Integrate Salesforce
with Boomi

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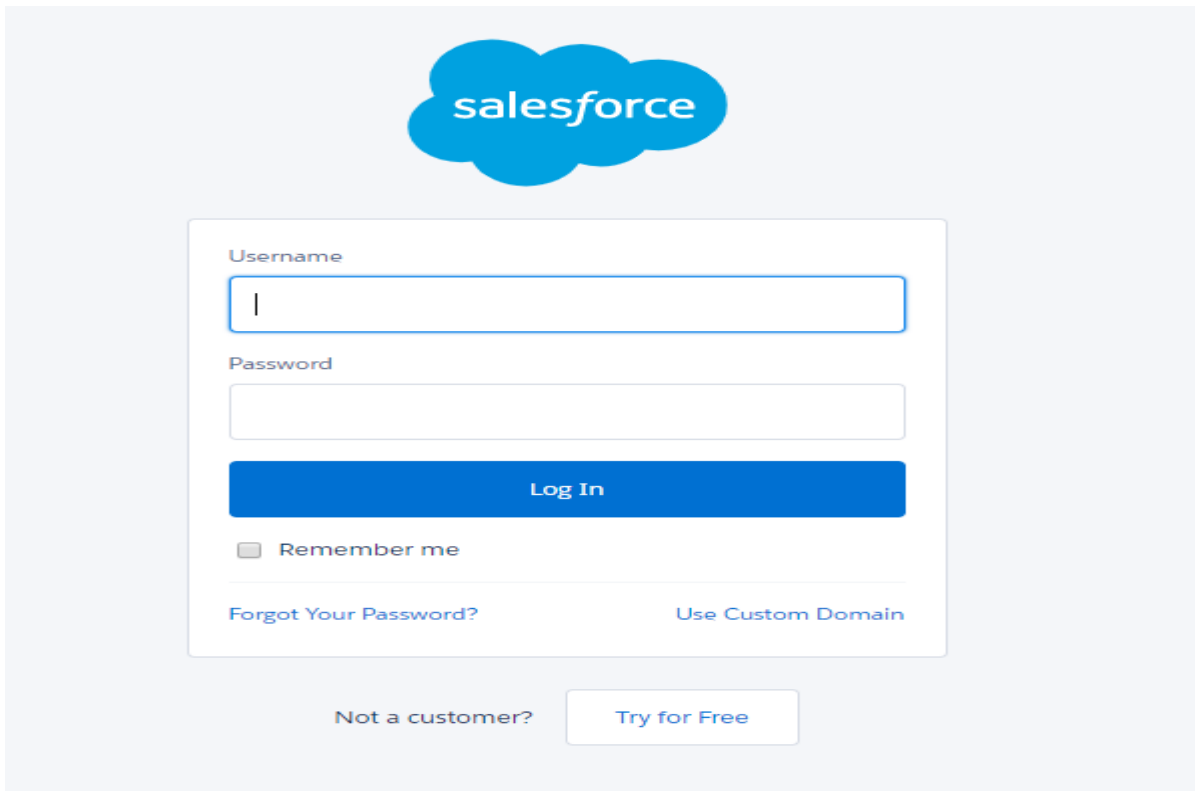
What is Salesforce?

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 https://login.salesforce.com/?locale=eu. If you have already Salesforce login details use those details for login otherwise you need to sign up for Salesforce.
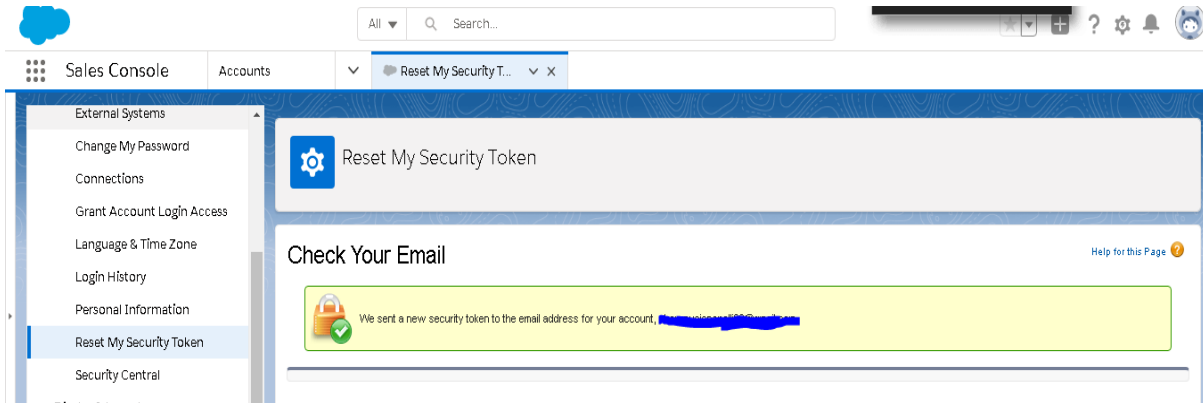

Step 2:-

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

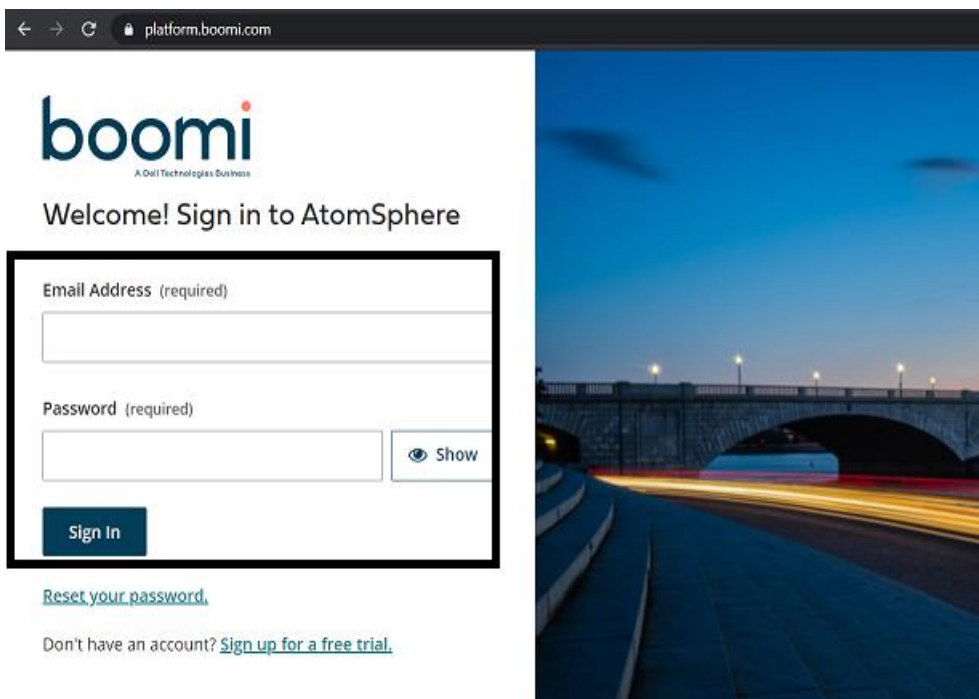- If you have a regular Salesforce account go to setup>My personal Information > Reset security Token.

