Informatica® Cloud Application Integration
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Synchronize Salesforce Accounts with Dynamics 365 Accounts

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Table of Contents

Preface 5

Chapter 1: Introduction to Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe 6

Prerequisites for using the recipe. 6

Creating a custom field in the Salesforce account entity. 6

Creating a custom field in the Dynamics 365 account entity. 7

Chapter 2: Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe contents. 10

Recipe assets. 11

Chapter 3: Using the Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe. 12

Copying and accessing the recipe. 12

Configuring and publishing the Salesforce connection. 13

Configuring and publishing the Dynamics 365 connection. 14

Configuring and publishing the process. 15

Preface

Use *Synchronize Salesforce Accounts with Dynamics 365 Accounts* to learn how to synchronize Salesforce accounts with Dynamics 365 accounts. The recipe is based on REST and SOAP APIs and you use an HTTP request to call the process. This guide assumes that you have an understanding of the Salesforce Connector and Dynamics 365 Connector concepts.

CHAPTER 1

Introduction to Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe

The Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe is based on REST and SOAP APIs.

The process synchronizes the Salesforce account with the Dynamics 365 account and populates custom ID fields. The process is called by an HTTP request with the Salesforce account ID as an incoming parameter. If validation is successful with ID and name, the process creates an account in Dynamics 365 and populates the **Dynamics_ID** field with the value from the Salesforce **Dynamics_ID** custom field. If an account with a Dynamics ID value from Salesforce already exists in Dynamics 365, the process updates the account with Salesforce account data. The process then returns the Account ID from Dynamics 365.

Prerequisites for using the recipe

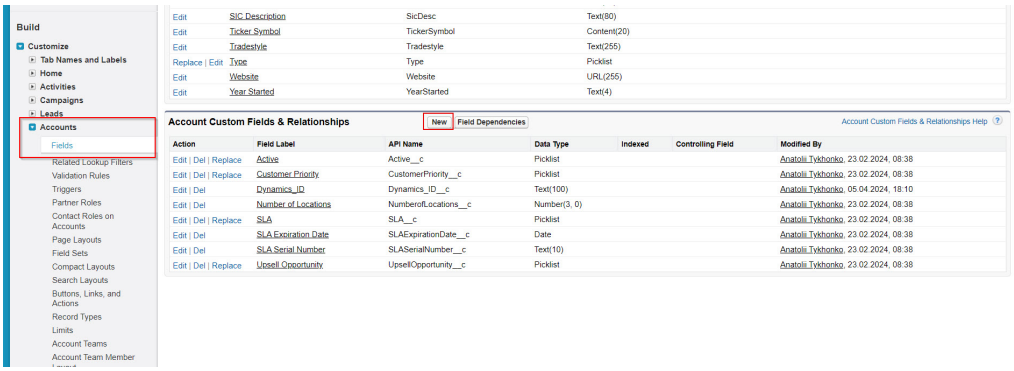
To synchronize Salesforce accounts with Dynamics 365 accounts, the following prerequisites must be met:

- Create a custom field in the Salesforce account entity
- Create a custom field in the Dynamics 365 account entity

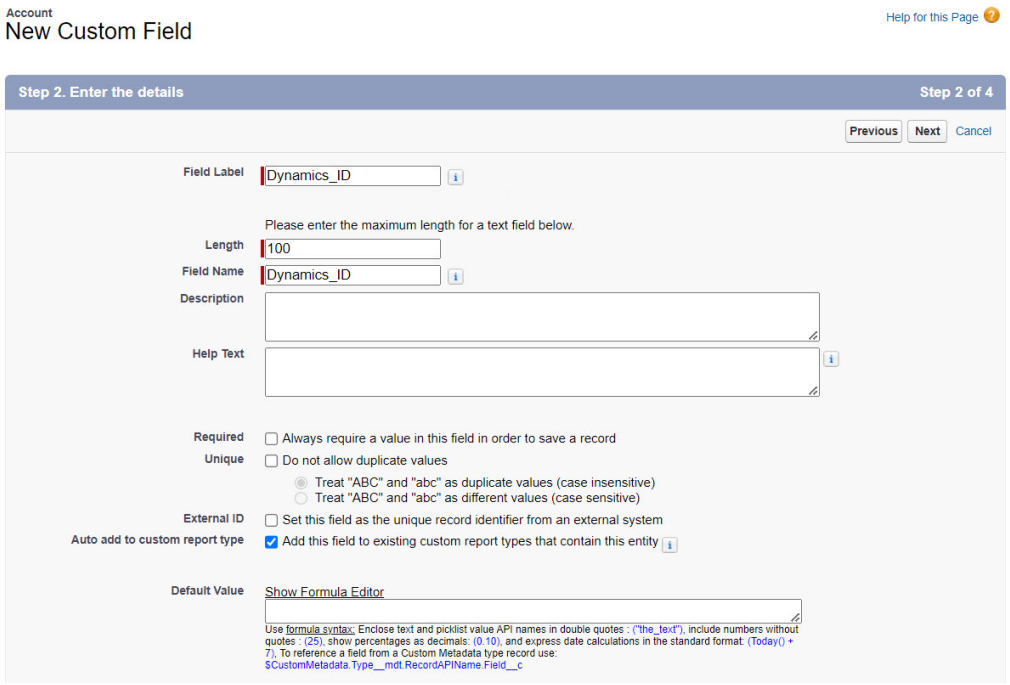
Creating a custom field in the Salesforce account entity

