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Salesforce Scenario



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Scope

In this page it's show an example of integration between a CRM platform and Connect using the Cloudblue Connect Zapier APP.

The CRM platform selected is Salesforce CRM Cloud Enterprise Edition.

Salesforce CRM is a Salesforce cloud management module, the world leader that allows the implementation of business processes in a simple and effective way.

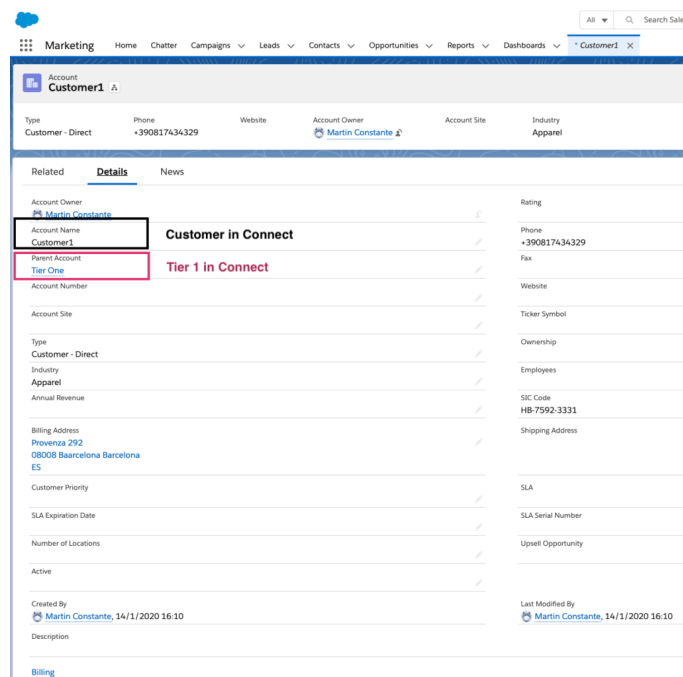
It offers an innovative technology that allows to optimize your business processes so that you can treat your customers individually, leaving aside the theory of mass marketing.

Modeling

A classic CRM workflow is like:



This integration was developed between a **Salesforce Dev Platform** and **Connect**. Covers the fulfillment workflow with:



T1: Is an Provider Account.

CloudBlue

Customer: Is a Customer in connect

Products: The products in the Salesforce catalog are corresponding with the product item in Connect. Then each SKU in Connect is a Product in the catalog.

The values of the family must be “Pay as you go” or “Reservation”. If the product have set Pay as you go, the Zap ignores the Quantity and set to “-1”

Products			
Recently Viewed			
3 items • Updated a few seconds ago			
	Product Name	Product Code	Product Description
1	Bender Model A	PRD-407-420-078-0001	Pay as you Go
2	Bender Model B	PRD-407-420-078-0002	Pay as you Go
3	10 Pax Licence Company Essentials	PRD-263-744-774-0001	Pay as you Go

ZAP Integration

Zap

To trigger the Zap from Salesforce, It was configured a workflow that send a webhook when a Sales Order is in “Completed” status.

Salesforce trigger configuration

Workflow Rules

Workflow Rule

Updated Order

Help for this Page

Workflow Rule Detail

Rule Name

Updated Order

Active

It triggers when an order is in complete

Rule Criteria

Order: Status EQUALS Activated

Created By

Martin Constante, 20/1/2020 12:02

Object

Order

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Modified By

Martin Constante, 20/1/2020 12:12

Workflow Actions

Immediate Workflow Actions

Type

Outbound Message

Description

Updated Order

Time-Dependent Workflow Actions

See an example

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

SETUP
Outbound Messages

Edit Outbound Message
Updated Order

Enter the details of your outbound message and select the fields you want included in this message. Note that the fields available depend on the type of record previously selected.

Save Save & New Cancel

Edit Outbound Message: Order ! = Required Information

Name **Updated Order**

Unique Name **Updated_Order**

Description

Endpoint URL **https://hooks.zapier.com/hooks/catch/6136264/ohri8dd/**

User to send as **Martin Constante**

Protected Component ☐

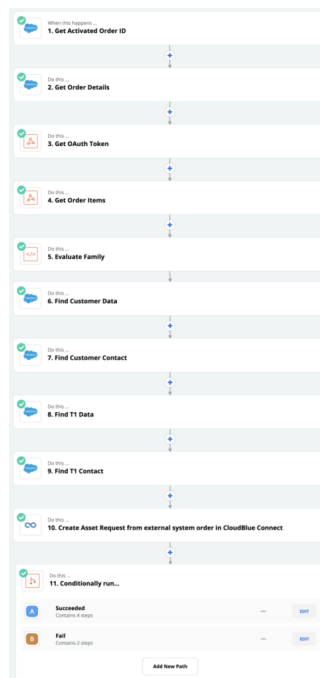
Send Session ID ☐

Order fields to send

Available Fields	Selected Fields
--None--	Accountid
	ActivatedById
	ActivatedDate
	BillToContactId
	BillingCity
	BillingCountry
	BillingGeocodeAccuracy
	BillingLatitude
	BillingLongitude
	BillingPostalCode
	BillingState
	BillingStreet
	CompanyAuthorizedById
	CompanyAuthorizedDate

Save Save & New Cancel

Zap detail



The step 11 evaluates what happened with the request and if is success, update the sales order item description in Salesforce with the Asset UUID created, otherwise send an email with the result of the request.