



Informatica® Cloud Application Integration
July 2024

Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts

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Preface

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

CHAPTER 1

Introduction to Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts recipe

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

When the **Account** or **Contact** entity is created or updated, the process is called by a webhook from Dynamics 365, and then a subprocess is called. The subprocess searches for an account in Salesforce based on the **new_salesforceid** field value. If the account exists, the process updates the Salesforce account data. If the account does not exist, the process creates a new account in Salesforce and assigns the **new_salesforceid** field value to the ID of the new account. The process creates a record in the Salesforce database. The subprocess for contact entities uses the same steps as the subprocess for account entities. It also creates a contact in Salesforce based on Dynamics 365 contact.

Prerequisites

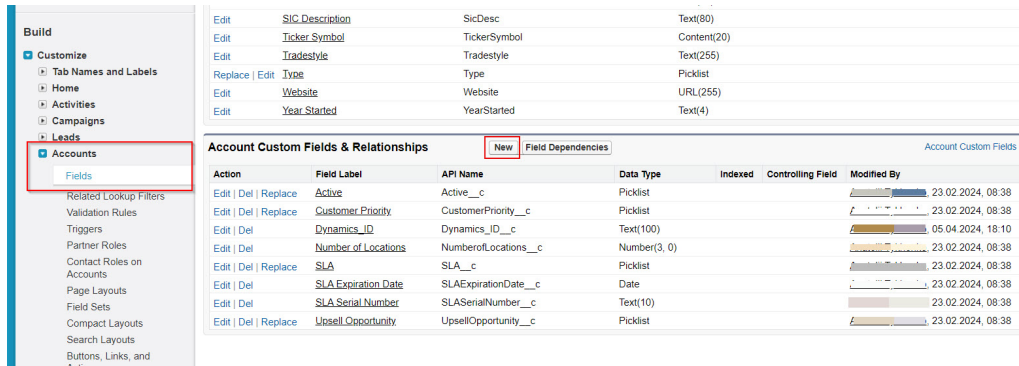
To synchronize Dynamics 365 accounts or contacts with Salesforce accounts or contacts, the following prerequisites must be met:

- Create a custom field in the Salesforce account and contact entities
- Create a custom field in the Dynamics 365 account and contact entities

Creating a custom field in the Salesforce account and contact entities

To create a custom field in the Salesforce account and contact entities, 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:



- In the **Field Label** and **Field Name** fields, enter the **Dynamics_ID** value and save the custom field. You must create a custom field with **Text** data type.

The following image shows the **New Custom Field** page:

Account New Custom Field

Step 2. Enter the details

Field Label ⓘ

Please enter the maximum length for a text field below.

Length

Field Name ⓘ

Description

Help Text ⓘ

Required Always require a value in this field in order to save a record

Unique Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity ⓘ

Default Value

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mtl.RecordAPIName.Field__c

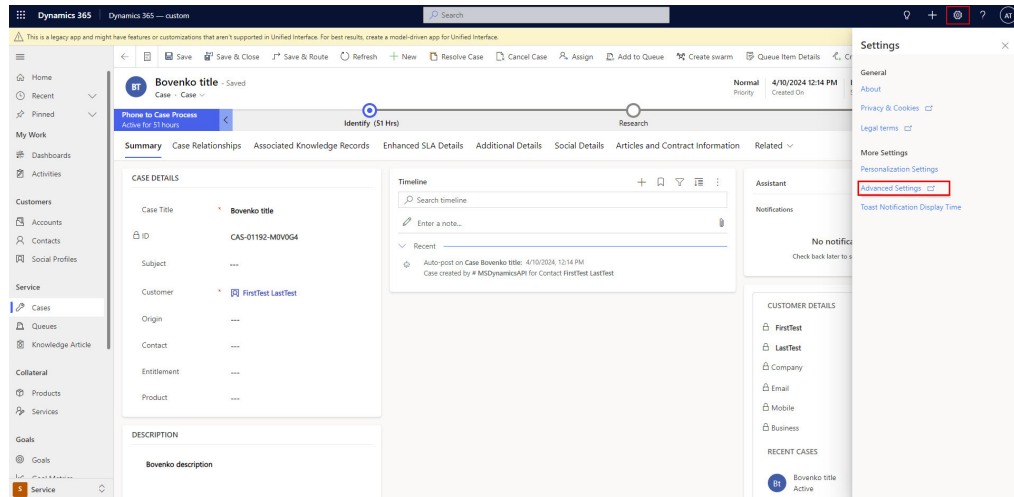
- Follow the same steps for the **Contact** entity.

