




Welcome to Developer 1



Accessing the Platform

<https://platform.boomi.com>

 Boomi

[Log In](#)

[Help. I forgot my password.](#)

Don't have an account?

Learn more about [application and data integration solutions](#) from Dell Boomi.



Course Overview

- SaaS Training: SF to DB, DB to SF/Mail
- Administration Training (for Developers)
- Development Life Cycle
- Properties
- Document Flow

SaaS Training Agenda

- SaaS Integration Overview
- Salesforce Connector Review
- Database Connector Review
- Advanced Logic Concepts
- System Lookups and Best Practices
- Messaging
- Event Synchronization

SaaS Integration Walkthrough



SaaS Training Integration Scenario

Business Use Case:

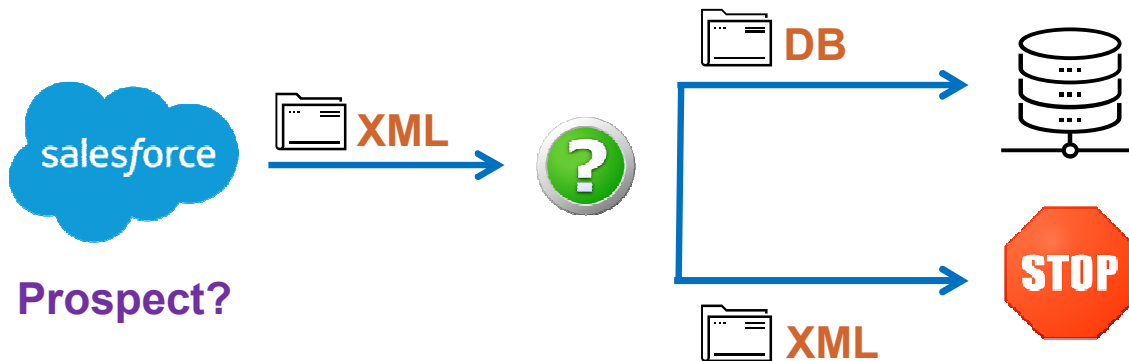
- Sales team enters **prospect** information into **salesforce.com**
- Operations team wants to query Salesforce Accounts (**Prospects**) and **send** responses to an Organization Tracking System for lead management
- They also want to **prevent duplicate prospects** from being entered



SaaS Training Integration Scenario

Integration Goal (Process 1 – Prospect Tracking):

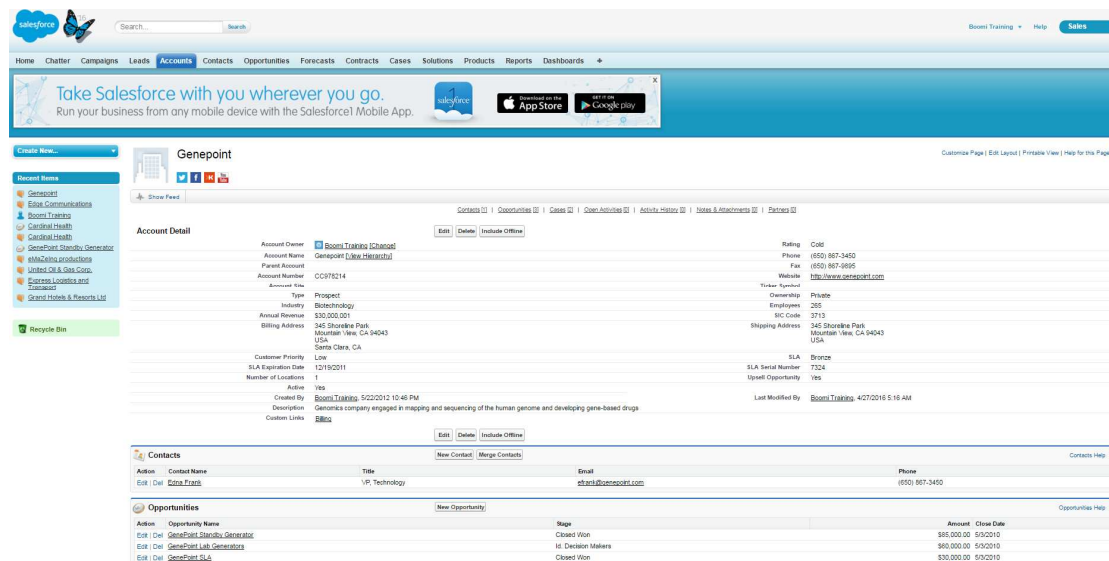
- Query the Salesforce Account object for modified Prospect records
- Insert main account information into the orgtrack database
- Add lookup logic to query the CUSTOMER table for existing records
- Route out existing records from the Process flow



