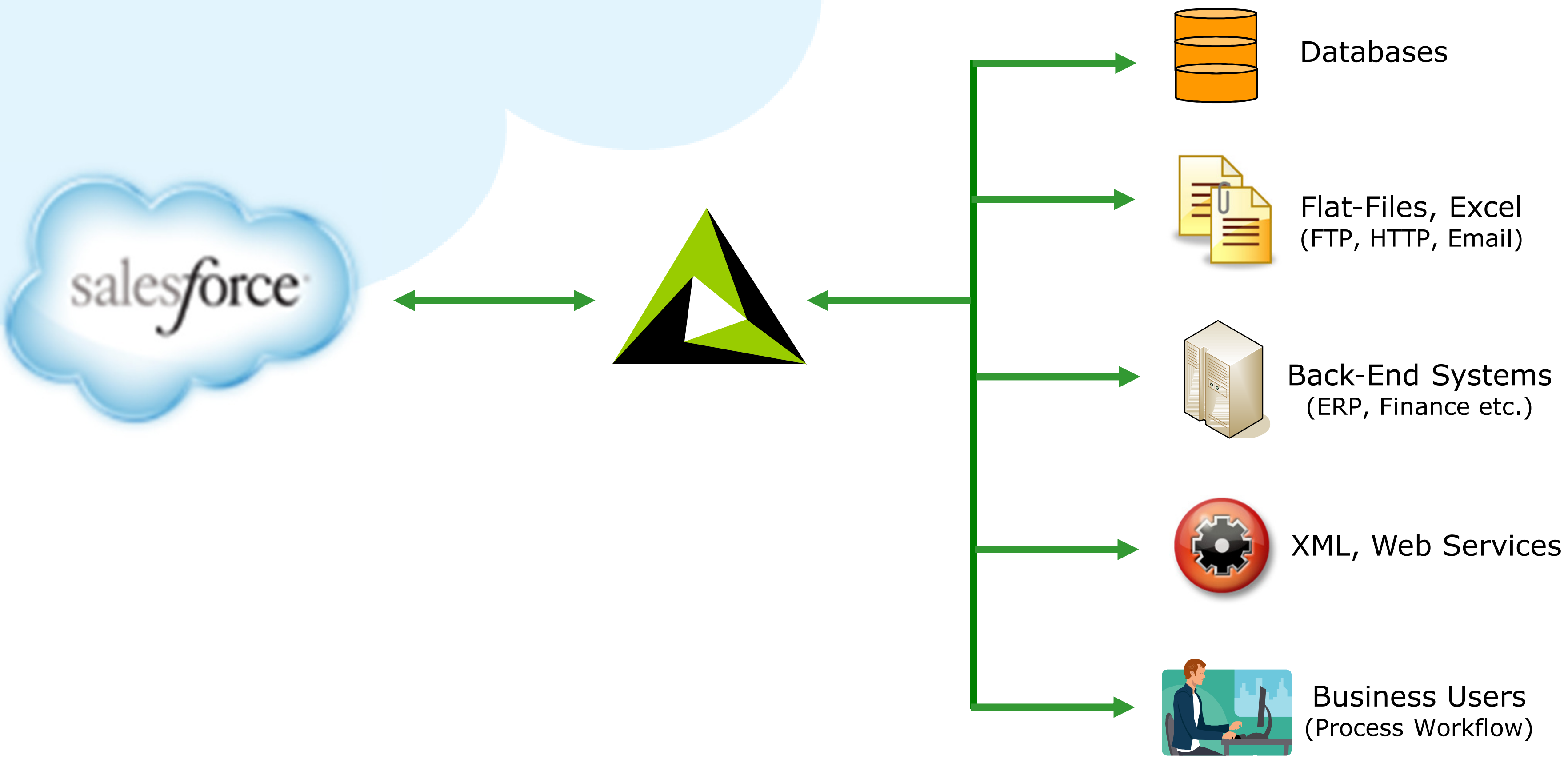
Use Case: Salesforce connector

Use cases for Salesforce connector



High-level Description

In this example we will use our Salesforce connector to connect to any application such as Database, ERP, Reporting, Workflow, Web Services or APIs.

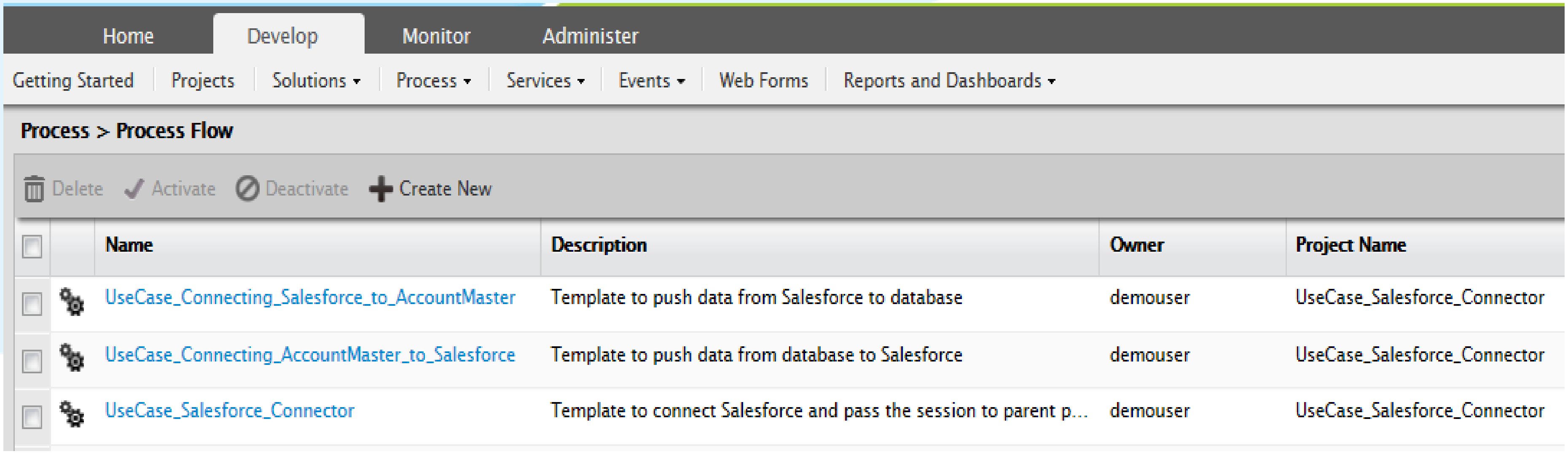
Specifically we have two working solutions as part of this scenario and these are:

1. (SF to DB) - First is a connection between Salesforce and Account Master database where Accounts are pulled from Salesforce and pushed into SAP Account Payable module.

