Managing Customer 360 data using CAI in C360 SaaS

Data Sheet | LumenData -

A step-by-step guide to creating and updating records using CAI.

PRODUCT REQUIREMENT

Application Integration, Business 360 (for Business Entities), and Customer 360.

Cloud Application Integration:

Cloud Application Integration in Informatica Intelligent Cloud Services (IICS) is a comprehensive and flexible solution that enables organizations to seamlessly integrate cloud-based applications, onpremises systems, and various data sources. It empowers businesses to streamline data integration, data synchronization, and data transformation processes, supporting modern data integration challenges in a multi-cloud and hybrid cloud environment.

CAI ASSETS USED TO CREATE RECORD:

- Service Connector
- App Connection
- Process



Service Connector:

The Service Connector in CAI refers to a pre-built connector that acts as a bridge between IICS and specific cloud-based applications or data sources. It provides a standardized and ready-to-use integration interface for connecting to popular SaaS (Software as a Service) applications, databases, or cloud platforms. The Service Connector abstracts the complexities of the underlying application's APIs, making it easier for users to interact with the application without having to write custom code.

App Connection:

An Application Connection in CAI represents a defined connection profile that establishes a secure connection between IICS and a specific data source or application. It includes the necessary connection parameters, such as the URL, username, password, and any required authentication tokens or keys.

Process:

The Process in CAI refers to the integration workflow that defines the sequence of steps and actions required to perform a specific data integration task. It orchestrates the data flow and transformation between the source and target applications, utilizing Service Connectors and Application Connections to enable the seamless exchange of data.

STEP-BY-STEP PROCESS For Creating Record:

1. Open Application Integration service from My Services.

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{A}	API Manager		API Portal	E	Application Integration
Z	Application Integration Console	Ø	Business 360 Console	Ø	Customer 360
	Data Integration	<u>luti</u>	Data Profiling	$\langle \! \! \otimes $	Data Quality
% >	Multidomain MDM	(m)	Product 360	65	Reference 360

- 2. Go to 'New' and click on 'Service Connectors'.
- 3. Click on 'Service Connector using Form'.



4. Go to 'Definition' and fill in the general information.

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5. Go to 'Action', fill in the name.

Action Name	Action Type	Description	
Create	General		
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<u>Action</u> Input Bindi	ng Ousput Teat Results		
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6. Go to 'Input' and create the required fields and give example values to test as shown in the below image.

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7. Go to 'Binding' and give the URL like "<baseApiUrl>/businessentity/public/api/v1/entity/<businessEntity>?sourceSystem= <source System>ourcePKey>" . Use your base URL



8. In 'Verb' select "POST" method.

URL:*	https://usw1-mdm.dmp- us.informaticacloud.com/business-	fox)
Verb:	POST	•
Multi Using:	Semicolon Separated	•
Authentication Type:	Custom	•

9. Under HTTP Headers, mention the below shown headers.

Action	Input	Binding	Output	Test Results
N				
Name				Source
Content-Type				application/json
Accept				application/json
IDS-SESSION-	ID			{\$sessionId}

10. Call the "Body" parameter which is created in the "Input" tab.

Binding Type:	Custom	•
Body:		
{\$body}		

11. Go to the 'Output" tab, create the output fields.

Action Input	Binding Outp	ut Test Results		
Nome*	Туре	Description	Get From	
response code	Text This is a list		HTTP Response Status Code	1
id	Text This is a list		Property businessid	

12. Go to 'Test Results', Test the result.

Act	tion	Input	Binding	Output	Test Results		
Test Se	rver:*	Test on Cloud	Server			•	Test
Action	Input	Binding	Output Test Results				
Test Server:*	Test on Clos	ud Server			• For		1
Result:	Successful.						
HTTP Stotue:	201						
URL	https://usw1-	mdm.dmp-vs.informaticas	cloud.com/business entity/pu	blic/api/v1/entry/c360	.personRsourceSystem=sfdc&sourcePKey=78999899		
Output Fiel	ds						Generate Process Objects

- 13. HTTP Status "201" indicates the record got created.
- 14. Save and Publish the Service Connector.
- 15. Go to 'New' and click on 'App Connections'.
- 16. Fill in the 'Name' and 'Location'
- 17. In 'Type' Go to folder and select your service connector.

Note: - You must publish your service Connector before creating App Connection.