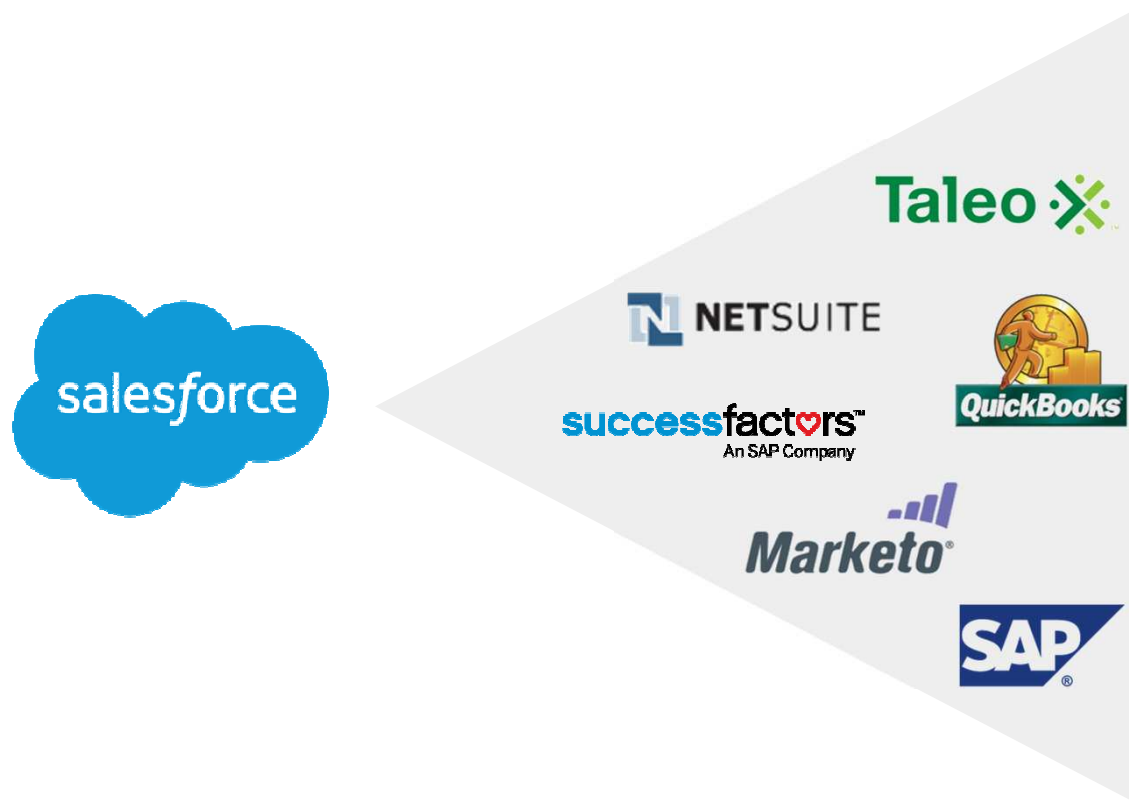
What is Salesforce?



- An online web-based Customer Relationship Management (CRM) application accessible from salesforce.com
- Captures and organizes communications and information from current or prospective customers for many departments across a company



SaaS Training Expectations



Salesforce Connector Options



- The main component contains all information needed to connect to a single Salesforce account instance
- Combination of two components:
 - 1) *Connection* – Sandbox or Production URL and integration user log-in
 - 2) *Operation* – Query or Write: Objects(s) Request/Response definition

Boomi Training (SF) - Salesforce ⓘ Folder Add Description

Connection

URL	<input type="text" value="https://www.salesforce.com/services/Soap/u/18.0"/>
User Name	<input type="text" value="train.boomi7@gmail.com"/>
Password	<input type="password" value="<Encrypted>"/>
Version	<input type="text" value="Version 15.0 - Current"/>
Maximum Concurrent Connections	<input type="text" value="10"/>

Account Query by Type - Salesforce Operation ⓘ Folder Add Description

Options	Archiving	Tracking	Caching	Import
Connector Action	<input type="button" value="Get"/>			
Object	Account__c			
Action	query			
Response Profile	<input type="text" value="SF_Account__c_QUERY_Response"/>			
Use Bulk API	<input type="checkbox"/>			
Include Deleted	<input type="checkbox"/>			
Batch Results	<input type="checkbox"/>			
Objects	Fields Filters Sorts			
Account__c	Account__c			
Child Objects	Id			
Parent Objects	Ownerid			
	IsDeleted			

Salesforce Connection Configuration

- **URL:** Production or Sandbox URL path to the Salesforce API
- **User:** Email for integration user with appropriate access rights
- **Password:** User log-in password concatenated with the user's Security Token generated within the Salesforce account instance

Boomi Training (SF) - Salesforce [?](#) [Folder](#) [Add Description](#)

Connection

URL	<input type="text" value="https://test.salesforce.com/services/Soap/u/39.0"/>
User Name	<input type="text" value="boomitrainer@dell.com"/>
Password	<input type="text" value="<Encrypted>"/>
Version	<input type="text" value="Version 15.0 - Current"/>
Maximum Concurrent Connections	<input type="text" value="10"/>

Let's Start Building!

Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 1: Set up Folders**
- **Exercise 2: Download Process Endpoints from the Process Library**
- **Exercise 3: View the Salesforce Read Connector**

Page(s): 5-7

Participants to Complete

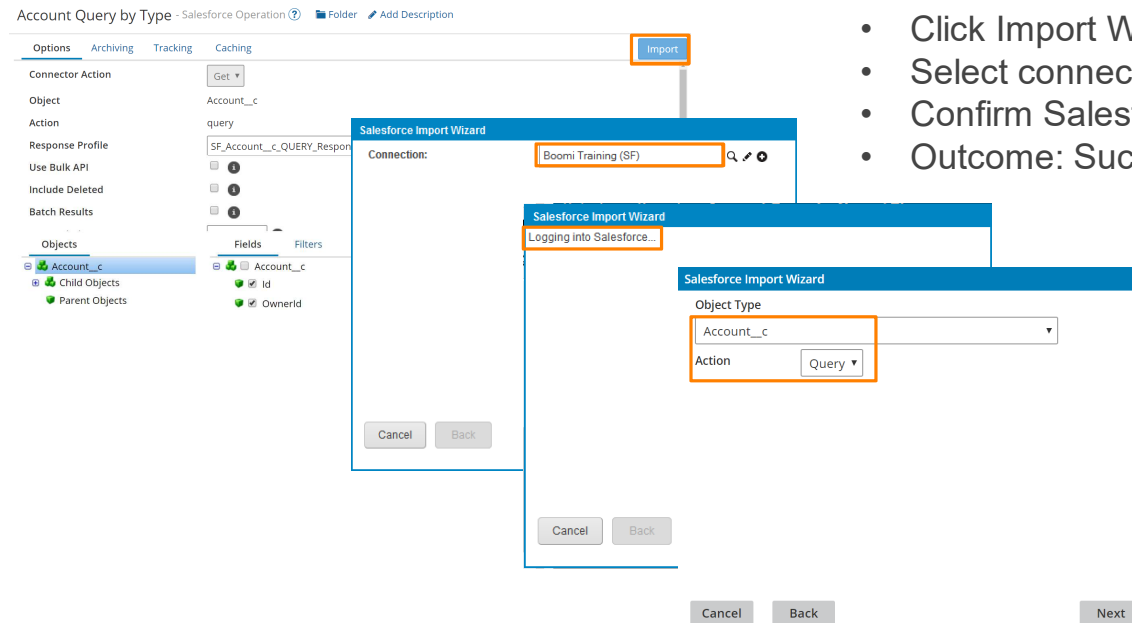
Participants to Complete:

