



Informatica® Cloud Data Integration

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# Oracle CRM On Demand Connector

Informatica Cloud Data Integration Oracle CRM On Demand Connector

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October 2022

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# Preface

Use *Data Integration Oracle CRM On Demand Connector* to learn how to set up and use Oracle CRM On Demand Connector. Learn how you can use Oracle CRM On Demand Connector to read data from and write data to Oracle CRM On Demand applications.

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# CHAPTER 1

## Introduction to Oracle CRM On Demand Connector

You can use Oracle CRM On Demand Connector to connect to Oracle CRM On Demand applications from Data Integration. Use Oracle CRM On Demand Connector to read data from or write data to Oracle CRM On Demand applications.

You can use Oracle CRM On Demand objects as sources and targets in synchronization tasks, mapping tasks, and mappings. You can create, update, upsert, or delete records when you use Oracle CRM On Demand Connector to write to Oracle CRM On Demand applications.

You can switch the mapping to advanced mode to include transformations and functions that enable advanced functionality.

## Oracle CRM On Demand Connector assets

Create assets in Data Integration to integrate data using Oracle CRM On Demand Connector.

When you use Oracle CRM On Demand Connector, you can include the following Data Integration assets:

- Mapping
- Mapping task
- Synchronization task

For more information about configuring assets and transformations, see *Mappings*, *Transformations*, and *Tasks* in the Data Integration documentation.

## Oracle CRM On Demand Connector example

You are a sales analyst and want to track the overall growth trend in sales, geographic distribution of sales, and top customers.

You can integrate data from multiple CRM sources, filter, and analyze the data in Oracle CRM On Demand application through Oracle CRM On Demand Connector.

You can configure a synchronization task or mapping task to read data from and write data to Oracle CRM On Demand applications. The operations team can use the data to perform data analytics.

## CHAPTER 2

# Oracle CRM On Demand connections

Create an Oracle CRM On Demand connection to connect to Oracle CRM On Demand applications. You can use the Oracle CRM On Demand connection in synchronization tasks, mapping tasks, and mappings.

You can use the following search parameters for Oracle CRM On Demand connections:

- Name
- Label
- Description
- Type

**Note:** You cannot use an Oracle CRM On Demand connection to add a lookup object in mappings.

## Oracle CRM On Demand connection properties

When you create an Oracle CRM On Demand connection, you must configure the connection properties.

The following table describes the Oracle CRM On Demand connection properties:

Connection property	Description
User Name	Oracle CRM On Demand user name. Use the following format: <domain>/<user_name> For example: domain/jsmith@companyname.com
Password	Oracle CRM On Demand password.
Service URL	URL of the Oracle CRM On Demand service. For example: <a href="https://secure-company.crmondemand.com">https://secure-company.crmondemand.com</a>

## CHAPTER 3

# Synchronization tasks with Oracle CRM On Demand Connector

Use the synchronization task to synchronize data between a source and target.

You can configure a synchronization task using the Synchronization Task wizard.

When you create a task, you can associate it with a schedule to run it at specified times or on regular intervals. Or, you can run it manually. You can monitor tasks that are currently running in the activity monitor and view logs about completed tasks in the activity log.

## Oracle CRM On Demand sources in synchronization tasks

When you configure a synchronization task to use an Oracle CRM On Demand source, you can read data from a single object or multiple related objects. To optimize performance, you can configure a filter in the **Data Filters** tab. You can add multiple Oracle CRM On Demand objects that have an explicit relationship defined in Oracle CRM On Demand.

You can also create a data filter, where you can select an object, field, operator, and enter a filter value based on which the synchronization task runs.

**Note:** Due to an Oracle CRM On Demand limitation, you cannot use custom objects 4-15 with synchronization tasks.

The following table describes the Oracle CRM On Demand source properties:

Property	Description
Connection	Name of the Oracle CRM On Demand source connection.
Source Type	Type of the Oracle CRM On Demand source object available. You can choose from the following source types: <ul style="list-style-type: none"><li>- Single</li><li>- Multiple</li></ul>



Property	Description
Source Object	Name of the source object.
Display source fields in alphabetical order	Displays target fields in alphabetical order. By default, fields appear in the order returned by the source system.

