Informatica®

Informatica® Cloud Data Integration

Zuora AQuA Connector

Informatica Cloud Data Integration Zuora AQuA Connector
April 2023

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Preface

Use Zuora AQuA Connector to read from or write to Zuora by using Cloud Data Integration. You can create a connection, develop mappings, synchronization tasks, and run synchronization and mapping tasks in Cloud Data Integration.

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CHAPTER 1

Introduction to Zuora AQuA Connector

You can use Zuora AQuA Connector to connect to Zuora from Data Integration.

Zuora AQuA Connector uses Zuora AQuA API in a stateful or a stateless mode to read data and to retrieve the deleted rows from Zuora AQua. You can use Zuora AQua API to download data in bulk from multiple objects. You can use Zuora AQuA Connector to read data from multiple related objects in Zuora.

Use a Zuora AQuA connection to create a Zuora AQuA source object in a synchronization task or mapping task. The Secure Agent reads the data for the corresponding object stored in Zuora AQuA. To use the AQuA API in a stateful mode, you need to specify the Project ID and the Partner ID in a synchronization task or mapping task.

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

Incremental loading in Zuora

Use incremental load to read data incrementally from Zuora. When you read data incrementally from Zuora, the Secure Agent reads the updated or added rows from Zuora.

When you use Zuora AQuA a continuous session across a series of requests ID formed in a stateful mode. When you specify the Partner ID and Project ID, the Secure Agent reads an incremental load of data from Zuora. When you do not specify the Partner ID and Project ID, the Secure Agent reads a full load of data from Zuora.

The following table shows an example of reading incremental load of data from Zuora:

Partner ID	Project ID	Records Fetched
Infa	A	First run - 100 Records The Secure Agent runs the first request query against all the records in the database and reads all the records present in Zuora. After the first run, the Secure Agent fetches 100 records. Consider after the first run, 5 rows are added to Zuora.
Infa	A	Second run - 5 Records The Secure Agent reads only 5 records that were added after the first run. After the second run, consider that 3 records are updated in Zuora.

Partner ID	Project ID	Records Fetched
Infa	A	Third run - 3 Records The Secure Agent reads the 3 updated records. After the third run, change the Project ID to B.
Infa	B	Fourth run- 105 Records After you change the project ID, the Secure Agent runs the request query against all the records in the database, and reads all the records present in Zuora.

Prerequisites for using Zuora AQuA Connector

If Currency Conversion feature is available for the Zuora tenant, you must disable the Currency Conversion option before you configure Zuora AQuA connections in mappings and mapping tasks.

To disable the Currency Conversion option, perform the following steps:

1. Log in to your Zuora account as an administrator.
2. Click your username at the top right corner and then select **Settings** > **Finance** > **Manage Currency Conversion**.
   The Manage Currency Conversion page appears.
3. Unselect the **Automatically include additional Currency Conversion information in data source exports** option.
4. Click **save**.

Zuora AQuA Connector Example

You are a business analyst in an organization. You use Zuora to manage all the subscription business spread across different locations.

You need to extract data from Zuora to a flat file and load data to a cloud analytics environment to perform analytics on the subscription business. You can use Zuora AQuA Connector to extract the customer subscription data from the Zuora objects to a flat file. You can load the extracted data to the cloud analytics environment to perform business analytics.

Zuora AQuA Connector assets

The following table lists the Zuora objects that you can use in Data Integration tasks:

Objects	Fetch	Data Preview	Lookup
Account	Yes	Yes	Yes
Accounting Code	Yes	Yes	Yes
Amendment	Yes	Yes	Yes
Billing Run	Yes	Yes	Yes
Communication Profile	Yes	Yes	Yes
Contact	Yes	Yes	Yes
Credit Balance Adjustment	Yes	Yes	Yes
Customer	Yes	Yes	Yes
Export	Yes	Yes	Yes
Gateway Reconciliation Event	Yes	Yes	Yes
Gateway Reconciliation Job	Yes	Yes	Yes
Gateway Reconciliation Log	Yes	Yes	Yes
Import	Yes	Yes	Yes
Invoice	Yes	Yes	Yes
Invoice Adjustment	Yes	Yes	Yes
Invoice Item	Yes	Yes	Yes
Invoice Item Adjustment	Yes	Yes	Yes
Invoice Payment	Yes	Yes	Yes
Payment	Yes	Yes	Yes
Payment Method	Yes	Yes	Yes
Payment Method Transaction Log	Yes	Yes	Yes
Payment Method Update	Yes	Yes	Yes
Payment Transaction Log	Yes	Yes	Yes
Processed Usage	Yes	Yes	Yes
Product	Yes	Yes	Yes