- **Exercise 1: Set up Folders**
- **Exercise 2: Download Process Endpoints from the Process Library**
- **Exercise 3: View the Salesforce Read Connector**

Page(s): 5-7

Salesforce Connectivity Testing

Use the Salesforce Connector components to ensure successful connectivity to your account instance



- Click Import Wizard Button
- Select connection component
- Confirm Salesforce log-in
- Outcome: Successful list of available Objects

Salesforce Operation Options (Query)

- **Query** returns 0 to many object records from a single API request based on 0 or more input “filters”
- **Response Profile:** Identifies full standard and custom response field set along with Salesforce data formats
- **Include Deleted:** Returns “deleted” records in results (QueryAll)
- **Batch Results:** Builds response records into a single List document
- **Query Limit:** Specifies max number of records to return (Default -1 is all results)
- **Show SOQL:** Displays read-only pop-up of current fields and filters in query language format
- **Objects:** Set different field rules per highlighted object
 - **Fields:** Select/Deselect specific fields or the entire field set
 - **Filters:** Narrows down the response set
 - **Sorts:** Orders results in an ascending or descending order.

Account Query by Type - Salesforce Operation ? Folder Add Description

Options Archiving Tracking Caching Import

Connector Action Get

Object Account__c

Action query

Response Profile SF_Account__c_QUERY_Response

Use Bulk API

Include Deleted

Batch Results

Query Limit -1

Show SOQL

Objects

Fields Filters Sorts

Account__c

Child Objects

Parent Objects

Filter

Logical - AND

Instructor to Demonstrate

Instructor To Demonstrate:

**Exercise 4: Create a Salesforce
query operation**

Page(s): 8-11

Participants to Complete

Participants to Complete:

**Exercise 4: Create a Salesforce
query operation**

Page(s): 8-11

Setting Parameters

Common interface for configuring runtime inputs

- Reference elements from document(s)
- Reference system date where the Process is executing
- Define lookup inputs against databases and system APIs
- Build dynamic messaging and notifications

Parameter Value

Type: Profile Element

Profile Type: Connector Call

Profile: Cross Reference Lookup

Element: Current Data

Date/Time

Document Cache Lookup

Process Property

Document Property

Dynamic Process Property

Profile Element

Sequential Value

SQL Statement

Static

Stored Procedure

Unique Value

Setting Parameters



Start Shape ?

The Start shape is the main shape that begins the Dell Boomi AtomSphere process flow. It is automatically added to each new process and it cannot be removed.

Type ☒ Connector ☐ Trading Partner ☐ Data Passthrough ☐ No Data

General **Parameters**

Add or edit the values of your parameters.



Name	Value	Source
Type=	Static value of 'Prospect'	

Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 5: Set the Salesforce runtime parameter**
- **Exercise 6: Test the process**

Page(s): 12-15

Participants to Complete

Participants to Complete:

- **Exercise 5: Set the Salesforce runtime parameter**
- **Exercise 6: Test the process**

Page(s): 12-15

Database Training Expectations



- The Database connector allows you to connect into any database solution supporting a JDBC driver.
- Goal is to read/write records from a demo organization tracking system
- MySQL is a popular open source database used as the database for this training

Database Connector Options



The main component contains all information needed to connect to a single Database instance

Combination of two components:

- 1) *Connection* – Database type, location, and user log-in
- 2) *Operation* – Read or Write: Statement and record grouping definition

Boomi Training (MySQL) - Database ⓘ Folder Add Description

Connection	Advanced Options	Connection Pool
Database URL	jdbc:mysql://traindb1.boomi.com:3306/orgtrack	
Driver Type	MySQL	
User Name	bootcamp	
Password	<Encrypted>	
Host	traindb1.boomi.com	
Port	3306	
Database Name	orgtrack	
Additional Options		
Class Name	com.mysql.jdbc.Driver	

Org Insert - Database Operation ⓘ Folder Add Description

Options	Archiving	Tracking	Caching
Connector Action	Send		
Profile	Customer Insert - BACKUP		
Commit Options			
Commit Option	Commit By Profile		
Batch Count	0		

Database Connection Configuration

- **Database URL:** Read only field for JDBC URL populated as other values are entered
- **Driver Type:** Dropdown for DB Type definition
- **User Name:** Database User Name
- **Password:** Database User Password
- **Host:** The name or IP address of the database (DB) server
- **Port:** The port on which to connect to the DB server: Ex. MSSQL – 1433; MySQL – 3306
- **Database Name:** The name of your database
- **Additional Options:** Items to add at the end of the DB URL; mostly name/value pairs
- **Class Name:** Read-only Java class name of the JDBC driver

