



**TGH**

Making Integrations Simpler



# Upsert Data to Master Data Hub

**Author**

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## Upsert Data to Master Data Hub

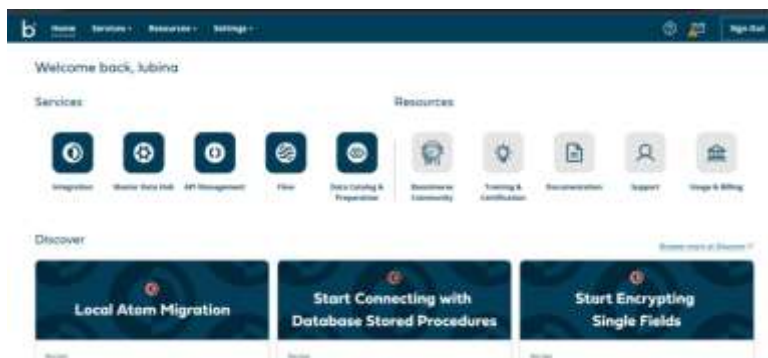
In this blog, let us discuss how to fetch data from different sources and upsert to Master Data Hub.

- We will fetch the data from different sources.
- Then will upsert to Master Data Hub using Boomi Master Data Hub Connector

**Step 1:** Log on to Boomi platform (<https://platform.boomi.com/>) with required credentials i.e. Email Address and Password.



**Step 2:** Once logged into Boomi platform, we will be able to view Home page.



**Step 3:** Now click on Integration. We will see the Build page.

Set up the Test Atom in the Test Atom cloud. Go to Manage->Atom Management.

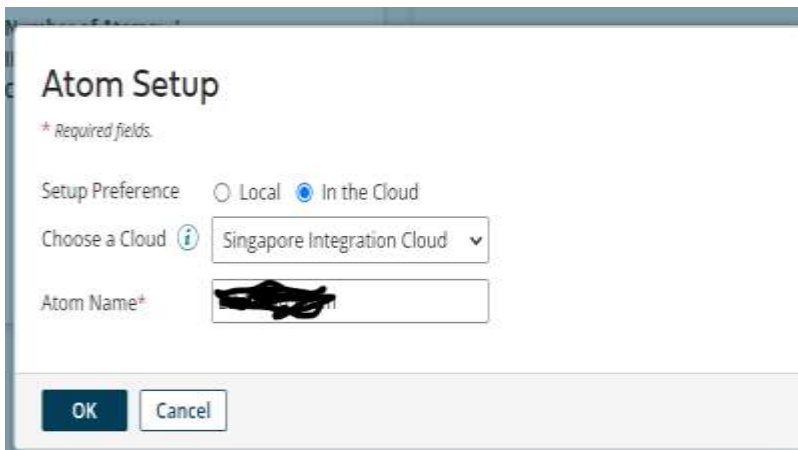
Click on New->Atom. Choose the radio button In the Cloud, give an atom name and

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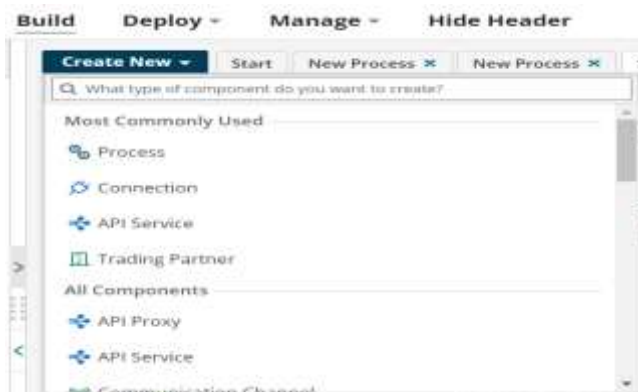
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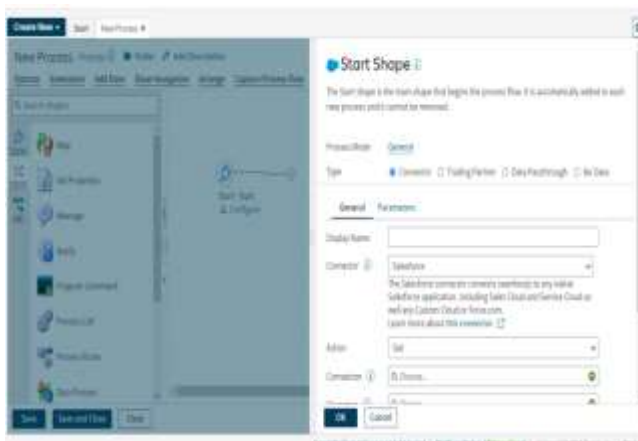
Click OK. We will use it to test and execute our processes.



