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

	Save Cancel							
Basic Information								
		= Required Information						
Connected App Name								
API Name								
Contact Email								
Contact Phone								
Logo Image URL@								
	Upload logo image or Choose one of our sample logos							
Icon URL®								
Info UBL	Choose one of our sample logos							
Description								
 API (Enable OAuth Settings) 								
Enable OAuth Settings								
« Back to Manage Connected Apps								
0								
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Consumer Details								
Consumer Key	2MU/COutAll 4O5walD2th/Marcon72 IN VmiAOr26t//h77o\/DkDiv67/6Hlacych							
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Consumer Secret	C910E6459F7FFA40560D41DE40A020862D170705A7BF5CDBF1490D6DC	C910E6459F7FFA40560D41DE40A020862D170705A7BF5CDBF1490D6DCC47C58F						
	Conv							
	(34)							

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.

		-	
N			salesforce connector
variable Name:	SF Client ID	D:9228	Enter Salesforce Client ID in below variable
	Do Not Log Workflow Item Details		SF Client ID
	Disable Workflow Item		Enter Salesforce Client Secret in below varia
Initial Value:			SF Client Secret
			Enter Salesforce Grant Secret in below varia
Global Session			SF Grant
			General SF Username
Variable Actions:			SF Password
🥥 SE			Request body for get token in below variable
			🥌 Token Request Body
			Enter Salesforce URL in below variable
			Get Token URL
Variable Action:	SET		POST request to get token
Field Tunes			Get token
Field Type.	CONSTANT		Translate Data to extract token
Constant Value:		😒 at	Extracted token
Repeat # Times:	1		Token
			Enter Salesforce object URL
			Salesforce URL
	T		Enter DB Information
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En	ter value		Iranslate Data from Database to Salesforce
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ne	re		A var Einstellame
			a var LastName
			a var Statue
			Tracking Report

Figure 2	2:	Bridgegate	workflow scree	n
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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.

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Data Source Type:	SESSION DATA	•	Enter Salesforce Grant Secret in bel	ow varia
Source Workflow Item:	Token Request Body	O	SF Username	
Outbound Condition:			G SF Password	
Source Field Name:	VALUE		Request body for get token in below	variable
Encoding:			Token Request Body	
Lifeoding.	UTF-8	0	Enter Salesforce URL in below varial	Je
Select Connection Inform	ation to Use:		Get Token URL	
Predefined Connection	Current Connection		Get token	
			Translate Data to extract token	
Predefined Connection:			Extracted token	
	Override Predefined Connection		🥥 Token	
Connection Type:	HTTP	0	Enter Salesforce object URL	
			Salesforce URL	
URL:	%WF_VARIABLE,Get Token URL%		Get Data From DB	
Request Type:	POST	0	Translate Data from Database to Sal	esforce
Content Type:	application/x-www-form-urlencoded		Send Data to Salesforce	
SOAP Action (opt):			🐨 Response	
Key Alias To Use:		.	🥥 var_FirstName	
Username:			var_LastName	
Password:			var_Company	
Timeout (secs):	000		Tracking Report	
	600		Error Handler	
SSL version:	TLSv1.2	0		
	Custom Header Fields			
	Force SSL Host Verification Force Synchronous Response Use Compression URLEncode			



- 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.

Do Not Log Workflow Item Details Run Concurrenty Archive Data Data Source Type: TRANSLATED DATA Source Workflow Item: Translate Data from Database to Salesforce View View Translate Data from Database to Salesforce View view of Connection System Default System Default System Default Source Workflow Item: Connection Override Predefined Connection View of View Item Easerst In Delow Variable Source Workflow Item System Default System Default System Default Source View Subsidy Korkflow Item System Default Source View Source View Source View Source Type: Source Connection Override Predefined Connection Source View Source View Source View Source View Source View Source Type: Source Type: Source Connection Source Connection Source Connection Source Connection Source Type: Source Connection Source Connection Source Connection Corrent Connection Source Conn	lame:	Send Data to Salesforce	ID:9558	Enter Salesforce Client ID in below variable
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Request Type: POST © Content Type: application/son © Application/son © Send Data from Database to Salesforce Key Alias To Use: © • Username: © • Password: 0 • Thesout (sees): 600 © SSL version: TLSv1.2 © Force SSL Host Verification © Receive Synchronous Response	URL:	%WE VARIABI E Salesforce LIRI %		Enter DB Information
Action (spt): application/json SOAP Action (opt): application/json SoAP Action (opt): application/json Desrame: application/json Password: application SSA version: TLSv1.2 Custom Header Fields (SET) Force SSL Host Verification Receive Synchronous Response	Request Type:	POST		Get Data From DB
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Password: Immeout (secs): 600 ISL version: Custom Header Fields (SET) Force SSL Host Verification @ Receive Synchronous Response	Jsername:			
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Force SSL Host Verification 💟 Receive Synchronous Response		Custom Header Fields (SET)		
		Force SSI Host Verification		

Figure 4: Send request to salesforce

Custom Header Values Create custom header fields fo	Custom Header Values Create custom header fields for the message.						
Key Name	Key Value						
Authorization	Bearer %WF_VARIABLE,Token%						



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.

Create Data Sets for Tracking Rep To make a copy of a Data Set, use	oort here e CTRL+C to copy and C	TRL+V to paste.						
isalesforce_connect_rep	Tracking Report Name salesforce_connect_report							
L4_837_Institutional	Field Name:	Data Type:	Size:	Is Insert:	Is Update:	Is Key:	Add Data Field	
cerner_connect_report	BG_TRANS_ID	bigint	20	Y	N	N	Delete Data Field	
epic_connect_report	BG_TIMESTAMP	timestamp		Y	N	N		
唱_hie_connect_report	Company	varchar	200	Y	N	N	Undo All Changes	
	FirstName	varchar	200	Y	N	N		
	ID	bigint	20	Y	N	N		
	LastName	varchar	200	Y	N	N		
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Add Tab 🕂								
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Teaching Danast Summary	2024/01/02	23:59 er Values	9	Filte	r List Clear Filter			
Nothing found to display.	- [compse]							
Tracking Report List - [Co	ustomize]							
6 items returned, displaying all	items.							
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		

Figure 7: Salesforce Tracking Report

Resolve Delete

Have a question? Visit-

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