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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.
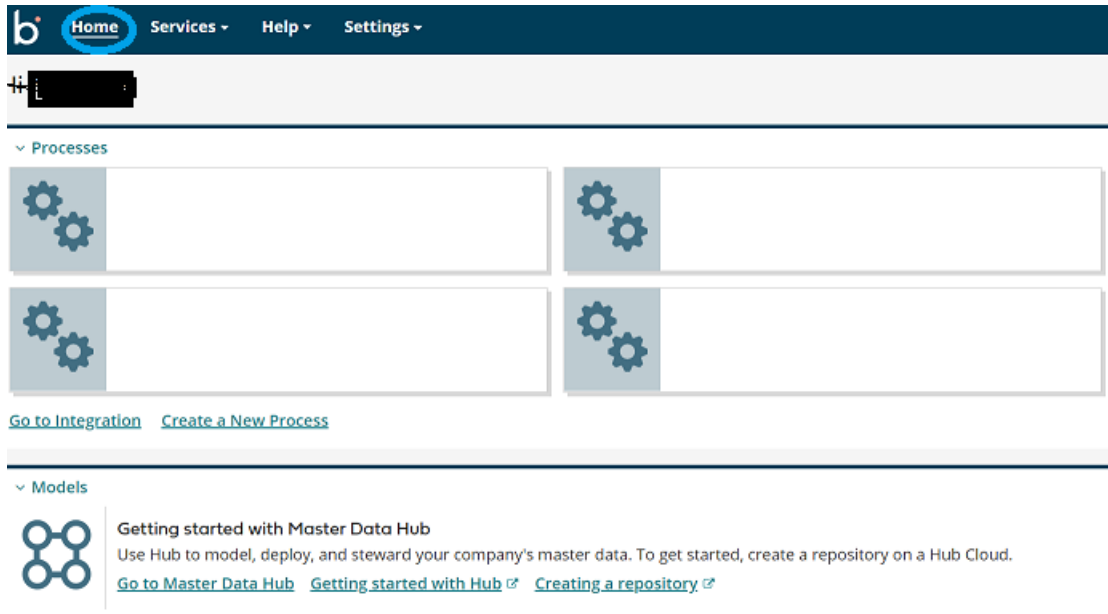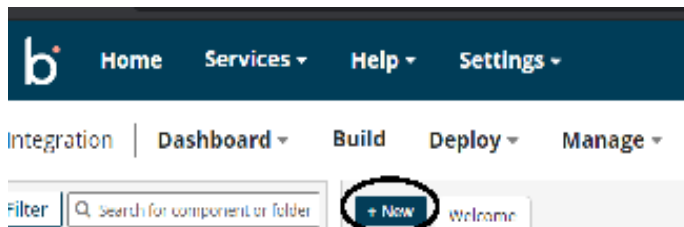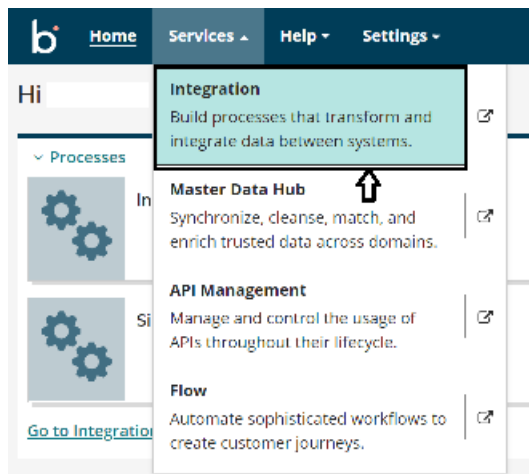- We will receive a security token in the mail.

Step 3:-

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

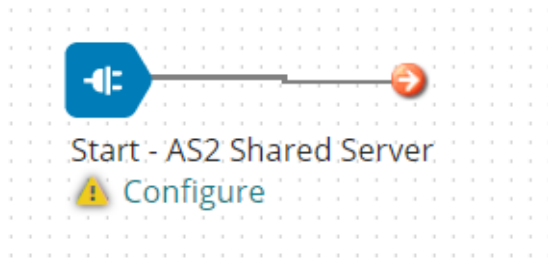**Step 4**: Once, you have logged into the Boomi platform, you will be able to view the Home page.
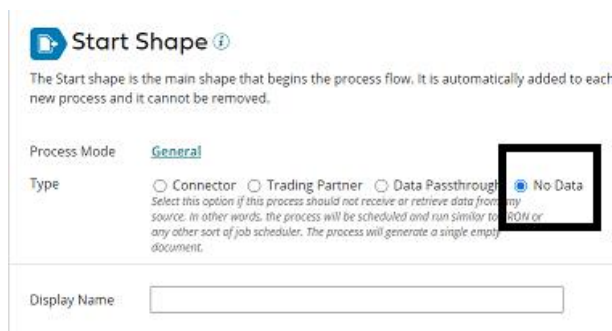

Step 5: Now, click on Services followed by Integration. You will see the Build page. Click on New.
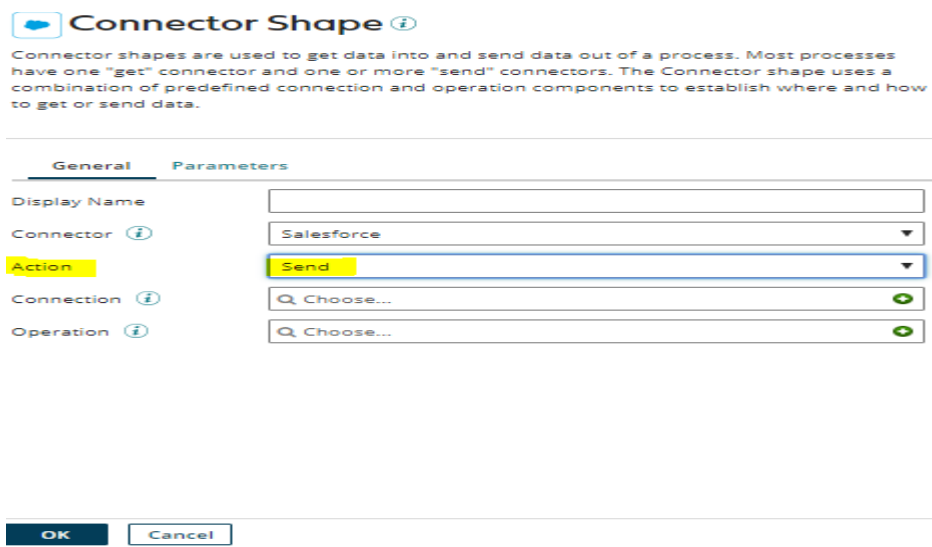
Step 5: Once, click on New, you will be able to create a process. You see that the process gets created with a start shape which is configured with AS2 Shared Server by default.

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

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

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

🔵 Connector Shape ⓘ

Connector shapes are used to get data into and send data out of a process. Most processes have one "get" connector and one or more "send" connectors. The Connector shape uses a combination of predefined connection and operation components to establish where and how to get or send data.

General   Parameters

Display Name	
Connector ⓘ	Salesforce ▼
Action	Send ▼
Connection ⓘ	🔍 Choose... ⊕
Operation ⓘ	🔍 Choose... ⊕

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

> Manage Users > Users > click your name > Change password > Reset Security Token.
> - This triggers an email which contains your security token.

Salesforce Connection - Salesforce ⓘ 📁 Folder ✏ Add Description

Connection

URL	https://login.salesforce.com/services/Soap/u/39.0
User Name	_____.com
Password	\<Encrypted\>
Version	Version 15.0 - Current ▼
Maximum Concurrent Connections	10

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

☁ Connector Shape ⓘ

Connector shapes are used to get data into and send data out of a process. Most processes have one "get" connector and one or more "send" connectors. The Connector shape uses a combination of predefined connection and operation components to establish where and how to get or send data.