Creating a custom field in the Dynamics 365 account and contact entities

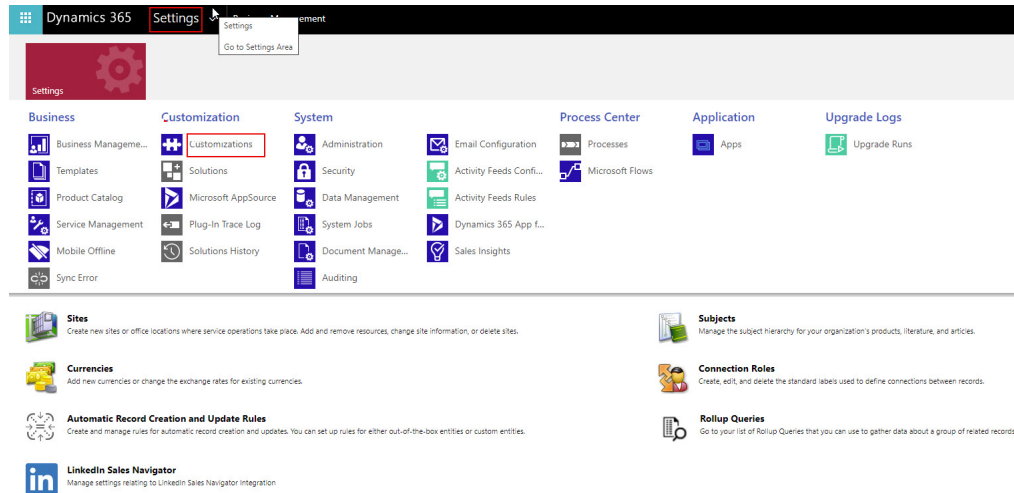
To create a custom field in the Dynamics 365 account and contact entities, perform the following steps::

- Log in to the Dynamics 365 organization.
- Go to **Settings > Advanced Settings**.

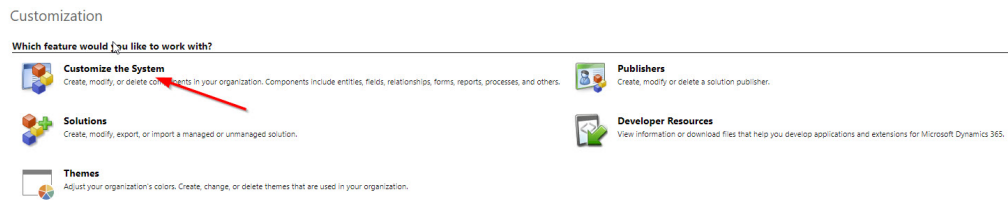
The following image shows the **Advanced Settings** option on the **Dynamics 365** page:



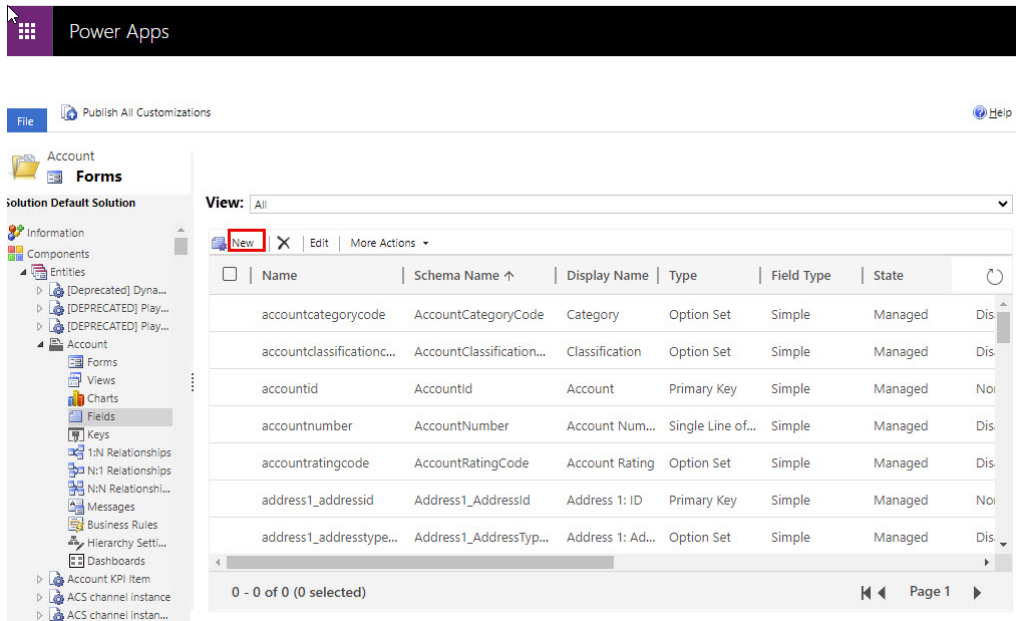
- On the **Settings** page, click **Customizations**.
The following image shows the **Customizations** option on the **Settings** page:



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

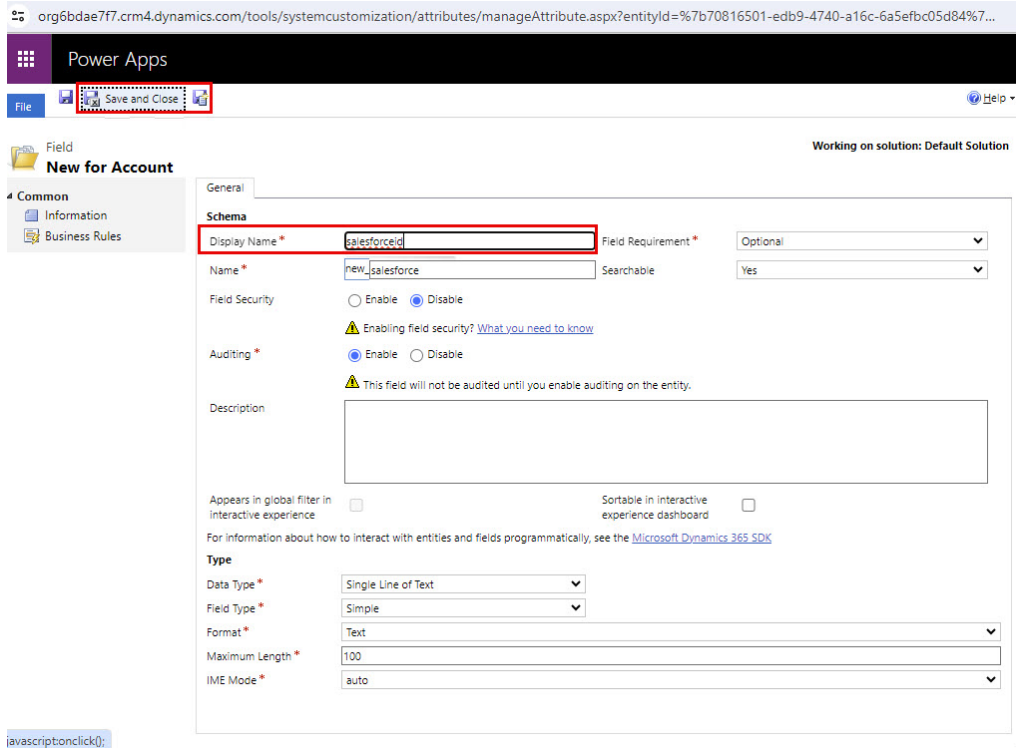


- Go to **Components > Entities > Account > Fields**, and then click **New**.
The following image shows the **New** button on the **Account Fields** page:



- In the **Display Name** field, enter the **salesforceid** value and click **Save and Close**. The value in the **Name** field will get automatically set to **new_salesforceid**.

The following image shows the **New for Account** page:



- Follow the same steps for the **Contact** entity.

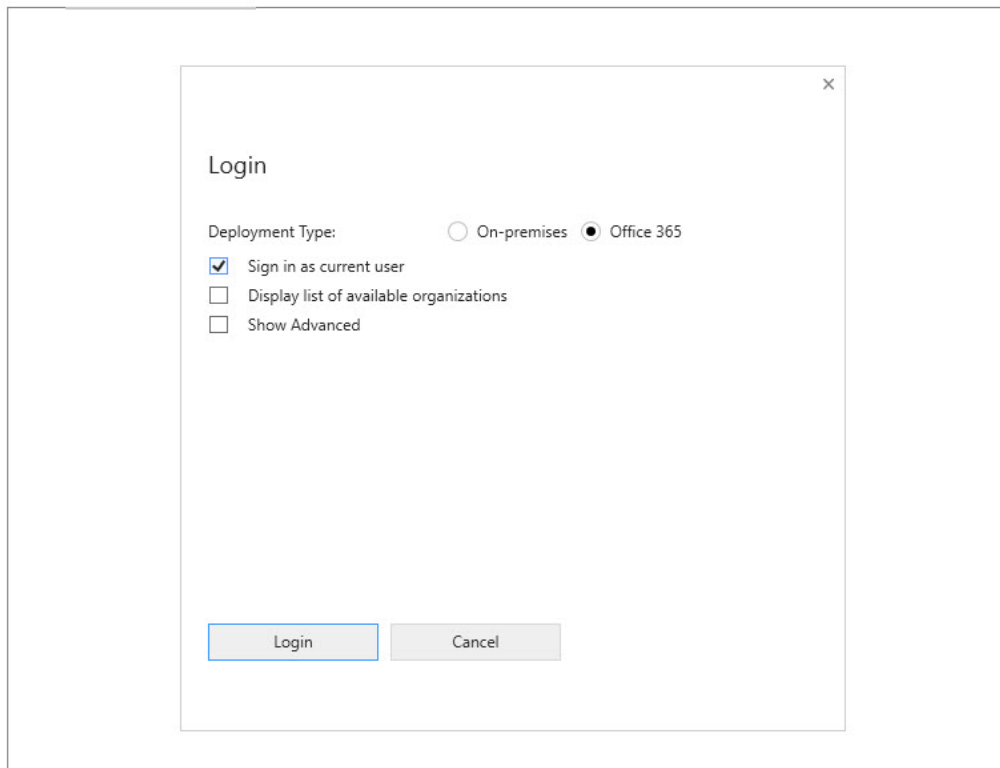
Creating webhooks in Dynamics 365

Use the Plug-in Registration Tool to [register a webhook](#). To get the Plug-in Registration Tool, see [Dataverse development tools](#).