Boomi Training (MySQL) - Database ? Folder Add Description

Connection Advanced Options Connection Pool

Database URL	jdbc:mysql://traindb1.boomi.com:3306/orgtrack
Driver Type	MySQL ▼
User Name	bootcamp
Password	<Encrypted>
Host	traindb1.boomi.com
Port	3306
Database Name	orgtrack
Additional Options	
Class Name	com.mysql.jdbc.Driver

Custom Database Connection

- **Class Name:** Java class name of the JDBC driver
- **Connection URL:** JDBC URL syntax

Custom DB - Database ? [Folder](#) [Add Description](#)

Connection Advanced Options Connection Pool

Database URL	jdbc:custom:///
Driver Type	<div>Custom ▼</div>
User Name	<div>Boomi Training</div>
Password	<div>Click to Set</div>
Class Name	<div></div>
Connection URL	<div>jdbc:custom://{0};{1}/{2}{3}</div>

Walkthrough

Walkthrough:

**Exercise 7: View the database
write connector**

Page(s): 16

Database Connectivity Testing

Use the “Test Connection” button to ensure successful connectivity to your database instance

The screenshot shows a 'Test Connection' dialog box from Boomi Training. The dialog has a title bar with '+ New' and 'Welcome' buttons. Below the title bar, the text 'Boomi Training' is displayed. A sidebar on the left lists connection parameters: Database URL, Driver Type, User Name, Password, Host, Port, and Database Name. The 'Connection' tab is selected, and a 'Test Connection' button is highlighted in the top right corner. In the center of the dialog, a large green checkmark is displayed above the text 'Test connection successful.'. At the bottom of the dialog, there are three buttons: 'Cancel', 'Back', and 'Finish'.

+ New Welcome

Test Connection

Boomi Training

Connection Adv

Database URL

Driver Type

User Name

Password

Host

Port

Database Name

Test Connection

Test connection successful.

Cancel Back Finish

Database Connectivity Testing

Use the **Database Connector** components and the Atom to ensure successful connectivity to your database instance

The screenshot shows the 'Database Import Wizard' interface. At the top, there's a header bar with 'Customer Insert - Database Profile', a 'Folder' icon, an 'Add Description' link, and an 'Import' button. Below this is a sidebar with 'Data Elements' and 'Options' tabs. Under 'Data Elements', 'Statement' and 'Fields' are listed, with 'Statement' selected. The main area is titled 'Database Import Wizard' and contains a 'Type' section with a description: 'The Import Wizard auto-generates a SQL statement, profile fields, and parameters based on the tables and columns that you select.' Below this is a 'Position' section with a red asterisk and the text 'Required fields.' The 'Table Name' section has a 'Browse In' button and a list of options: 'Connection *', 'Schema Filter', and 'Object Filter'. The 'Choose a Table' section is a large box containing a list of tables, with 'CONTACT' and 'CUSTOMER' selected. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

- Enable and Click Import Wizard Button
- Select Atom & connection component
- Confirm Atom to DB Server Log-in
- Outcome: Successful list of available tables

Database Operation Options (Write/Send)

Write Profile

- Statically or dynamically define Write statements against a table or stored procedure inputs
- Use the **Import Wizard** to dynamically poll a table and auto-list the columns with field types

Commit Options

- Option: Commit statement(s) based on number of rows or statement sets defined in Profile
- Batch Count: Specify the commit interval or leave as 0 to indicate no limit

Database Write - Database Operation ? [Folder](#) [Add Description](#)


Options Archiving Tracking Caching

Connector Action Send ▾

Profile Choose... 🔍 +

Commit Options

Commit Option	Commit By Profile ▾
Batch Count	0



Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 8: Create a database write operation**
- **Exercise 9: Create a database write profile**

Page(s): 17-20

Participants to Complete

Participants to Complete:

- **Exercise 8: Create a database write operation**
- **Exercise 9: Create a database write profile**
- **Class Activity 1: Create a Salesforce to database insert map**

Page(s): 17-21

Instructor to Demonstrate

Instructor To Demonstrate:

- **Review Class Activity 1: Create a Salesforce to database insert map**
- **Exercise 10: Map the source and destination fields**
- **Exercise 11: Set default mapping values**

Page(s): 21-24

Participants to Complete

Participants to Complete:

- **Exercise 10: Map the source and destination fields**
- **Exercise 11: Set default mapping values**
- **Class Activity 2: Populate the CREATE_DATE field**
- **Additional Challenge 1: Update the Salesforce query operation with contact information**
- **Additional Challenge 2: Map the contact information**

Page(s): 22-28

Instructor to Demonstrate

Instructor To Demonstrate:

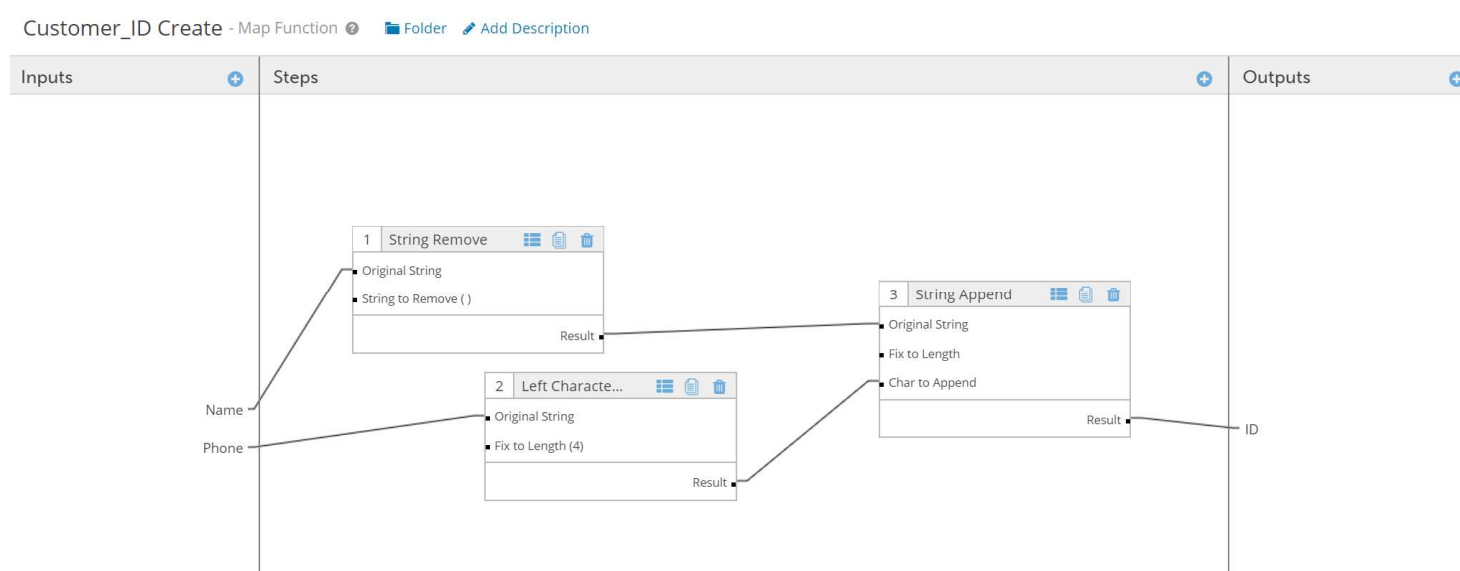
- **Review Class Activity 2: Populate the CREATE_DATE field**
- **Review Additional Challenge 1: Update the Salesforce query operation with contact information**
- **Review Additional Challenge 2: Map the contact information**

Page(s): 25-28

User Defined Map Functions



- Permits multiple steps of conversion logic to be applied to values as they are being mapped
- Can be saved and reused across multiple maps requiring the same conversion logic



Instructor to Demonstrate

Instructor To Demonstrate:

**Exercise 12: Create a user-defined
map function**

Page(s): 29-33

Participants to Complete

Participants to Complete:

**Exercise 12: Create a user-defined
function**

Page(s): 29-33

Instructor to Demonstrate

Instructor To Demonstrate:

Exercise 13: Test the process

Page(s): 34

Participants
to Complete

Participants to Complete:

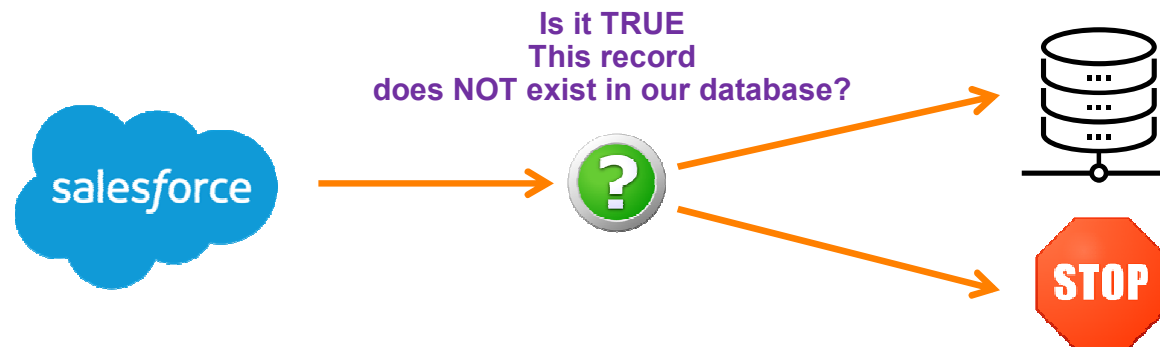
Exercise 13: Test the process

Page(s): 34

What is a Decision?



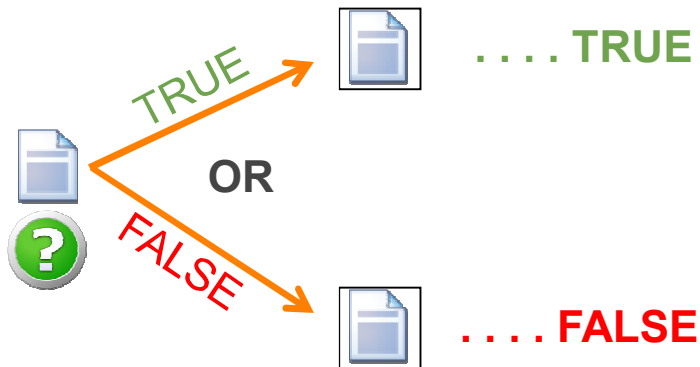
- Query records in Salesforce
- TRUE or FALSE. Is this a new account? Is the record non-existent in our database?
- If it is TRUE, and the record is not in our database, we will write it to the database
- If it is FALSE, and the record already exists, we will send the record down another path



What is a Decision?



- Decisions are commonly used to **validate field values** or **check the existence of data** in a destination system
- Compares 2 values and routes a document down a TRUE or FALSE path based on the outcome of the comparison
- TRUE documents are processed to completion BEFORE the FALSE documents are processed
- The Compare Type can be changed to manipulate the outcome



Decision Shape

The Decision shape routes documents based on a true/false comparison of two values. Those values can be anything from field values in the current document (profile elements), static values, results of a database or even an application query, and more.