General   **Parameters**

Display Name	
Connector ⓘ	Salesforce ▼
Action	Send ▼
Connection ⓘ	🔍 Salesforce Connection ✏ ⊗
Operation ⓘ	🔍 Choose... ●

OK   **Cancel**

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

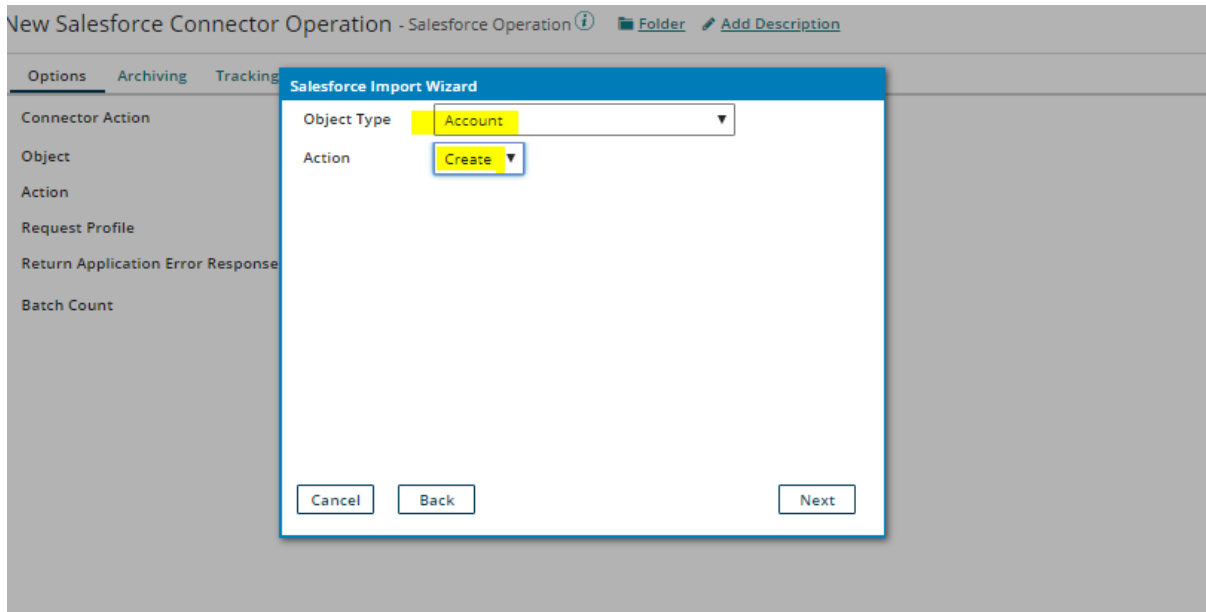**Step 12:-** We need to choose the connection to import objects.

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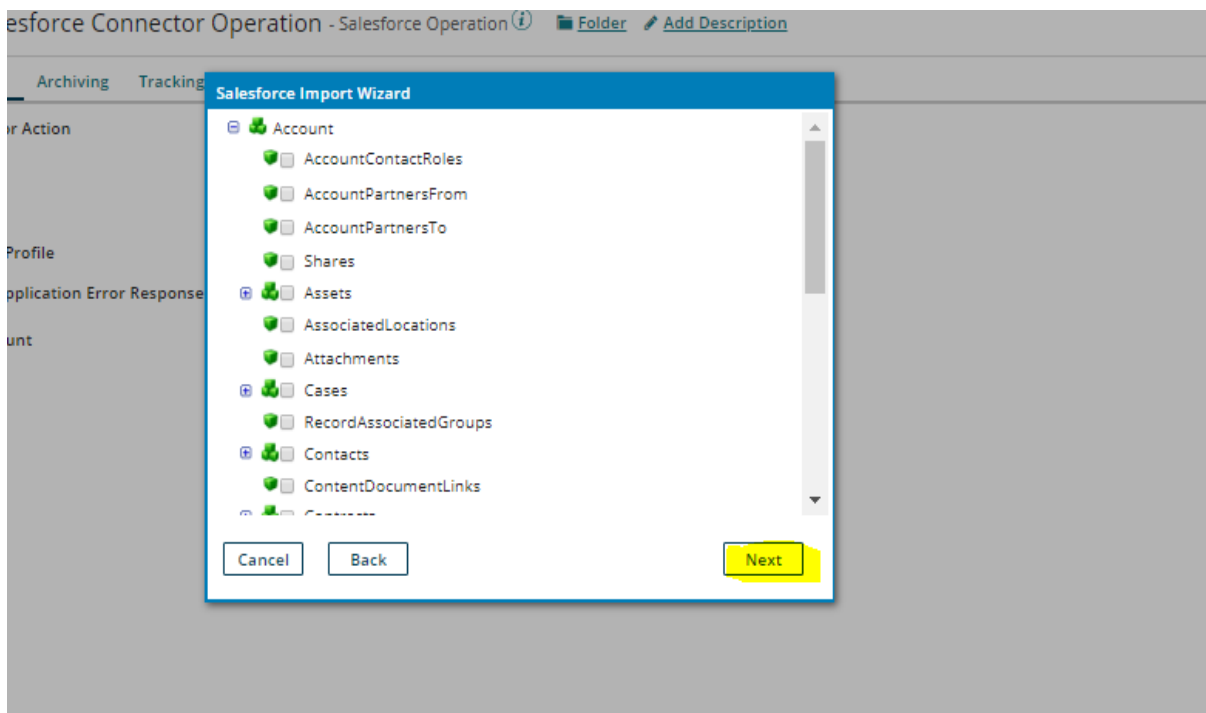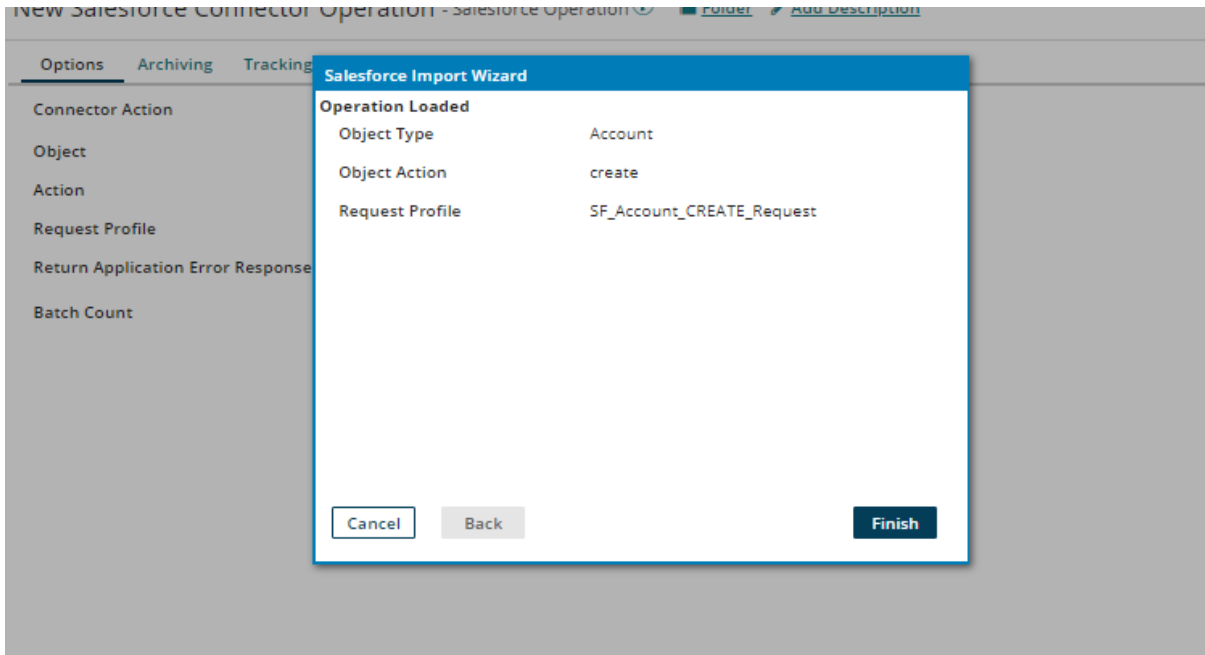
Step 14:- Choose the object, which you want to import. In this exercise, we are going to work on accounts object and action will be created. Click on the next.
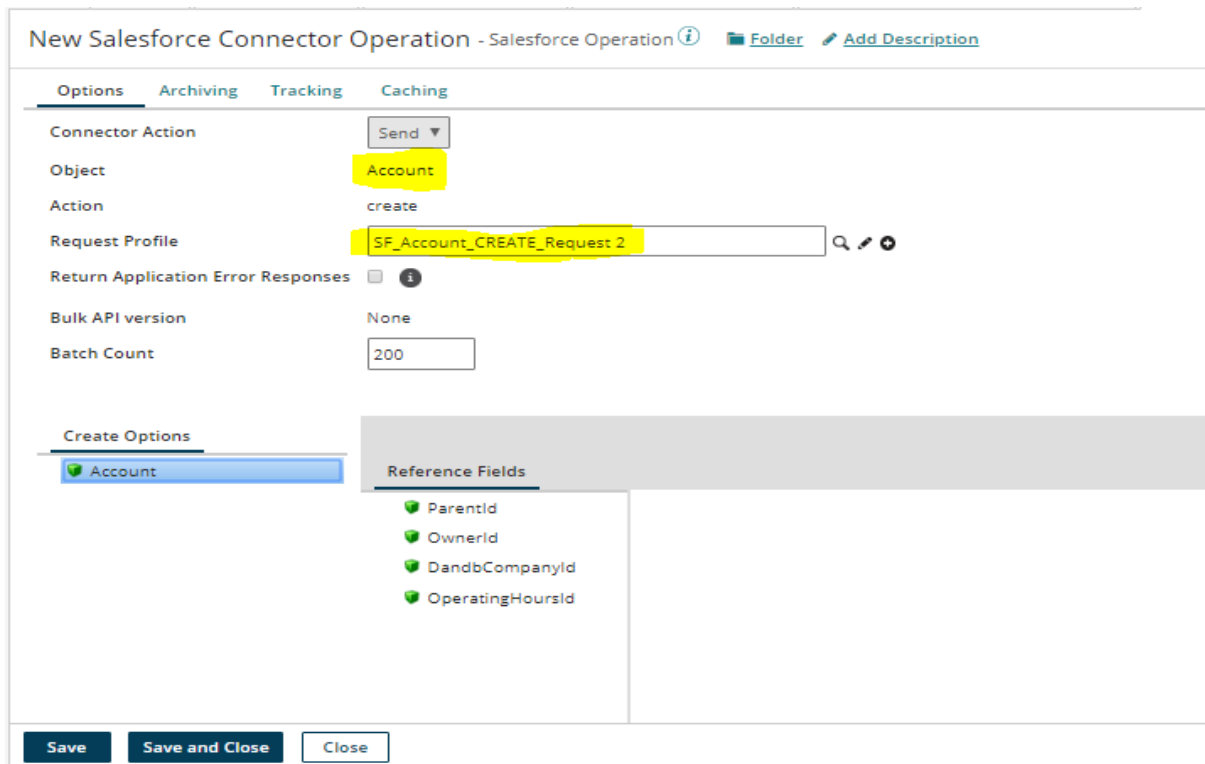

