# TIBCO Flogo® Connector for Salesforce.com

# User's Guide

*Software Release 1.2*
*May 2020*

**Important Information**

# Contents

# TIBCO Documentation and Support Services

### How to Access TIBCO Documentation

Documentation for TIBCO products is available on the TIBCO Product Documentation website, mainly in HTML and PDF formats.

The TIBCO Product Documentation website is updated frequently and is more current than any other documentation included with the product. To access the latest documentation, visit https://docs.tibco.com.

### Product-Specific Documentation

The following documentation for this product is available on the TIBCO Flogo® Connector for Salesforce.com Product Documentation page.

- *TIBCO Flogo® Connector for Salesforce.com Release Notes*
- *TIBCO Flogo® Connector for Salesforce.com Installation*
- *TIBCO Flogo® Connector for Salesforce.com User's Guide*

### How to Contact TIBCO Support

You can contact TIBCO Support in the following ways:

- For an overview of TIBCO Support, visit http://www.tibco.com/services/support.
- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the TIBCO Support portal at https://support.tibco.com.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to https://support.tibco.com. If you do not have a user name, you can request one by clicking Register on the website.

### How to Join TIBCO Community

TIBCO Community is the official channel for TIBCO customers, partners, and employee subject matter experts to share and access their collective experience. TIBCO Community offers access to Q&A forums, product wikis, and best practices. It also offers access to extensions, adapters, solution accelerators, and tools that extend and enable customers to gain full value from TIBCO products. In addition, users can submit and vote on feature requests from within the TIBCO Ideas Portal. For a free registration, go to https://community.tibco.com.

# Overview

Salesforce.com is a cloud-based service for customer relationship management (CRM) that helps companies automate and manage the sales cycle, marketing activities, and customer service. Use TIBCO Flogo® Connector for Salesforce.com to add Salesforce.com data to your Flogo Enterprise flows. This section discusses the tiles related to TIBCO Flogo® Connector for Salesforce.com.

You must have valid connections created on the **Connections** page before using a Salesforce.com connection for either a Salesforce.com trigger or Salesforce.com activity.

# Creating a Salesforce.com Connection

You must create a Salesforce.com connection before you can use TIBCO Flogo® Connector for Salesforce.com. The Salesforce.com connection contains all the parameters required to connect to the Salesforce.com REST API. The Salesforce.com connection is used by all the activities in the Salesforce.com category. Before you create a Salesforce.com connection, be sure that you have an active Salesforce.com account.

Make sure that you have set up the OAuth Permissions in Salesforce.com before installing the connector. For details, see the "Configuring the OAuth Permissions in Salesforce.com" topic in the *TIBCO Flogo® Connector for Salesforce.com Installation* guide.

Before you create a Salesforce.com connection, familiarize yourself with Salesforce.com. For details on how to use the Salesforce.com product, see the Salesforce.com product documentation.

You can have a maximum of four active Salesforce.com connections for one user at any time. If you create more than four connections for the same user, the first connection that you created gets deactivated. This limit is enforced by Salesforce.com.

You now have the option to create a Salesforce.com connection to a **Sandbox** environment when creating new connections. All your existing Salesforce.com connections default to the **Production** environment. You can switch environments for existing connections using Edit connection.

Make sure that the pop-up blocker in your browser is configured to always allow pop-ups from for the Salesforce.com site. On Macintosh, clicking the link to the site results in the connection details page hanging, so make sure to select the radio button for "**Always allow pop-ups from *<site>*.**"

To create a flow using the Salesforce.com trigger see the "Creating a Connection Flow" topic in the Flogo Enterprise User's Guide.

To create a Salesforce.com connection, click the **Connections** tab on the Flogo Enterprise page.