Label:

First Value:

Compare Type:

Second Value:

Options for Compare Type and Second Value:

- Equal To
- Not Equal To
- Greater Than
- Greater Than or Equal To
- Less Than
- Less Than or Equal To
- Matches Regular Expression
- Matches Wildcards

Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 14:** Add a decision shape to query the database
- **Exercise 15:** Test the decision lookup

Page(s): 35-39

Participants to Complete

Participants to Complete:

- **Exercise 14: Add a decision shape to query the database**
- **Exercise 15: Test the decision lookup**

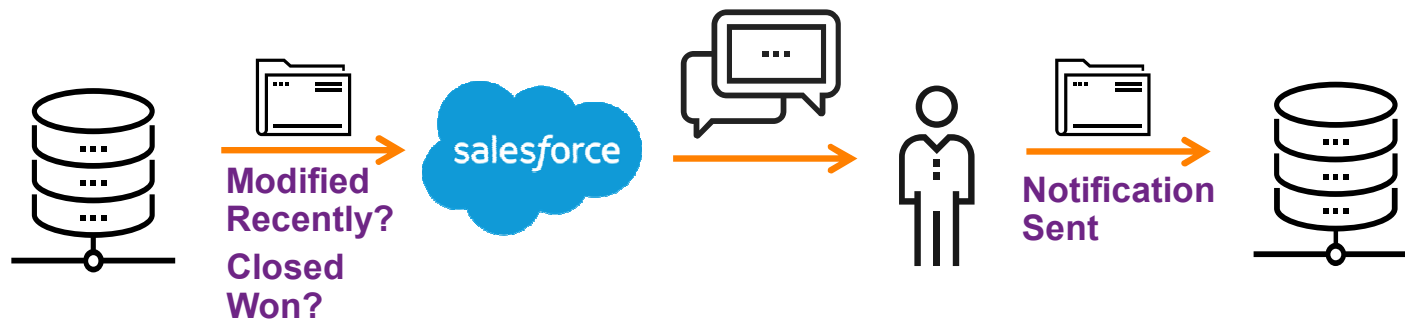
Page(s): 35-39

Congratulations!

SaaS Training Integration Scenario

Business Use Case:

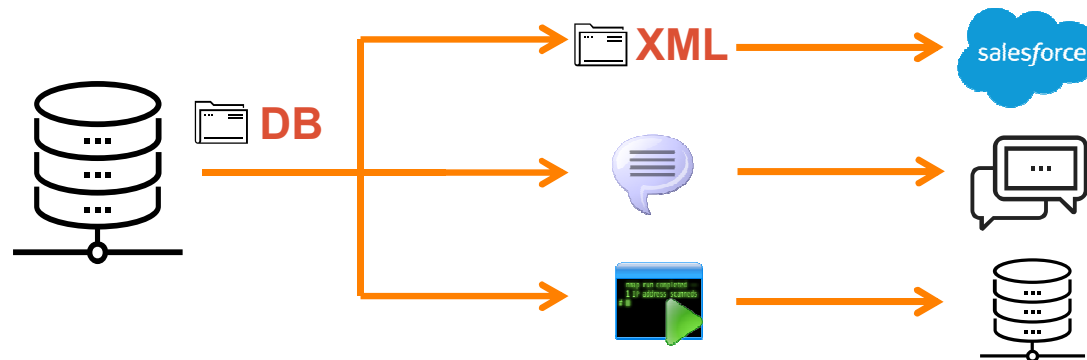
- Checks are made against the Tracking DB for recently closed opportunities
- The Salesforce record is updated to reflect new contract Service Level Agreement (from current value to 'Gold')
- A team member is then notified via email
- The Tracking DB is updated to reflect the team member was notified



SaaS Training Integration Scenario

Integration Goal (Process 2 – Daily Customer Wins):

- Query the Organization Tracking System for modified Customer records
- Update Salesforce Account records to SLA 'Gold'
- Email monitoring user dynamic content about new customer records
- Update Database System indicating emails have been sent



Database Operation Options (Read)

Read Profile

- Statically or dynamically define Read statement against table(s) or stored procedure outputs
- Use the **Import Wizard** to dynamically poll tables and auto-list the columns with field types

Grouping Options

- Link Element: The common field in a record group to batch document(s)
- Batch Count: Define an interval for the grouping behavior
- Max Rows: The maximum number of rows to return in a single read request

Query Customer by Date - Database Operation ? Folder Add Description

Options Archiving Tracking Caching

Connector Action Get ▾

Profile Query Customer by Modified Date 🔍 ✎ ⊕

Grouping Options

Link Element	Q CUSTOMER_ID (Statement/F ✕)
Batch Count	1
Max Rows	0

Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 16: Create a database read process**
- **Exercise 17: Set a database runtime parameter**
- **Exercise 18: Test the process**

Page(s): 40-47

Participants to Complete

Participants to Complete:

- **Exercise 16: Create a database read process**
- **Exercise 17: Set a database runtime parameter**
- **Exercise 18: Test the process**

Page(s): 40-47

Salesforce Write Options



Create – Creates **new** records in a defined object

- Generate the internal 'ID' field automatically for each document executed

Update - Updates **existing** records in a defined object

- Supply the internal 'ID' field in the request to update the existing object record.

Upsert – Creates **new** or Updates **existing** records in a defined object

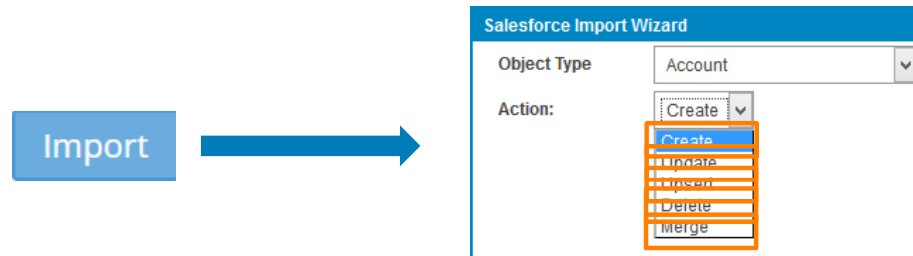
- Identify a designated internal 'ID' field in the request for Salesforce to determine the correct action.

