Oracle® Fusion Middleware

Using Salesforce Cloud Adapter Configuration Wizard

12.1.3

E63254-01

May 2015

ORACLE

Oracle Fusion Middleware Using Salesforce Cloud Adapter Configuration Wizard, 12.1.3

E63254-01

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Preface

Using Salesforce Cloud Adapter Configuration Wizard describes the pages of the Adapter Configuration Wizard that you are guided through to configure the Salesforce Cloud adapter.

Topics:

- Audience
- Documentation Accessibility
- Related Resources
- Conventions

Audience

Using Salesforce Cloud Adapter Configuration Wizard is intended for users who want to create, deploy, test, and monitor applications that use the Salesforce Cloud adapter.

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.

Related Resources

For more information, see these Oracle resources:

- *Developing SOA Applications with Oracle SOA Suite*
- *Administering Oracle SOA Suite and Oracle Business Process Management Suite*
- *Administering Oracle Service Bus*
- *Understanding Technology Adapters*

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

Configuring Salesforce Cloud Properties

The Salesforce Cloud adapter enables you to create integrations with a Salesforce Cloud application.

The following sections describe how to configure Salesforce Cloud as a target in an integration. You cannot configure Salesforce Cloud as a source in an integration.

Topic

- Configuring Basic Information Properties
- Configuring Oracle Cloud Adapter Connection and CSF Key Properties
- Configuring Salesforce Target Operations Properties
- Configuring Salesforce Target Headers Properties
- Reviewing Configuration Values on the Summary Page

Configuring Basic Information Properties

You can enter a name and description on the Basic Info page of each source and target in your integration.

Topics

- What You Can Do from the Basic Info Page
- What You See on the Basic Info Page

What You Can Do from the Basic Info Page

You can specify the following values on the source or target Basic Info page. The Basic Info page is the initial wizard page that is displayed whenever you drag a connector to the source or target area.

- Specify a meaningful name.
- Specify a description of the responsibilities.

What You See on the Basic Info Page

The following table describes the key information on the Basic Info page.

Element	Description
What do you want to call your connection?	Provide a meaningful name so that others can understand the connection. For example, if you are creating a source Oracle RightNow

Element	Description
	Cloud connection, you may want to name it `RightNowInboundDirection`). You can include English alphabetic characters, numbers, underscores, and dashes in the name. You cannot include the following: • Blank spaces (for example, My RightNow Connection) • Special characters (for example, #;83& or righ(t)now4) • Multibyte characters
What does this connection do?	Enter an optional description of the connection's responsibilities. For example: `This connection receives an inbound request to synchronize account information with Oracle Sales Cloud.`

Configuring Oracle Cloud Adapter Connection and CSF Key Properties

Enter the Oracle Cloud adapter configuration connectivity and Credential Store Framework (CSF) key values for your integration.

Topics

- What You Can Do from the Oracle Cloud Adapter Connection Page

  What You See on the Oracle Cloud Adapter Connection Page
- What You Can Do from the Oracle Cloud Adapter CSF Key Page
- What You See on the Oracle Cloud Adapter CSF Key Page

What You Can Do from the Oracle Cloud Adapter Connection Page

You can specify the following connection values for the Oracle Cloud adapter.

- Specify the WSDL URL for some adapters. If you are configuring the Oracle Eloqua Cloud adapter, no WSDL is required.
- Specify the security policy.
- Create the authentication key. A key created for one direction (for example, outbound) is also available for selection in the other direction (for example, inbound).

What You See on the Oracle Cloud Adapter Connection Page

The following table describes the key information on the Oracle Cloud adapter Connection page.

Element	Description
WSDL URL	**Note**: This field is not displayed for the Oracle Eloqua Cloud adapter.

Element	Description
	Specify the WSDL. The WSDL is used to build integrations specific to your instance. You can also select the WSDL from a file system or another source by choosing the browser icon next to the **WSDL URL** field. Click **File System** at the top of the dialog, then browse for the WSDL.
Security Policy	Select the security policy appropriate to your environment (for example, **USERNAME_PASSWORD_TOKEN**). • The wizard shows all policies, including those that may not be applicable. To make a correct selection, you must have a knowledge of policies. For example, you cannot select a SAML-based policy because the identity is not propagated. • The policies you apply to the cloud adapter are unique to the cloud adapter and do not impact other endpoints in the composite.
Authentication Key	Select the CSF authentication key. • **Add**: Click to create a new authentication key. You must specify the key name, user name, and password. To successfully deploy and administer your application, you must specify these same values in Oracle Enterprise Manager Fusion Middleware Control. • **Edit**: Click to edit an authentication key. • **Delete**: Click to delete an authentication key.
Test	Click to validate the authentication key.

