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# Salesforce Scenario



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## Scope

In this page it's show an example of integration between a CRM platform and Connect using the Cloudblue Connect Zapier APP.

The CRM platform selected is Salesforce CRM Cloud Enterprise Edition.

Salesforce CRM is a Salesforce cloud management module, the world leader that allows the implementation of business processes in a simple and effective way.

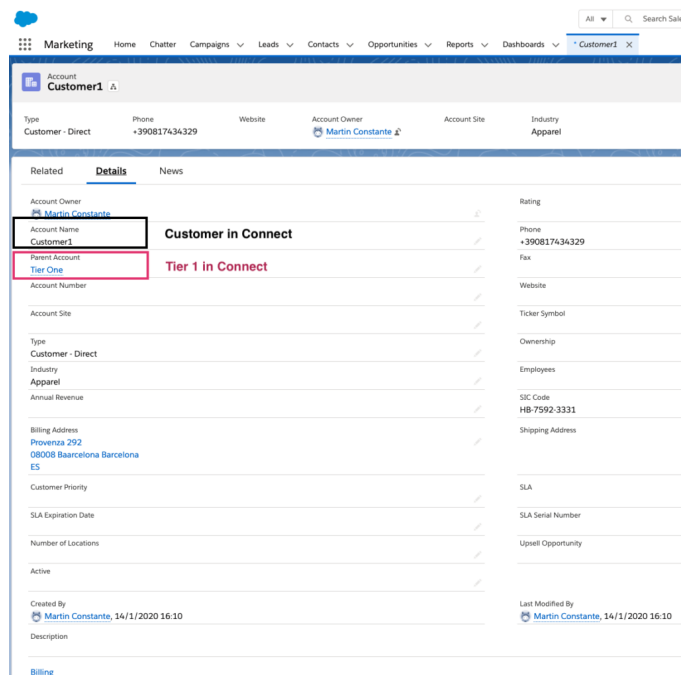
It offers an innovative technology that allows to optimize your business processes so that you can treat your customers individually, leaving aside the theory of mass marketing.

## Modeling

A classic CRM workflow is like:



This integration was developed between a **Salesforce Dev Platform** and **Connect**. Covers the fulfillment workflow with:

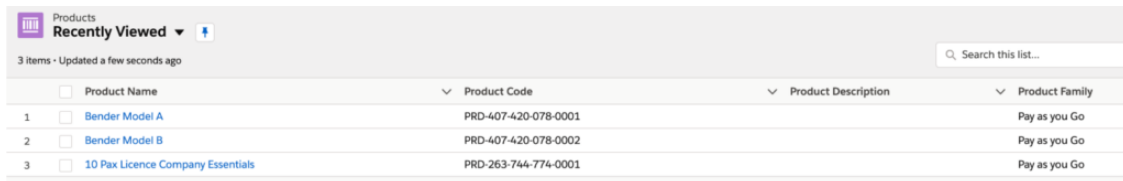


**T1:** Is an Provider Account.

**Customer:** Is a Customer in connect

**Products:** The products in the Salesforce catalog are corresponding with the product item in Connect. Then each SKU in Connect is a Product in the catalog.

The values of the family must be “Pay as you go” or “Reservation”. If the product have set Pay as you go, the Zap ignores the Quantity and set to “-1”



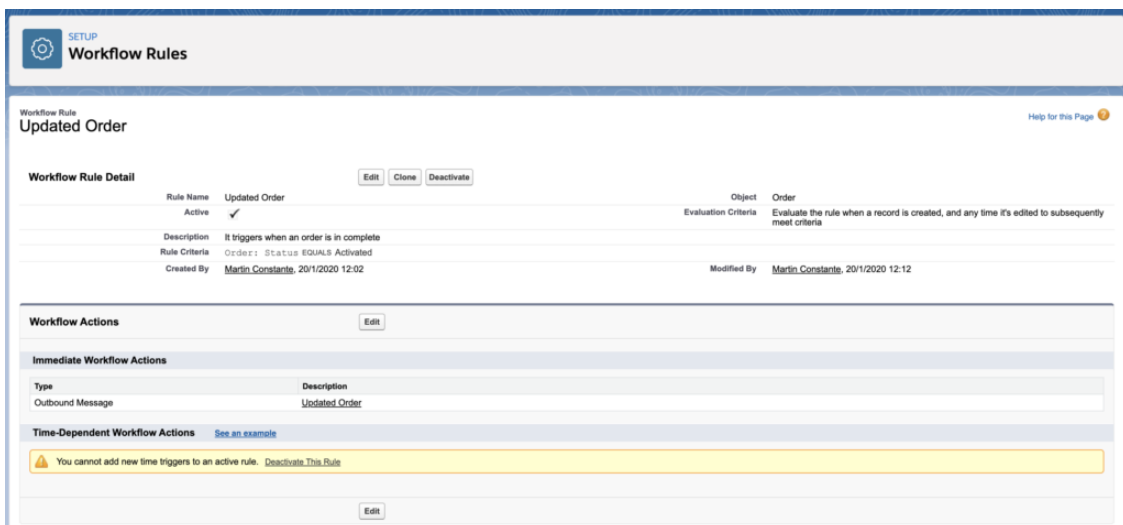
	Product Name	Product Code	Product Description	Product Family
1	Bender Model A	PRD-407-420-078-0001		Pay as you Go
2	Bender Model B	PRD-407-420-078-0002		Pay as you Go
3	10 Pax Licence Company Essentials	PRD-263-744-774-0001		Pay as you Go

## ZAP Integration

# Zap

To trigger the Zap from Salesforce, It was configured a workflow that send a webhook when a Sales Order is in “Completed” status.