Delete - Deletes **existing** records in a defined object

- Supply the internal 'ID' field in the request to delete the existing object record.

Merge - Merges Salesforce records of **the same object type** into one record

- You must use the masterRecord/ID field to indicate which of the records is the master record.



Salesforce Operation Options (Write/Update)



- **Request Profile:** Standard and custom request field set along with data formats
- **Return Application Error Responses:** Returns XML responses
- **Use Bulk API:** Applies Bulk API to execute send (Up to 10,000 records)
- **Batch Count:** Specify the number of documents to send in 1 request

Account Update - Salesforce Operation Folder Add Description

Options	Archiving	Tracking	Caching	
Connector Action			Send ▼	
Object			Account	
Action			update	
Request Profile			SF_Account_UPDATE_Request	
Return Application Error Responses		<input checked="" type="checkbox"/>		
Use Bulk API		<input type="checkbox"/>		
Batch Count			200	

Instructor to Demonstrate

Instructor To Demonstrate:

**Exercise 19: Create a Salesforce
update action**

Page(s): 48-49

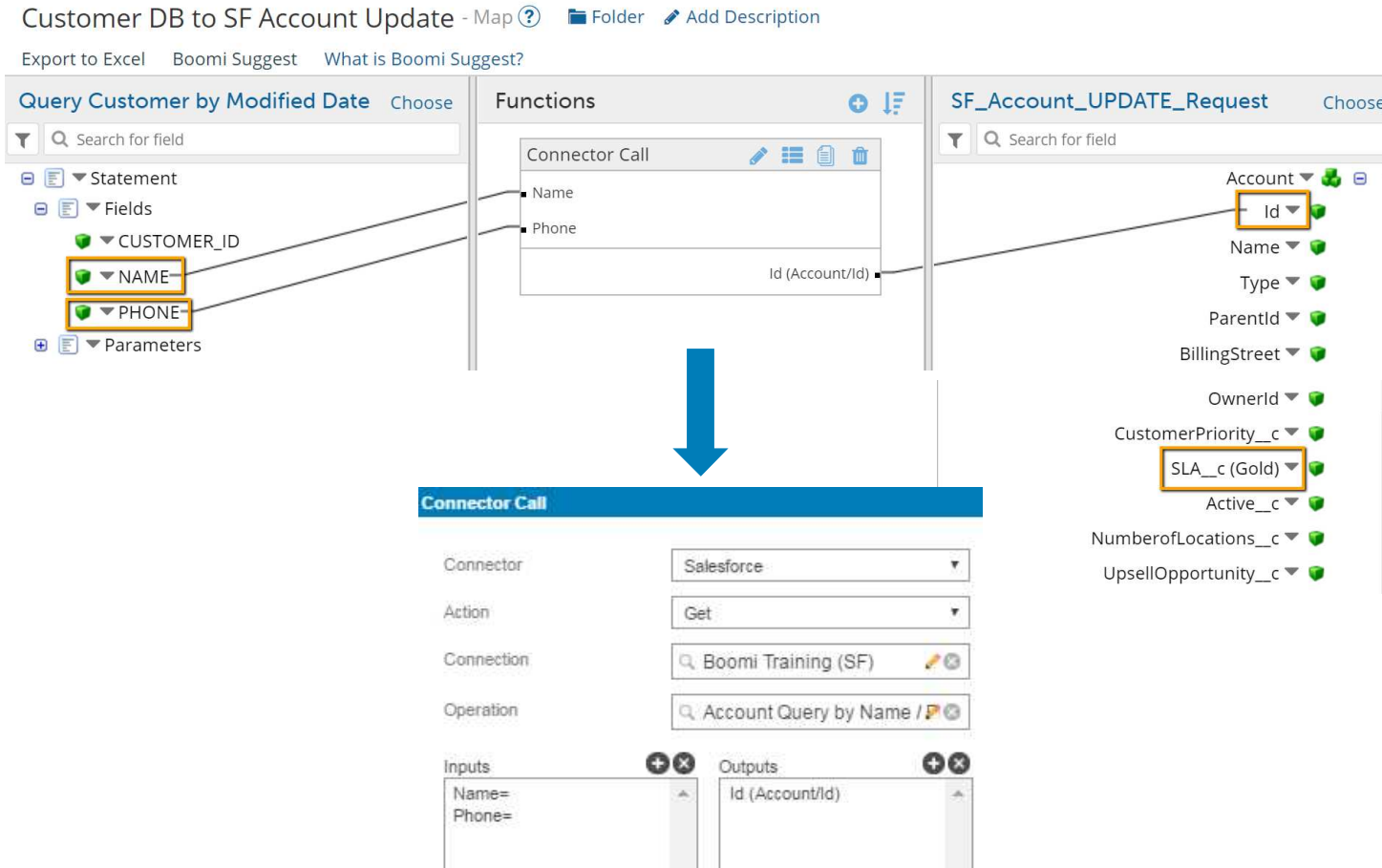
Participants to Complete

Participants to Complete:

**Exercise 19: Create a Salesforce
update action**

Page(s): 48-49

Updating Account Record in Salesforce



Connector Call Usage



- Identify and configure all object query operations before building your full integration solution
- Add Connector Call in logic shapes or map functions to perform document-level queries on-the-fly (NOTE: this has negative performance implications and should not be a first resort)
- Enable caching in map functions to limit API requests for common input records
- If multiple mappings or logic require the same Connector Call, consider using Dynamic Document Properties or Document Caching at the front-end of the Process

