

Introduction

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Understanding Different Connector Types

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Connectors

- Connectors are the main component that contains all the information needed to connect to a data source or application.

Why use Connectors?

- Simplifies application support
- Supports advanced options to fine-tune behavior
- Built-in data manipulation
- Real-time support

Connector Types:

- Application : Connector used for specific Application (Ex: CRM)
- Technology: Used to connect from various protocols (Ex: HTTP,SFTP..etc)
- Event-Driven: connectivity to event-based systems (Ex: Google Pubsub)
- Custom: We can develop custom connector API using the connector SDK

Salesforce Read Connector

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Salesforce Read Connector

- The Salesforce Read Connector retrieves information from a Salesforce account.

Create A folder for process

Create sub-folder for #connections

Open process library and install

Map

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Types of Map

- **Standard:** Performs a single step (ex: converting to uppercase, math operation)
- **User Defined:** We can create a user defined functions using combination of standard functions

Standard Map Functions:

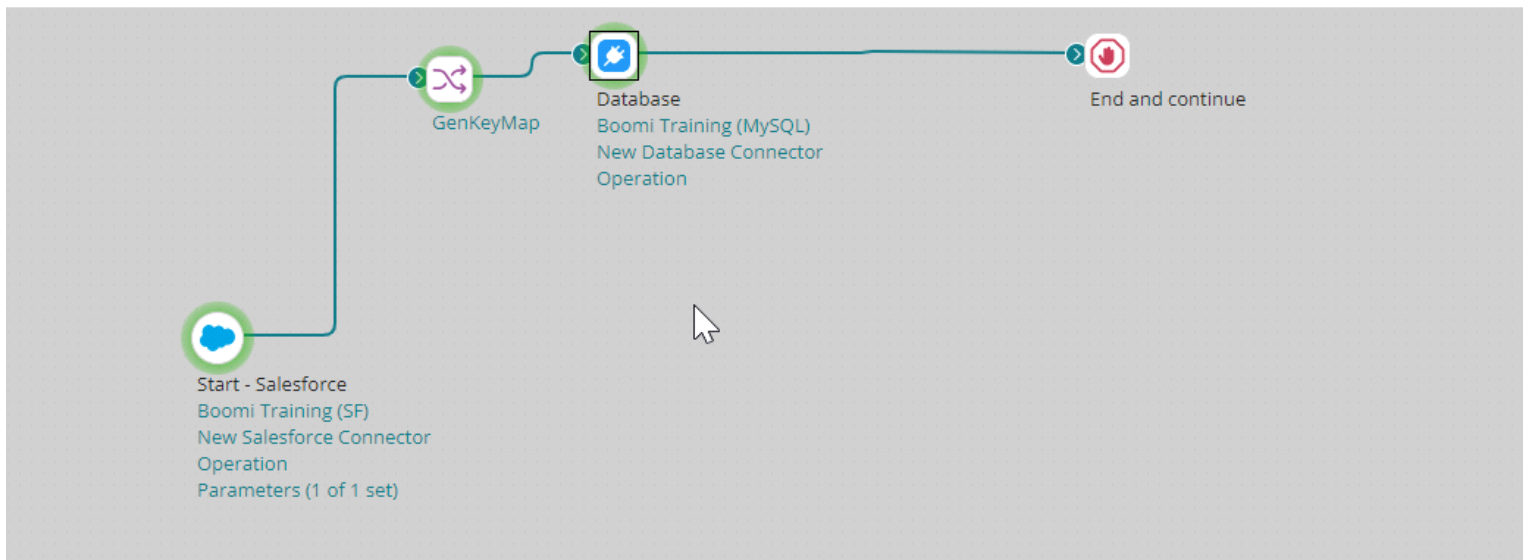
- String
- Date
- Numeric
- Date
- Lookup
- Connector
- Custom Scripting
- Properties