What You Can Do from the Oracle Cloud Adapter CSF Key Page

You can specify the following CSF key values for the Oracle Cloud adapter.

- CSF key name
- Company name for the Oracle Eloqua Cloud adapter only.
- User name and password

What You See on the Oracle Cloud Adapter CSF Key Page

The following table describes the key information on the Oracle Cloud adapter CSF Key page.

Element	Description
CSF Key Name	Specify the CSF key to enable runtime injection of credentials. The adapter uses the

Element	Description
	CSF to retrieve the username and password required for authentication with the application (for example, the Oracle Sales Cloud or Oracle HCM application). This key identifies your login credentials during design-time. To successfully deploy and administer your application, you must specify these same values in Oracle Enterprise Manager Fusion Middleware Control. For instructions, see the *Oracle Cloud Adapters Postinstallation Configuration Guide*.
Company Name	**Note**: This field is only displayed for the Oracle Eloqua Cloud adapter. Specify the Oracle Eloqua company name.
User Name	Enter the user name for connecting to your application (for example, the Oracle Sales Cloud or Oracle HCM application). Your administrator provides you with user credentials.
Password	Enter the password for connecting to your application.
Re-enter Password	Re-enter the same password a second time.

Configuring Salesforce Cloud Target Operation Properties

Enter the Salesforce Cloud target operation values for your integration.

Topics

- What You Can Do from the Salesforce Target Operations Page
- What You See on the Salesforce Target Operation Page

What You Can Do from the Salesforce Cloud Target Operations Page

You can configure the following target operations values for Salesforce Cloud.

- Select either of the following operation types:
  1. CRUD
  2. Salesforce Object Query Language (SOQL) or Salesforce Object Search Language (SOSL) query
- Select the business objects.
- Specify the SOQL/SOSL query.

What You See on the Salesforce Target Operations Page

The following table describes the key information on the Salesforce Cloud target Operations page.

Element	Description

Select an Operation Type	Select the type of operation to perform:
	• **CORE** : Represents all core operations supported by the Salesforce application.
	• **CRUD**: Represents the create, read, update, delete, or destroy operations to perform on Salesforce business objects. Each letter maps to a standard SQL statement, HTTP method, or DDS operation. Select the CRUD operation to perform: **Create**, **Delete**, **Retrieve**, or **Update**.
	• **MISC**: Represents the set of specialized task operations (such as fetching user information associated with the current session) in the Salesforce application.
	• **SOSL/SOQL**: Select to enter a Salesforce Object Query Language (SOQL) or Salesforce Object Search Language (SOSL) query to send as a request to perform in the Salesforce application. The following operations are available:
	  • **query**: Executes a query against specific criteria and returns data matching that criteria. Only records not deleted from your Salesforce application account are returned.
	  • **queryAll**: Returns the same data as the **query** operation, along with deleted records present in the recycle bin.
	  • **search**: Returns records from the Salesforce application. You can specify binding parameters to dynamically provide a search string as input to your search operation.
	If you select this option, the page is refreshed to display a field for entering an SOQL or SOSL query to send for validation:
	• **Query Statement**: Enter a valid query statement. SOQL statements evaluate to a list of sObjects, a single sObject, or an integer for `count` method queries.
	`“SELECT Id FROM Contact WHERE Name LIKE 'A%' AND`

Element	Description

	`MailingCity = 'California'"`
	
	or
	
	`SELECT COUNT() FROM Contact`
	
	SOSL statements evaluate to a list of sObjects, where each list contains the search results for a particular sObject type. For example:
	
	`"SELECT a.name, a.id, a.accountNumber, c.name from Contact c, c.Account"`
	
	• **Binding Parameters**: Displays any parameters included in the specified query. For example, `orgId` is a parameter in the following query:
	
	`SELECT a.name, a.id, a.accountNumber, c.name from Contact c, c.Account a WHERE a.name = "&orgId"`
	
	This query displays a binding parameters text box in which to enter a test value for `orgId`.
	• **Test My Query**. Click to validate the query against the Salesforce application. Query results are displayed. If errors occur, you receive results about how to correct the query.

Filter By Object Name	Type the initial letters to filter the display of business objects. You can also select a filter type: • **All**: Displays all objects. • **Custom**: Displays objects you created. Custom business objects are appended with "_c." • **Standard**: Business objects delivered as part of the Salesforce application.
Select Business Objects	Select a single or multiple business objects to include in the operation. You can select up to ten objects for one operation.

Configuring Salesforce Cloud Target Header Properties

Enter the Salesforce Cloud target header values for your integration.

Topics

- What You Can Do from the Salesforce Target Headers Page
- What You See on the Salesforce Target Header Page

What You Can Do from the Salesforce Cloud Target Headers Page

You can configure the target header properties for Salesforce Cloud.