To create a webhook in Dynamics 365, perform the following steps:

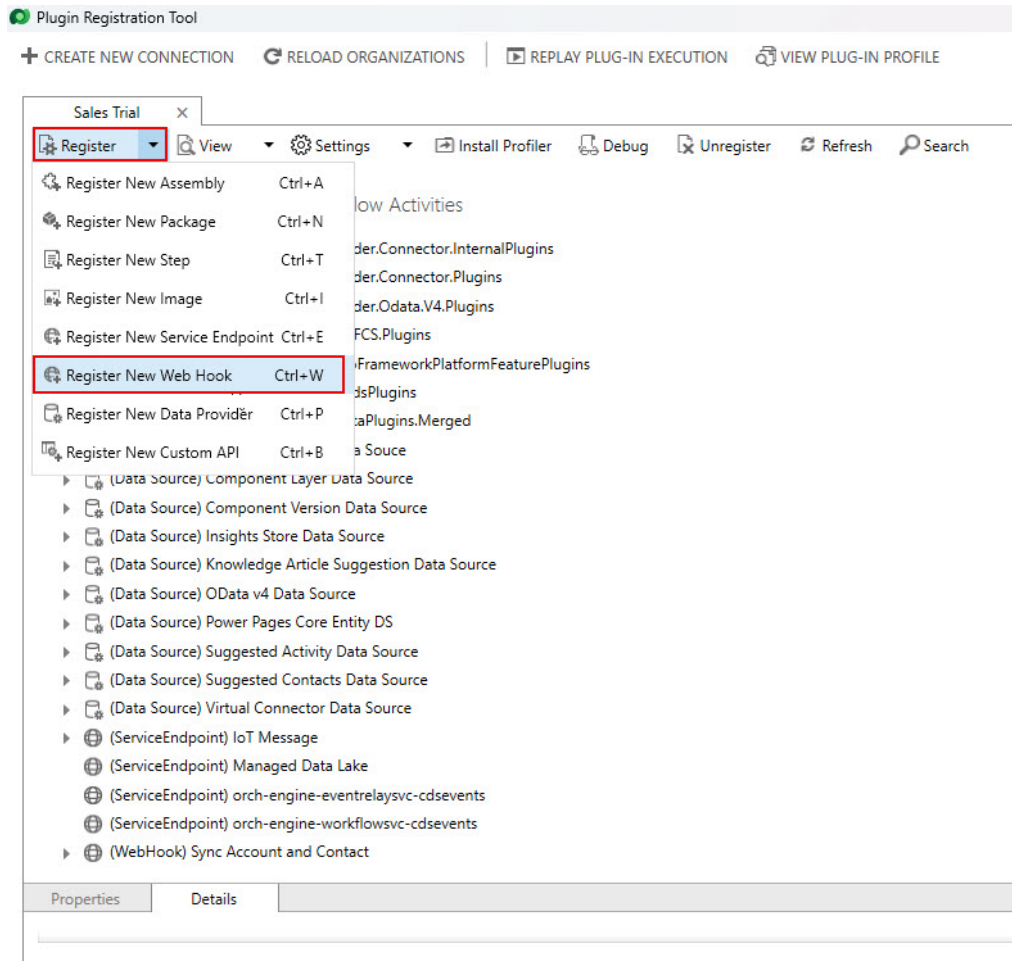
1. Open the Plug-in Registration Tool and log in to your organization.
2. Click **CREATE NEW CONNECTION** on the **Plugin Registration Tool** page.

The following image shows the **CREATE NEW CONNECTION** button on the **Plugin Registration Tool** page:



3. Go to **Register** and select **Register New Web Hook**.

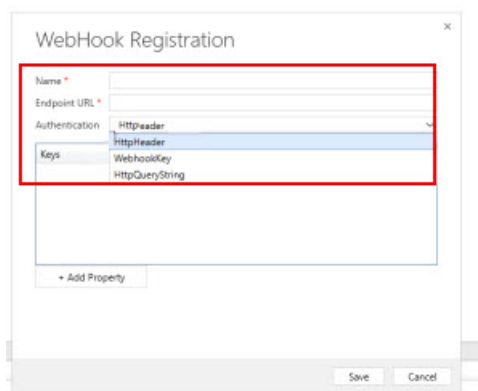
The following image shows the **Register New Web Hook** option on the **Register** menu:



4. Enter the webhook name, Service URL in the **Endpoint URL** field, and the authentication method in the **Authentication** field.