Connection D	erdits		
Name:*	App-Connection		
Location:*	Default	Browse	
Description			
		10	
htter.	Default > Service_Connector	•	
Run Onc*	Cloud Server or any Secure Agent		
Connection Tests	Nor Supported		
ODoro-Enobled	Nor Supported		

- 18. Save and Publish the App Connection.
- 19. Go to 'New' and click on 'Process'.

20. Click on 'Start' fill in the general information and click on 'Input Fields' in the properties pane.

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Assign	Drag and drop a	shape from the palette to configure	the process.				
*o Service							
°°	Start	End					
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Process Prope	rties						8
Process Prope	rties Step Type:	Start					8
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Process Prope	erties				80
General	Input Fields (6)				4
Stort	Nome	Туре	Description	Required	-
Input Fields	sourceSystem	Text			
Output Fields	businessEntity	Text			
Temp Fields	sessionID	Text			
Messoges	sourcePKey	Text			
Advanced	LoutName	Text			
Notes	city	Test			

21. Drag 'Service' from the design pane and fill in the general information.

22. Go to 'Service' select the 'service type' as "Connection".

23. Select your 'App Connection' in 'Connection' tab.

24. Create the input fields and output fields.

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 Name
 Type

 response code
 Text

 id
 Text

25. Go to 'Input Fields' click on the " button and select the fields which you created and give the value as "Field" (Except 'Body') and select the field again.

General	Input Fields (5)					0
Service	Name	Required	Value			
Input Fields	sourceSystem		Field	*	sourceSystem 🛥	
fault Handling	sourcePKey		Field	~	sourceРКеу •	
Timer Events	businessEntity		Field	~	businessEntity •	
ane stage treas	sessionId		Field	~	sessionId •	
	body		Formula	~	°(

26. For 'Body' select the value as 'Formula' and give the payload.

businessEntity city Current User LastName Add > sessionID sourcePKey sourceSystem	<pre>9</pre>

27. Drag one 'decision' component and place it after the 'service' component and give name for that component.



28. Give the required conditions on both paths.

29. Drag 'Assignment' component from the design pane and fill in 'Name'.

30. Go to 'Assignments' tab, create a Field, and assign 'Field' under 'Assigned Using'.

Note: - If the record is created, it will return the business Id of the record.



31. Repeat Steps 29 and 30.

Note: - If the SC gives another response code other than 201. This step will give that response code.



- 32. 'Save' and 'publish' the process.
- 33. Click on " button. And select 'Run using'.
- 34. Fill the 'Process Input' with the required data.

Process Objects	Process Input	Encoding:	JSON	w	Sove Aa	Sove	5	Û	10
	{ "econneRustem": "rids"; "basinesEnthi": "1-300.person"; "ession[D": "getUZE=HVw0ys&UOS=MA2"; "essimeEKay": "Pet3964938"; "celly": "Shormo"; "celly": "Shormo"; "celly": "Mongolon#								

35. Click on 'Run'.



36. Click on the action name which is popped in blue color. It will show the flow of the task.

Log		Design		Find	←	Q	Ģ
Step	Duration (HH:MM:SS.ar						
Ront	00:00:00.0						
reole_service	00:00:01.647						
esponse code	00:00:00.0	Start 🧹	response Contains 201 -> N id End				
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asignment to id	00:00:00.0	Create_service	Changing In Assignment to				
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37. Click on the "Assignment to ID" to see the MDM ID which got created in C360.

		Design				Find	I← Q Q
itep	Duration (HH:MM:SS.s:						
Ron	00:00:00.0						
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iaponae code	00.00.00.0	Start	/	response Contains 201-1 BG id	End J		
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38. Go to 'Customer 360' and check the record which you just created.

	. monuterity	History	Relationship Graph			
ation						
		Middle N	ame:	Last Name:*	Full Name:	
		C.		Sharma	Rahul C. Sharma	
		Suffix Na	me:	Title:	Designation:	
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STEP-BY-STEP PROCESS FOR UPDATING RECORD:

39. Repeat 1-5 steps to create the new Service Connector.

40. Go to 'Input' and create the required fields and give example values to test as shown in the below image.

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<i>t</i> -		lee Dissole			$[(\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $
unalisten		D Sauste			46x

41. Go to 'Binding' and give URL like "<baseApiURL>/businessentity/public/api/v1/entity/<businessEntity>/<businessId>? sourceSystem=<sourceSystem>". Use your base URL in marked place.