What You See on the Salesforce Target Header Page

The following table describes the key information on the Salesforce Cloud target Header page.

The headers available for configuration are based on the operation you selected on the target Operations page. There are two types of headers:

- Request headers are sent with the request message to the Salesforce application.
- Response headers are received with the response message sent from the Salesforce application.

For more information about these header properties, visit www.salesforce.com and specify the specific name of the property in the search utility.

Element	Description
AllOrNoneHeader (request header)	Specifies the transactional behavior for Salesforce application operations. If you set **AllorNone** to **true**, the call to the Salesforce application is committed only if it completes without any errors. Otherwise, it is rolled back. The default behavior is to commit partial records without any error.
AllowFieldTruncationHeader (request header)	Specifies the truncation behavior for the following fields (each are string data types): • `anyType` • `email` • `picklist` • `encryptedstring` • `textarea` • `mulitpicklist` • `phone` • `string` Set **allowFieldTruncation** to one of the following values: • **True**: If you enter a value of 25 characters in a field of 20 characters, the first 20 records are inserted into the field and the transaction is successful.

Element	Description
	• **False**: If you enter a value of 25 characters in a field of 20 characters, an error is thrown and the transaction does not commit.
AssignmentRuleHeader (request header)	Specifies the assignment rule to use when creating or updating an account, case, or lead. The assignment rule can be active or inactive. The ID is retrieved by querying the `AssignmentRule` object. If the ID is specified, you do not need to specify the **useDefaultRule** value. • **assignmentRuleId**: The ID of the assignment rule to use. The ID is not validated by the Salesforce Cloud application, whether or not it exists. Validation occurs during runtime. • **useDefaultRule**: If set to **true**, the default (active) assignment rule is used. If set to **false**, the default (active) assignment rule is not used.

EmailHeader (request header)	Specifies whether or not to send a notification email. You can set the following properties:
	• **triggerAutoResponseEmail**
	  • **true**: Triggers automatic response rules for leads and cases.
	  • **false**: Automatic response rules for leads and cases are not triggered.
	• **triggerOtherEmail**
	  • **true**: The email is triggered outside the organization.
	  • **false**: The email is not triggered outside the organization.
	• **triggerUserEmail**
	  • **true**: The email is triggered and sent to users in the organization. This email is triggered by a number of events such as adding comments to a case or updating a task.
	  • **false**: The email is not triggered and sent to users in the organization.

DebuggingHeader (request header)	Specify the debugging log level. The following log levels are supported: • **NONE** (least verbose) • **DEBUGONLY** • **DB** • **PROFILING** • **CALLOUT** • **DETAIL** (most verbose)

Element	Description
MruHeader (request header)	The Salesforce application shows the most recently used (MRU) items. In API version 7.0 or later, the list is not updated by itself. Use **MruHeader** to update the list. Using this header can negatively impact performance. Set **updateMru** to one of the following values: • **true**: The list of MRU items is updated in the Salesforce application. • **false**: The list of most recently used items is not updated in the Salesforce application.
PackageVersionHeader (request header)	Specifies the package version for any installed package. The package version identifies the components in a package. The package version follows the format `majorNumber.minorNumber.patchNumber` (for example, `3.4.5`, where `3` refers to `majorNumber`, `4` refers to `minorNumber`, and `5` refers to `patchNumber`) .
QueryOptions (request header)	Specifies the batch size for queries. The default value is `500`, the minimum value is `200`, and the maximum value is `2000`.
DebuggingInfo (response header)	This information is only returned if the **debugLevel** request header is sent with the request payload to the Salesforce application.
LimitInfoHeader (response header)	Provides information about the limitations of API calls on a per-day basis for the organization. • **current**: The number of calls already used in the organization. • **Limit**: The organization's limit for the specified limit type. • **Type**: The limit information type specified in the header `API REQUESTS` (contains limit information about API calls for the organization).

Reviewing Configuration Values on the Summary Page

You can review the specified source or target connector configuration values on the Summary page.

Topics

- What You Can Do from the Summary Page

- What You See on the Summary Page

What You Can Do from the Summary Page

You can review source or target configuration details from the Summary page. The Summary page is the final wizard page for each connection after you have completed your configuration.

- View the configuration details you defined for the source or target. For example, if you have defined an inbound Oracle RightNow Cloud source with a request business object and immediate response business object, specific details about this configuration are displayed on the Summary page.
- Click **Done** if you want to save your configuration details.
- Click a specific tab in the left panel to update your configuration definitions.

What You See on the Summary Page

The following table describes the key information on the Summary page.

Element	Description
Summary	Displays a summary of the source or target configuration values you defined on previous pages of the wizard. To return to a previous page to update any values, click the appropriate tab in the left panel.