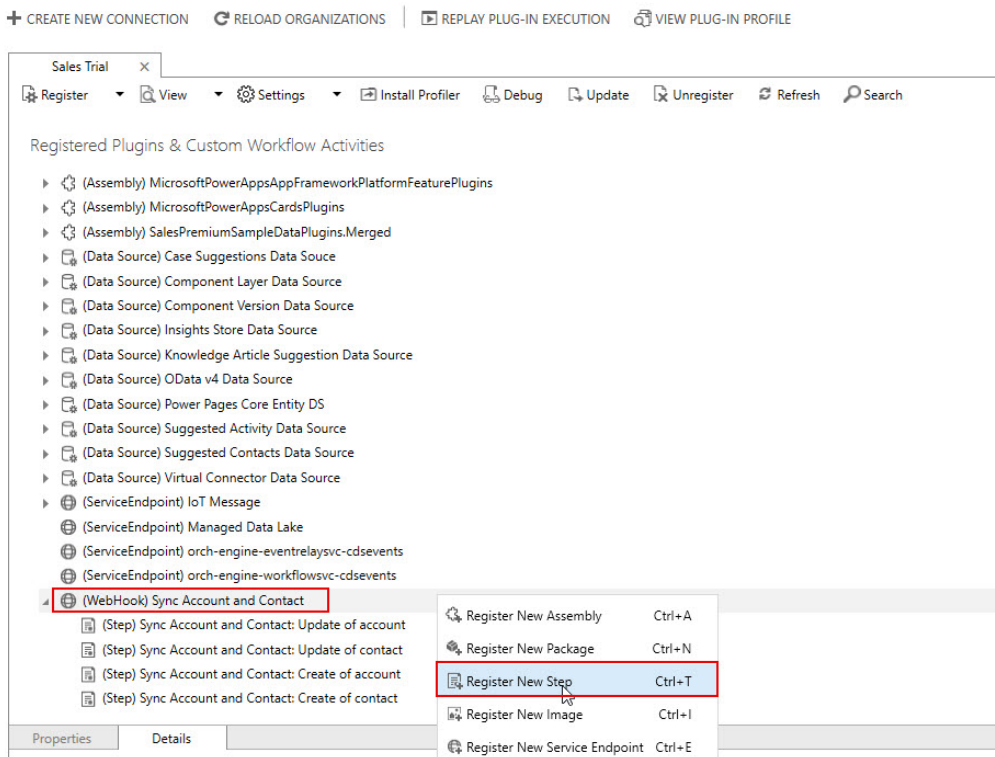
You must specify some key string.

The following image shows the **WebHook Registration** dialog box:

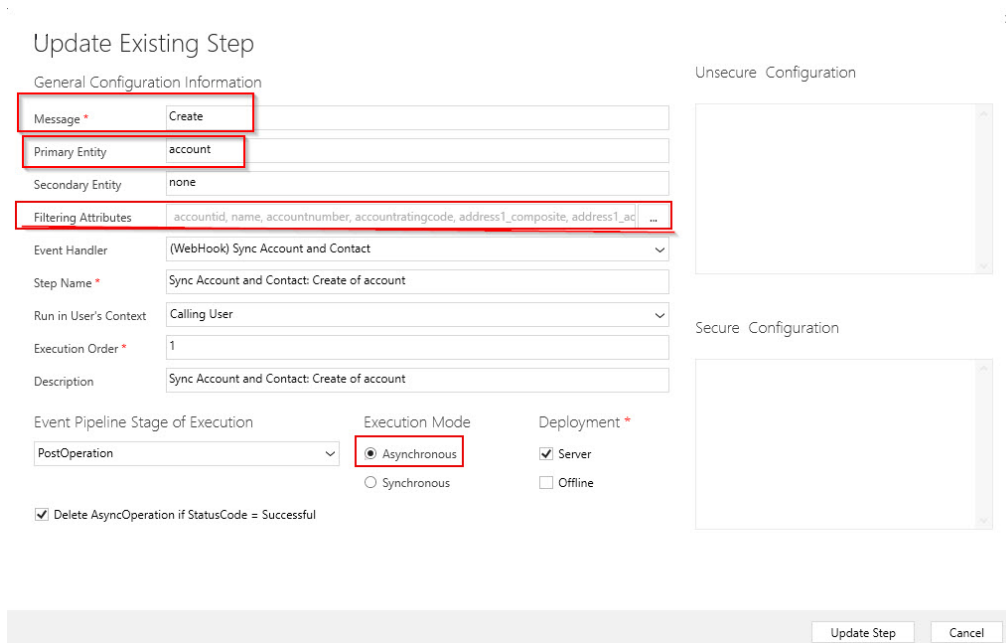


5. Go to **WebHook** and select **Register New Step**.

The following image shows the **Register New Step** option:

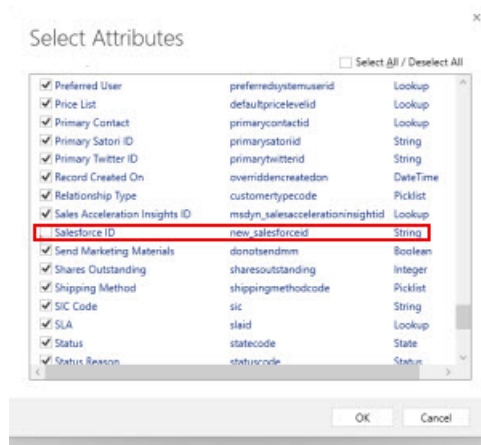


- In the **Update Existing Step** page, enter the value as **Create** in the **Message** field, **account** in the **Primary Entity** field, and select **Asynchronous** in the **Execution Mode** field. The following image shows the **Update Existing Step** page:



- In the **Select Attributes** dialog box, clear the **Salesforce ID** custom field to prevent the webhook from triggering when this field is updated.

The following image shows the **Salesforce ID** custom field attribute in the **Select Attributes** dialog box:



Note: Currently, preventing the webhook from triggering when the **Salesforce ID** custom field is updated is not supported in Dynamics 365. The process ends when it receives a webhook with data indicating that this field has been updated.

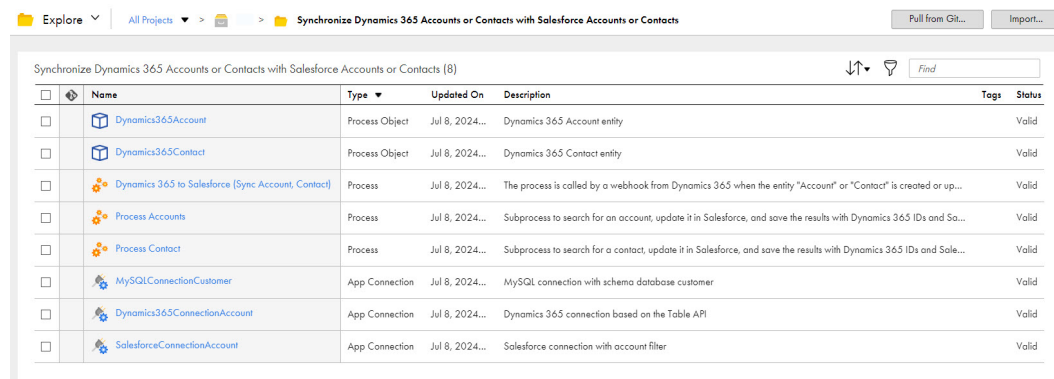
8. Follow steps 5, 6, and 7, that is, **Register New Step** steps for registering the update account entity and create or update contact entity.

CHAPTER 2

Recipe contents

The Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts recipe contains multiple assets such as process objects, app connections, and processes.

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



Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts recipe assets

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

Asset Name	Asset Type	Description
Dynamics365Account	Process Object	Dynamics 365 Account entity.
Dynamics365Contact	Process Object	Dynamics 365 Contact entity.
MySQLConnectionCustomer	App Connection	MySQL connection with the schema database customer.
Dynamics365ConnectionAccount	App Connection	Dynamics 365 connection based on the Table API.

Asset Name	Asset Type	Description
SalesforceConnectionAccount	App Connection	Salesforce connection with the account filter.
Process Accounts	Process	Subprocess to search for an account, update it in Salesforce, and save the results with Dynamics 365 IDs and Salesforce IDs in the database.
Process Contact	Process	Subprocess to search for a contact, update it in Salesforce, and save the results with Dynamics 365 IDs and Salesforce IDs in the database.
Dynamics 365 to Salesforce (Sync Account, Contact)	Process	When the Account or Contact entity is created or updated, the process is called by a webhook from Dynamics 365, and then a subprocess is called. The subprocess searches for an account in Salesforce based on the new_salesforceid field value. If the account exists, the process updates the Salesforce account data. If the account does not exist, the process creates a new account in Salesforce and assigns the new_salesforceid field value to the ID of the new account. The process creates a record in the Salesforce database. The subprocess for contact entities uses the same steps as the subprocess for account entities. It also creates an account to which the contact is associated.

CHAPTER 3

Using the Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts recipe

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

Step 1: Copy and access the recipe

Step 2: Configure and publish the Dynamics365ConnectionAccount connection

Step 3: Configure and publish the SalesforceConnectionAccount connection

Step 4: Configure and publish the MySQLConnectionCustomer connection

Step 5: Configure and publish the processes

Copying and accessing the recipe

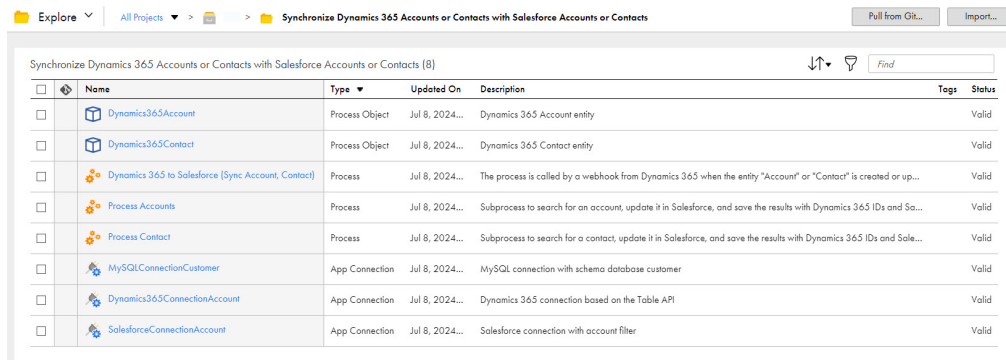
To copy and access the recipe content, perform the following steps:

1. Open the **Synchronize Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts** 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.

- 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 Dynamics 365 connection

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

- Open the **Dynamics365ConnectionAccount** connection.
- In the **Type** field, select **Dynamics365**.
- In the **Run On** field, select **Cloud Server or any Secure Agent**.
- 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.
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.

- Save and publish the connection.

Configuring and publishing the Salesforce connection

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

1. Open the **SalesforceConnectionContact** 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**:

The screenshot displays the configuration page for a Salesforce connection. At the top, the 'Authentication' section has a dropdown menu set to 'Password'. Below this is a table with columns for Name, Value, and Description. The table is divided into three sections: 'Authentication Properties', 'Event API Settings', and 'Connection Properties'.

Name	Value	Description
User Name *		Enter a Salesforce user name with API access for password authentication.
Password *		Enter the password associated with the user account.
Security Token *		Enter the security token associated with the user account for API access.
Service URL *	https://login.salesforce.com/services/Soap/c/56.0	Enter the Salesforce URL to use for login. Use the Soap/c form of the URL (the Enterprise WSDL) instead of Soap/u.
Event API Settings		
Consumer Key		Enter the consumer key associated with the Salesforce user account for API access. Required only for Salesforce event sources and event targets.
Consumer Secret		Enter the consumer secret associated with the Salesforce user account for API access. Required only for Salesforce event sources and event targets.
Connection Properties		
Object Filter	Account, Contact	Enter a comma-separated list of object names.

- 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**:

Authentication Type:

Name	Value	Description
Authorization URL *	https://login.salesforce.com/services/oauth2/authorize	Enter the Salesforce OAuth authorization URL. Default value for production is https://login.salesforce.com/services/oauth2/authorize. For Sandbox, use https://test.salesforce.com/services/oauth2/authorize.
Token Request URL *	https://login.salesforce.com/services/oauth2/token	Enter the OAuth token request URL. For production, use https://login.salesforce.com/services/oauth2/token. For sandbox, use https://test.salesforce.com/services/oauth2/token.
Session Duration	60	Enter the number of minutes to wait before refreshing the session. Default is 60 minutes.
Authorization Status	Not yet authorized.	Indicates the current status and the last time that authorization was completed
Authorize Access	<input type="button" value="Authorize"/>	Click to initiate the authorization workflow using OAuth.

Connection Properties:

Name	Value	Description
Object Filter	Account, Contact	Enter a comma-separated list of object names.

5. Save and publish the connection.

Configuring and publishing the MySQLConnectionCustomer connection

Before configuring the MySQLConnectionCustomer connection, perform the following steps:

- Create a database to store the result.

The following snippet is an example for creating a database in MySQL:

```
CREATE DATABASE `customer`;
CREATE TABLE `customer_onboard` (
  `dynamics_id` varchar(255) DEFAULT NULL,
  `salesforces_id` varchar(255) DEFAULT NULL,
  `name_entity` varchar(255) DEFAULT NULL,
  `process_id` varchar(255) DEFAULT NULL,
  `result_status` varchar(255) DEFAULT NULL
) ENGINE=InnoDB DEFAULT CHARSET=utf8mb4 COLLATE=utf8mb4_0900_ai_ci;
```

- To use a MySQL database, you can download the `mysql-connector-j-8.0.33.jar` JDBC driver from <https://dev.mysql.com/downloads/connector/j/>.

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

1. Open the **MySQLConnectionCustomer** connection.
2. In the **Type** field, select **JDBC Generic Cloud Adapter**.
3. In the **Run On** field, select the Secure Agent.