**Step 4:** Go back to Build Page . Click on Create new . Choose Process.



**Step 5:** By Default Start shape of connector Salesforce. We have to pull the required data from Salesforce. Configure connection and operation.



**Step 6:** Configure the connection.

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**Step 7:** Configure Operations. Import only the fields we needed. (Id, AccountId, LastName, FirstName, Name, MailingCity, Email)



**Step 8:** Same way Configure another interface for pulling data from MySQL Database. Configure the Start shape with Database connector. The Action is Get. Configure Connection and operation.

**Step 9:** Before configuring the operation, create a table in the database with the columns as shown below.

Name	Null?	Type
contactid		varchar2(30)
FirstName		varchar2(30)
LastName		varchar2(30)
Email		varchar2(50)
MailAddress		varchar2(50)
phone		varchar2(11)

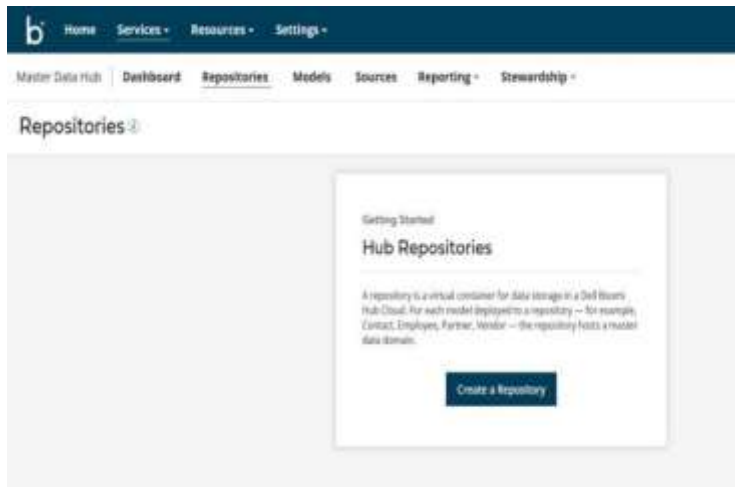
Configure the operation and import the profile from MySQL Database.



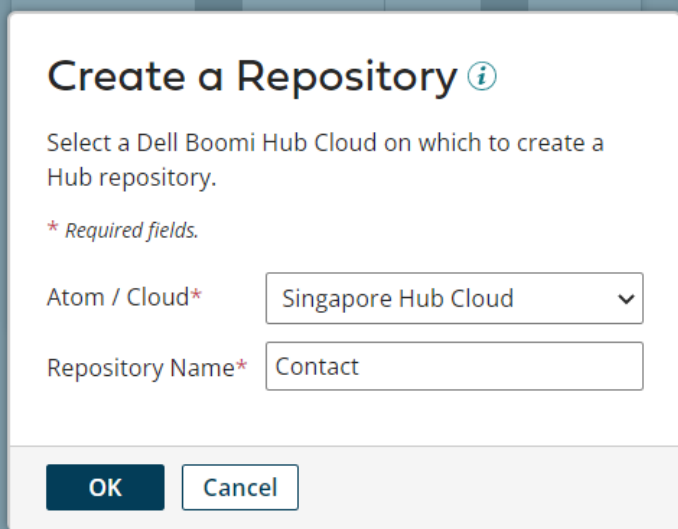
**Step 10:** We will get the data from database.