2. (DB to SF) - Second is a connection between an Account Master database and Salesforce where Accounts are pulled from Account Master database and pushed into Salesforce.

Goal of this use case is to provide you with working templates so that you can expand on these and build your own solutions.

Sample process flows using Salesforce connector



There are three process flows for your reference:

UseCase_Connecting_Salesforce_to_AccountMaster: In this example we show how to push data from Salesforce to Account Master database using the Salesforce Connector. This is SF to DB flow.

UseCase_Connecting_AccountMaster_to_Salesforce: In this example we show how to push data from a backend Account Master database to Salesforce using the Salesforce Connector. This is DB to SF flow.

UseCase_Salesforce_Connector: The Salesforce connector is a sub process that is called by any solution that requires connection to Salesforce to exchange data with any system. Both the processes above call this sub process.

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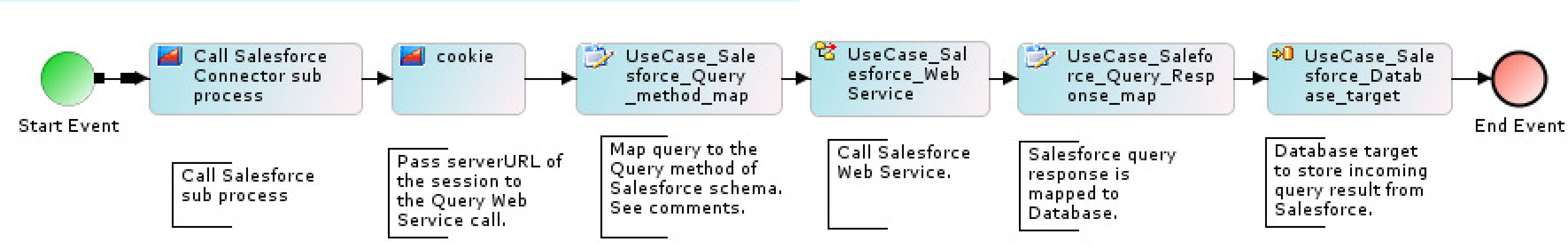
Technical design:
Connecting Salesforce to Account Master database



This process flow

- Calls Salesforce Connector sub process
- It gets back the session back from sub process call
- Session persisted in this process using the cookie
- Next we map the Query rule in the mapping to search for the Account in Salesforce
- The Mapping output which is a SOAP Query method envelope is passed to Salesforce Web Service call
- Result of the Web Service is mapped to Account Master database
- Data is loaded into the database target
- Refer to the annotations and comments for this process in the Process Designer for more details

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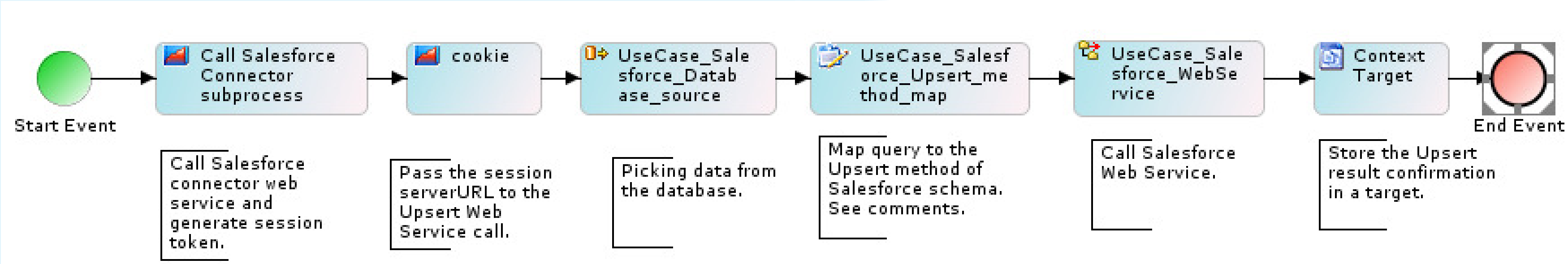
Technical design:
Connecting Account Master database to Salesforce



This process flow

- Calls Salesforce Connector sub process
- It gets back the session from sub process call
- Session is persisted in this process using the cookie
- Next we get the data from Mast Account database using the Database Source activity
- Next we map the source data to the Upsert function and the Account data object of Salesforce
- The Mapping output which is a SOAP Upsert method envelope is passed to Salesforce Web Service call
- Result of the Web Service is mapped to target context variable
- Now login to Salesforce and verify that Accounts data is inserted/updated.
- Refer to the annotations and comments for this process in the Process Designer for more details

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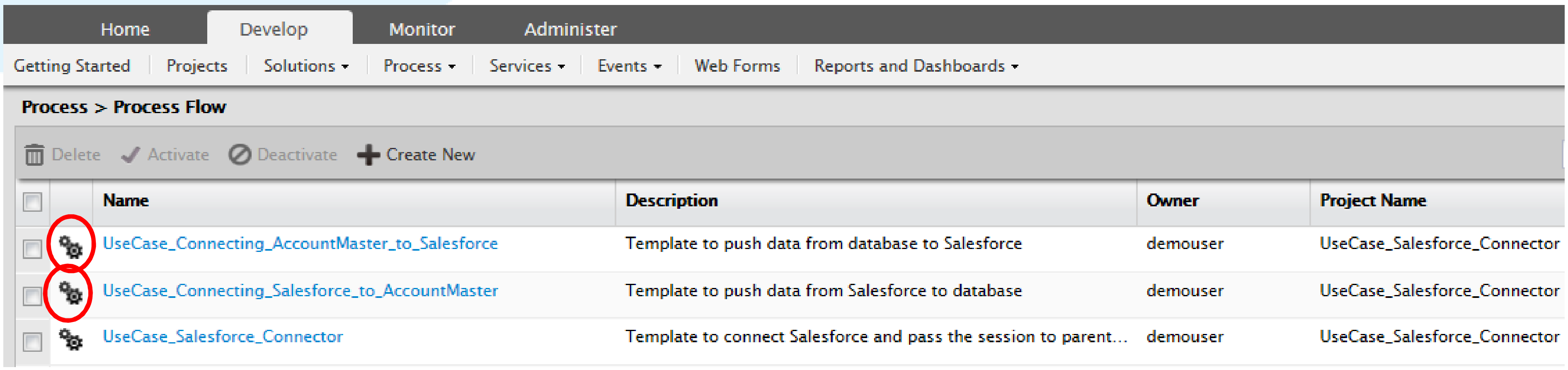
Let’s run the process flow

