Salesforce Connect Accelerator Documentation

1.0 Overview

Salesforce Connect Accelerator is a workflow designed to streamline the integration of applications with Salesforce.

1.1 Scope

The workflow first requests Salesforce for authentication token which works as authorization in subsequent requests. The process involves fetching data from a database and transforming the incoming data into the necessary JSON format for insertion into Salesforce.

Transformed Data is inserted into Salesforce through Post HTTP request along with relevant authorization, creating a record in Salesforce.

The accelerator has 1 main workflow to execute:

1. Salesforce Connector – Bridgegate initiates the workflow to pull the data from the Database and then send to Salesforce

1.1.2 Workflow

The Workflow can be triggered through Schedule or in real-time. First a POST request is sent to Salesforce along with relevant token body to get the authorization token. In response of the post request, we receive the token in JSON format. The token is then extracted from the response.

Now, Get Data is used to pull the inbound data from the table. The extracted data is then converted to JSON format as per the specifications of Salesforce.

Using the previously acquired token, the JSON containing Data is sent as a post request to create an object record in Salesforce.

1.2 Prerequisites

Before using the Salesforce Connector Accelerator, ensure that you have the following prerequisites in place:

1. **Registered Salesforce Application:**
    - Register your application through Salesforce admin login.
2. **Salesforce Client ID:**

- Obtain the Salesforce client ID for your registered application.

3. **Salesforce Grant type:**
    - Determine the necessary Salesforce grant type required for your application.
4. **Database Table for getting Salesforce data:**
    - Create a table for Salesforce leads from which data will be picked to generate Leads in Salesforce. Following is query for creating table

CREATE TABLE **training.sf_leads** (

LastName VARCHAR(255),

FirstName VARCHAR(255),

Salutation VARCHAR(10),

Title VARCHAR(255),

Company VARCHAR(255),

Street VARCHAR(255),

City VARCHAR(255),

State VARCHAR(255),

PostalCode VARCHAR(20),

Country VARCHAR(255),

Latitude DOUBLE,

Longitude DOUBLE,

Phone VARCHAR(20),

MobilePhone VARCHAR(20),

Fax VARCHAR(20),

Email VARCHAR(255),

Website VARCHAR(255),

Description TEXT,

LeadSource VARCHAR(50),

Status VARCHAR(50),

Industry VARCHAR(255),

Rating VARCHAR(50),

AnnualRevenue DECIMAL(18, 2),

NumberOfEmployees INT,

OwnerId VARCHAR(18),

```
    IsConverted BOOLEAN,
    IsUnreadByOwner BOOLEAN,
    Jigsaw VARCHAR(255),
    CleanStatus VARCHAR(50),
    CompanyDunsNumber VARCHAR(255),
    DandbCompanyId VARCHAR(255),
    SICCode__c VARCHAR(10),
    ProductInterest__c VARCHAR(255),
    Primary__c VARCHAR(3),
    CurrentGenerators__c VARCHAR(255),
    NumberofLocations__c INT
);
```

Fields and table name can be changed according to requirement, but user needs to update the mapping accordingly.

1.3 Download and Installation

To download and use the Salesforce Connect Accelerator, follow these steps:

1. **Download:**
    - Download the accelerator package.

2. **Unzip:**
    - Unzip the downloaded package.

3. **Extract to Bridgegate Installation Folder:**
    - Locate the Bridgegate installation folder on your system.

4. **Navigate to Accounts Folder:**
    - In the Bridgegate installation folder, navigate to the 'accounts' folder.

5. **Choose Your Folder:**
    - Select the appropriate folder based on your application or configuration.

6. **Extract Files:**
    - Extract the contents of the accelerator package into the chosen folder.

1.4 Step-By-Step Process with Screenshots.

Step 1: Register Salesforce Client Application

Navigate to the Salesforce portal to register a new client application.