**Step 11:** Before configuring MDH connector, We need to set up the repository in Service-> Master Data Hub. After clicking on Master Data Hub, below window appears.



**Step 12 :** Click on Create a Repository , Choose the cloud Atom, give the Repository Name click OK.



**Create a Repository** ⓘ

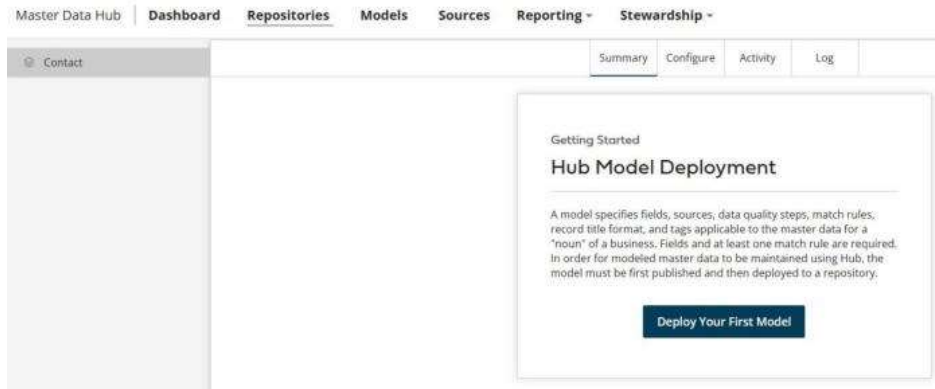
Select a Dell Boomi Hub Cloud on which to create a Hub repository.

\* Required fields.

Atom / Cloud\*

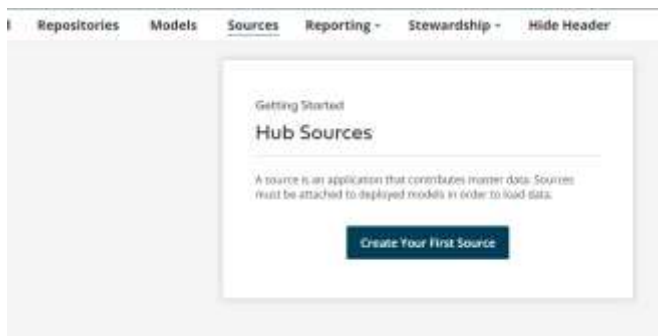
Repository Name\*

**Step 13:** The Repository got created. You are now inside the Contact Repository.



**Step 14:** Next we need to create the hub sources. As we are getting data from two sources, MySQL and Salesforce, we are creating two sources.

**Step 15 :** Select Source tab and select Create your First Source.



**Step 16:** Create a Source window will appear. Configure the MySQL Source and click on Save.



**Step 17:** Repeat the above step to create the Salesforce Source.



**Step 18:** Now both sources get created.

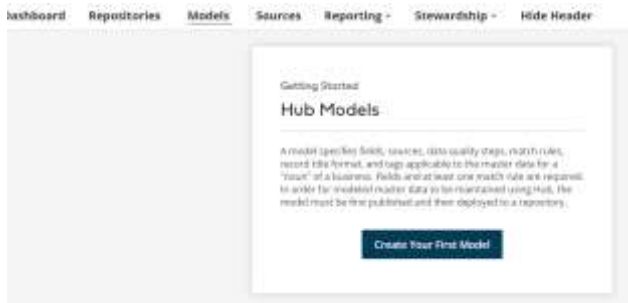
Sources ⓘ

Create a Source

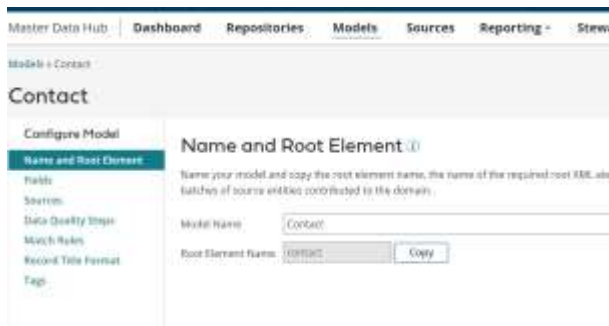
Name	Source ID	Last Modified
MySQL	MySQL	16 Jan 2023 by L. Iitkeef
SFDC	SFDC	16 Jan 2023 by L. Iitkeef