Step 15:- Now you will see all the fields under that object. click on next.
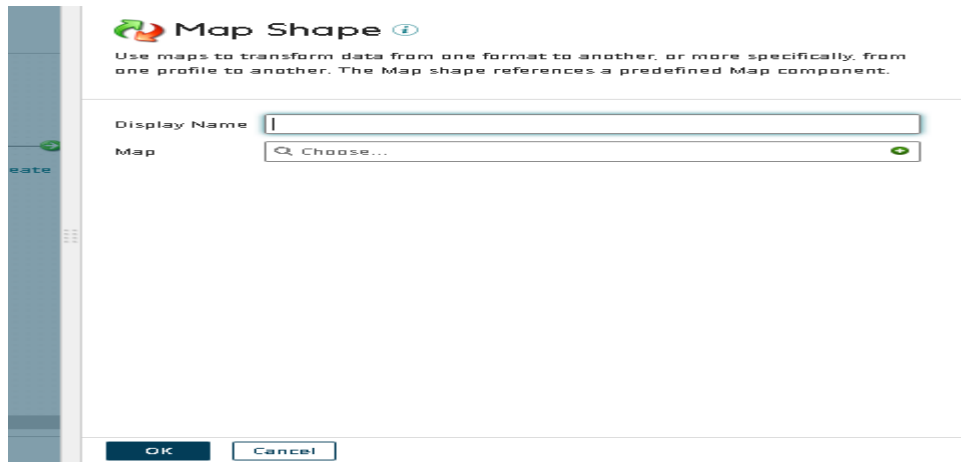
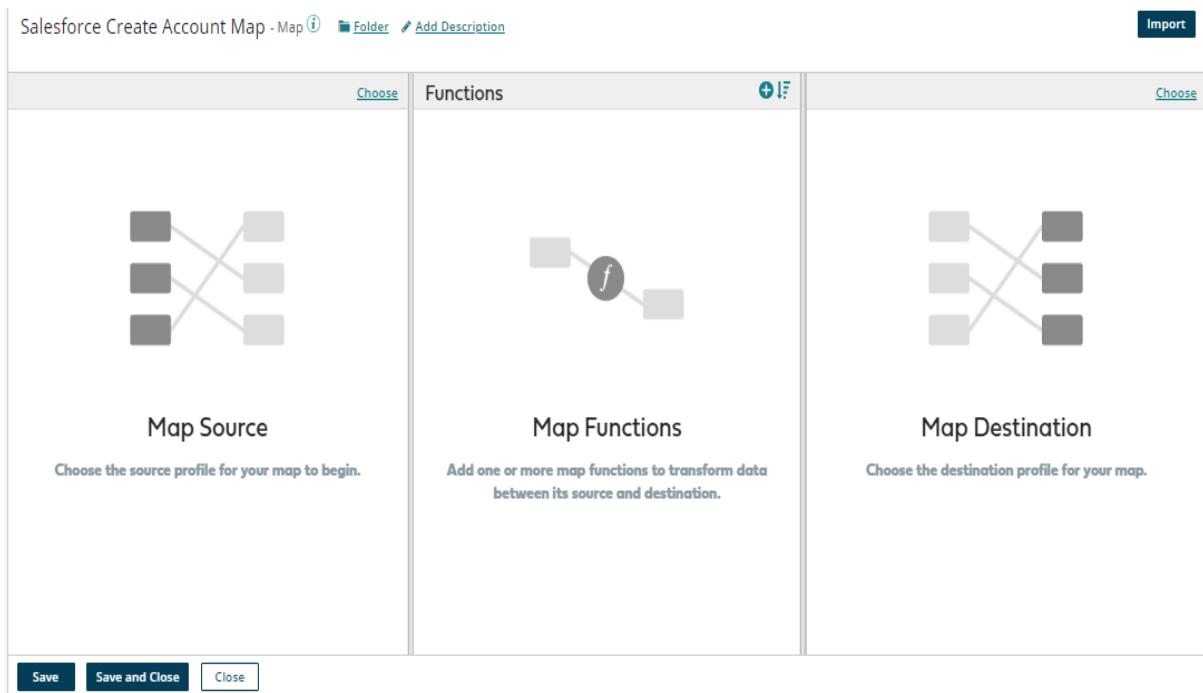**Step 16**: With this our object is ready to import and then we need to click on finish.