If this is the first connection you are adding, do the following:

1. Click the **Salesforce connector** tile.

2. Follow these steps:

   a. In the **Salesforce Connector** dialog, enter a name for the connector in the **Name** text box and optionally a description in the **Description** text box.

   b. Select the **Environment** you want to use from the drop down list.

   c. Enter the **Client Id** and **Client Secret**. The **Consumer Key** field in Salesforce.com corresponds to Client ID in Salesforce.com Connection dialog, and the Consumer Secret in Salesforce.com corresponds to Client Secret in Salesforce.com Connection dialog.

   d. Enter your username and password for Salesforce.com and click **Log In**. If your Salesforce account(s) credentials are saved, the username(s) are listed and you can click on the username for the account you want to use to create this connection.

   e. You might be asked to verify your identity. Enter the code you received in the **Verification Code** text box and click **Verify**.

   f. In the Allow Access dialog, click **Allow**.

      The **Connections** page opens displaying the new connection you just created.

If you already have an existing connection for any connector in Flogo Enterprise, the connections are displayed on the **Connections** page.

1. Click **Add Connection**.

2. Click the **Salesforce connector** tile.

3. Follow these steps:

   a. In the **Salesforce Connector** dialog, enter a name for the connector in the **Name** text box and optionally a description in the **Description** text box.

   b. Select the **Environment** you want to use from the drop down list.

   c. Enter the **Client Id** and **Client Secret**. The Consumer Key field in Salesforce.com corresponds to Client ID in Salesforce.com Connection dialog, and the Consumer Secret in Salesforce.com corresponds to Client Secret in Salesforce.com Connection dialog.

   d. Enter your username and password for Salesforce.com in the **Username** and **Password** text boxes respectively, and click **Log In**. If your Salesforce account(s) credentials are saved, the username(s) are listed and you can click on the username for the account you want to use to create this connection.

   e. You might be asked to verify your identity. Enter the code you received in the **Verification Code** text box and click **Verify**.

   f. In the Allow Access dialog, click **Allow**.

      The **Connections** page opens displaying the new connection you just created.

# ReceiveSalesforceMessage Trigger

**ReceiveSalesforceMessage** is a Salesforce.com trigger that is created by default when you create a flow for TIBCO Flogo® Connector for Salesforce.com. It receives messages whenever a change occurs in Salesforce.com and activates the flow.

To create a flow using this trigger, see the "Creating a Connection Flow" topic in the Flogo Enterprise User's Guide.

**Trigger Settings**

On the **Trigger Settings** tab, provide the following information to identify which Salesforce.com connection to use and the type of object to use for the selected connection.

| Field | Application Property? | Description |
|---|---|---|
| Connection | | Salesforce.com connection name. |
| | | If you have multiple Salesforce.com connections, and would like to use a different connection than the one you specified when creating the flow, you can change the connection by selecting it from the drop down menu for this field. |
| | | **Default value:** The name of the Salesforce.com connection that you had selected at the time creating this flow. |
| Object | | Salesforce.com business object name. |
| | | If you would like to configure this trigger with a different object than the one you specified when creating the flow, you can change the object by selecting it from the drop down menu for this field. |
| | | **Default value:** The name of the Salesforce.com object that you had selected at the time of creating this flow. |
| Subscriber type | | The type of subscription. |
| | | **Default value:** PushTopic |
| Auto Create PushTopic | | Select `False` to use an existing Salesforce PushTopic. |
| | | **Default value:** `True` |
| Query | Yes | Available when you select **Auto Create PushTopic** as `True`. |
| | | The query used to receive information from Salesforce.com, for example Select Id, Name From Account. The query must be in the SOQL (Salesforce Object Query Language) syntax. Selecting the Id field is mandatory in the query for this trigger. The query object must be the same as the one that you selected in the **Object Name** field. See the Salesforce documentation for more details. |

| Field | Application Property? | Description |
|---|---|---|
| Channel Name | Yes | Available when **Auto Create PushTopic** is set to `false`.<br><br>Enter the topic name of the stream to which the listener subscribes.<br><br>The topic name starts with /topic/ and continues with the topic name configured on the Salesforce server.<br><br>📋 You can configure this activity only for a PushTopic that exists on the Salesforce server. |
| Replay ID | Yes | Available when **Auto Create PushTopic** is set to `false`.<br><br>Salesforce stores events for 24 hours. By configuring this field, you can retrieve events that are in the retention window.<br><br>• `-2` starts the replay from 24 hours ago.<br>• `-1` starts the replay from the moment the listener starts.<br>• An actual replay ID means all events after that ID can be retrieved. For example, if the Replay ID is 7, all the events having Replay ID greater than 7 are retrieved. |

**Map to Flow Inputs**

This tab allows you to map the trigger output to the flow input.