**Step 19:** Next we need to create the model. Navigate to the Model Tab, click on Create Your First Model.

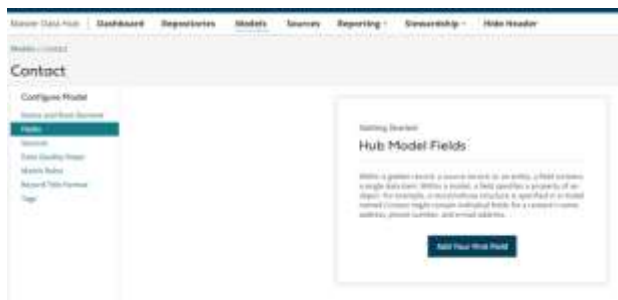
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**Step 20:** Enter a model name. This will be the root XML element name.



**Step 21 :** Select the Field option to add the Fields.

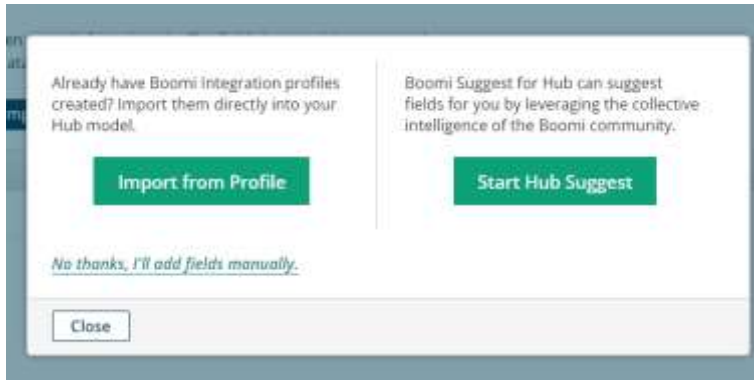


**Step 22:** Select Add Your First Field. You will be presented with three options to generate fields.

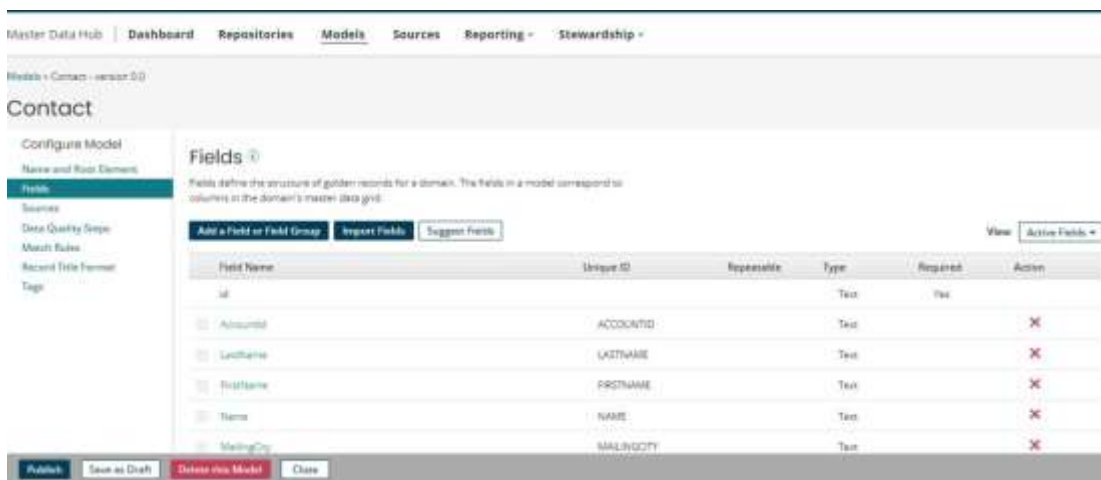
**Import from Profile, Start hub suggest, and No thanks,I'll add manually.**

We can use the SFDC profile from the integration process.Select Import from Profile button.





