





# Integrate Salesforce with Boomi





### **Integrate Salesforce with Boomi**

In this document, we are going to see how to integrate Salesforce with Boomi.

#### What is Salesforce?

Salesforce is a cloud computing service as a software (SaaS) company that specializes in customer relationship management (CRM)

Here we will see how to create a new account in the salesforce by using Dell Boomi

#### Steps to establish connectivity between SalesForce and Dell Boomi.

#### Step 1:-

Navigate to the salesforce portal using the URL <u>https://login.salesforce.com/?locale=eu</u>. If you have already Salesforce login details use those details for login otherwise you need to sign up for Salesforce.

sales	sforce	
Username		
Lo	g In	
Remember me		
Forgot Your Password?	Use Custom Domain	
Not a customer?	Try for Free	

#### Step 2:-

Once we log into Salesforce we need to generate a security token which we will use as a password.

• If you have a regular Salesforce account go to setup>My personal Information > Reset security Token.

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- If you have a salesforce developer account from the home page, go to Manage Users>Users>Click your name > Change Password > Reset Security Token.
- We will receive a security token in the mail.

			All	▼ Q Search		_	? ‡	
0 0 0 0 0 0 0 0 0	Sales Console	Accounts	~	🛡 Reset My Security T 🗸 🗙				
	External Systems Change My Password Connections Grant Account Login Acc	cess	Reset	t My Security Token				
	Language & Time Zone Login History		Check You	r Email			Help for thi	s Page 😢
•	Personal Information Reset My Security Token		We se	ent a new security token to the email addre	ss for your account, 📫 👘 weiee			
	Security Central							

#### Step 3:-

Now, log onto the Boomi platform (<u>https://platform.boomi.com/</u>) with the required credentials i.e. Email Address and Password.

← → C ♠ platform.boomi.com		-	
<b>boomi</b> Welcome! Sign in to AtomSph	nere	-	
Email Address (required)			
Password (required)	Show		
Sign In	<u>.</u>	2	
<u>Reset your password.</u> Don't have an account? <u>Sign up for a free trial.</u>			

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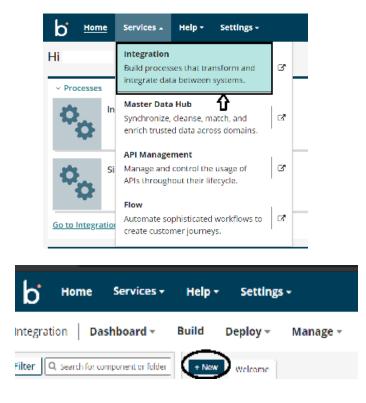




**Step 4**: Once, you have logged into the Boomi platform, you will be able to view the Home page.

b 🐖	Services -	Help 🕶	Settings <del>-</del>	
li.	•			
~ Processe	5			
•				Ф <mark>ф</mark>
•				Ф <mark>ф</mark>
<u>Go to Integr</u>	ation <u>Create a N</u>	ew Process		
~ Models				
80		el, deploy, a		naster data. To get started, create a repository on a Hub Cloud. reating a repository ♂

**Step 5:** Now, click on Services followed by Integration. You will see the Build page. Click on New.

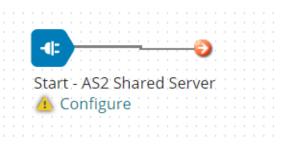


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**Step 5:** Once, click on New, you will be able to create a process. You see that the process gets created with a start shape which is configured with AS2 Shared Server by default.



Step 6: Click on the start shape and select no data in Type. Select save.

and the second	s the main shape that begins the process flow. It is automatically added to each it cannot be removed.
Process Mode	General
Туре	Connector Trading Partner Data Passthrough No Data Select this option if this process should not receive ar retrieve data front my source, in other words, the process will be scheduled and run similar to hold to any other source of a backeduler. The process will generate a single empty document.