Objects	Fetch	Data Preview	Lookup
Product Rate Plan	Yes	Yes	Yes
Product Rate Plan Charge	Yes	Yes	Yes
Product Rate Plan Charge Tier	Yes	Yes	Yes
Rate Plan	Yes	Yes	Yes
Rate Plan Charge	Yes	Yes	Yes
Rate Plan Charge Tier	Yes	Yes	Yes
Refund	Yes	Yes	Yes
Refund Invoice Payment	Yes	Yes	Yes
Refund Transaction Log	Yes	Yes	Yes
Subscription	Yes	Yes	Yes
Taxation Item	Yes	Yes	Yes
Updater Batch	Yes	Yes	Yes
Usage	Yes	Yes	Yes

Note: You cannot preview data when you retrieve the deleted rows from Zuora.

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

CHAPTER 2

Zuora AQuA Connections

Create a Zuora connection to securely read data from Zuora. You can create a Zuora AQuA connection on the **Connections** page.

Use the Zuora AQuA connection when you create a synchronization task or a mapping task.

Connect to Zuora

Let's configure the Zuora AQuA connection properties to connect to Zuora.

Before you begin

Before you configure the connection properties, you'll need to get information from your Zuora account. The following video shows you how to get information from your Zuora account:



Connection details

The following table describes the basic connection properties:

Property	Description
Connection Name	Name of the connection. Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + -, Maximum length is 255 characters.
Description	Description of the connection. Maximum length is 4000 characters.
Type	Zuora AQuA

Property	Description
Runtime Environment	The name of the runtime environment where you want to run the tasks. Select a Secure Agent runtime environment.
Endpoint URL	The URL of the Zuora server. For example, you can specify the URL as `https://www.zuora.com/apps/api/`.
Username	User name for the Zuora account.
Password	Password for the Zuora account.
WSDL Version	Zuora WSDL version number.

Advanced settings

The following table describes the advanced connection properties:

Property	Description
Entity ID	The entity ID to connect to a specific entity in a tenant that contains multiple entities.
Entity Name	The entity name to connect to a specific entity in a tenant that contains multiple entities.
Retrieve Deleted Rows	Optional. Retrieves the deleted rows in an incremental mode. Default is false.
UTC Offset	The difference in hours from the Coordinated Universal Time (UTC) for a particular place and date. You can use the UTC offset value when you use the lastruntime data filter field to read data from Zuora based on the specified time zone.

CHAPTER 3

Synchronization Tasks with Zuora AQuA

Use a 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.

Zuora AQuA sources in synchronization tasks

You can read data from a single object when you configure a synchronization task to use a Zuora AQuA source. You can read data from custom fields in a Zuora object in a synchronization task.

To optimize performance, you can configure a filter or advanced data filters on the **Data Filters** tab. To configure advanced filter, use Zuora Object Query Language (ZOQL).

The following table describes the Zuora AQuA source properties:

Property	Description
Connection	Name of the Zuora AQuA source connection.
Source Type	Type of the source object. You can write data to a single Zuora AQuA source object. You cannot write data to multiple objects.
Source Object	Name of the Zuora AQuA source objects. Zuora AQuA Connector supports the following custom objects: **_All_Objects** You can use _All_Objects to download the data from multiple source objects at once. **_QueryObject** You can use _QueryObject to define a ZOQL query to read data from multiple or related objects.

Property	Description
Display technical names instead of labels	This property is not applicable for Zuora AQuA because both the technical name and label is same.
Display source fields in alphabetical order	Displays source fields in alphabetic order. By default, fields appear in the order returned by the source system.

