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Mulesoft Anypoint Platform →

Salesforce Integration using Mulesoft

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The following article showcases an integration example between the CRM platform and CloudBlue Connect by using the CloudBlue Connect Mulesoft extension. This article also explains the CRM workflow and provides a video tutorial.

Salesforce Cloud Enterprise Edition represents the aforementioned CRM platform. Salesforce provides various cloud-based solutions and a platform that helps organizations to effectively streamline their sales and marketing operations. Refer to the salesforce.com to learn more about this platform

Video Tutorial

The video tutorial below showcases and describes the Salesforce integration via the Mulesoft extension:

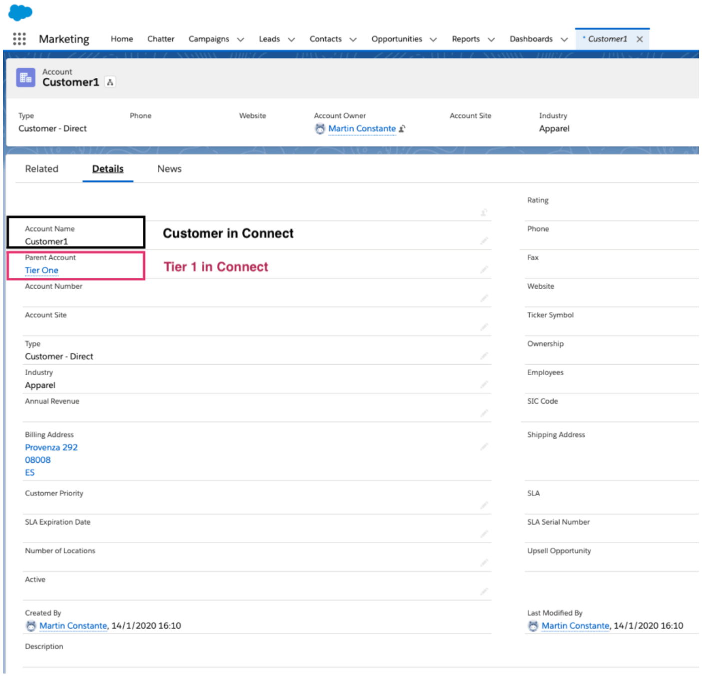
Salesforce Workflow

Before following the integration instructions, it is important to understand a standard Salesforce workflow. The following schematically illustrates and describes this workflow:

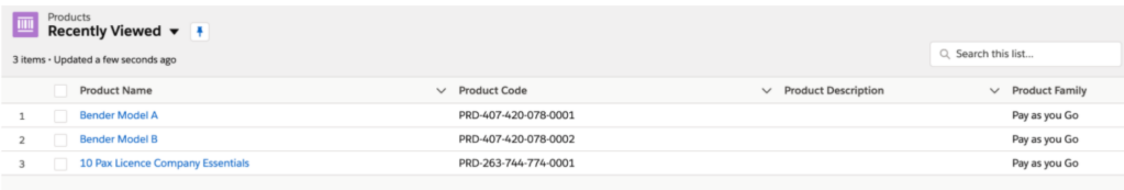
1. It is necessary to create a customer and reseller (T1) accounts.
2. Define sales quotes, i.e., the proposed prices of your product and services.
3. Generate sales order, i.e., specify the details about the product or services ordered by the customer.
4. Prepare billing data and invoices.

The example below showcases the implemented Connect integration on the **Salesforce Dev Platform**, where:

- **T1:** This represents a Reseller (Tier 1) account within the Connect platform.
- **Customer:** This account, as the name implies, represents your customer.
- **Products:** The products in the Salesforce Catalog should match the product items (SKUs) on Connect.



Furthermore, note that the **product family** values should be set to *Pay as you go* or *Reservation*. In case the product is set to *Pay as you go* value, the quantity value is ignored and set it to “-1”.