Step 7: Drag the salesforce connector into process canvas & change the action to send.

have one "get" connector	• Shape () ed to get data into and send data out of a process. Most processe and one or more "send" connectors. The Connector shape uses d connection and operation components to establish where and	a
General Paramet	ers	
Display Name		
Connector (i)	Salesforce	•
Action	Send	•
Connection (i)	Q Choose	•
Operation (1)	Q Choose	•
OK Cancel		

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#### **Step 8:** Click on '+' to create new connection for salesforce

Connector	Shape 🕖
have one "get" connector a	d to get data into and send data out of a process. Most processes and one or more "send" connectors. The Connector shape uses a I connection and operation components to establish where and how
General Paramete	rs
Display Name	
Connector (1)	Salesforce 🔻
Action	Send 🔻
Connection $(i)$	Q Choose O
Operation (i)	Q Choose O
OK Cancel	

Step 9:- To set up a connection we need to follow the below steps.

- URL:-By default we will see the sales force URL in the connection.
- Username:- The Salesforce team will create a user for the integrations(Booomi) team. We will use the same in place of the user name.

The user must have sufficient permissions to use the API and perform the necessary actions required by your integration scenario.

- Password:- Password will be a combination of password and token which we received through the mail. We are going to append a password and token.
- Steps to Generate Token:-
  - Log into Salesforce via the browser to request your security token.
  - Do one of the following:

If you have a regular Salesforce account, go to Setup > My Personal Information > Reset Security Token.

If you have a Salesforce developer account, from the home page, go to

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Manage Users > Users > click your name > Change password > Reset Security Token.

• This triggers an email which contains your security token.

https://login.salesforce.com/services/Soap/u/39.0
com
<encrypted></encrypted>
Version 15.0 - Current
10

**Step 10:** Click on "+" to create new operation

Connector	Shape 🛈
have one "get" connector	d to get data into and send data out of a process. Most processes and one or more "send" connectors. The Connector shape uses a d connection and operation components to establish where and how
General Paramete	ers
Display Name	
Connector (i)	Salesforce 🔻
Action	Send 🔻
Connection $(i)$	Q Salesforce Connection
Operation (1)	Q Choose
OK Cancel	

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#### Step 11: Click on the import button to import the required object.

New Salesforce Connector Operation - Salesforce Operation (1) E Folder Add Description

Options Archiving Tracking	Caching	Import
Connector Action	Send T	
Object	None	
Action		
Request Profile	Choose Q 🖉 O	
Return Application Error Responses		
Batch Count	200	

#### Step 12:- We need to choose the connection to import objects.

New Salesforce Connector	Operation - Sa	lesforce Operation 🛈 🛛 🖿 Fol	der 🖋 Add Description	
Options Archiving Tracking	Salesforce Import	Wizard		
Connector Action Object Action Request Profile Return Application Error Response Batch Count	Connection Bulk API version	Salesforce Connection		
	Cancel	Back	Next	_

**Step 13:-** After selecting the connection click on the next. If you are using bulk API then select the required version otherwise keep it as none.

racking	Salesforce Import \	Wizard	
	Connection	Salesforce Connection	۹/٥
	Bulk API	None 🔻 🚯	
	version		
esponse			
	Cancel B	ack	Next

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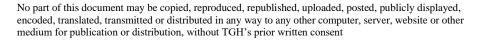
**Step 14:-** Choose the object, which you want to import. In this exercise, we are going to work on accounts object and action will be created. Click on the next.

New Salesforce Connector Operation - Salesforce Operation 🕖 🖀 Folder 🖉 Add Description						
Options Archiving Tracking	Salesforce Imp	oort Wizard				
Connector Action	Object Type	Account	•			
Object	Action	Create				
Action						
Request Profile						
Return Application Error Response						
Batch Count						
	Cancel	Back		Next		

Step 15:- Now you will see all the fields under that object. click on next.