To create a custom field in the Salesforce account entity, perform the following steps:

1. Log in to the Salesforce organization.
2. Go to **Setup** > **Build** > **Customize** > **Accounts** > **Fields**, and then click **New**.
   The following image shows the **New** button on the **Accounts Fields** page:



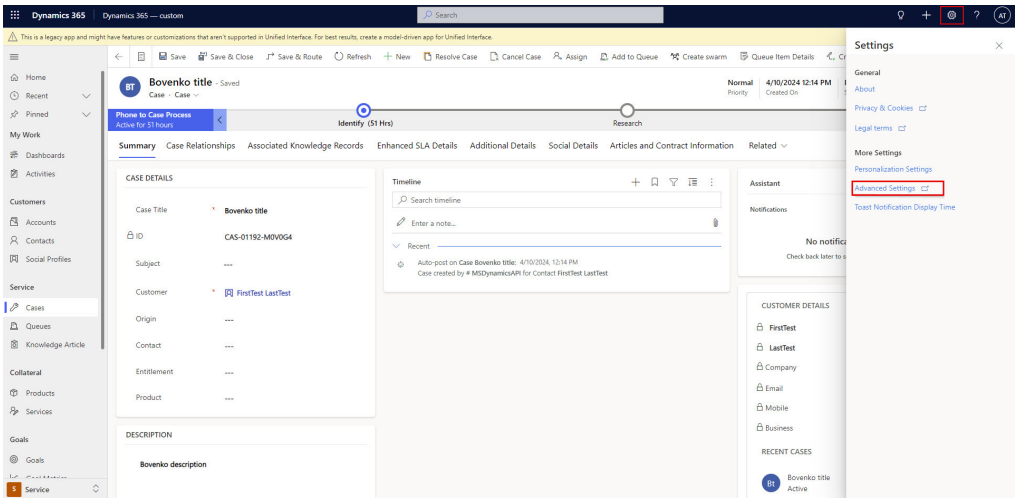
3. In the **Field Label** field, enter the **Dynamics_ID** value and save the custom field.
   The following image shows the **New Custom Field** page:



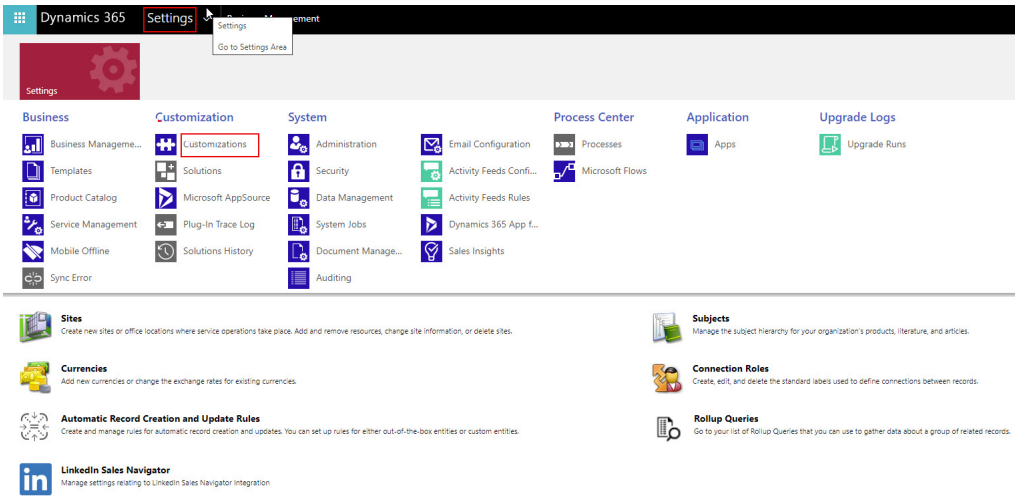
Creating a custom field in the Dynamics 365 account entity