Configure the advanced source properties to read data in an incremental load session or to retrieve the deleted rows from a Zuora source. The advanced source properties appear on the **Schedule** tab of the Synchronization Task wizard.

The following table describes the Zuora AQuA advanced source properties:

Advanced Property	Description
Enable Logging	Writes the error details into the log file that you can use for troubleshooting purposes.
Project ID	The ID that uniquely identifies a Data Integration project for a partner.
Partner ID	The ID that uniquely identifies a partner. **Note:** Contact Zuora Global Support if you do not have a Partner ID.

Configuring Advanced Data Filter Properties for _All_Objects

You can select _All_Objects as source object to download the data from multiple sources at once. You must specify the directory where the Secure Agent downloads the data in Gunzip format.

1. In Data Integration, click **New** > **Tasks**.
2. Select **Synchronization Task**, and click **Create**.

   The **Definition** tab appears.
3. Configure the fields on the **Definition** page.
4. Click **Next**.

   The **Source** tab appears.
5. Select the **Connection** for the task.

   Configure the fields on the **Source** page and select _All_Objects as a **Source Object.**
6. Navigate to **Data Filters** tab.

   The **Data Filters** tab appears
7. Click **New** to create a Data Filter.

   Select **object** as _All_Objects page.
8. Click **Advanced**.

   The **Advanced Data Filter** tab appears.

9. Navigate to **Filter Expression** section and enter the query using key-value pair structure.

   You can use the following query snippet as a reference:

```
{
 "_FLT_unzip_files": "false",
 "_FLT_files_download_location": "C:/a_IOD/Files/ZuoraAqua/_FLT_files_download_location",
 "_FLT_exclude_objects": "Account, Contact",
 "Account": "Autopay = 'true'",
 "Contact": "Country= 'India'"
}
```

   The following table describes the filter parameters that you can define in an query:

Key	Description
_FLT_unzip_files	Optional. When you specify the parameter as true, the Secure Agent extracts the data and downloads the files in .csv format. If you specify the parameter as false, the Secure Agent downloads the files in Gunzip file format. Default is false.
_FLT_files_download_location	Optional. Specifies the directory where Secure Agent must store the files after downloading from the source. You must specify the directory where the Secure Agent downloads the file.
_FLT_include_objects	Optional. You can specify the objects that Secure Agent must include while downloading the files from the source objects. The Secure Agent only downloads the files from the objects that you have included in the parameter.
_FLT_exclude_objects	Optional. You can specify the objects that Secure Agent must exclude while downloading the files from the source objects. The Secure Agent downloads all the files from the objects expect the files from the objects that you have included in the parameter.
ObjectName	Optional. You can specify a where clause along with the any valid source object.

   Note: If you specify both the FLT_include_objects and FLT_exclude_objects parameters, synchronization task fails.

10. Click **OK.**

    Note: You cannot configure the `$LastRunTime` variable in an advanced data filter to read data from Zuora AQuA based on the specified time zone.

Configuring Advanced Data Filter Properties for _QueryObject

You can select _QueryObject as source object and define multiple ZOQL queries to download the data from multiple or related source objects at once. You must specify the directory where the Secure Agent downloads the data in Gunzip format.

1. In Data Integration, click **New** > **Tasks**.
2. Select **Synchronization Task**, and click **Create**.

The **Definition** tab appears.

3. Configure the fields on the **Definition** page.
4. Click **Next**.

   The **Source** tab appears.
5. Select the **Connection** for the task.

   Configure the fields on the **Source** page and select _QueryObject as a **Source Object.**
6. Navigate to **Data Filters** tab.

   The **Data Filters** tab appears
7. Click **New** to create a Data Filter.

   Select **object** as _QueryObject. page.
8. Click **Advanced**.

   The **Advanced Data Filter** tab appears.
9. Navigate to **Filter Expression** section and enter the query using key-value pair structure.