- In the **Connection Properties** section, enter values for the following properties:

Property	Description
JDBC Connection URL	The URL schema for the database. Use the following schema for the MySQL database: <code>jdbc:mysql://<Host>:<Port>/<Database></code> For example: <code>jdbc:mysql://<Host>:<Port>/customer</code>
JDBC Jar Directory	The path to the JDBC driver <code>.jar</code> file. For example, you can enter the following directory: <code>C:/jdbc</code> If you do not specify a directory path, the Secure Agent gets the <code>.jar</code> file from the <code>process-engine/ext</code> directory. You must specify one of the following values for the JDBC connection to work successfully: <ul style="list-style-type: none"> - JDBC JAR directory. If you choose to specify the JDBC JAR directory, you can place the <code>.jar</code> file in any directory and specify the directory in the JDBC Jar Directory field. - JDBC driver class name. If you choose to specify the JDBC driver class name, you must place the JDBC driver <code>.jar</code> file in the following directory: <code>process-engine/ext</code>
JDBC Driver Class Name	The name of the JDBC driver class. Use the following MySQL driver class name: <code>com.mysql.jdbc.Driver</code> You must specify one of the following values for the JDBC connection to work successfully: <ul style="list-style-type: none"> - JDBC JAR directory. If you choose to specify the JDBC JAR directory, you can place the <code>.jar</code> file in any directory and specify the directory in the JDBC Jar Directory field. - JDBC driver class name. If you choose to specify the JDBC driver class name, you must place the JDBC driver <code>.jar</code> file in the following directory: <code>process-engine/ext</code>
Schema	The schema name is the database name. For example: <code>customer</code>
User name	User name to connect to the database.
Password	Password to connect to the database.
Object Filter	Object names. For example: <code>customer_onboard</code>

- Save and publish the connection.

Configuring and publishing the processes

- Open the **Process Accounts** process.
- On the **Start** tab of the Start step, select **Cloud Server** from the **Run On** list.
- Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
- Save and publish the process.
- Open the **Process Contact** process.
- On the **Start** tab of the Start step, select **Cloud Server** from the **Run On** list.
- Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
- Save and publish the process.

9. Open the **Dynamics 365 to Salesforce (Sync Account, Contact)** process.
10. On the **Start** tab of the Start step, select **Cloud Server** from the **Run On** list.
11. Optionally, you can change the tracing level from **Verbose** to **None** on the **Advanced** tab.
12. Save and publish the process.

Synchronizing Dynamics 365 Accounts or Contacts with Salesforce Accounts or Contacts

When the **Account** or **Contact** entity is created or updated, the process is called by a webhook from Dynamics 365.

The process takes the data from the webhook, the object type, and the ID, and then calls a subprocess to process the account or contact entity. The subprocess tries to find an account in Salesforce based on the value in the **new_salesforceid** field. If the account exists, the process updates the data in the Salesforce account. If an account does not exist, the process creates a new account in Salesforce, and then assigns the value of the **new_salesforceid** field to the ID of the created account.

The process then creates a record in the database with the values Dynamics_ID, Salesforce_ID, entity name, Process_ID, and status as success. If an error occurs while creating the account, the value of the **new_salesforceid** field is not assigned, and only the values Dynamics_ID, Process_ID, and status as failed are written to the database.

The process for contact entities uses the same steps as the subprocess for account entities, including creating an account to which the contact is associated.

Synchronization occurs based on the fields given in following table:

Dynamics 365 - Account	Salesforce - Account
Account Name	Account Name
Address 1(Composite)	Billing Address
Annual Revenue	Annual Revenue
Description	Description
Fax	Fax
ID	Dynamics_ID(custom field)
Industry	Industry
Number of Employees	Number of Employees
Ownership	Ownership
Phone	Phone
SIC Code	SIC Code

Dynamics 365 - Account	Salesforce - Account
Ticker Symbol	Ticker Symbol
Website	Website

Dynamics 365 - Contact	Salesforce - Contact
ID	Dynamics_ID(custom field)
First Name + Last Name	Name
Account Name	Account Name
Job Title	Title
Email	Email
Business Phone	Phone
Mobile Phone	Mobile
Fax	Fax
Address 1(Composite)	Mailing Address
Address 2	Other Address
Personal Notes	Description
Birthday	Birthday

The industry fields for accounts are mapped based on the fields given in the following table:

Dynamics 365	Salesforce
Accounting	Finance
Agriculture and Non-petrol Natural Resource Extraction	Agriculture
Broadcasting Printing and Publishing	Media
Brokers	Insurance
Building Supply Retail	Retail
Business Services	Consulting
Consulting	Consulting
Consumer Services	Other
Design, Direction and Creative Management	Other

Dynamics 365	Salesforce
Distributors, Dispatchers and Processors	Other
Doctor's Offices and Clinics	Healthcare
Durable Manufacturing	Other
Eating and Drinking Places	Food & Beverage
Entertainment Retail	Entertainment
Equipment Rental and Leasing	Other
Financial	Finance
Food and Tobacco Processing	Food & Beverage
Inbound Capital Intensive Processing	Other
Inbound Repair and Services	Other
Insurance	Insurance
Legal Services	Other
Non-Durable Merchandise Retail	Retail
Outbound Consumer Service	Other
Petrochemical Extraction and Distribution	Other
Service Retail	Retail
SIG Affiliations	Other
Social Services	Other
Special Outbound Trade Contractors	Other
Specialty Realty	Other
Transportation	Transportation
Utility Creation and Distribution	Other
Vehicle Retail	Other
Wholesale	Other