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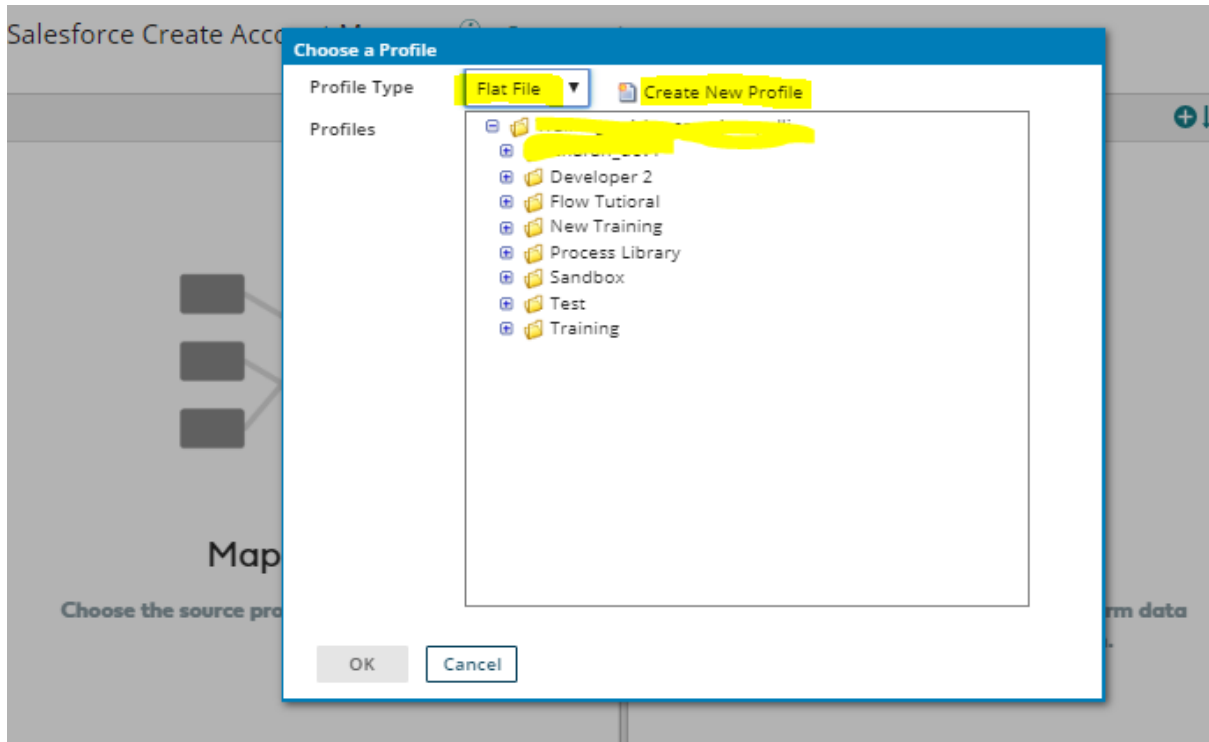
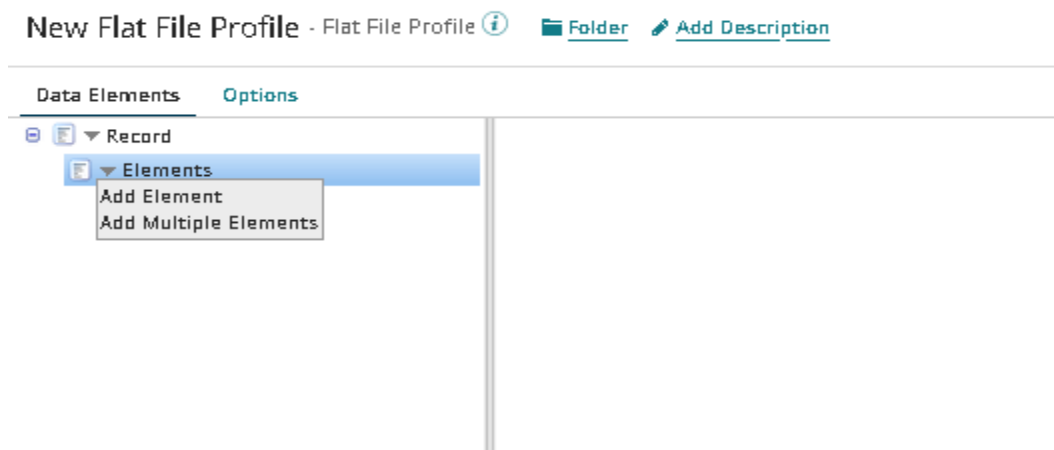**Step 18:** Now Drag the map shape onto the process canvas and click on the '+' symbol.

Step 11:- Name the map as "Salesforce Create Account Map"
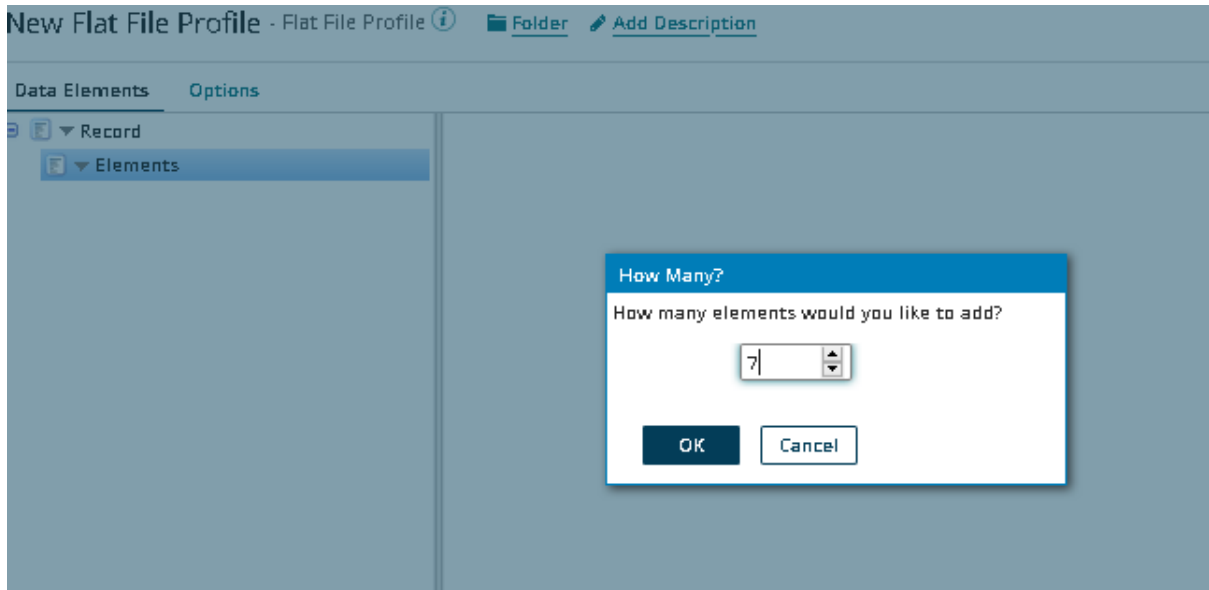
Step 12: Click on the choose on the left side of the map, select profile type as Flat file and click on Create new profile.
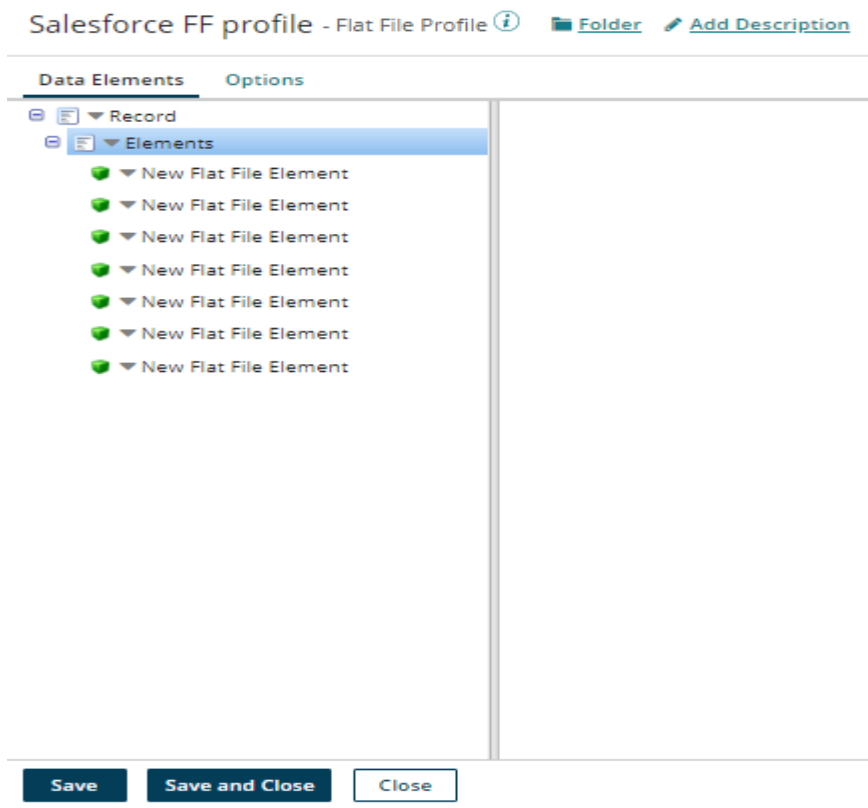