Provide basic details such as:

- Name of the application
- Contact Information
- Auth Settings

Save the registration to generate:

- Client/Consumer ID
- Client/Consumer Secret

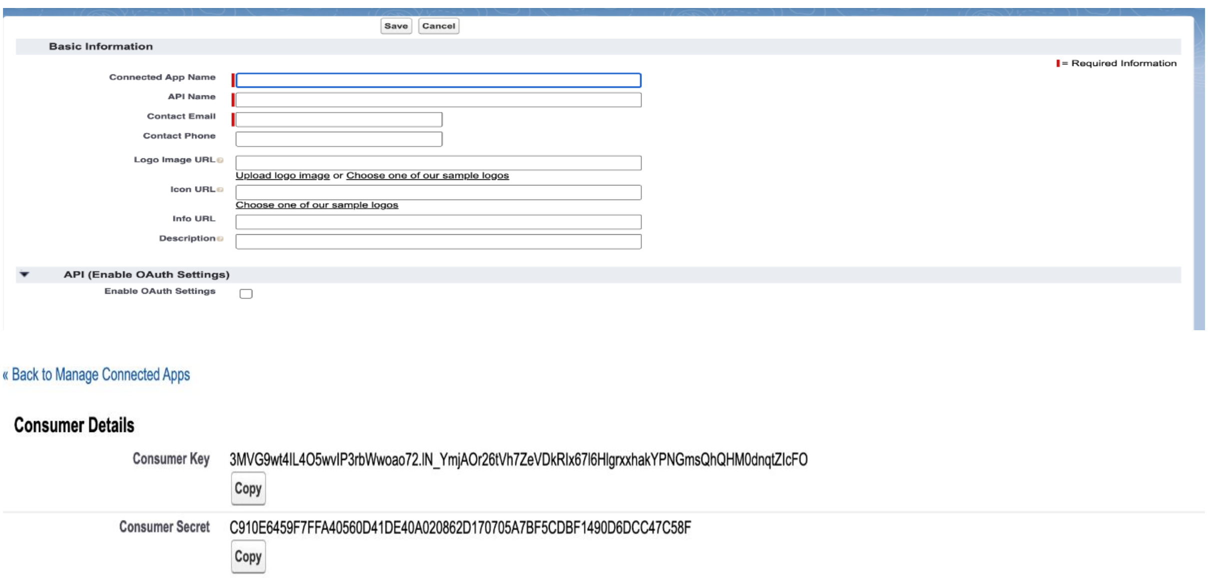


Figure 1: Salesforce application registration screen

Step 2: Configuring your accelerator

1. Open **Bridgegate** Workbench.
2. Check if the folder you moved is available in the following tabs:
    a. Inbound Tab
    b. Outbound Tab
    c. Workflow Tab
3. In the Workflow **“Salesforce Connector”**, you should see two variables:
    a. **SF Client ID:** This should be your client ID registered in the above step.
    b. **SF Client Secret:** This should be your client Secret registered in the above step.
    c. **SF Grant:** This should be your method grant to get authorize Token. We can use Grant type ‘**password’** in this case.

Also, the user needs to input variables such as Salesforce username, Salesforce password and Salesforce URL to execute the workflow as expected.