(login in as demouser/indigo1)

Run-time: Execute the process flows

Execute the process and see the results

- You can execute the process by clicking on the Execute icon next to the process flow name
- If the process flows are bound to an Event then the flows will be triggered automatically
- Refer to Help on how to bind an event to a process flow



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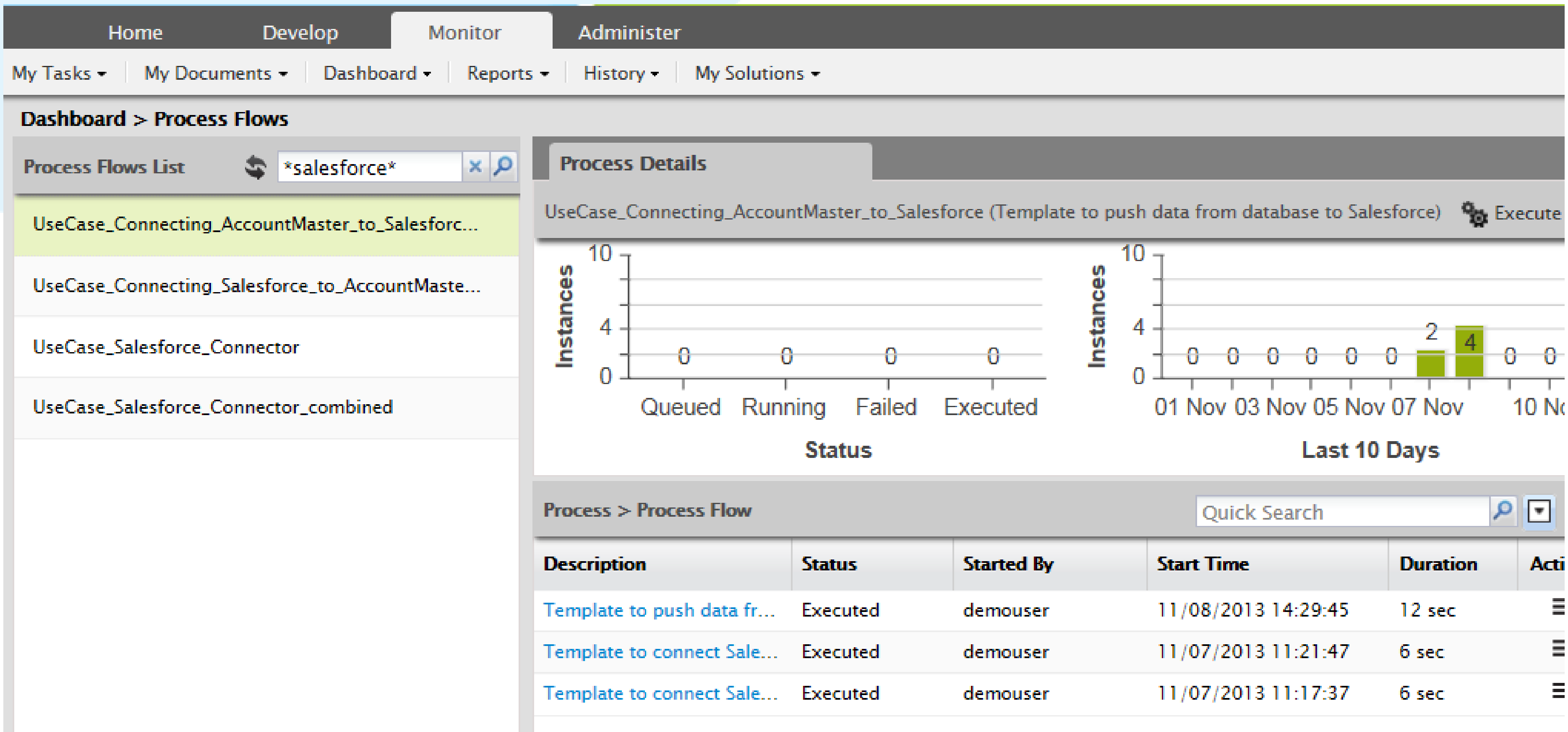
Run-time: Checking the status of the process execution

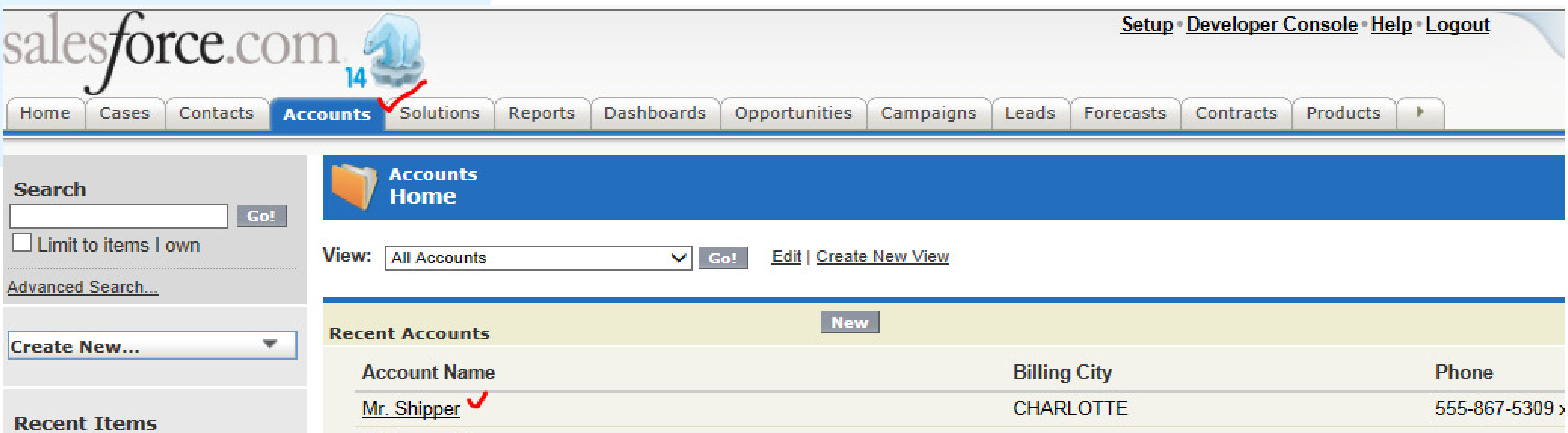
Once a flow is executed click on View Logs or go to Monitor > Dashboard > Process Flow and click on your flow to the right