To create a custom field in the Dynamics 365 account entity, perform the following steps:

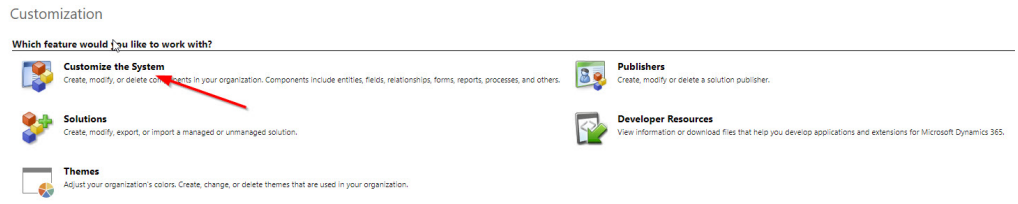
1. Log in to the Dynamics 365 organization.
2. Go to **Settings** > **Advanced Settings**.
   The following image shows the **Advanced Settings** option on the **Dynamics 365** page:



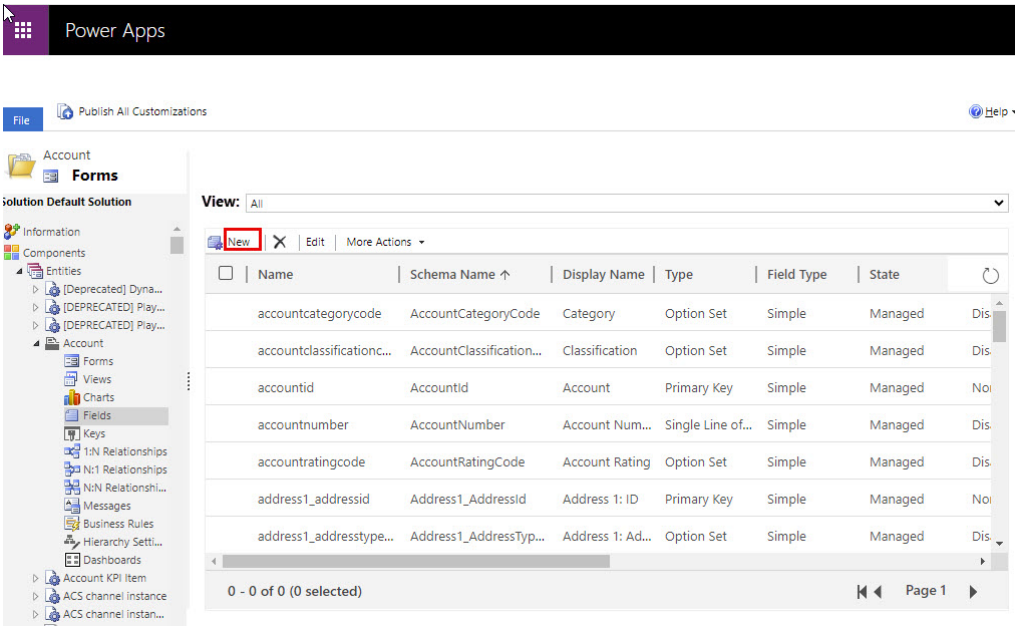
3. Click **Customizations** on the **Settings** page.
The following image shows the **Customizations** option on the **Settings** page:



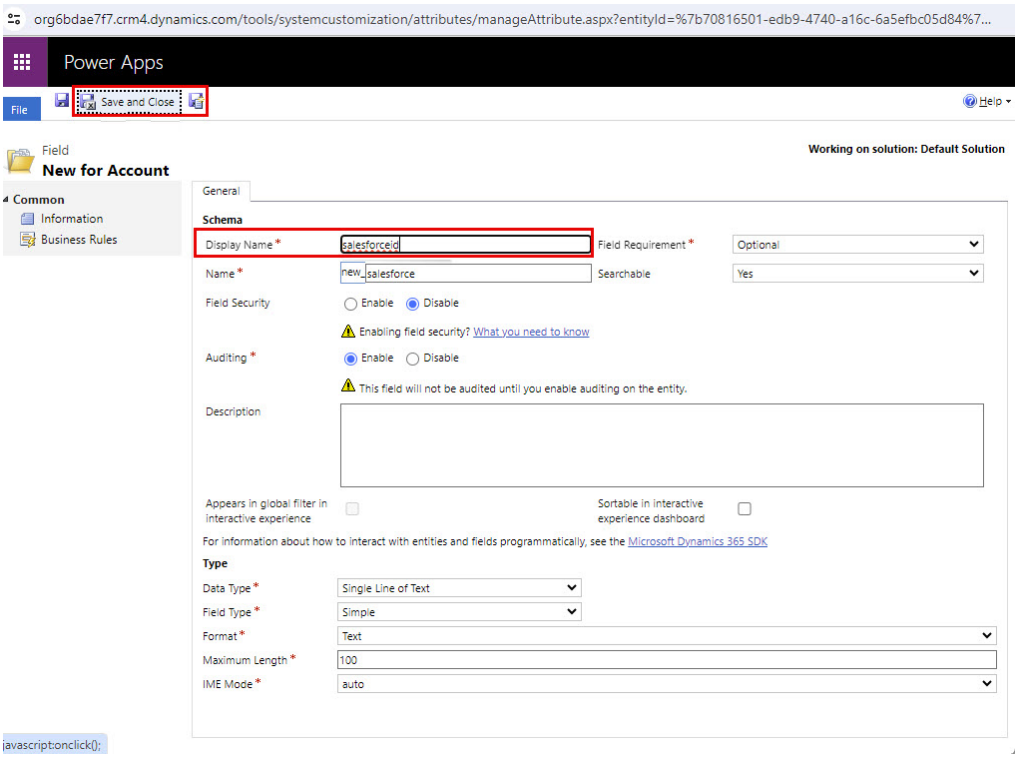
4. Click **Customize the System**.
The following image shows the **Customize the System** option on the **Customization** page:



5. Go to **Components** > **Entities** > **Account** > **Fields**, and then click **New**.
The following image shows the **New** button on the **Account Fields** page:



6. In the **Display Name** field, enter the **salesforceid** value and click **Save and Close**.
The following image shows the **New for Account** page:

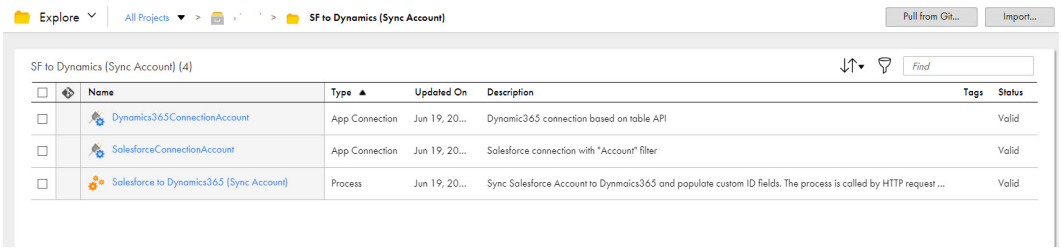


CHAPTER 2

Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe contents

The Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe contains multiple assets such as app connections and process.

The following image shows the assets that the Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe package contains:



Recipe assets

The following table lists the assets that the Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe package contains:

Asset Name	Asset Type	Description
Dynamics365ConnectionAccount	App Connection	Dynamics 365 connection based on the Table API.
SalesforceConnectionAccount	App Connection	Salesforce connection with the account filter.
Salesforce to Dynamics365 (Sync Account)	Process	The process synchronizes the Salesforce account with the Dynamics 365 account and populates custom ID fields. The process is called by an HTTP request with the Salesforce account ID as an incoming parameter. If validation is successful with ID and name, the process creates an account in Dynamics 365 and populates the **Dynamics_ID** field with the value from the Salesforce **Dynamics_ID** custom field. If an account with a Dynamics ID value from Salesforce already exists in Dynamics 365, the process updates the account with Salesforce account data. The process then returns the Account ID from Dynamics 365.