esforce Connector	Operation - Salesforce Operation (i) <b>Eolder</b> Add Description
Archiving Tracking	Salesforce Import Wizard
r Action	G 🗸 Account
	AccountContactRoles      AccountPartnersFrom
	AccountPartnersTo
Profile	👻 Shares
oplication Error Response	Assets      AssociatedLocations
unt	🐨 📄 Attachments
	Cases     RecordAssociatedGroups
	🖲 💑 🗌 Contacts
	ContentDocumentLinks
	Cancel Back Next

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Options Archiving Tracking	<sup>8</sup> Salesforce Import Wizard		
Connector Action	Operation Loaded		
Dbject	Object Type	Account	
	Object Action	create	
ction	Request Profile	SF_Account_CREATE_Request	
equest Profile			
eturn Application Error Response	e		
Batch Count			
aten count			
	Cancel Back		Finish

Step 16: With this our object is ready to import and then we need to click on finish.

**Step 17**: We can see the object name and request profile which we are going to use in map shape. Save and close the operation.

Options Archiving Tracking	Caching	
Connector Action	Send 🔻	
Object	Account	
Action	create	
Request Profile	SF_Account_CREATE_Request 2	Q / O
Return Application Error Responses	6	
Bulk API version	None	
Batch Count	200	
Create Options		
🗣 Account	Reference Fields	
	V Parentid	
	😻 Ownerld	
	DandbCompanyld	
	OperatingHoursId	

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Step 18: Now Drag the map shape onto the process canvas and click on the '+' symbol.

	nap 🚱	Shape 🕖
		ansform data from one format to another, or more specifically, from inother. The Map shape references a predefined Map component.
	Display Name	
-63	Мар	Q Choose O
ate		
	ок с	Cancel

Step 11:- Name the map as "Salesforce Create Account Map"

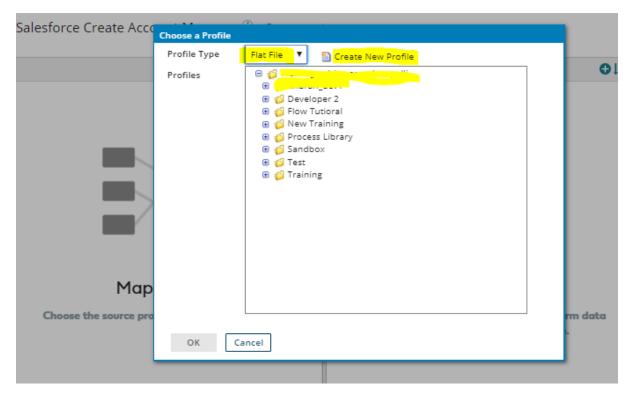
Salesforce Create Account Map - Map (1) Ecolder Add Description				
Choose	Functions	Choose		
Map Source Choose the source profile for your map to begin.	Map Functions Add one or more map functions to transform data between its source and destination.	Map Destination Choose the destination profile for your map.		
Save Save and Close Close				

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**Step 12:** Click on the choose on the left side of the map, select profile type as Flat file and click on Create new profile.



**Step 13:** Now we need to create Flat file elements. Click on the elements to create multiple child elements and select "Add multiple Elements".

New Flat File Profile - Flat File Profile 🕖 🗎 🔤	lder 🕜 Add Description
Data Elements Options	
😑 💽 🔻 Record	
E Flements Add Element Add Multiple Elements	

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**Step 14:** For now we are going to give limited data to create an account in the sales force with 7 elements. Give the value and click on the OK.

New Flat File Profile - Flat File Profile (	Ender Add Description
Data Elements Options	
B ▼ Record	
	How Many?
	How many elements would you like to add?
	OK Cancel

Step 15: Rename the profile as "Salesforce FF profile"

Salesforce FF profile - Flat File Profile 🛈	Folder	Add Description
Data Elements Options		
😑 🛐 🔻 Record		
⊟ ▼ Elements		
📦 🔻 New Flat File Element		
👽 🔻 New Flat File Element		
🐨 🔻 New Flat File Element		
📦 🔻 New Flat File Element		
📦 🔻 New Flat File Element		
💿 🔻 New Flat File Element		
💓 🔻 New Flat File Element		
Save Save and Close Close		

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Step 16: Create the profile with below elements. And click on save and close.