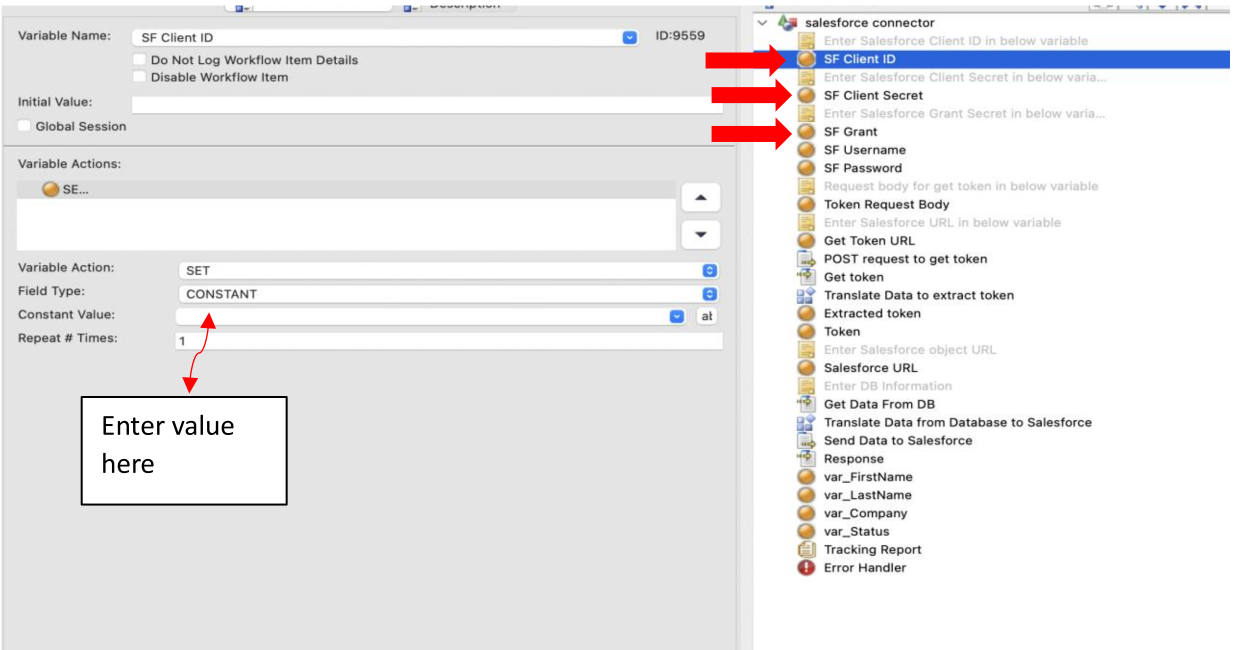


Figure 2: Bridgegate workflow screen

4. **Post Request to Get token from Salesforce-** A POST request is sent to Salesforce application to get a Token. The request body Contains the Client ID, Client Secret, Grant, Username and Password.

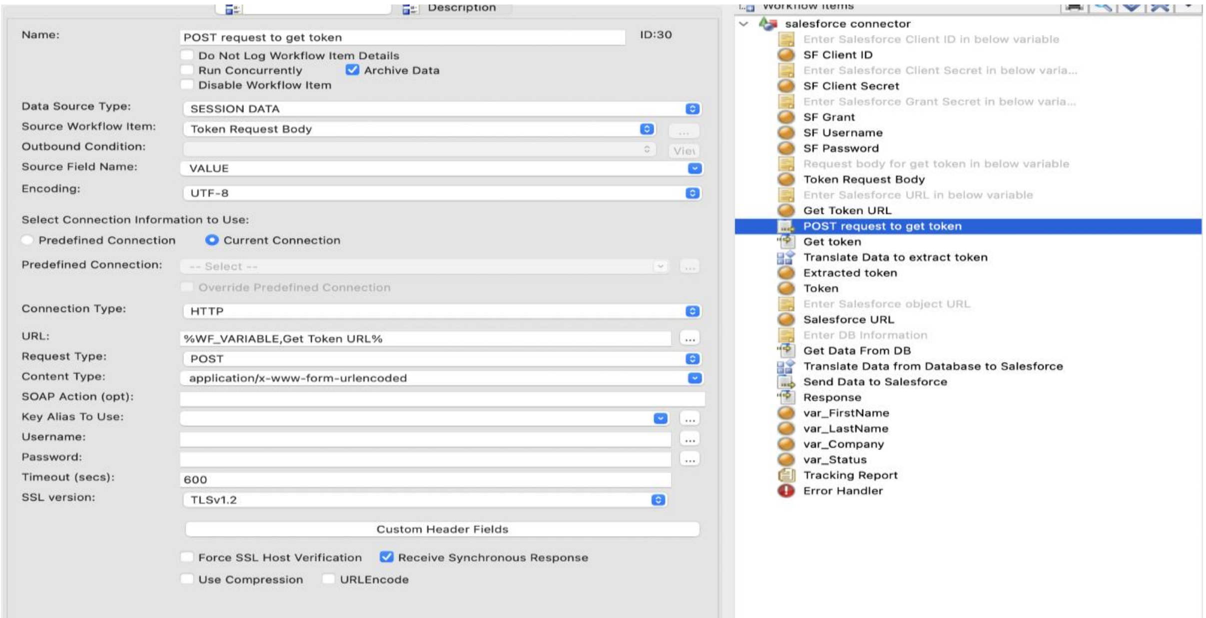


Figure 3: Post request for token

5. **Get Data from DB-** The Data is fetched from the Database table Using the Predefined connection or PDC with a name **Input Database** to Connect to MySQL database.

6. **Send Data to Salesforce-** The Data pulled from the database is then translated to required JSON format in Translate Data from Database to Salesforce workflow item.
   The data is pushed to Salesforce to create a new object record.