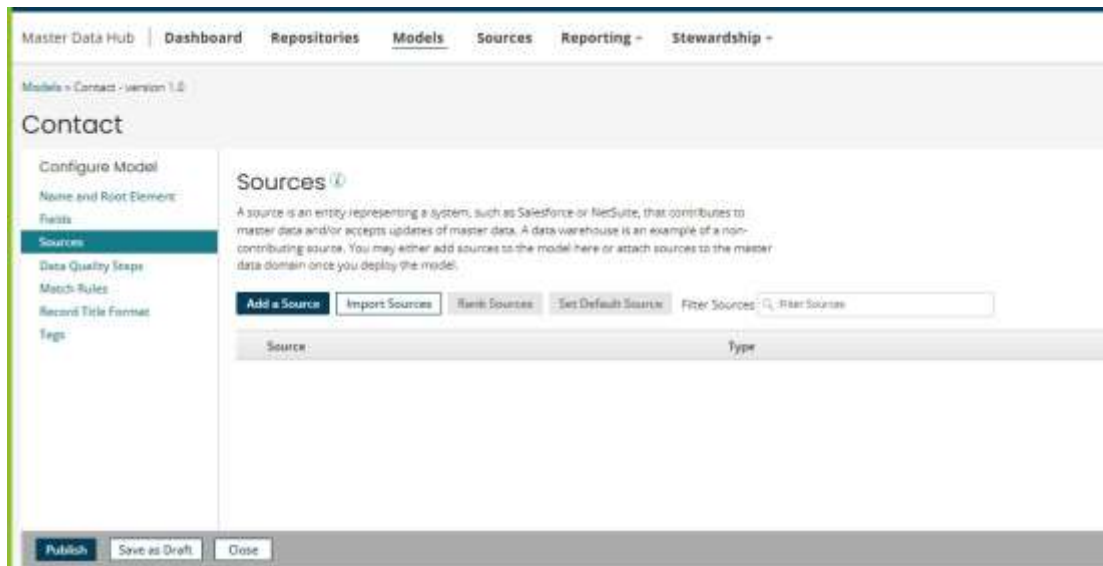
**Step 23:** We will get the required fields from Salesforce.



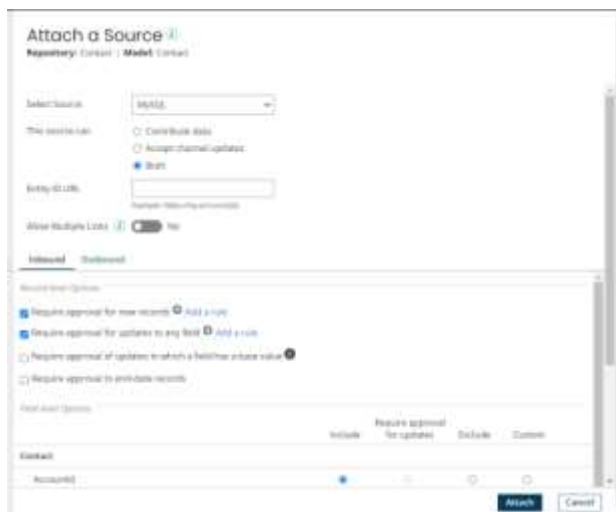
**Step 24:** All sources have a relationship with the Hub. For Hub to synchronize master data across sources, the sources need to be set up and configured. This can be done before or after model deployment. We have two sources SFDC and MySQL.

SFDC is the trusted source. It is configured as contribute only. No need to give any approval options as it is a trusted source.

**Step 25:** Navigate to Model tab >> select your Model >> select sources >> select add source.



**Step 26:** MySQL is configured as contribute and accept and it is not a trusted source. So we are giving inbound option for approval in creating and updating records



**Step 27:** Next step is to set match rules. We are defining a series of rules which will determine if a given contact is unique, or exists. Here we are using Name and email fields to set the match rules.