The screenshot shows the 'Connector Call' configuration window in Boomi. It has a blue header bar with the text 'Connector Call'. Below the header, there are four fields: 'Connector' with a dropdown menu showing 'Salesforce', 'Action' with a dropdown menu showing 'Get', 'Connection' with a text field containing 'Boomi Training (SF)' and a search icon, and 'Operation' with a text field containing 'Account Query by Name' and a search icon. At the bottom, there are two sections: 'Inputs' and 'Outputs'. The 'Inputs' section has a table with two rows: 'Name=' and 'Phone='. The 'Outputs' section has a table with one row: 'Id (Account/Id)'. Both sections have a '+' and a '-' icon to the right of the table header.

Instructor to Demonstrate

Instructor To Demonstrate:

**Exercise 20: Create a Salesforce
update map**

Page(s): 50-56

Participants to Complete

Participants to Complete:

**Exercise 20: Create a Salesforce
update map**

Page(s): 50-56

Mail Connection Configuration

- **Host:** IP Address or the Domain Name of the Mail Server
- **Port:** The command port the server will listen for incoming connections from a mail client
- **Use TLS?:** Encrypts all data with a digital security certificate
- **Use SSL?:** Encrypts all data exchanged between the server with a certificate
- **User/Password Auth?:** Check to provide login credentials to authorize the user with the mail server.
- **User:** User Name of the account on the mail server
- **Password:** Password of the account on the mail server

Boomi Training (Mail) - Mail ? Folder Add Description

Connection

Host	email-smtp.us-west-2.amazonaws.com
Port	587
Use TLS?	<input checked="" type="checkbox"/>
Use SSL?	<input type="checkbox"/>
User / Password Authorization?	<input checked="" type="checkbox"/>
User Name	AKIAIXMKUNOJDKH53SHQ
Password	<Encrypted>

Mail Operation Configuration (Write/Send)

Customer Win Email - Mail Operation ? Folder Add Description

Options Archiving Tracking Caching

Connector Action	Send ▼
From	boomitrain@gmail.com
To	boomitrain@gmail.com
Subject	New Customer
Disposition	Inline ▼
Content Type	text/plain ▼

Instructor to Demonstrate

Instructor To Demonstrate:

**Exercise 21: Create a mail
operation**

Page(s): 57-58

Participants to Complete

Participants to Complete:



**Exercise 21: Create a mail
operation**

Page(s): 57-58

What is a Message?



- Generates a free-flow text message from dynamic or static inputs
- Converts documents passing through it into new data
- Often paired with Mail connector for advanced notifications

 **Message Shape** 

The Message shape can generate a free-flow text message from a dynamic or static set of input parameters. Documents that are sent to a Message shape are transformed and the documents that come out have the format of the message.





Label

Options ☐ Combine documents into a single message

Message

Prospect -{1}- closed on {2}.

Variables

{1}

Database Profile - Query Customer by Modified Date - NAME (Statement/Fields/NAME)

Instructor to Demonstrate

Instructor To Demonstrate:

- **Exercise 22: Configure a message shape**
- **Exercise 23: Test the mail connectivity**

Page(s): 59-63

Participants to Complete

Participants to Complete:

- **Exercise 22: Configure a message shape**
- **Exercise 23: Test the mail connectivity**
- **Additional Challenge 3: Format output to email**

Page(s): 59-64

Instructor to Demonstrate

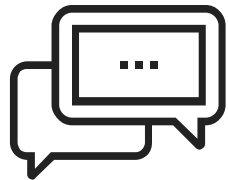
Instructor To Demonstrate:

**Review Additional Challenge 3:
Format output to email**

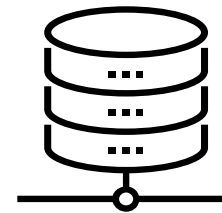
Page(s): 64

Update the Database

Email Notification Sent



Reflect Change in DB



orgtrack.CUSTOMER: 2 rows total (approximately)

COMPANY_KEY	CUSTOMER_ID	NAME	STATUS	CREATE_DATE	MODIFIED_DATE	WIN_FLAG	NOTIFY_STATUS
59	EdgeCommunications6000	Edge Communications	1	2012-05-03 13:24:06	2012-05-04 14:09:15	1	0
59	GenePoint3450	GenePoint	1	2012-05-03 13:24:06	2012-05-04 14:09:12	1	0

Change 'NOTIFY_STATUS' to '1'



What is a Program Command?



- Executes database and system-level commands in the Process flow
- Includes SQL or command window to write dynamic commands
 - System: {#}
 - Database: ?
- Does not return document(s) into Process flow

Program Command Shape ⓘ

The Program Command shape enables database and system-level commands to be executed as part of the process flow.

Label: Optional

Type: SQL Statement ▼

Options: ☒ Run Once Per Execution

Connection: Boomii Training (MySQL) - Solutions ⓘ ⓘ

SQL: UPDATE CUSTOMER SET NOTIFY_STATUS = 1 WHERE CUSTOMER_ID = ? AND USER_ID = 'BOOMIBOOT'

Edit SQL

Variables: ? Database Profile - Query Customer by Modified Date - CUSTOMER_ID (Statement/Fields/CUSTOMER_ID)

Instructor to Demonstrate

Instructor To Demonstrate:

Exercise 24: Add a SQL Command

Page(s): 65-67

Participants to Complete

Participants to Complete:

Exercise 24: Add a SQL Command

Page(s): 65-67

Congratulations!



Boomi

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