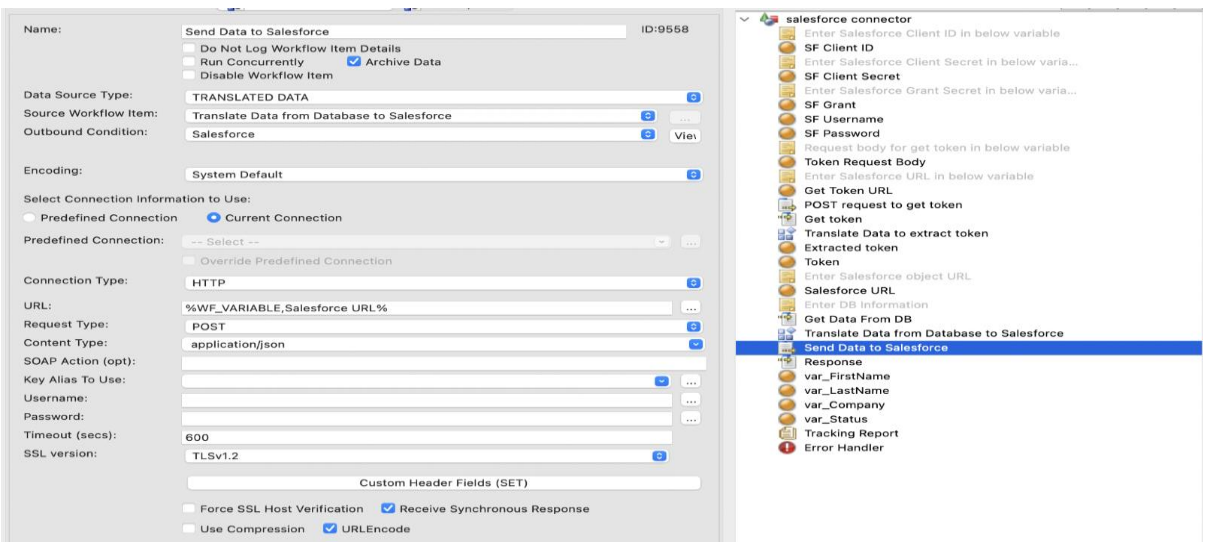


Figure 4: Send request to salesforce

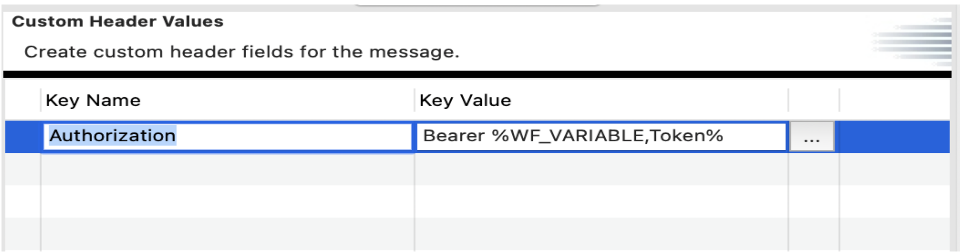
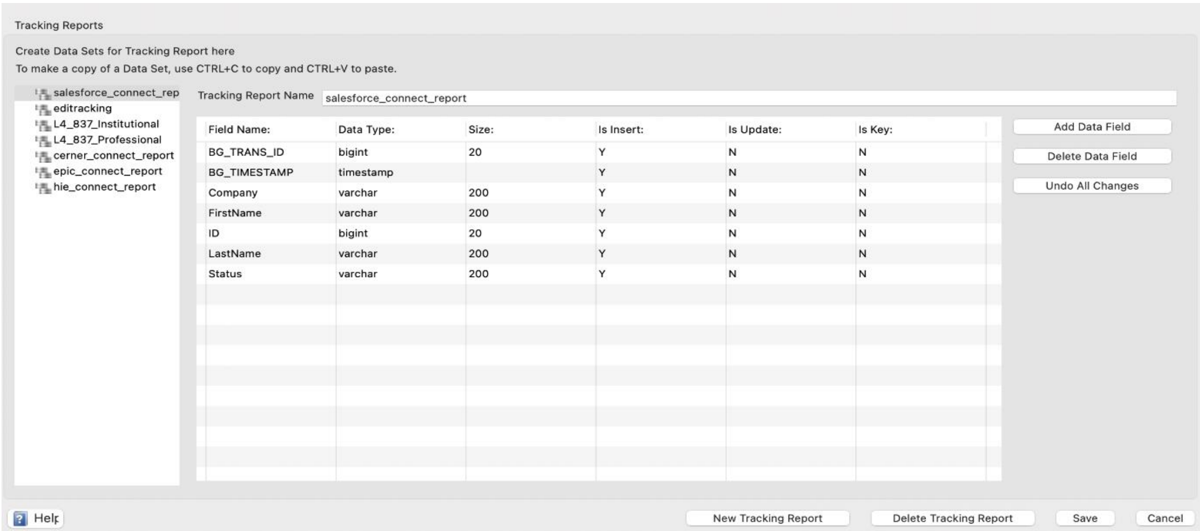