Step 13: Now we need to create Flat file elements. Click on the elements to create multiple child elements and select "Add multiple Elements".

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.

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

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

Salesforce FF profile - Flat File Profile ⓘ   📁 Folder   ✏️ Add Description

Data Elements   Options

- ⊟ ▾ Record
  - ⊟ ▾ Elements
    - 🟢 ▾ Name
    - 🟢 ▾ ShippingCity
    - 🟢 ▾ ShippingState
    - 🟢 ▾ ShippingPostalCode
    - 🟢 ▾ ShippingCountry
    - 🟢 ▾ Phone
    - 🟢 ▾ Description

Element Details

Set properties for the selected element.

Data Name ⓘ	Description
Position ⓘ	7
Mandatory ⓘ	☐
Enforce Unique ⓘ	☐

Field Size Options

Field Length Validation	☐
Min Length	0
Max Length	0

Data Format Options

Data Type	Character ▾ ⓘ

Save   **Save and Close**   Close   Previous Save on ~~_____~~   Revert

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 ⓘ   📁 Folder   ✏️ Add Description   [Import]

Salesforce FF profile   Choose

Filter   🔍 Search for field

- ⊟ ▾ Record
  - ⊟ ▾ Elements
    - 🟢 ▾ Name
    - 🟢 ▾ ShippingCity
    - 🟢 ▾ ShippingState
    - 🟢 ▾ ShippingPostalCode
    - 🟢 ▾ ShippingCountry
    - 🟢 ▾ Phone
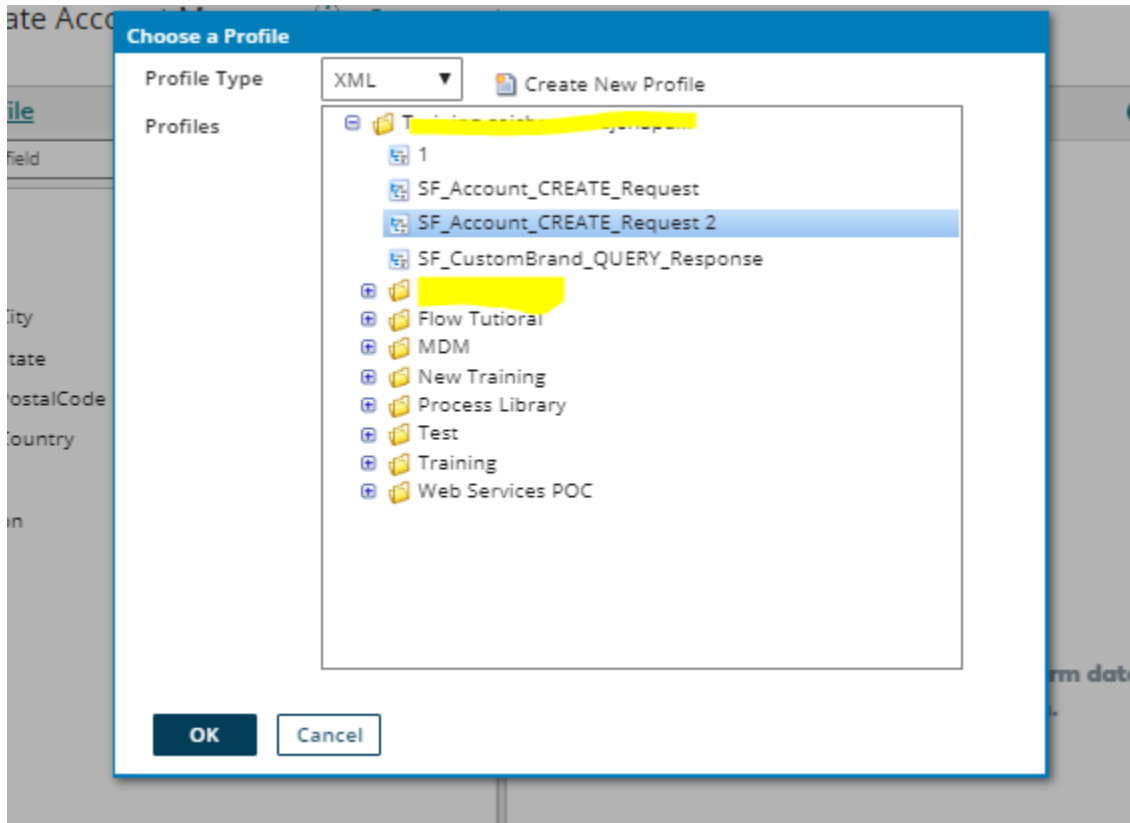   - 🟢 ▾ Description