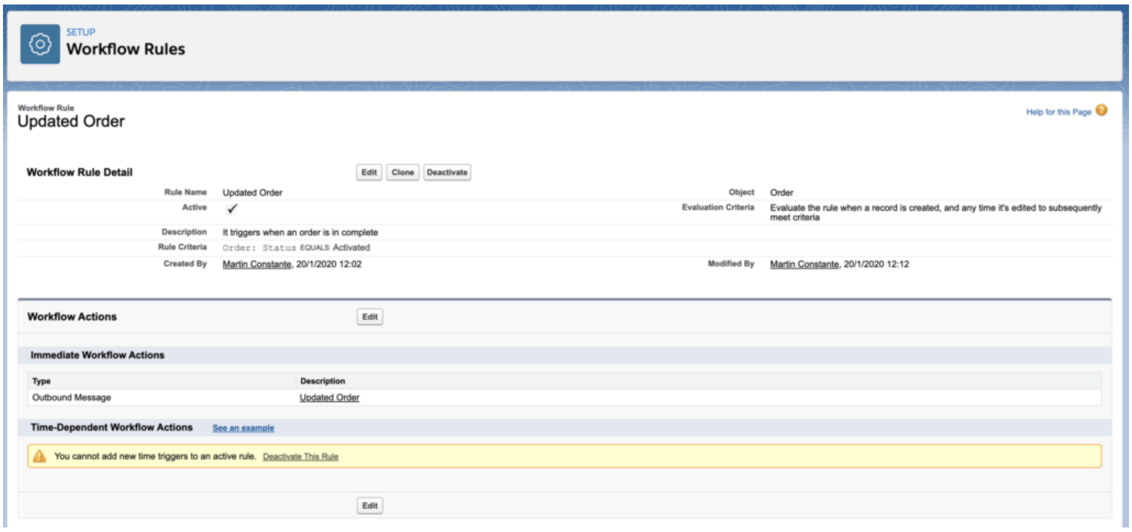


Mulesoft Integration

The following integration example triggers the Mulesoft App from the Salesforce platform. This integration features a workflow rule that sends a webhook call once your **Sales Order** is assigned to the *Activated* Status.

Trigger Configuration

The integration example includes the following trigger configuration on the Salesforce platform:



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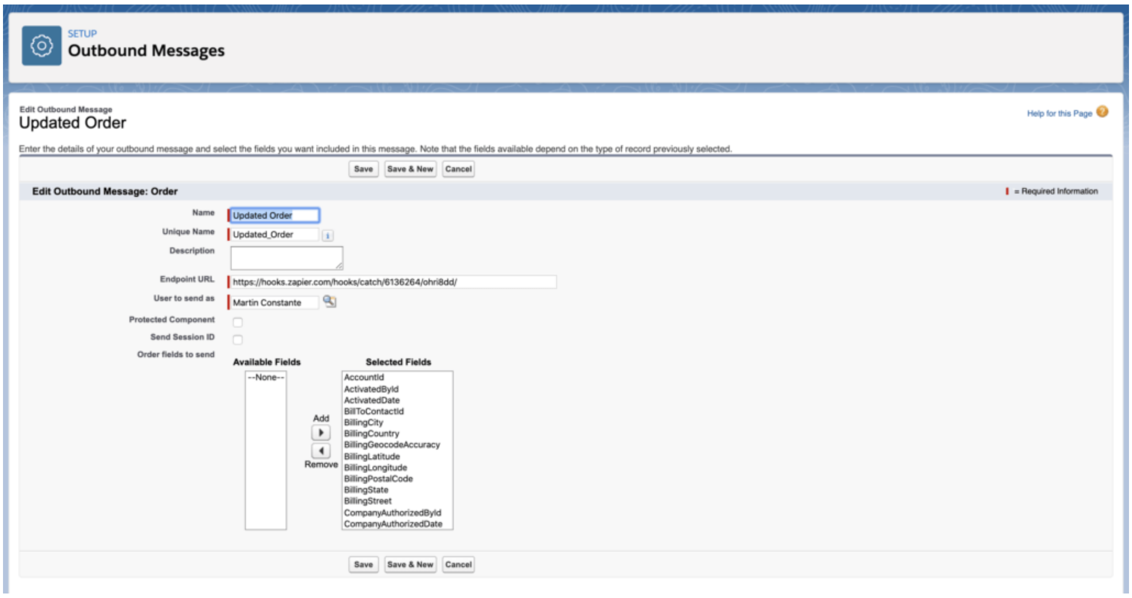