Navigate to Match Rules sub tab. Select Add a Match Rule. Match Rule window will appear.



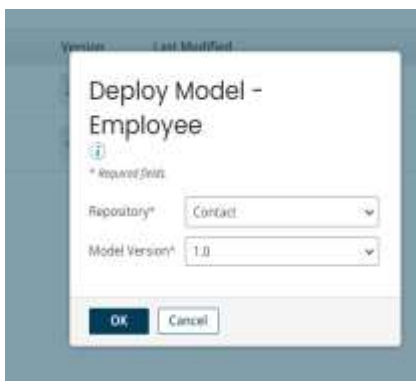
**Step 28:** Choose Top Level Operator tab should be And, then select Add an expression link. choose the Name field from drop down and set it as your first expression. Repeat the step to set email. Select save.



**Step 29:** Then Save as Draft and select Publish. After publish, directed to models tab, there we can deploy.



**Step 30:** Select Deploy, a window will appear, confirm your Repository name and Model version and click OK.



**Step 31:** In the repository tab choose the repository you created and select the particular model, in that select sources section beside summary. Select action icon for SFDC and select Enable Initial Load.

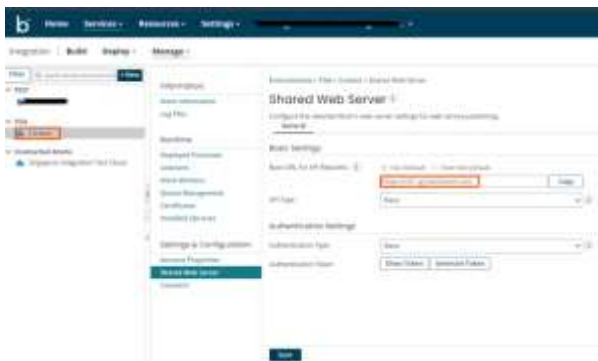
Note: Enable Initial Load. Sources added to a model are inactive until we open the channel of communication between Integration and Hub by enabling the initial load.

**Step 32:** In the repository tab choose the repository you created and select the particular model, in that select sources section beside summary. Select action icon for SFDC and select Enable Initial Load.



**Step 33:** Navigate back to Integration Service. We already pulled the data from Salesforce. Now configure the MDM connector. The action should be upsert. Configure the connection. In connection we have to configure URL, username and token.

Navigate to Atom management, select the Atom with same name as repository. select shared web server. Copy the URL, append '/mdm/' and paste it in URL tab in MDM connector connection.



