

SALESFORCE

CREATING A RECORD

Projects > Salesforce > CREATE : Recipe

CREATE

Edit recipeStart recipe

RecipeJobsConnectionsVersionsTest casesSettings

TRIGGER

1Trigger every 5 minutes

ACTIONS

2Download file contents from FTP/FTPS serverFile

3Parse JSON document

4Create Account in Salesforce

5STOP job

Fullscreen

Inactive

Successful jobsFailed jobs

10

LocationSalesForce

Move

Stopped17 minutes ago

DependenciesRecipe uses 2 assets

DescriptionAdd description

AssistIQ

Search...

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterGroupsCalendarMore

AccountNaveen

+ FollowNew ContactNew CaseNew Note

Account Ownernaveen kumar

Account NameNaveen

Parent Account

Account Number

Account Site

Type

Industry

Annual Revenue

Billing AddressKMMIndia

Customer Priority

Rating

Phone

Fax

Website

Ticker Symbol

Ownership

Employees

SIC Code

Shipping Address

SLA

Filters: All time • All activities • All types

RefreshExpand AllView All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

To Do List

READING A RECORD

Projects > Salesforce > GET: Recipe

GET

Edit recipeStart recipe

RecipeJobsConnectionsVersionsTest casesSettings

1Trigger every 5 minutes

ACTIONS

2Search for Accounts in SalesforceBatch

3Parse JSON document

4Upload a file to FTP/FTPS serverFile

5STOP job

Inactive

Successful jobsFailed jobs

10

LocationSalesForce

Stopped15 minutes ago

DependenciesRecipe uses 2 assets

Description

Assist

Search...

StarAddShareHelpSettings12Avatar

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterGroupsCalendarMore

AccountNaveen

+ FollowNew ContactNew CaseNew Note

Account OwnerRating

naveen kumar

Account NamePhone

Naveen

Parent AccountFax

Account NumberWebsite

Account SiteTicker Symbol

TypeOwnership

IndustryEmployees

Annual RevenueSIC Code

Billing AddressShipping Address

KMMIndia

Customer PrioritySLA

Filters: All timeAll activitiesAll types

RefreshExpand AllView All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

UPDATING A RECORD

Projects > Salesforce > update : Recipe

update

Edit recipeStart recipe

RecipeJobsConnectionsVersionsTest casesSettings

TRIGGER

1Trigger every 5 minutes

ACTIONS

2Download file contents from FTP/FTPS serverFile

3Parse JSON document

4Update Account in Salesforce

5STOP job

Inactive

Successful jobsFailed jobs

20

LocationSalesForce

StoppedA few seconds ago

DependenciesRecipe uses 2 assets

Description

Sales

HomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterGroupsCalendarMore

Search...

AccountNaveen

Account Ownernaveen kumar

Account NameNaveen

Parent Account

Account Number

Account Site

Type

Industry

Annual Revenue

Billing AddressHYDIndia

Customer Priority

Rating

Phone

Fax

Website

Ticker Symbol

Ownership

Employees

SIC Code

Shipping Address

SLA

FollowNew ContactNew CaseNew Note

Filters: All time • All activities • All types

RefreshExpand AllView All

Upcoming & Overdue

No activities to show.

No past activity. Past meetings and tasks marked as done show up here.

DELETING A RECORD

Search...

★

+

🔍

?

⚙️

🔔

👤

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

✎

Accounts

Recently Viewed

🔼

🔽

New

Import

2 items • Updated a few seconds ago

🔍 Search this list...

⚙️

📅

🔄

✎

🗑️

🔼

	Account Name	Account Site	Phone	Account Owner Alias
1	Naveen			nkuma
2	Ubanka			nkuma

Projects > Salesforce > delete : Recipe

delete

Edit recipe

Start recipe

Recipe

Jobs

Connections

Versions

Test cases

Settings

Fullscreen

+

-

TRIGGER

1

Trigger every 5 minutes

ACTIONS

2

Delete Account in Salesforce

3

STOP job

End

Inactive

Successful jobs

Failed jobs

1

0

Location

Salesforce

Move

Stopped

A few seconds ago






Dependencies



Recipe uses 1 asset

Description







Add description

AssistiQ

 **Sales** Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ Reports ▾ Chatter Groups ▾ Calendar ▾ More ▾    ? ⚙️ 🔔 

 Accounts **Recently Viewed** ▾ 

1 item • Updated a few seconds ago







New Import

	<input type="checkbox"/> Account Name ▾	<input type="checkbox"/> Account Site ▾	<input type="checkbox"/> Phone ▾	<input type="checkbox"/> Account Owner Alias ▾
1	<input type="checkbox"/> Naveen			nkuma ▾