- View the diagnostics logs by clicking on the link for each instance in the Description column
- To verify data you can go to Salesforce or Database to confirm data changes depending upon the flow direction



Run-time: Viewing the results in Salesforce

Once the flow is executed, depending upon the flow direction you can view the results in Salesforce or in the database.
If the data is pushed from database to Salesforce, then login to your Salesforce account and view the results.
Depending upon the data object being refreshed in Salesforce go to its tab and view new records.
Similarly if the data is being pushed into a database then refresh the table and see the results.



Let's build the process flow

Design methodology

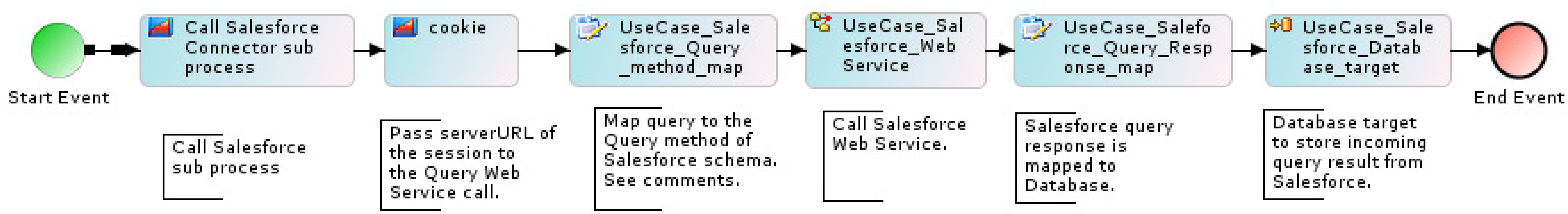
Design → Configure → Deploy

Design	Configure	Deploy
Design a high level process flow	Configure all the activities In the process flow	Attach the process flow to an Event to trigger the process automatically.

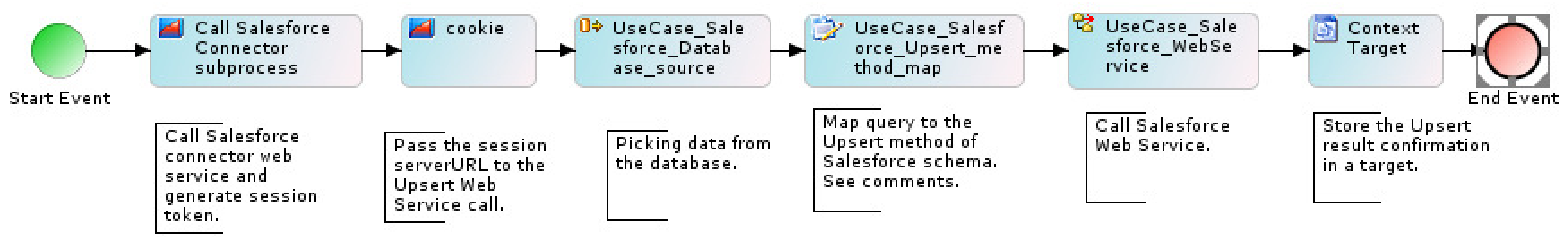
Design: First let's create a Top level design of the solution using the Process Designer

Go to Develop > Process > Process Flow
Create new and in the designer, design a top-level flow by pulling the icons from the palette area.
Refer to the demo and tutorial videos on how to design a process flow.
Each activity performs a discreet function such as connecting to Salesforce, persisting the session and either sending data to Salesforce or receiving data from Salesforce.
To view their design, right click on the names and edit the processes and view these flows in the Process Designer.