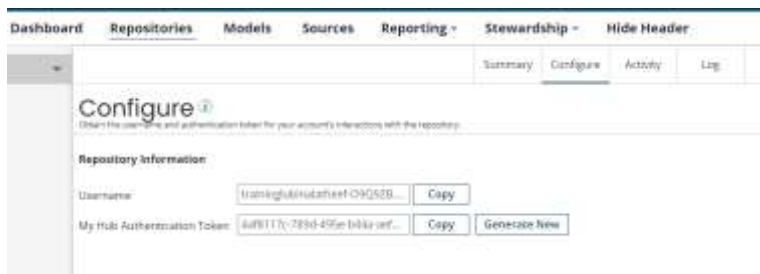
**Connection**

URL ⓘ

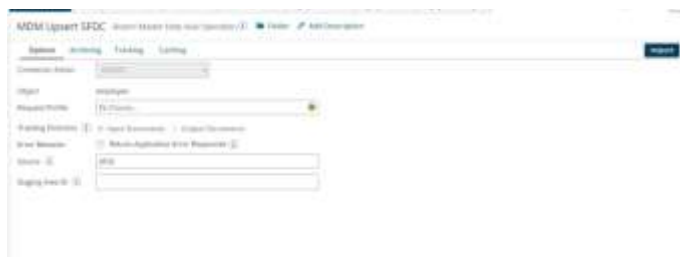
Username ⓘ

Token ⓘ

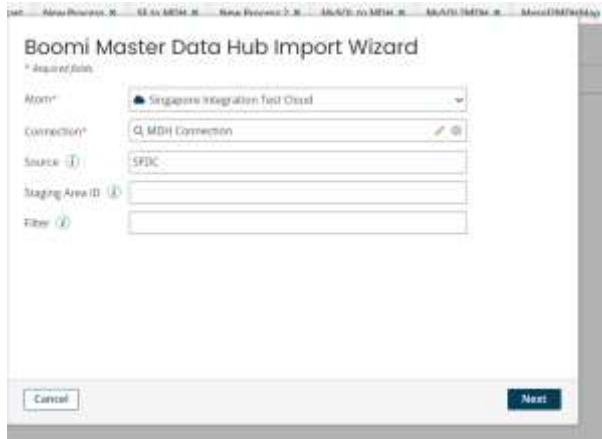
**Step 34:** The username and token will be getting from MDH service. Navigate to Master Data Hub service choose Repository, Select Contact Repository, Choose Configure, there will find the username and password.



**Step 35:** Now Configure operation.



**Step 36:** Select the import button,Boomi Master Data Hub Import Wizard window appears. Give the Atom,Connection,Source Details. Choose Next



**Step 37:** Choose the object type Contact and go next, will get the required profile. Save and close your operation.

**Step 38:** Configure the Map Shape. Choose Salesforce profile in the source and MDM profile in the target and do the mapping.



**Step 39:** Place the Stop shape after Boomi Master Data Hub Connector . Finally the interface looks like below. Save it and Test it.



**Step 40:** View the documents by selecting the MDH connector, and selecting the view icon within connection tab.



**Step 41:** This will display the document viewer. Below is the data included in one of the golden record.



**Step 42:** Confirm that all document shown in the MDM connector get inserted to golden record. Navigate to Master Data Hub Service, Select Contact Repository, go to Stewardship sub-tab and select Golden Records, you can see the data added to golden records.



**Step 43:** When you have confirmed, the data loaded completely, navigate to the Contact model in MDH. Select the Sources tab, and then click the gear icon next to the SFDC source. Select Finish Initial Load.

**Step 44:** We need to Enable initial load of MySQL Source for inserting data to MDH.

**Step 45:** We already pulled the data from MySQL Database in previous steps. We can reuse the MDH connection we already setup before. We have to configure MDH operation in the same way we did in the Step:36 to Step:37 with source as MySQL.

**Step 46:** Configure the Map shape with MySQL Profile as the source profile and MDH profile as target profile.



**Step 47:** Arrange the shapes in order and test it.

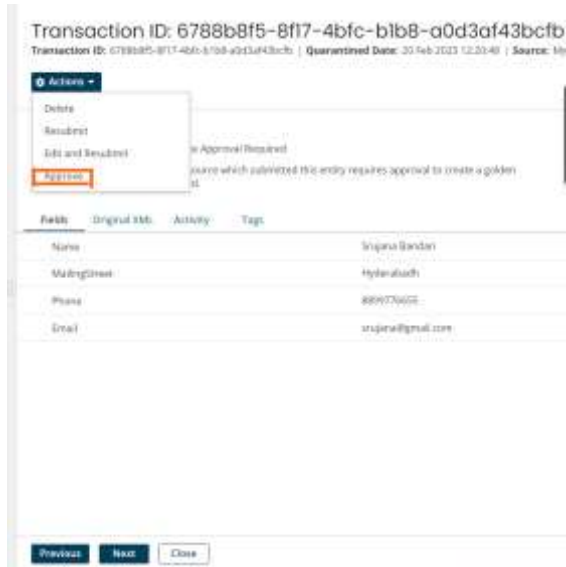


**Step 48:** The MySQL to MDH process has been run and your contact data should now be in MDH. Since extra approval rules were added to the MySQL source, the data has not made it into the Golden Record. The records which do not meet the requirements to become a golden record, will be quarantined. These records need approval to go into Golden Record.



**Step 49:** After giving the approval, it will insert into Golden Record.





By following all these steps will ensure that the data is accurate, consistent, and up to date across all your systems.



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