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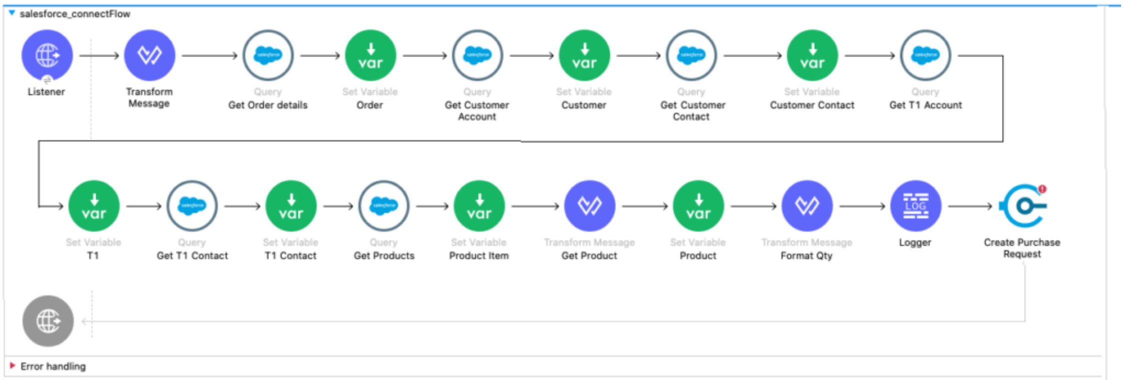
- **Workflow Rule**: The workflow rule specifies *Order* as selected object. In addition, it contains a criteria that triggers the workflow once the order status equals *Activated*.
- **Workflow Actions**: This contains an outbound message with your required endpoint URL.

Integration Flows

The integration example includes two flows on the Anypoint platform: one that *creates* a purchase requests on the Connect platform once a Salesforce order is generated and another that *saves* request data on Salesforce in case this purchase request is approved.

Create Purchase Request

This flow should generate a new purchase request on Connect once a new sales order is created on the Salesforce platform:



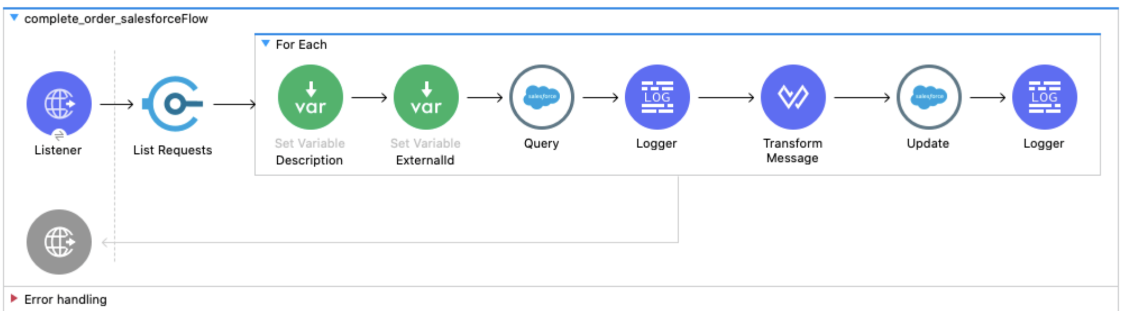
The first step of this flow is creating an http listener that receives the data of your Salesforce orders. Namely, the listener should receive the Order identifier for the following processing.

Thereafter, the flow defines queries that get order details from Salesforce, customer account details, customer contacts, Tier 1 account data, T1 contact data, and product information.

After these steps are successfully defined, the flow includes all required data to create a purchase request on the Connect platform via the Mulesoft Extension.

Save Request Data

Once the purchase request is approved on the Connect platform, this flow should update the Salesforce order with all required purchase data:



First of all, it is necessary to configure a Connect webhook for the required product. This webhook should trigger your created listener once a purchase request is approved. Thus, define this listener as the first step of this flow.

Next, the flow should get approved purchase request data. Therefore, the flow lists all purchase requests and includes the Salesforce query for each approved request.

Finally, the flow updates each approved request on the Salesforce platform and provides the required product information.

Note that your subscription external ID on Connect should match the OrderID value on the Salesforce platform.