Data Elements Options		
<ul> <li></li></ul>	Element Det Set properties for the se	
ShippingPostalCode	Data Name	Description
ShippingCountry	Position (1)	7
🜍 🔻 Phone	Mandatory (i)	
Description	Enforce Unique i	
	Field Size Options	
	Field Length Validation	
	Min Length	0
	Max Length	0
	Data Format Option	s
	Data Type	Character 🔻

**Step 17:** Now we need to select the destination profile in the map. Click on the Choose button on the right side of the map.

Salesforce Create Account Map - Map (	i) 🖿 <u>Folder</u> 🖉	Add Description		Import
Salesforce FF profile	Choose	Functions	O₩	Choose
Filter Q, Search for field				
😑 🛐 🔻 Record				
😑 🔄 🔻 Elements				
🎯 🔻 Name				
👽 🔻 ShippingCity				
💗 🔻 ShippingState				
🗑 🔻 ShippingPostalCode				
👽 🔻 ShippingCountry				
📦 🔻 Phone				
😻 🔻 Description				
		Map F	unctions	Map Destination
			nctions to transform data ce and destination.	Choose the destination profile for your map.
Save Save and Close Close		-		

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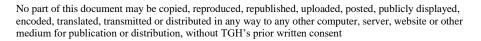
**Step 18:** Choose the profile type as XML and select the create incident request profile, which we imported from service now then Click ok.

ate Acco	Choose a Profile		
	Profile Type	XML 🔻 🛅 Create New Profile	
ile	Profiles	😑 🦸 Tanining anish and a subscription	<
field		n 1	
		R SF_Account_CREATE_Request	
		R SF_Account_CREATE_Request 2	
		SF_CustomBrand_QUERY_Response     G	
lity		🗑 💋 Flow Tutioral	
tate		🕀 🧔 MDM	
ostalCode		<ul> <li>         G New Training G Process Library         </li> </ul>	
ountry		🕀 🤪 Test	
		<sup>(1)</sup> <sup></sup>	
n		🔀 🃁 Web Services POC	
			rm date
	OK Ca	ncel	
	_		

**Step 19:** Now do the one-to-one mappings for all seven source fields to respective fields in the destination.

esforce FF profile		SF Account CREATE Request 2	
	Choose Functions		Cho
er Q, Search for field		Filter Q, Search for field	
S ▼ Record		Billing	state 🔻 🍞
Elements		BillingPostal	lode 🔻 🎯
Vame		BillingCou	intry 🔻 🍯
ShippingCity		BillingLati	cude 🔻 🥡
ShippingState		BillingLongi	
ShippingPostalCode		BillingGeocodeAccu	racy 🔻 🍞
ShippingCountry		ShippingS	treet 🔻 🗑
💡 🔻 Phone			gCity 🔻 🌒
		Shipping	
		ShippingPostal	
		ShippingCou	
		ShippingLati	
		ShippingLong	
		ShippingGeocodeAccu	
			-
			ione 🔻 🌒
			Fax 🔻 🌒
		AccountNur	-
		We	osite 🔻 🌹

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**Step 20:** We have placed the message shape after the start shape and have added some static values to it which will serve as an input to the Salesforce request profile elements.

PMESSAGE Shape (F) The Message shape generates a free-flow text message from a dynamic or static set of input parameters. Documents that are sent to a Message shape are transformed, and the documents that come out have the format of the message.			
Display Name	[		
Option	Combine documents into a single message (i)		
Message	John,Manhattan,10005,USA,9752672787,New Account		
Variables	o ≠ ⊗ ∓ ≛		
	{1} Example variable		

**Step 21:** Now map the Start Shape=>Message Shape=>Map=>Salesforce connector>Stop Shape.

Salesforce Integration - Process 🕖 📁 Folder 🕜 Add Description			
Options Extensions Add Note	Show Navigation Arrange		
Q mes O			
Results PMessage			
Lumesse TalentLink — Partner Connector	▶ <u> </u>		
	Start - No Data Message Salesforce Create Accouncil Start - No Data Message Salesforce Create Accouncil Salesforce Connection		
	New Salesforce Connector Operation		

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**Step 22:** Deploying the Interface to create an account in Salesforce was completed and now we are going to test the process. Click on the test which was seen in the top right corner of the process build.