Figure 5: Custom Header Value

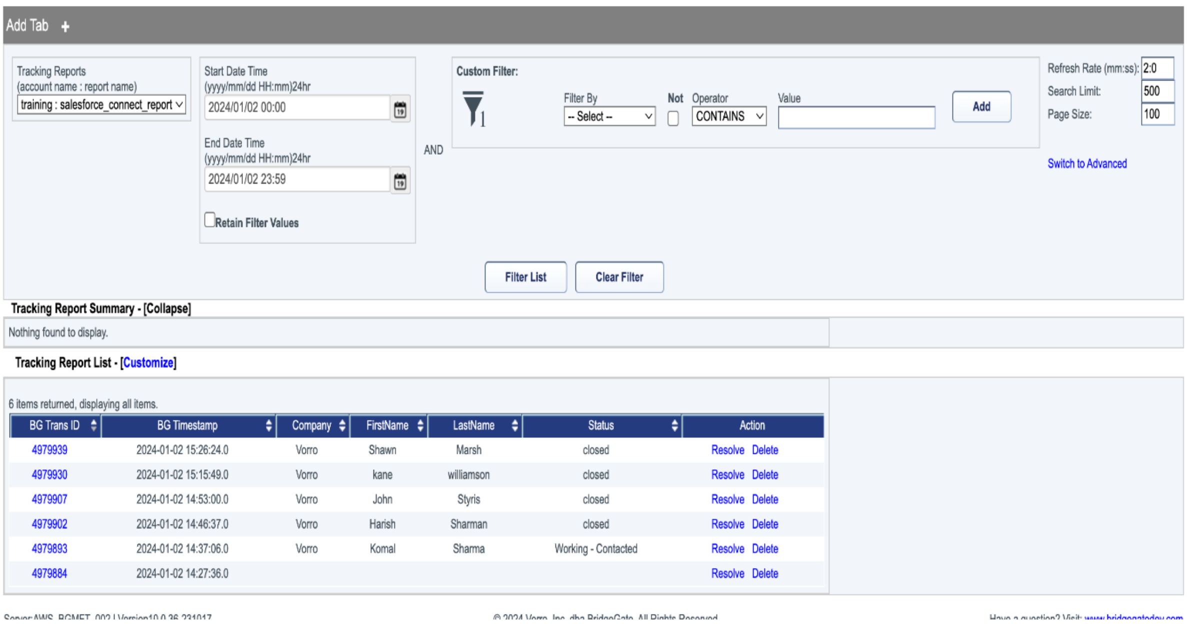
7. **Tracking report-** Tracking Report is used to capture the session data of the workflow and the data that is being pushed into Salesforce. Below is the Sample of Tracking report **salesforce_connect_report** used in Salesforce Connector. Fields in the Report can be added, removed or modified as per the required customization.

   Tracking Report can be added or modified from **Repository** ->**Tracking report**. User can either add a new report or modify an existing report. After selecting the report, you have the option to add or modify pertinent fields and their properties.



Field Name:	Data Type:	Size:	Is Insert:	Is Update:	Is Key:
BG_TRANS_ID	bigint	20	Y	N	N
BG_TIMESTAMP	timestamp		Y	N	N
Company	varchar	200	Y	N	N
FirstName	varchar	200	Y	N	N
ID	bigint	20	Y	N	N
LastName	varchar	200	Y	N	N
Status	varchar	200	Y	N	N

Figure 6 Tracking Report



BG Trans ID	BG Timestamp	Company	FirstName	LastName	Status	Action
4979939	2024-01-02 15:26:24.0	Vorro	Shawn	Marsh	closed	Resolve Delete
4979930	2024-01-02 15:15:49.0	Vorro	kane	williamson	closed	Resolve Delete
4979907	2024-01-02 14:53:00.0	Vorro	John	Styris	closed	Resolve Delete
4979902	2024-01-02 14:46:37.0	Vorro	Harish	Sharman	closed	Resolve Delete
4979893	2024-01-02 14:37:06.0	Vorro	Komal	Sharma	Working - Contacted	Resolve Delete
4979884	2024-01-02 14:27:36.0					Resolve Delete

Figure 7: Salesforce Tracking Report