Salesforce Account

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Salesforce Account SOURCE	DB Customer Insert DESTINATION
Billing_Address__c	BILL_TO_ADDR1
Billing_City__c	BILL_TO_CITY
Billing_Address_Country__c	BILL_TO_COUNTRY
Name	BILL_TO_NAME
Phone__c	BILL_TO_PHONE
Billing_State__c	BILL_TO_STATE
ZipCode__c	BILL_TO_ZIP
Fax__c	FAX_NUM
Industry__c	INDUSTRY
Name	NAME
Phone__c	PHONE
Shipping_Address__c	SHIP_TO_ADDR1
Shipping_Address_City__c	SHIP_TO_CITY
Shipping_Address_Country__c	SHIP_TO_COUNTRY
Name	SHIP_TO_NAME
Phone__c	SHIP_TO_PHONE
Shipping_Address_State__c	SHIP_TO_STATE
Shipping_Address_Zipcode__c	SHIP_TO_ZIP
Website__c	URL

Process: Generate Unique Key ▼



Decision and Stop Shape

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Database Query Connector

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Query Customer by Date - Database Operation

 [Folder](#)

 [Add Description](#)

[Options](#)

[Archiving](#)

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[Caching](#)


Database Options

The operation represents a specific action to be performed on the database connection. For example, in the operation you define whether to get or send information, how to batch commit database inserts, etc.

Connector Action


Get


Profile 

 Query Customer by Mo




Grouping Options

Link Element 


 CUSTOMER_ID (Statement/F



Batch Count 

1



Max Rows 

0



Salesforce Write Connector

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Salesforce Write Actions

- Create
- Update
- Upsert
- Delete

Upsert:

- This action makes "insert-new-or-update-existing" integrations simple. Instead of performing a lookup against Salesforce to see if a certain record exists and performing a separate insert or update mappings and calls, simply perform an Upsert request and let Salesforce decide whether to insert or update the data.

Configure a Salesforce Write Operation

Select the "i" markers to learn more about the Salesforce Write Operations.

Account Update - Salesforce Operation ⓘ

Folder Add Description

Options Archiving Tracking Caching

Connector Action

Send ▾

Object

Account_c

Action

update

Request Profile

SF_Account_c_UPDATE_Request ⓘ 🔍 ✎ ⛶

Return Application Error Responses

☐ ⓘ ⓘ

Bulk API version

None

Batch Count

200 ⓘ

Request Profile:

- The Request Profile represents the structure of the Salesforce object you are updating. It is created by an import.

Batch Count:

- The number of documents to send in one salesforce request. (default 200 transactions)

Connector Call

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Perform a call out to any application connector. Typically used to perform cross-reference lookups or obtain supplemental data.

Note:

The Atom Map Extension object and Environment Map Extension object of the AtomSphere API do not support this function.

Mail Connector

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The Message Shape

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Message Shape ⓘ

To transform incoming document data into a free-form message using a combination of static and dynamic variables, use the Message shape. The Message shape is often used to construct email messages.

Display Name ⓘ

Option ⓘ ☐ Combine documents into a single message ⓘ

Message ⓘ Enter your message, using {1} to insert a variable.

Variables ⓘ + ✎ ✕ ⌵ ⌴

{1} Example variable

Message

This field contains the free-flow text message to be generated. You can specify variables here by creating a placeholder, beginning with 1: {<parameter_number>} — for example, {1}.

Note: In messages the single quote (') is a special character. The following points regarding single quotes apply *only* to the message text that you enter. Single quotes are *not* stripped if they are coming in as part of the data.

- A single quote by itself is stripped from the message. For example, the message text `today's date` is rendered as `today's date`.
- Two consecutive single quotes are rendered as a single quote. For example, the message text `today''s date` is rendered as `today's date`.
- An open single quote without a closing single quote escapes the rest of the message. For example, if the variable {1} is the time using a Date Mask of hh, and the variable {2} is the date, an example of the rendering of the message text `{1} o'clock {2}` would be `12 oclock {2}`.
- JSON content in messages must be escaped by wrapping it with single quotes, thereby distinguishing it from a variable.