   You can use the following query snippet as a reference:

```
{
"_FLT_unzip_files": "true",
"_FLT_files_download_location": "C:/a_IOD/Files/ZuoraAqua/_FLT_files_download_location",
"FileAccount": "SELECT Entity.*, SoldToContact.*, Account.* FROM Account",
"File2": "SELECT *, Entity.* FROM Account WHERE Account.Autopay = 'true'"
}
```

   The following table describes the filter parameters that you can define in an query:

Key	Description
_FLT_unzip_files	Optional. When you specify the parameter as true, the Secure Agent extracts the data and downloads the files in .csv format. When you specify the parameter as false, the Secure Agent downloads the files in Gunzip file format. Default is false.
_FLT_files_download_location	Specifies the directory where Secure Agent stores the files after downloading from the source. You must specify the directory where the Secure Agent downloads the file.
Key name	You can specify multiple queries to download the data from multiple or related source objects. The Secure Agent names the file based on the key before it download the files. **Note:** You must define at least one query.

10. Click **OK.**

    Note: You cannot configure the `$LastRunTime` variable in an advanced data filter to read data from Zuora AQuA based on the specified time zone.

Synchronization Task Example

You are a business analyst in an organization. Your organization uses Zuora to manage all the subscription business spread across different locations. You need to extract data from Zuora to a flat file and load data to a cloud analytics environment to perform analytics on the subscription business.

Perform the following steps to read data from a Zuora source and write data to a flat file:

Note: You need to create a Zuora AQuA connection before you create the synchronization task.

1. In Data Integration, click **New** > **Tasks**.
2. Select **Synchronization Task**, and click **Create**.

   The **Definition** tab appears.
3. Configure the following fields on the **Definition** tab:

Field	Description
Task Name	Name of the synchronization task. For example,ZuoraAqua_Read_IncremetalLoad
Description	Description of the synchronization task. Maximum length is 255 characters.
Task Operation	You can read data from a Zuora AQuA source. You cannot perform insert, update, upsert, or delete operations on a Zuora AQuA.

4. Click **Next**.

   The **Source** tab appears.
5. Configure the following fields on the **Source** tab:

Field	Description
Connection	Select a Zuora AQuA connection you created. For example, ZuoraAQuAConnection
Source Type	Select Single.
Source Object	Select the required object from the list.

6. Click **Next**.

   The **Target** tab appears.
7. Configure the following fields on the **Target** tab:

Field	Description
Connection	Select a flat file connection.
Target Object	Click Create Target.

8. Click **Next**.

The **Data Filters** tab appears.

9. Select the filter object, filter field, and filter operator to create a data filter on the **Data Filters** page.
10. Click **Next**.

    The **Field Mapping** tab appears.
11. Click **Automatch** on the **Field Mapping** tab to map source fields to target fields accordingly.
12. Click **Validate Mapping** to validate the mapping.
13. Click **Next**.

    The **Schedule** tab appears where you can schedule the task for each requirement and save.
14. Configure the advanced source properties on the **Schedule** tab.
15. Click **Save** and then **Finish**.
16. From the **Explore** page, select the task, and click **Actions** > **Run**.

    In Monitor, you can monitor the status of the task.

CHAPTER 4

Mappings and mapping tasks with Zuora AQuA

When you configure a mapping, you describe the flow of data from the source to the target.

A mapping defines reusable data flow logic that you can use in mapping tasks.

When you create a mapping, you define the Source transformations to represent a Zuora AQuA object. Use the Mapping Designer in Data Integration to add the Source transformations in the mapping canvas and configure the Zuora AQuA source properties.

In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

You can use Monitor to monitor the jobs.

Zuora AQuA sources in mappings

You can configure a source object to represent a single Zuora object in a mapping. You can read data from custom fields in a Zuora object in a mapping.

The following table describes the Zuora AQuA source properties that you can configure in a source object:

Property	Description
Connection	Name of the active source connection.
Source Type	Type of the Zuora AQuA source object available. You can read data to a single or parameter source object.
Object	Name of the source object for the mapping.

Configure the advanced source properties when you create a mapping to read data in an incremental load session or to retrieve the deleted rows from a Zuora source.

The following table describes the Zuora AQuA advanced source properties:

Advanced Property	Description
Project ID	The ID that uniquely identifies a Data Integration project for a partner.
Partner ID	The ID that uniquely identifies a partner. **Note:** Contact Zuora Global Support if you do not have a Partner ID.
QueryName	The name of the query that you want to run. Maximum length is 32 characters.