Functions   ⊕ ☰

Map Functions

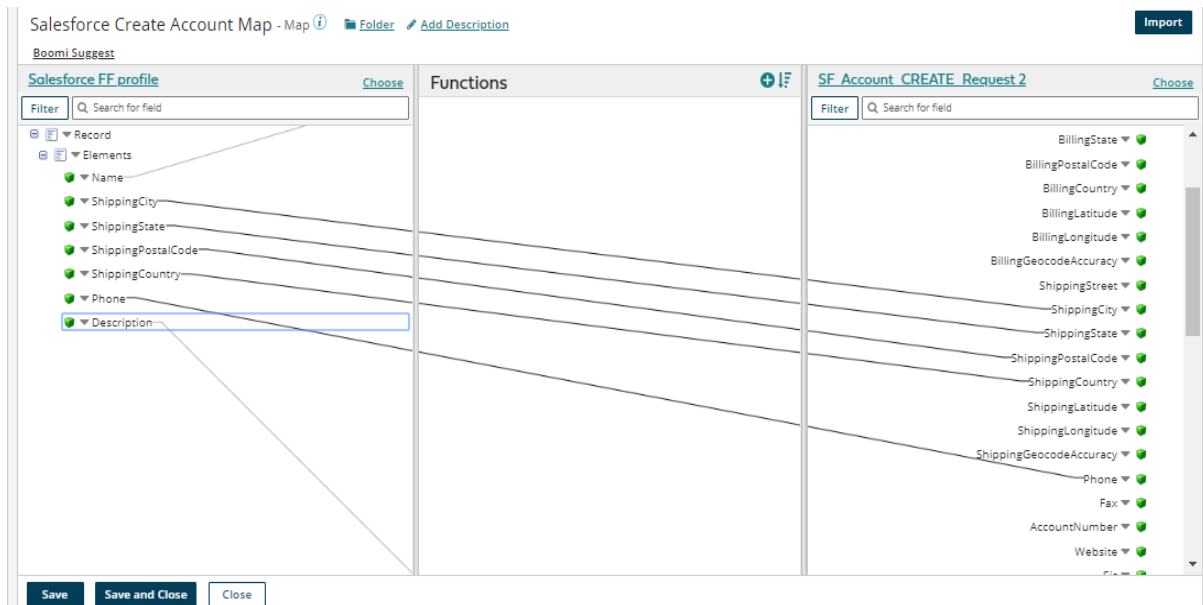Add one or more map functions to transform data between its source and destination.

Choose

Map Destination

Choose the destination profile for your map.
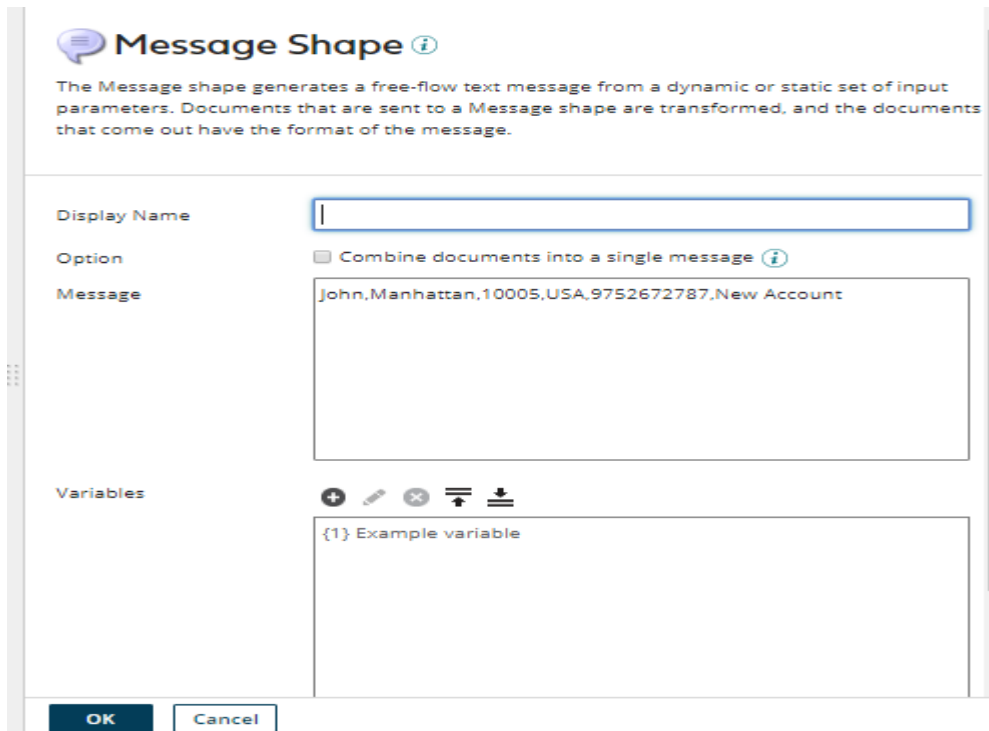
Save   **Save and Close**   Close

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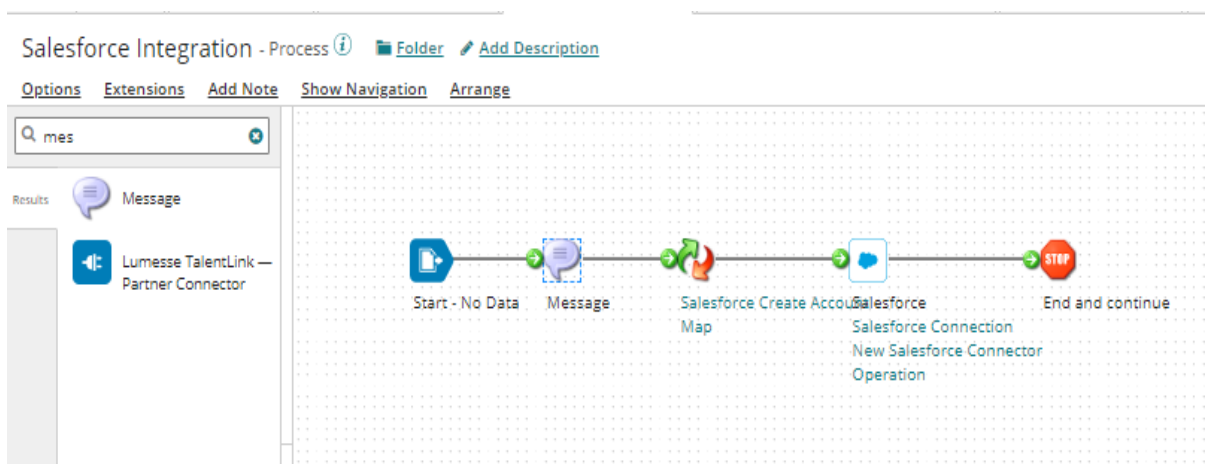