5 Expression Editor for URL		× ^م ري
Create an expression with fields and operators.		
<u>Fields</u> Functions	Expressi	ion Type: Content
Input Parameters	1	https://usw1-mdm.dmp-us.informaticacloud.com/business- entity/public/api/v1/entity/{\$businessEntity}/{\$businessID}?sourceSystem={\$sourceSystem}
	Operato	ors
	AND	OR NOT () = I= < > <= >=
		OK Cancel

42. In 'Verb' select "PATCH" method.

Action	Input	Binding	Output	Test Results	
URL:*		https://usw1- us.informaticad	mdm.dmp- cloud.com/busine		f asi //
Verb:		PATCH			-
Multi Using:		Semicolon Sep	parated		•
Authentication Type:		Custom			•
HTTPS / Mutual Auth	entication:				

43.Repeat steps 9-12.

44. HTTP Status "200" indicates the record got Updated.

Test Server:*	Test on Cloud Server	Test	
Result:	Successful.		
HTTP Status:	200		
1101-	home //www.medm.en.us information lowed com Austinana antity / while / oni /v] /a	wiky /z340 narrow /MDM000000TA8NJS2sourceSustemestide	

45. Repeat Steps 14-25.

46. For 'Body' select the value as 'Formula' and give the payload.

Fields Functions XML Objects	Expression	APQ
businessEntity Current User sessionID sourcePKey sourceSystem	<pre> 1 '[2 { 3</pre>	, , < > < >

Pesign	for Expression Editor for Body		Ľ×⊗
	Create an expression with fields and operators.		
Service Subpr Huma Create and create_servi	businessEntity Current User sessionID sourcePKey sourceSystem	Expression Control of the second	
			- 1 -

47. Repeat steps 27-28.

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Assign Service	Start response Contains 200 P Assignment to End	
response Pro	perfies	080
response Pro General Decision	Field: responsecode • Paths	080
 response Pro General Decision 	perties Field: responsecode • Paths	
response Pro General Decision	perties Field: responsecode + Paths Path Condition Value	
response Pro General Decision	perties Field: responsecode Paths Path Condition Value Puth Contains Value 200	+

48. Change the value in path1 to "200".

49. Repeat the steps 29-33.

50. Fill the 'Process Input' with required data.

t Process Input Collection						New Ing
Select the input to run the process	with					
Choose an option:	*					
Process Objects	Process Input	Ecodina	ISON -	Save As	Save 1) . . (
	{ "borneSystem": "bds", "bornessforth", "c260.person", "ensionE?: "oliCoNoCodoFHDouc "burnessid": "wIDM000000168ht3 }	sdwolf,				



52. Repeat steps 35-37.

53. Go to 'Customer 360' and check the record which you just updated.

	Rahul C. Einstein		• 8	
Record	Details Source Records Hierarchy History Relationship Graph			
History	Feed		3 🗰	
• AUG	UST 02, 2023	Changed in Middle Name, Designation, Address > Address Line 1 and 2 more August 02, 2023 at 08:49 PM Changed Inc Name Inf	2	
Ø	Changed in Middle Name, Designation, Address > Address Une 1 and 2 more August 02, 2023 at 08:49 PM Changed by Imran.Id	Business Entity Fields System Fields		
Ø	Changed in First Name, Full Name, Address > Address Line 1 and 4 more August 02, 2023 at 06:07 PM	Middle Name G:		
	Changed by Imran.Jd	Address (3)		
•	Added in First Name,Middle Name,Last Name,Full Name,Gender and Image August 02, 2023 at 03:06 PM	Address Line 1 ++6 BTM Hene> BTM Park		
	Added by Imnan.Jd	City Bengelore		
	You have reached the end of the history feed for the applied filters.	Postal Code 560003 → 560068		

ABOUT LUMENDATA:

LumenData is a leading provider of Enterprise Data Management, Cloud & Analytics solutions. We help businesses navigate their data visualization and analytics anxieties and enable them to accelerate their innovation journeys. Founded in 2008, with locations in multiple countries, LumenData is privileged to serve over 100 leading companies, including KwikTrip, Versant Health, US Food & Drug Administration, US Department of Labor, Cummins Engine, BCG, and others. LumenData is SOC2 certified and has instituted extensive controls to protect client data, including adherence to GDPR and CCPA regulations.

Get in touch to discuss how we can facilitate data-driven transformation for your organization.



SHAIK MAHAMMAD IMRAN Associate Consultant

Shadwal Srivastava Technical Lead



Contact us +1 (855) 695-8636 info@lumendata.com

lumendata.com

MEET OUR AUTHORS -