The Date Mask in a variable of type Date and Time cannot have an open single quote without a closing single quote.

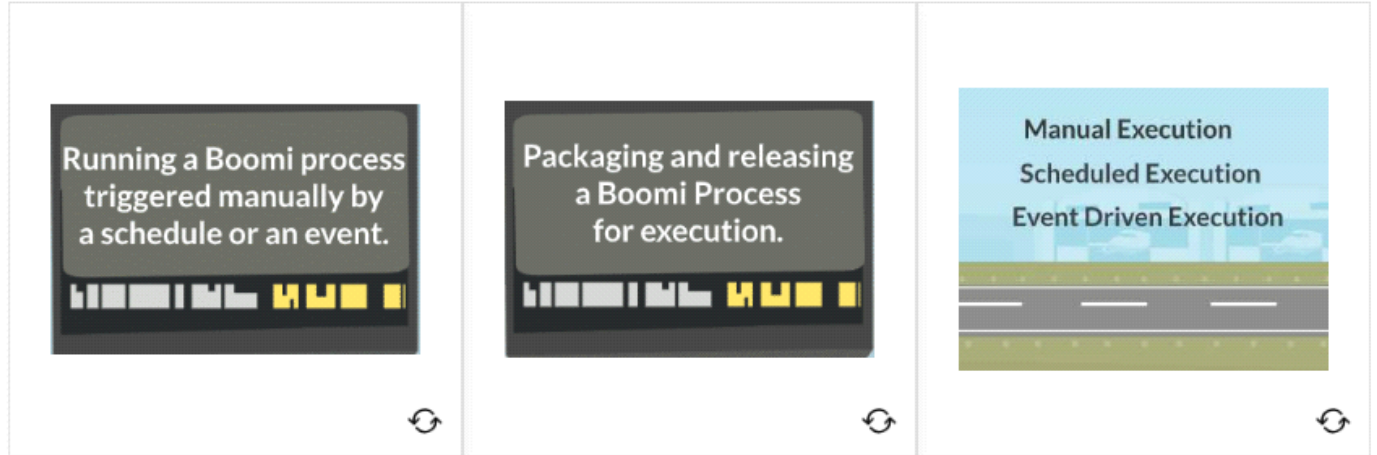
- If the Date Mask contains a single quote before some text and a single quote after the text, the single quotes are treated as escape characters. They cause the text between the single quotes to appear in the message. Consider a Date and Time variable using a Date Mask of yyyy.MM.dd G 'at' HH:mm:ss z. An example of the rendering of the variable is `2012.12.18 AD at 15:08:56 PDT` (with the word `at` appearing in the message).
- You can use a combination of single quotes and two consecutive single quotes to get the results you need. Consider a Date and Time variable using a Date Mask of hh 'o'clock' a, zzzz. An example of the rendering of the variable is `1 o'clock PM, Pacific Daylight Time`.

Note:

Please note that there is a 5 MB character limit restriction if you want to pass Parameter data as a variable.

Type Process Execution

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License Classification According To Environment

1. **Production:** Uses production connectors and production license
2. **Test :** Uses test connectors and test license

Connector Classes

1. **Small Business :** For example, QuickBooks and Sage 50/Peachtree.
2. **Standard :** For example, NetSuite, Salesforce, SFTP, Disk.
3. **Enterprise:** For example, SAP and Oracle E-Business.
4. **Trading Partner:** For example, your trading partner profiles, such as X12, HL7, and EDIFACT.

Connectors Without Impact!

The connectors listed below do not affect the license count.

- AS2 Shared Server
- Atom Queue
- AtomSphere API
- AtomSphere Partner API
- Flow Services Server
- MDM
- MDM Listener
- MLLP Server
- Web Services Server

Exception Shape

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Exception Shape

- The Exception shape allows you to stop data flow down a path and set custom error messages that are written to the Process Log and published on the Process Reporting page of the Manage menu.