SF to DB

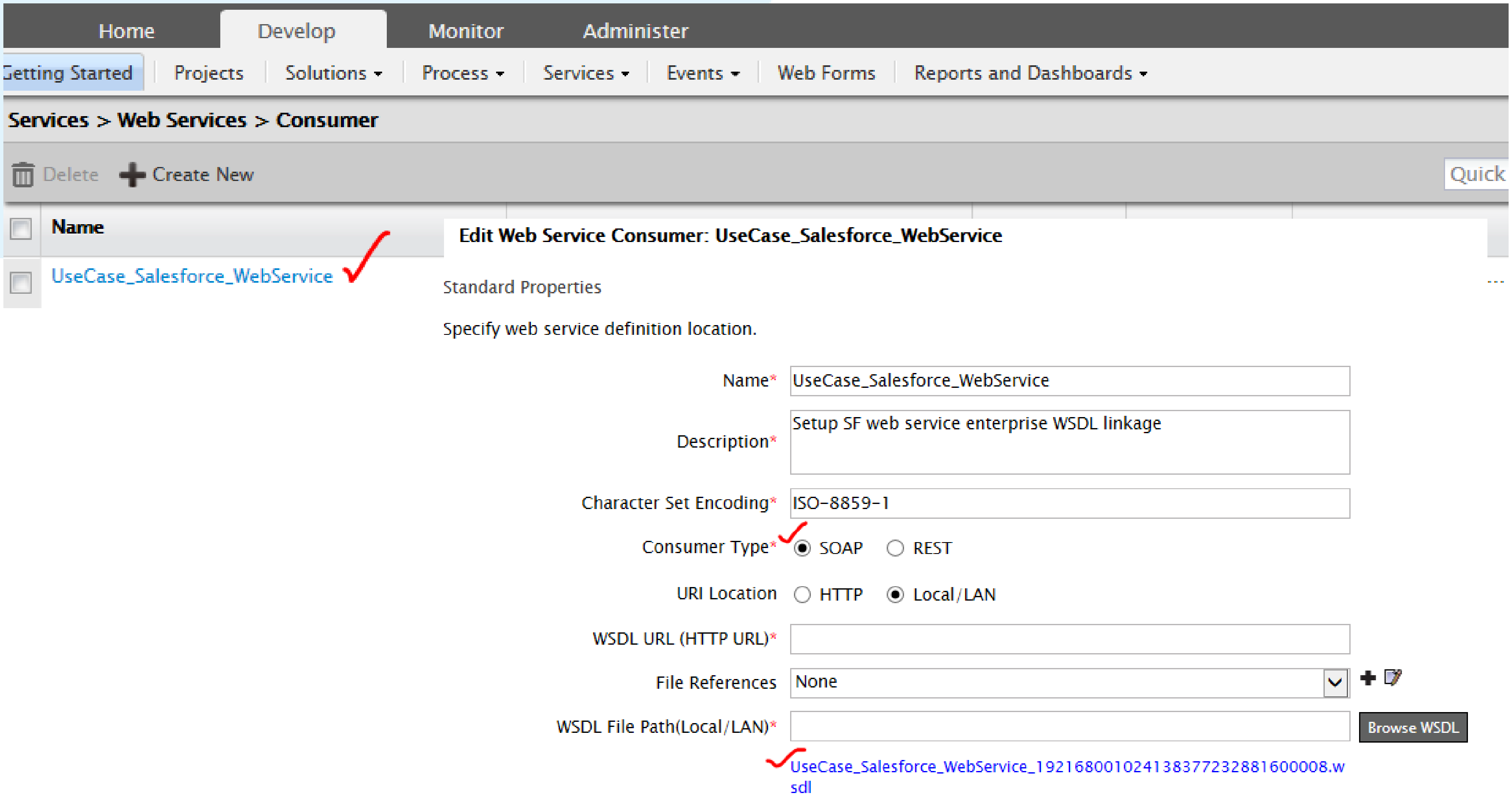


DB to SF



Configure: Salesforce Web Service Consumer activity

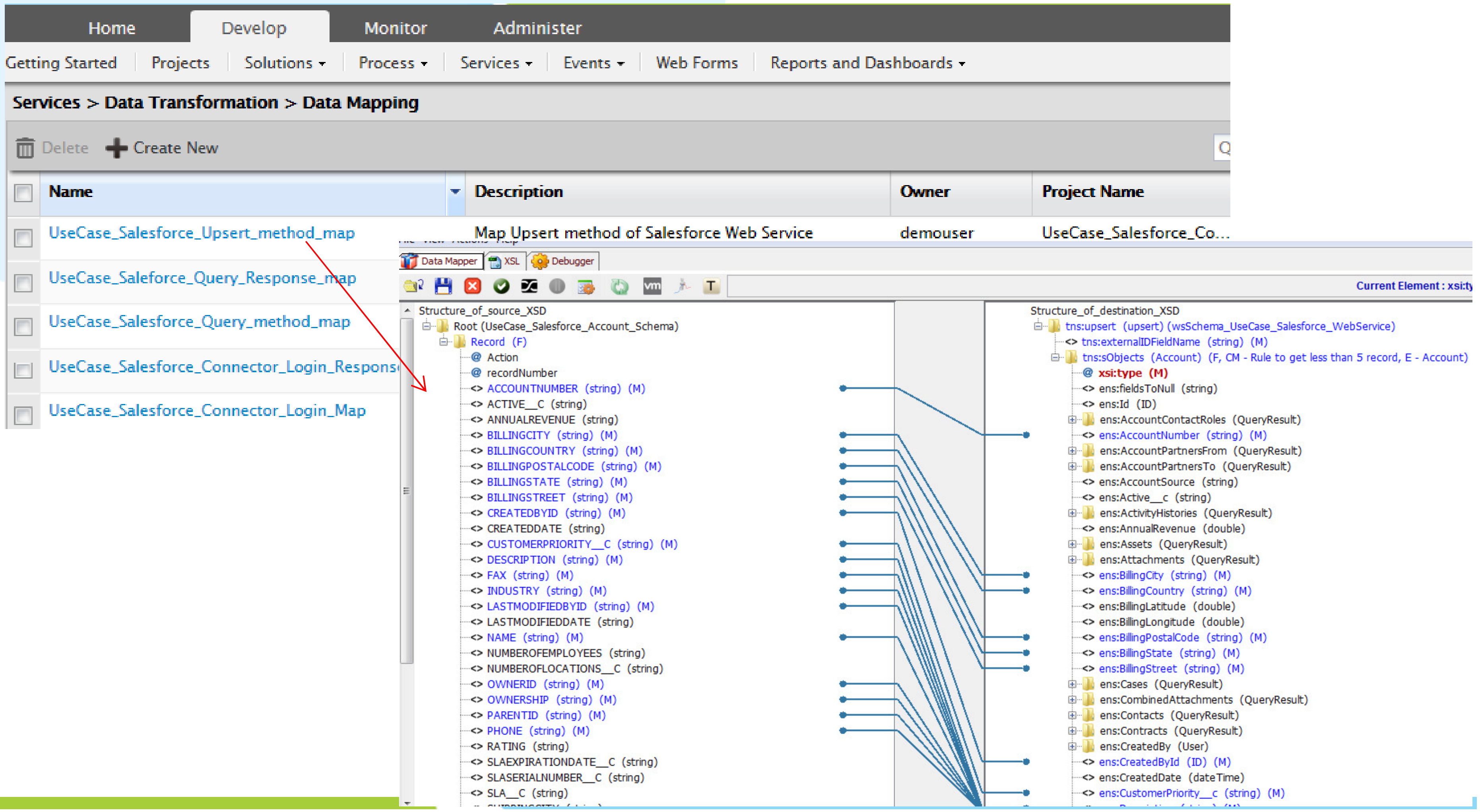
This activity is used in connecting to Salesforce. Go to Develop > Services >Web Services > Consumer
Here we created a consumer activity by uploading enterprise.wsdl file.
In Salesforce you can get the WSDL from Setup > Develop > API



Configure: Mapping to Map Query, Upsert or other Salesforce methods

Go to Develop > Services > Data Transformation > Mapping

Here you will see list of maps related to this use case. Right click, edit and open the mapping to see the conversion rules.