The following table describes the Oracle CRM On Demand source advanced properties:

Property	Description
Start Date	Start date and time for capturing changed data. Use the following format: <code>yyyy-MM-ddThh:mm:ss&lt;+/-&gt;hh:mm</code> For example, <code>2011-05-03T02:00:00-07:00</code> . Here, <code>2011-05-03</code> is the date, <code>02:00:00</code> is the time, and <code>-07:00</code> specifies the hour before GMT. Specify the number of hours that your time zone is before or after GMT. The T between the date and time adds a space at run time.
End Date	End date and time for capturing changed data. Use the following format: <code>yyyy-MM-ddThh:mm:ss&lt;+/-&gt;hh:mm</code>
Page Size	Maximum number of rows that the Secure Agent writes to Oracle CRM On Demand in a page. You can specify up to 100 rows. Default is 10.

## Oracle CRM On Demand targets in synchronization Tasks

You can use a single object as a target in a synchronization task.

The following table describes the Oracle CRM On Demand target properties:

Property	Description
Connection	Name of the Oracle CRM On Demand target connection.
Target Object	Name of the Oracle CRM On Demand target object.
Display target fields in alphabetical order	Displays target fields in alphabetical order. By default, fields appear in the order returned by the target system.

The following table describes the Oracle CRM On Demand target advanced properties :

Property	Description
Batch Size	Maximum number of records that the Secure Agent writes to Oracle CRM On Demand in a batch. When you set the batch size to 0, the Secure Agent writes the data to the target one row at a time. You can specify up to 20 rows for parent records.
Success File	Generates an Oracle CRM On Demand success file.
Reject File	Generates an Oracle CRM On Demand error file.
Success File Directory	Directory for the success file. Enter a directory that is local to the Secure Agent.
Error File Directory	Directory for the error file. Enter a directory that is local to the Secure Agent.

## CHAPTER 4

# Mappings and mapping tasks with Oracle CRM On Demand Connector

Use the Data Integration Mapping Designer to create a mapping. When you create a mapping, you configure a source or target to represent an Oracle CRM On Demand object. In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

## Oracle CRM On Demand sources in mappings

To read data from an Oracle CRM On Demand database, configure an Oracle CRM On Demand object as the Source transformation in a mapping.

Specify the name and description of the Oracle CRM On Demand source. Configure the source and advanced properties for the source object.

The following table describes the properties that you can configure for an Oracle CRM On Demand source:

Property	Description
Connection	Name of the Oracle CRM On Demand source connection.
Source Type	Type of the Oracle CRM On Demand source. You can choose from the following source types: <ul style="list-style-type: none"><li>- Single</li><li>- Multiple</li><li>- Parameter</li></ul>
Object	Name of the source object. You can specify a custom query for a source object.
Filter	Configure a simple filter to remove rows at the source. You can improve efficiency by filtering early in the data flow. A simple filter includes a field name, operator, and value.
Sort	This property is not applicable for Oracle CRM On Demand Connector.

You can set the tracing level in the advanced properties session to determine the amount of detail that appears in the log for this transformation.

The following table describes the tracing level values:

Tracing Level	Description
Terse	The Secure Agent logs initialization information, error messages, and notification of rejected data.
Normal	The Secure Agent logs initialization and status information, errors encountered, and skipped rows due to transformation row errors. Summarizes session results, but not at the level of individual rows.
Verbose Initialization	In addition to normal tracing, the Secure Agent logs additional initialization details, names of index and data files used, and detailed transformation statistics.
Verbose Data	In addition to verbose initialization tracing, the Secure Agent logs each row that passes into the mapping. Also notes where the Secure Agent truncates string data to fit the precision of a column and provides detailed transformation statistics.  When you configure the tracing level to verbose data, the Secure Agent writes row data for all rows in a block when it processes a transformation.

## Oracle CRM On Demand targets in mappings

To write data to an Oracle CRM On Demand target, configure an Oracle CRM On Demand object as the Target transformation in a mapping.

Specify the name and description of the Oracle CRM On Demand target.

The following table describes the properties that you can configure for an Oracle CRM On Demand target:

Property	Description
Connection	Name of the Oracle CRM On Demand target connection.
Target Type	Type of the Oracle CRM On Demand target.
Object	Name of the Oracle CRM On Demand target object. You can choose from the following target types: <ul style="list-style-type: none"> <li>- Single</li> <li>- Parameter</li> </ul>
Operation	Type of the target operation. You can select the following operations: <ul style="list-style-type: none"> <li>- Insert</li> <li>- Update</li> <li>- Delete</li> <li>- Data Driven</li> </ul>

If you select the **Forward Rejected Rows** option, the Secure Agent flags the rows for reject and writes them to the reject file. If you do not select the **Forward Rejected Rows** option, the Secure Agent drops rejected rows and writes them to the session log file. The Secure Agent does not write the rejected rows to the reject file.

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