### Salesforce trigger configuration



**Workflow Rule**  
Updated Order

**Workflow Rule Detail**

Rule Name	Updated Order	Object	Order
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	It triggers when an order is in complete		
Rule Criteria	Order: Status EQUALS Activated		
Created By	Martin Constante, 20/1/2020 12:02	Modified By	Martin Constante, 20/1/2020 12:12

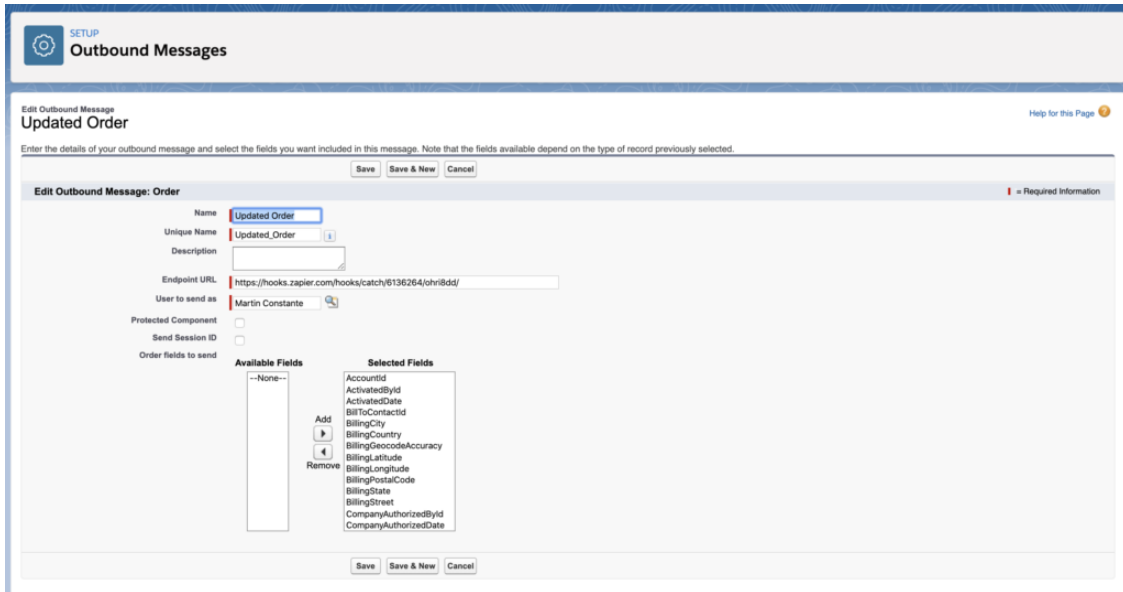
**Workflow Actions**

**Immediate Workflow Actions**

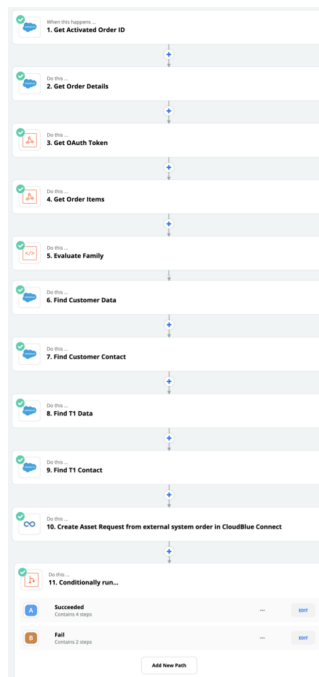
Type	Description
Outbound Message	Updated Order

**Time-Dependent Workflow Actions** [See an example](#)

⚠ You cannot add new time triggers to an active rule. [Deactivate This Rule](#)



**Zap detail**



The step 11 evaluates what happened with the request and if is success, update the sales order item description in Salesforce with the Asset UUID created, otherwise send an email with the result of the request.

**Description of each Zap step**

- Step 1 Get Activated Order ID
- Step 2 Get Order Details
- Step 3 Get Oauth Token
- Step 4 Get Order Items
- Step 5 Evaluate Family
- Step 6 Find Customer Data
- Step 7 Find Customer Contact
- Step 8 Find T1 Data
- Step 9 Find T1 Contact
- Step 10 Create Asset Request
- Step 11 Conditionally Run
- Step 13 Update Sales Order Description
- Step 14 Itemize Response
- Step 15 Get Product Item ID
- Step 16 Save Asset UUID in Salesforce
- Step 18 Send Email in Gmail