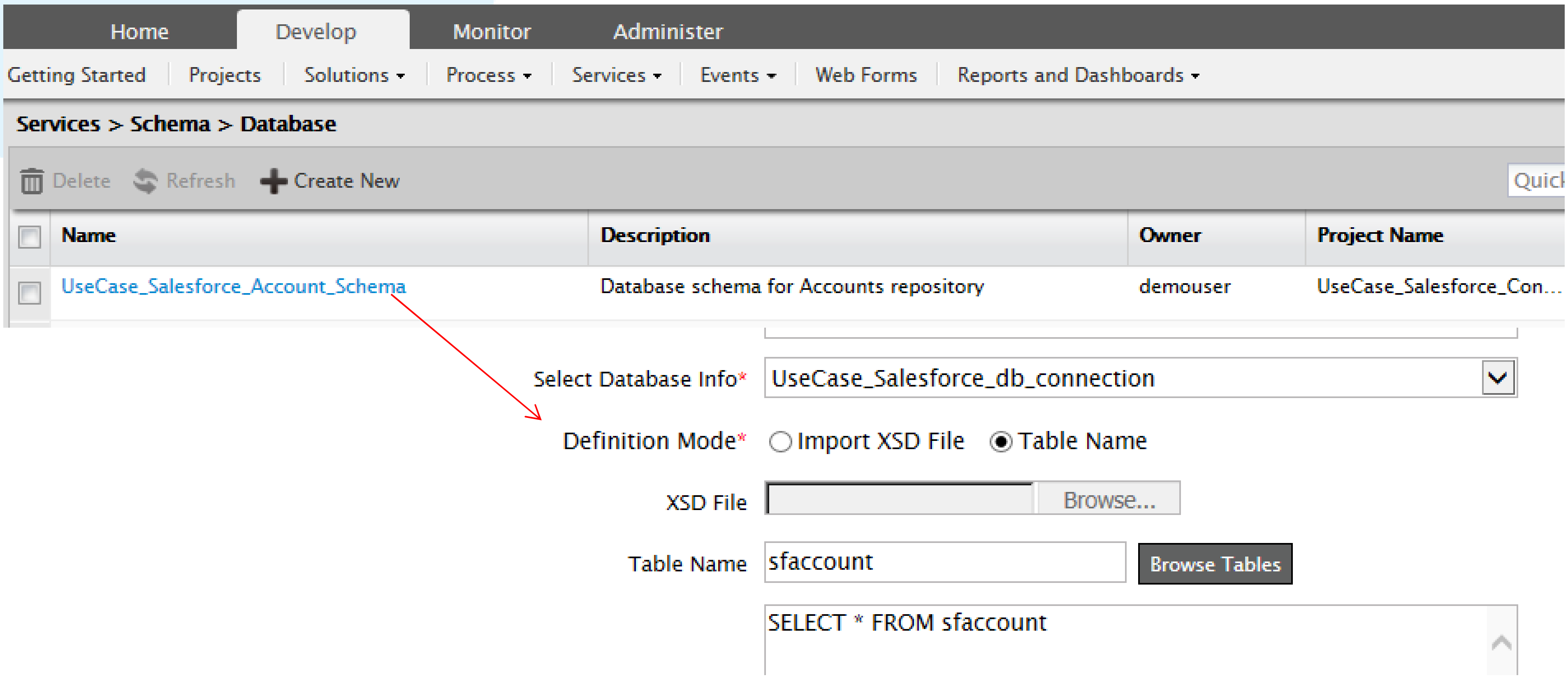


Configure: Schema, Source, and Target activities

For this use case we have created schema for the Account Master database. This can be viewed by going To Develop > Services > Schema. Also refer to the Source and Target for this use case.

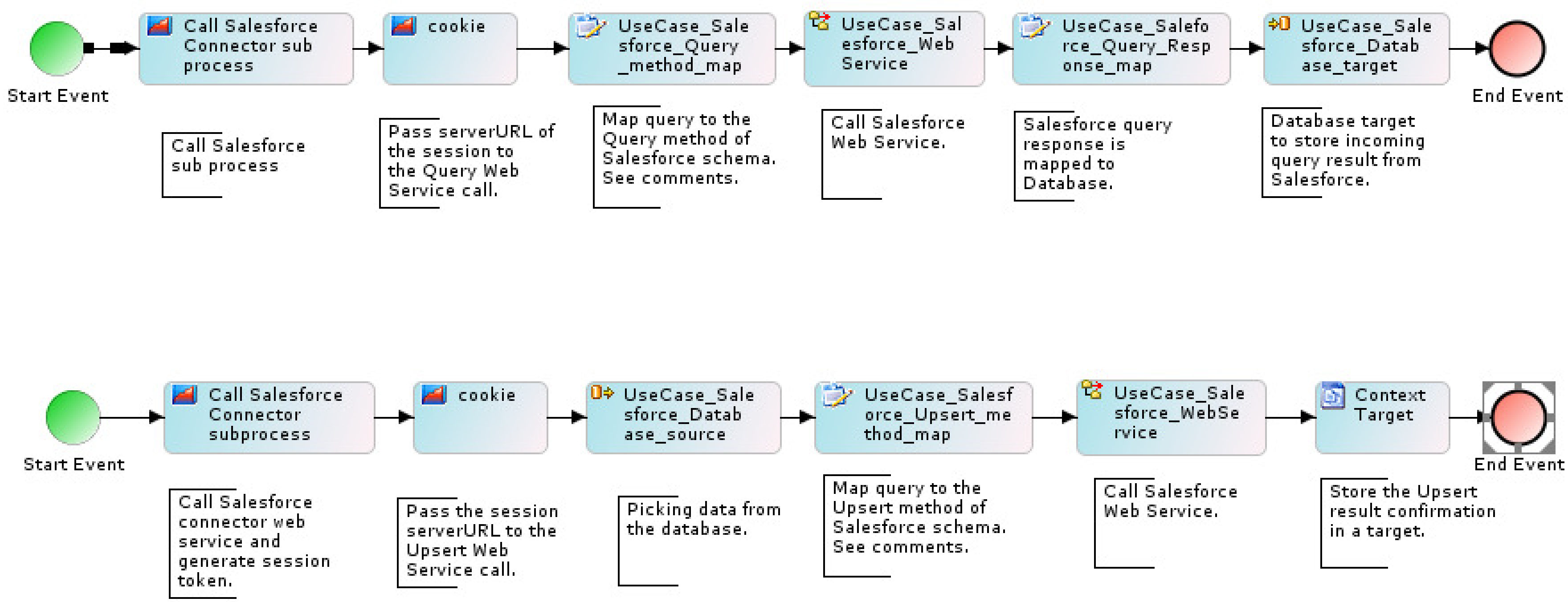
We are using MySql database to pull accounts and push them to Salesforce and vice versa.