Salesforce Integration - Process (i) 🛛 🖿 Folder 🖌 Add Description				Create Packaged Component				
Optic	ns Extensions	Add Note	Show Navigation	Arrange				
Q Shapes								
		D	•	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	•			
Connect		Start - No Dat	a Message	Salesforce Create Account Map	Salesforce End a Salesforce Connection New Salesforce Connector Operation	nd continue		

Step 23: Select the atom where we going to test the interface. And click on the Run Test

+ New	Test	ile X SF_Account_CREATE_Request X
Sales	Test Atom Cloud	Create Packaged Component Test
Option	Test Extensions	
Q Shapes	Run Test Cancel	
Recute Execute		
Logic		
Connect	Start - No Data Message Salesforce Create Account Salesforce End and continue Map Salesforce Connection	
	New Salesforce Connector Operation	

Step 24: We can see the response from the salesforce.

Document Viewer			s
<pre>cloceunts</pre>		+	
Formatted view is on. Formatted view may hide some data for easier reading.           Download Original Document           Close Document Viewer			
	<ul> <li>Account&gt;         <ul> <li><id>&lt;0012w00000MdhyYAAR</id> <li><success>true</success> <li> </li> </li></li></ul> </li> <li></li> <li><!--</th--><th><ul> <li>Account&gt;         <ul> <li><id>&lt;0012w00000MdhyYAR</id> <li><success>true</success> <li>&lt;</li> <li><success>true</success> <li></li> </li></li></li></ul> </li> <li><a a="" href="mailto:&lt;/a&gt;         &lt;ul&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li></a></li></a></li></a></li></a></li></a></li></a></li></a></li></ul></th><th><ul> <li>Account&gt;</li> <li><id>&lt;0012w00000MdhyYAAR</id></li> <li><success>true</success></li> <li></li> </ul></th></li></ul>	<ul> <li>Account&gt;         <ul> <li><id>&lt;0012w00000MdhyYAR</id> <li><success>true</success> <li>&lt;</li> <li><success>true</success> <li></li> </li></li></li></ul> </li> <li><a a="" href="mailto:&lt;/a&gt;         &lt;ul&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> <li><a a="" href="mailto:&lt;/a&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li> <li><a a="" href="mailto:&lt;/a&gt;             &lt;/li&gt;             &lt;li&gt;&lt;a href=" mailto:<=""> </a></li></a></li></a></li></a></li></a></li></a></li></a></li></a></li></ul>	<ul> <li>Account&gt;</li> <li><id>&lt;0012w00000MdhyYAAR</id></li> <li><success>true</success></li> <li></li> </ul>

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**Step 25:** Now open the salesforce portal and navigate to the Accounts then you will see the new account details.

Sales Console Accounts	All ▼     Q     Search Accounts and more       ∨     Im John     ∨ ×	
John A Follow New Contact New Case Type Phone (975) 267-2787 Website Account Owner Contact Account Site Industry	Activity     Chatter     Details       Account Owner     Image: Constraint of the second s	News       Rating       Phone       (975) 267-2787       Fax       Website       Itcker Symbol       Ownership       Employees       SIC Code       Shipping Address       Manhattan, 10005 NY       USA

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At TGH, we specialize in driving digital transformation through seamless Integration Technologies.

Operating as an INTEGRATION FACTORY, we serve as a one-stop shop for all your integration needs. Our expert team is well-versed in enterprise software and legacy system integration, along with leading iPaaS technologies like Boomi, MuleSoft, Workato, OIC, and more.

We're committed to enhancing business processes and solving problems through our integration expertise.



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