CHAPTER 3

Using the Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe

To use the Synchronize Salesforce Accounts with Dynamics 365 Accounts recipe, you must perform the following steps manually:

Step 1: Copy and access the recipe

Step 2: Configure and publish the SalesforceConnectionAccount connection

Step 3: Configure and publish the Dynamics365ConnectionAccount connection

Step 4: Configure and publish the process

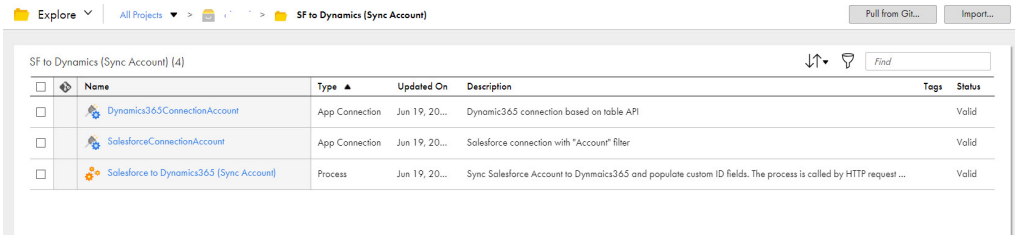
Copying and accessing the recipe

To copy and access the recipe content, perform the following steps:

1. Open the **Synchronize Salesforce Accounts with Dynamics 365 Accounts** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.

   It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.
4. After the recipe is copied, click **Explore** to access the recipe content.
5. Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box.

   All the assets in the recipe are displayed as shown in the following image:



Configuring and publishing the Salesforce connection

To configure and publish the Salesforce connection, perform the following steps:

1. Open the **SalesforceConnectionAccount** connection.
2. In the **Type** field, select **Salesforce**.
3. In the **Run On** field, select **Cloud Server or any Secure Agent**.
4. In the **Authentication Type** field, select **Password** or **OAuth** as needed.

   Based on the authentication type selected, perform one of the following steps:

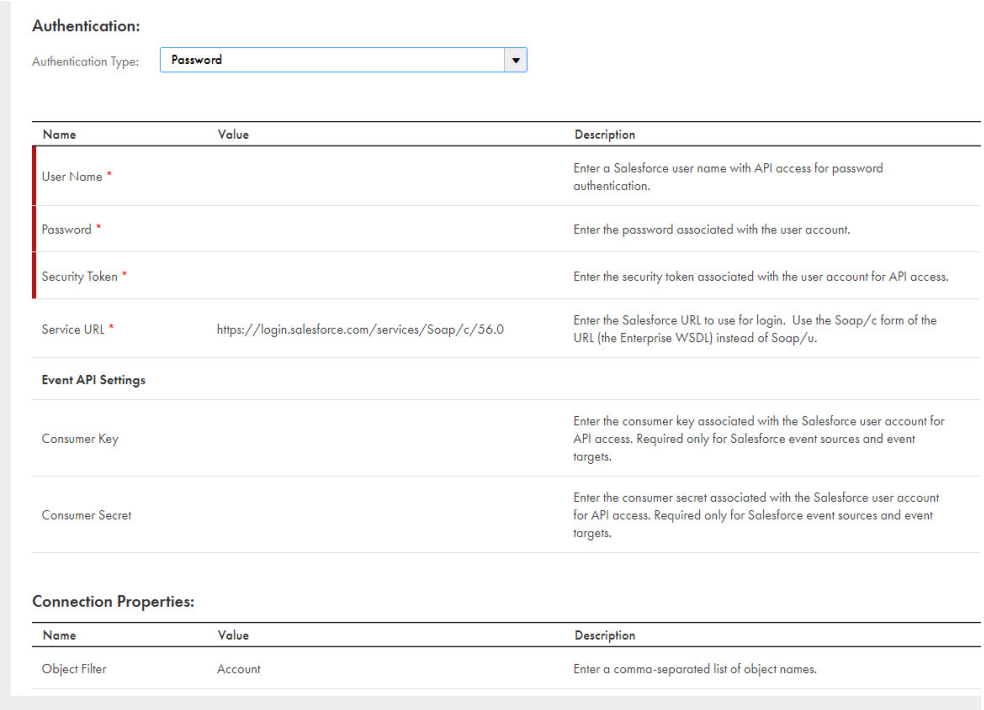
   - For **Password** authentication, enter values for the following properties:

     - User Name: Salesforce developer account user name.