Table script is available in the use case description page.



Configure: Process Flow

Each of the activity created in the two flows is then attached to its related step by going to the repository view and selecting the specific activity and attaching it to the step. Each step has annotation that describes what the Activity is going to do at run-time.



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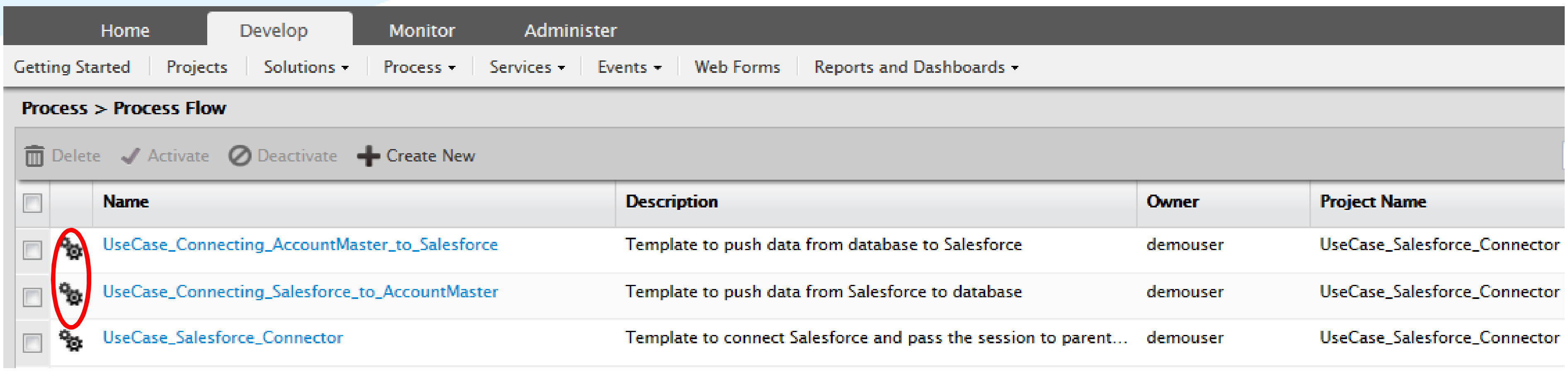
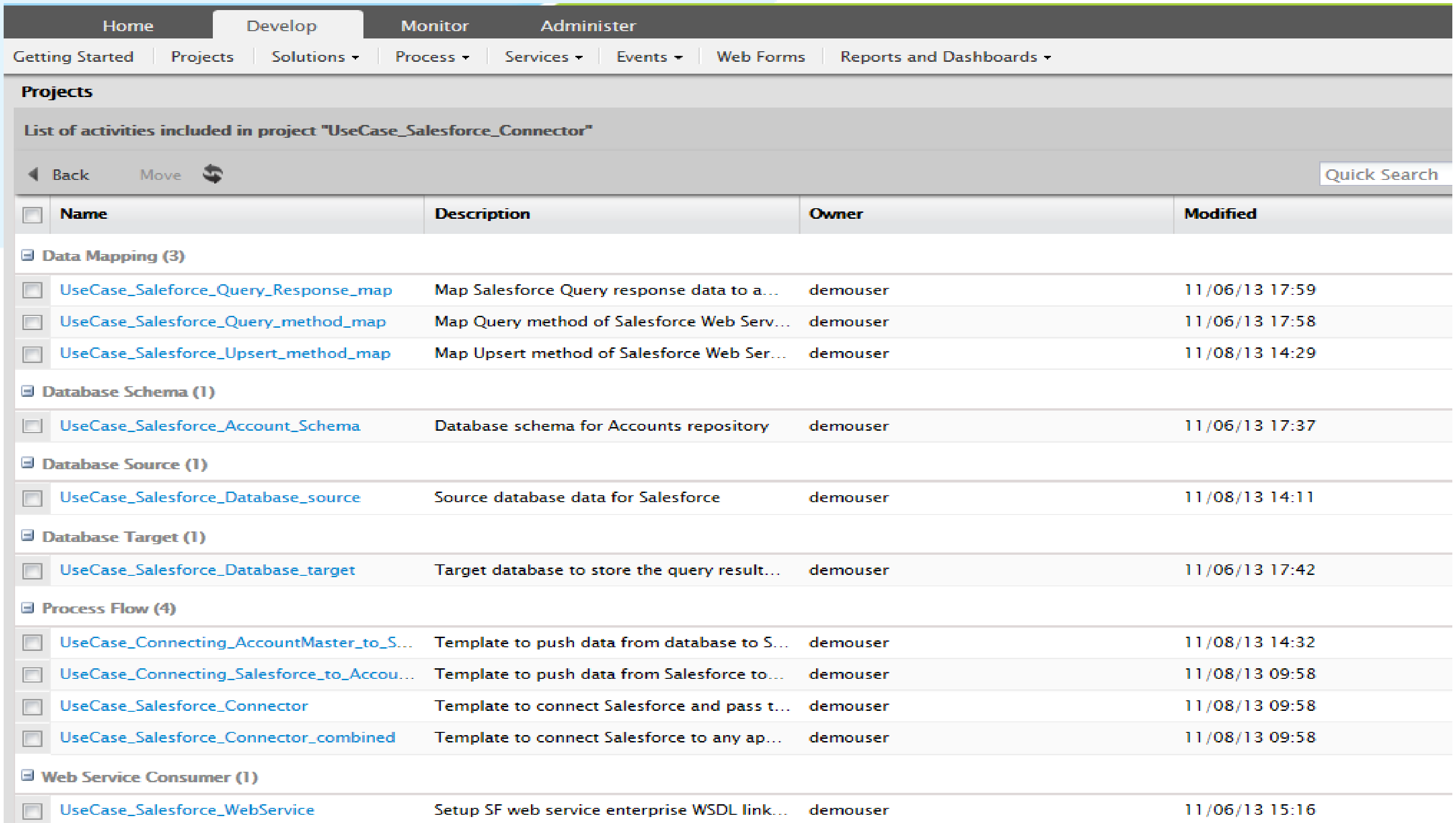
Deploy: Manually execute or attach it to Calendar (batch) Event

You can manually execute the process flows by going to Develop > Process > Process Flow as shown below. You can also right click on the Process Flow names and select 'Bind Event' to attach the flow execution to run automatically.