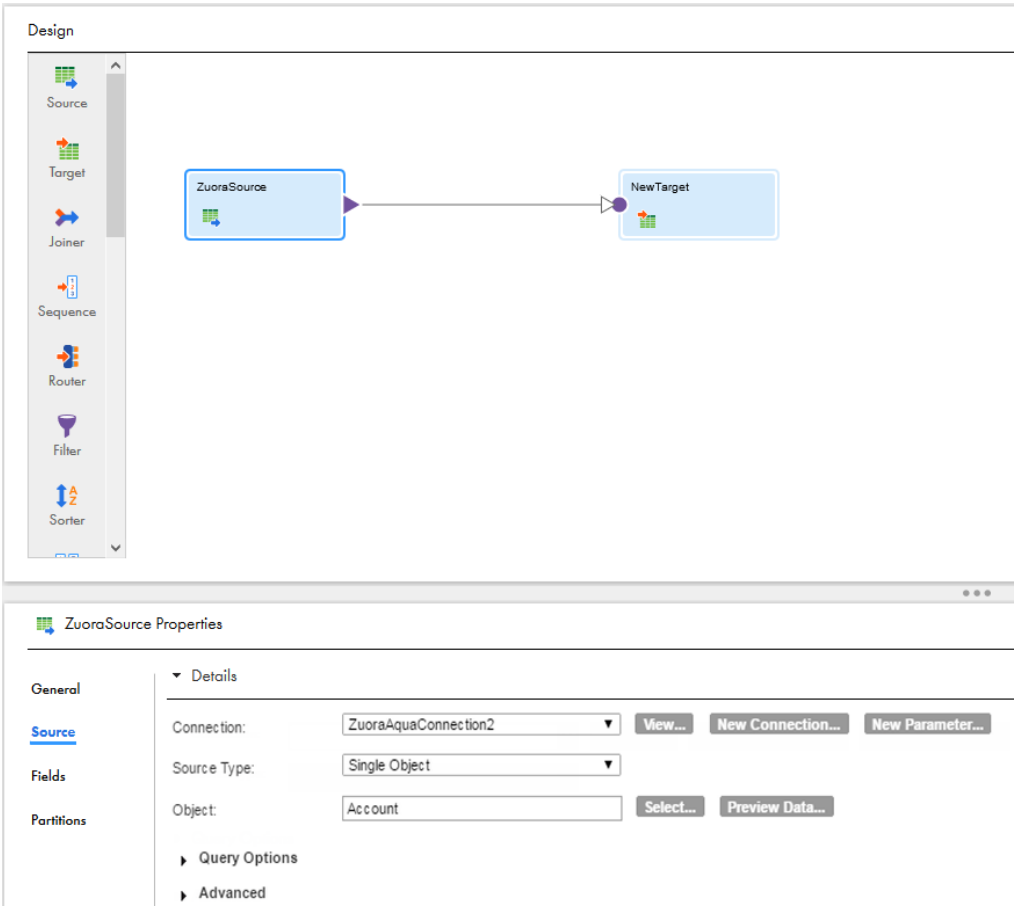
Zuora AQuA Mapping Example

You are a business analyst in an organization. Your organization uses Zuora to manage all the subscription business spread across different locations. You need to extract data from Zuora to a flat file and load data to a cloud analytics environment to perform analytics on the subscription business.

Perform the following steps to read data from a Zuora AQuA source and write data to a flat file target:

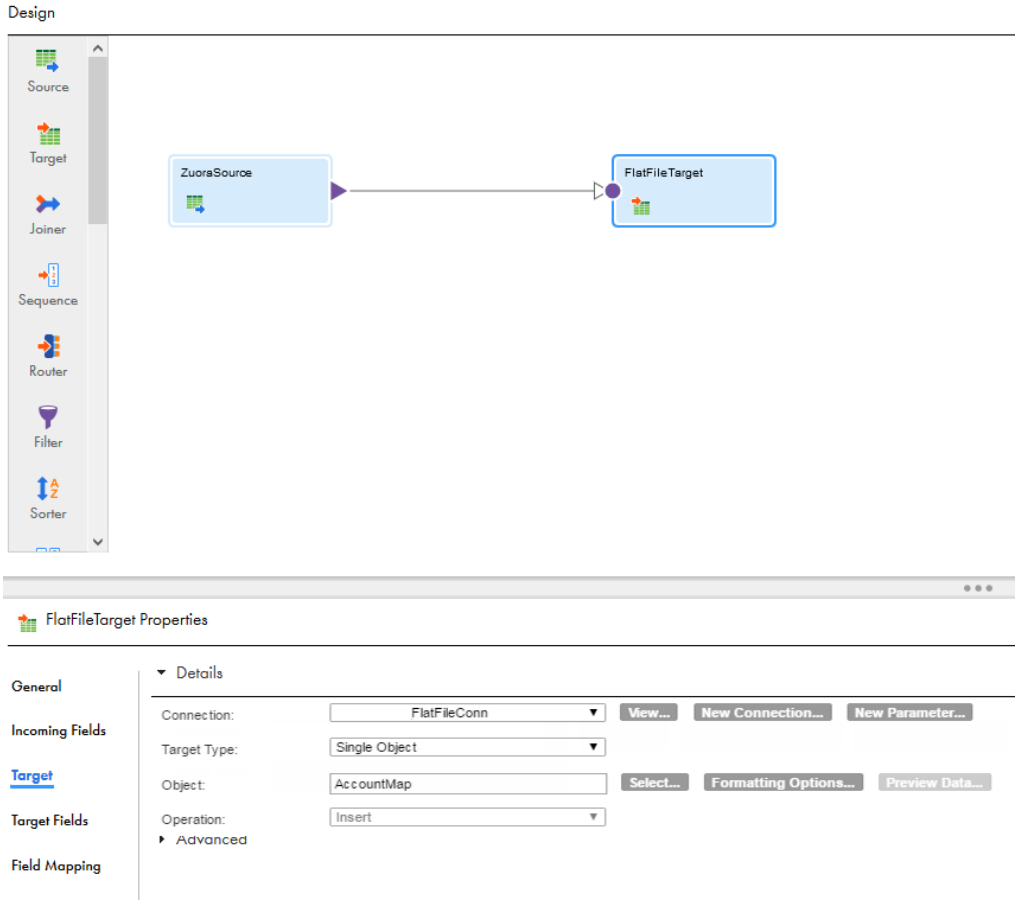
1. In Data Integration, click **New** > **Mapping**, and then click **Create**.
2. Provide a name, location, and description for the mapping.
3. To configure the source properties and the advanced source properties, select **Source** on the Transformation palette.

The following image shows details of the **Source Properties** page:



4. To configure the target properties and the advanced target properties, select **Target** on the Transformation palette.

The following image shows details of the **Target Properties** page:



5. Map the source and target.



6. Click **Save** and then click **Run.**

   In Monitor, you can monitor the status of the mapping task.

CHAPTER 5

Data type reference

Data Integration uses the following data types in synchronization tasks, mapping tasks, and mappings with Zuora AQuA:

Zuora AQuA native data types

Zuora AQuA data types appear in the Source transformations when you choose to edit metadata for the fields.

Transformation data types

Set of data types that appear in the transformations. They are internal data types based on ANSI SQL-92 generic data types, which the Secure Agent uses to move data across platforms. Transformation data types appear in all transformations in a mapping.

When Data Integration reads source data, it converts the native data types to the comparable transformation data types before transforming the data. When Data Integration writes to a target, it converts the transformation data types to the comparable native data types.

Zuora AQuA and transformation data types

The following table lists the Zuora AQuA data types that Data Integration supports and the corresponding transformation data types:

Zuora AQuA Data Type	Transformation Data Type	Description
Boolean	String	True/False
Date	Date	Calendar date (year, month, day).
Datetime	Date	Calendar date (year, month, day).
Decimal	Decimal	Exact numeric of selectable precision.
Integer	Integer	Signed four-byte integer.
PickList	String	Variable-length character string with a user-defined limit.
Text	String	Variable-length character string with a user-defined limit.
ZOQL	String	Variable-length character string with a user-defined limit.

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  example 7