# SalesforceCreate Activity

This activity adds an object to the database of your organization.

**Configuration**

On the **Configuration** tab, provide the following information to identify which Salesforce.com connection to use and the type of object to create.

| Field | Description |
| --- | --- |
| Connection Name | Salesforce.com connection name. If you have created multiple Salesforce.com connections, select the one you want to use from the drop down menu for this field. |
| Object Name | Salesforce.com business object name. Select the object you want to use for this activity from the drop down menu for this field. |

**Input**

You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. The input tree displayed for this activity depends on the object that you selected in the **Configuration** tab. Refer to the "Using the Mapper" section in the Flogo® Enterprise documentation for details on how to use the mapper.

**Output**

The schema for the output of this activity is displayed in a tree format in this tab. The schema varies according to the object that you selected on the **Configuration** tab. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

# SalesforceQuery Activity

This activity executes the specified SOQL SELECT statement. It executes a query against the specified object for the specified connection and returns the data that matches the specified criteria in the query.

**Configuration**

On the **Configuration** tab, provide the following information to identify which Salesforce.com connection to use and the type of object to query.

| Field | Description |
|---|---|
| Connection Name | Salesforce.com connection name. If you have created multiple Salesforce.com connections, select the one you want to use for this flow. |
| Object Name | Salesforce.com business object name. Select the object you want this activity to use for this activity from the drop down menu for this field. |

**Input**

Entering or mapping a value for the id field in this tab is mandatory. See the Salesforce documentation for more details.

Enter the Salesforce.com query, you want to send to Salesforce using SOQL (Salesforce Object Query Language). You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. The input tree displayed for this activity depends on the object that you selected in the **Configuration** tab. Refer to the "Using the Mapper" section in the Flogo® Enterprise documentation for details on how to use the mapper.

**Output**

The schema for the output of this activity is displayed in a tree format in this tab. The schema varies according to the object that you selected on the **Configuration** tab. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

# SalesforceUpdate Activity

This activity updates an existing object within the database of your organization.

**Configuration**

On the **Configuration** tab, provide the following information to identify which Salesforce.com connection to use and the type of object to use for the selected connection.

| Field | Description |
|---|---|
| Connection Name | Salesforce.com connection name. If you have created multiple Salesforce.com connections, select the one you want to use for this flow. |
| Object Name | Salesforce.com business object name. Select the object you want this activity to use for this activity from the drop down menu for this field. |

**Input**

Entering or mapping a value for the ID field on this tab is mandatory. See the Salesforce documentation for more details.

Input the details of the object that you want to update. You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. The input tree displayed for this activity depends on the object that you selected in the **Configuration** tab. Refer to the "Using the Mapper" section in the Flogo® Enterprise documentation for details on how to use the mapper.

**Output**

The schema for the output of this activity is displayed in a tree format in this tab. The schema varies according to the object that you selected on the **Configuration** tab. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

# SalesforceDelete Activity

This activity is used to delete a record in the Salesforce.com database. It deletes an instance of the specified object from the database of your organization.

**Configuration**

On the **Configuration** tab, provide the following information to identify which Salesforce.com connection to use and the type of object to be deleted.

| Field | Description |
|---|---|
| Connection Name | Salesforce.com connection name. If you have created multiple Salesforce.com connections, select the one you want to use for this flow. |
| Object Name | Salesforce.com business object name whose record you want to delete from the Salesforce.com database. |

**Input**

Entering or mapping a value for the id field in this tab is mandatory. See the Salesforce documentation for more details.

Input the details of the object that you want to delete. You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. The input tree displayed for this activity depends on the object that you selected in the **Configuration** tab. Refer to the "Using the Mapper" section in the Flogo® Enterprise documentation for details on how to use the mapper.

**Output**

The schema for the output of this activity is displayed in a tree format in this tab. The schema varies according to the object that you selected on the **Configuration** tab. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.