     - Password: Salesforce developer account password.

     - Security Token: Salesforce security token.

     The following image shows the **SalesforceConnectionAccount** connection detail page with the authentication type set to **Password**:



   - For **OAuth** authentication, enter values for the following properties:

     - Authentication URL: Endpoint used to make OAuth authorization requests to Salesforce.

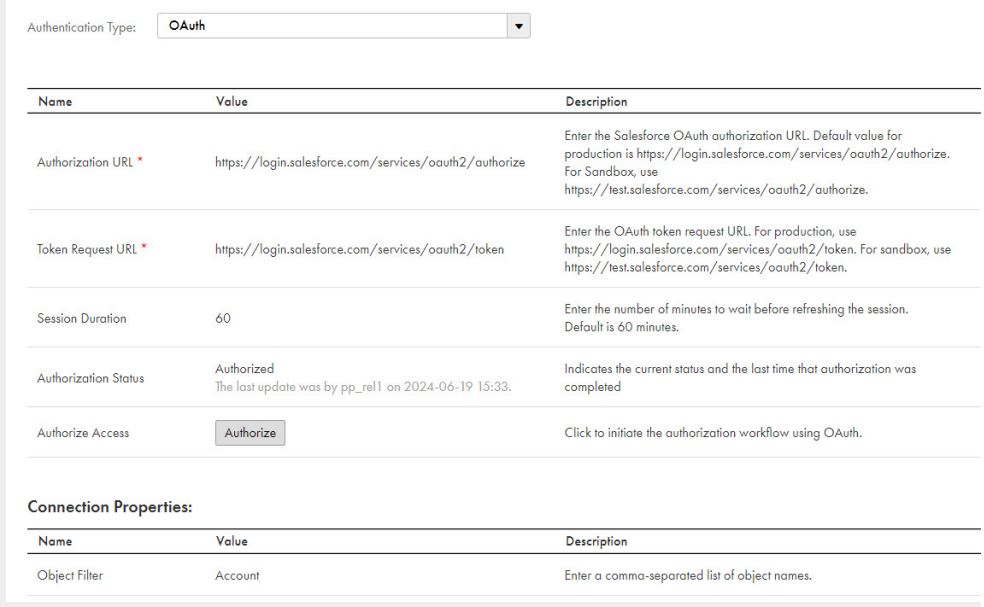
     - Token Request URL: Endpoint used to make OAuth token requests to Salesforce.

     - Session Duration: Number of minutes after which the OAuth token expires.

     - Authorize access: Click **Authorize** > enter Salesforce developer account credentials > click **Allow**.

     The OAuth authentication process starts. You can check the current authorization status in the **Authorization Status** property.

The following image shows the **SalesforceConnectionAccount** connection detail page with the authentication type set to **OAuth**:



5. Save and publish the connection.

Configuring and publishing the Dynamics 365 connection

To configure and publish the Dynamics 365 connection, perform the following steps:

1. Open the **Dynamics365ConnectionAccount** connection.
2. In the **Type** field, select **Dynamics365**.
3. In the **Run On** field, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
Tenant_ID	Dynamics 365 tenant ID to get the access token. Enter the tenant ID that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365 after creating the client credentials.
Client_ID	Dynamics 365 client ID to generate a valid access token. Enter the client ID that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365.
Client_Secret	Dynamics 365 client secret that you generated under **Microsoft Entra ID** > **App registrations** in Dynamics 365.

Property	Description
Grant_type	Grant type that the Dynamics 365 instance uses to get an access token for third-party client authorization. Enter the value as **client_credentials**.
Resource_URL	URL to access the Dynamics 365 instance.

5. Save and publish the connection.

Configuring and publishing the process

1. Open the **Salesforce to Dynamics365 (Sync Account)** process.
2. On the **Start** tab of the Start step, select **Cloud Server** from the **Run On** list.
3. In the **Applies To** field, select **Account (SalesforceConnectionAccount)**.
4. From the **Run As** list, select **Current User**.
5. Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
6. Save and publish the process.