Step 19: Now do the one-to-one mappings for all seven source fields to respective fields in the destination.
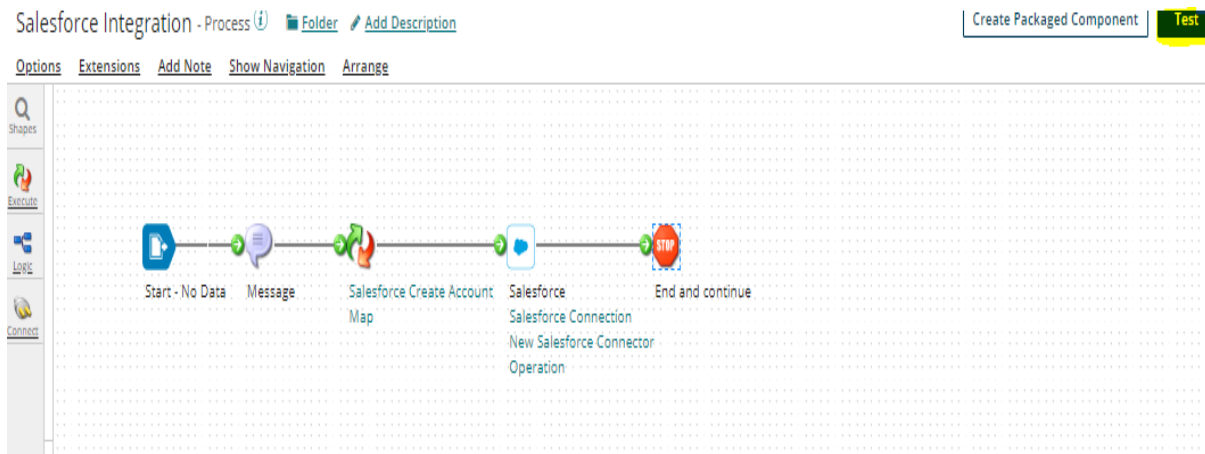
Step 20: We have placed the message shape after the start shape and have added some static values to it which will serve as an input to the Salesforce request profile elements.
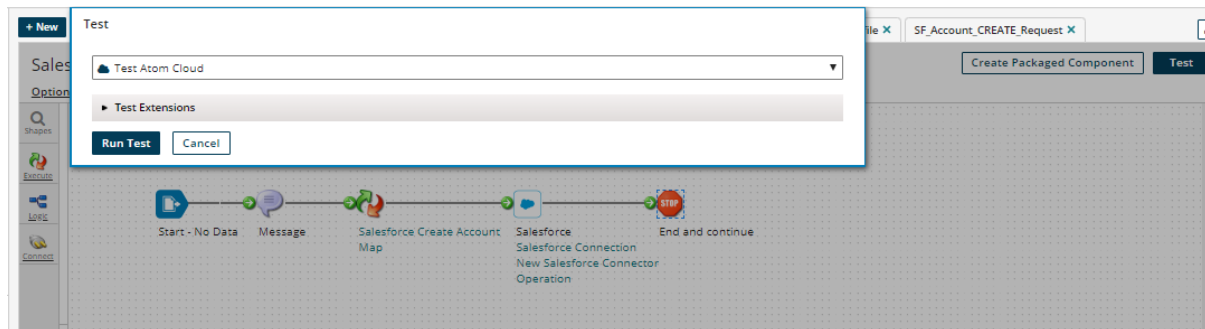

Step 21: Now map the Start Shape=>Message Shape=>Map=>Salesforce connector>Stop Shape.
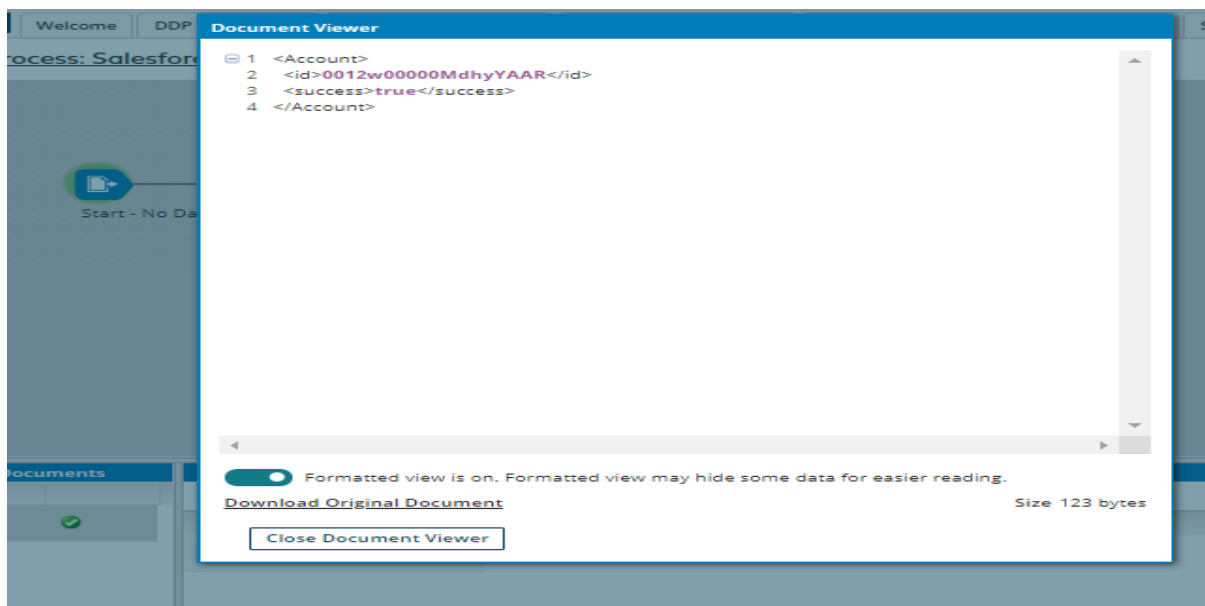
Step 22: Deploying the Interface to create an account in Salesforce was completed and now we are going to test the process. Click on the test which was seen in the top right corner of the process build.
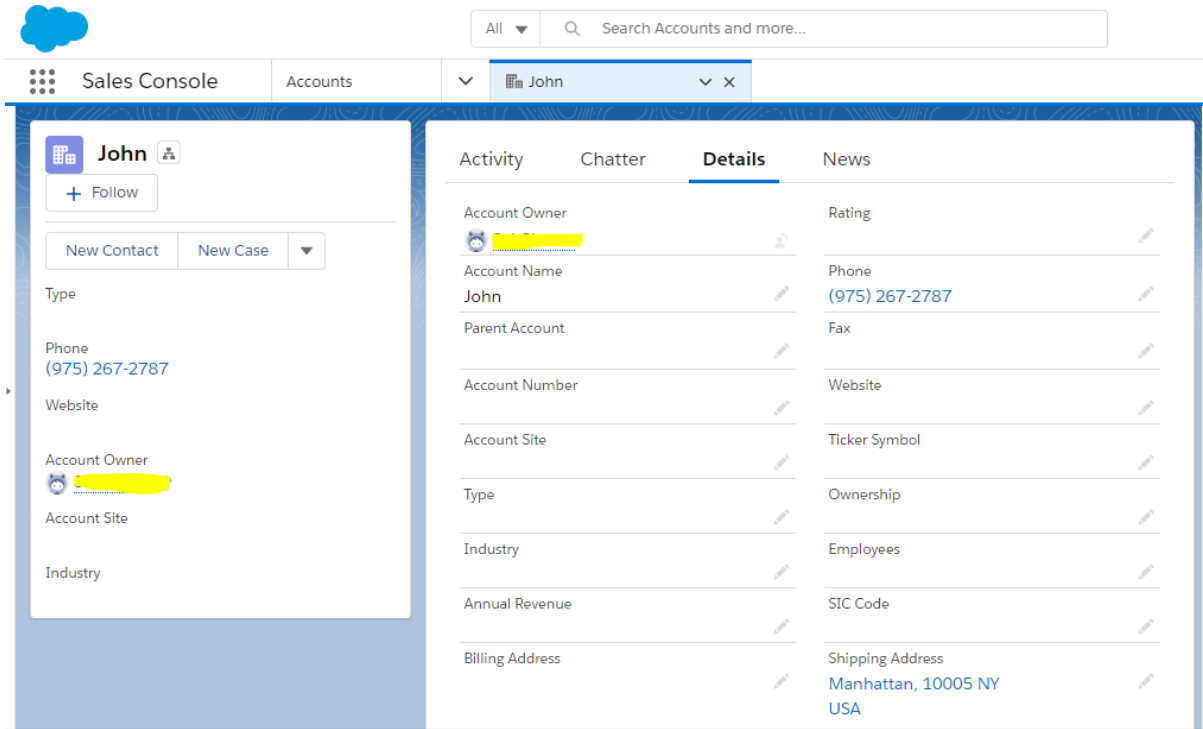

Step 23: Select the atom where we going to test the interface. And click on the Run Test

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

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

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