Managing the activities created for this use case

You can manage and view all the activities of this use case by going to Develop > Projects
Click on the project named "UseCase_Salesforce_Connector" and it will show all the activities configured for this process under its related categories. You can open any category to view its activities.



Home | Develop | Monitor | Administer

Getting Started | Projects | Solutions ▾ | Process ▾ | Services ▾ | Events ▾ | Web Forms | Reports and Dashboards ▾

Projects

List of activities included in project "UseCase_Salesforce_Connector"

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Name	Description	Owner	Modified
Data Mapping (3)			
UseCase_Saleforce_Query_Response_map	Map Salesforce Query response data to a...	demouser	11/06/13 17:59
UseCase_Salesforce_Query_method_map	Map Query method of Salesforce Web Serv...	demouser	11/06/13 17:58
UseCase_Salesforce_Upsert_method_map	Map Upsert method of Salesforce Web Ser...	demouser	11/08/13 14:29
Database Schema (1)			
UseCase_Salesforce_Account_Schema	Database schema for Accounts repository	demouser	11/06/13 17:37
Database Source (1)			
UseCase_Salesforce_Database_source	Source database data for Salesforce	demouser	11/08/13 14:11
Database Target (1)			
UseCase_Salesforce_Database_target	Target database to store the query result...	demouser	11/06/13 17:42
Process Flow (4)			
UseCase_Connecting_AccountMaster_to_S...	Template to push data from database to S...	demouser	11/08/13 14:32
UseCase_Connecting_Salesforce_to_Accou...	Template to push data from Salesforce to...	demouser	11/08/13 09:58
UseCase_Salesforce_Connector	Template to connect Salesforce and pass t...	demouser	11/08/13 09:58
UseCase_Salesforce_Connector_combined	Template to connect Salesforce to any ap...	demouser	11/08/13 09:58
Web Service Consumer (1)			
UseCase_Salesforce_WebService	Setup SF web service enterprise WSDL link...	demouser	11/06/13 15:16

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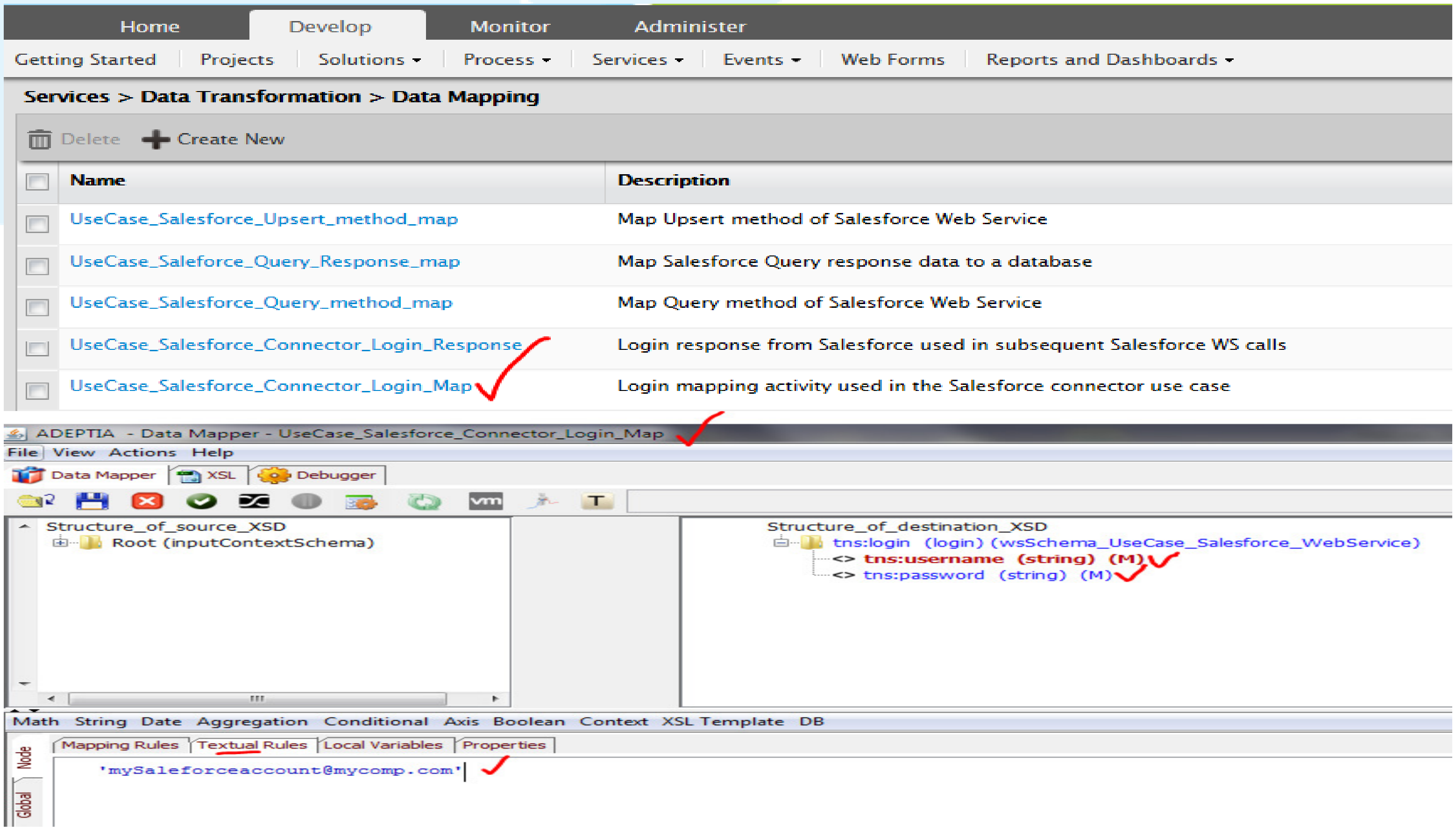
Providing Salesforce login credentials in the Connector flow

In the Salesforce Connector process flow, the very first activity is a Mapping activity that we use to map the Salesforce login credentials to the Login method. These need to be edited for your testing. These can also be passed dynamically. Go to Develop > Services > Data Transformation > Mapping and edit the mapping with your credentials. Note that in the password field you need to merge your password with the Salesforce token such as 'myPasswordXXXX'.



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Thank You!

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