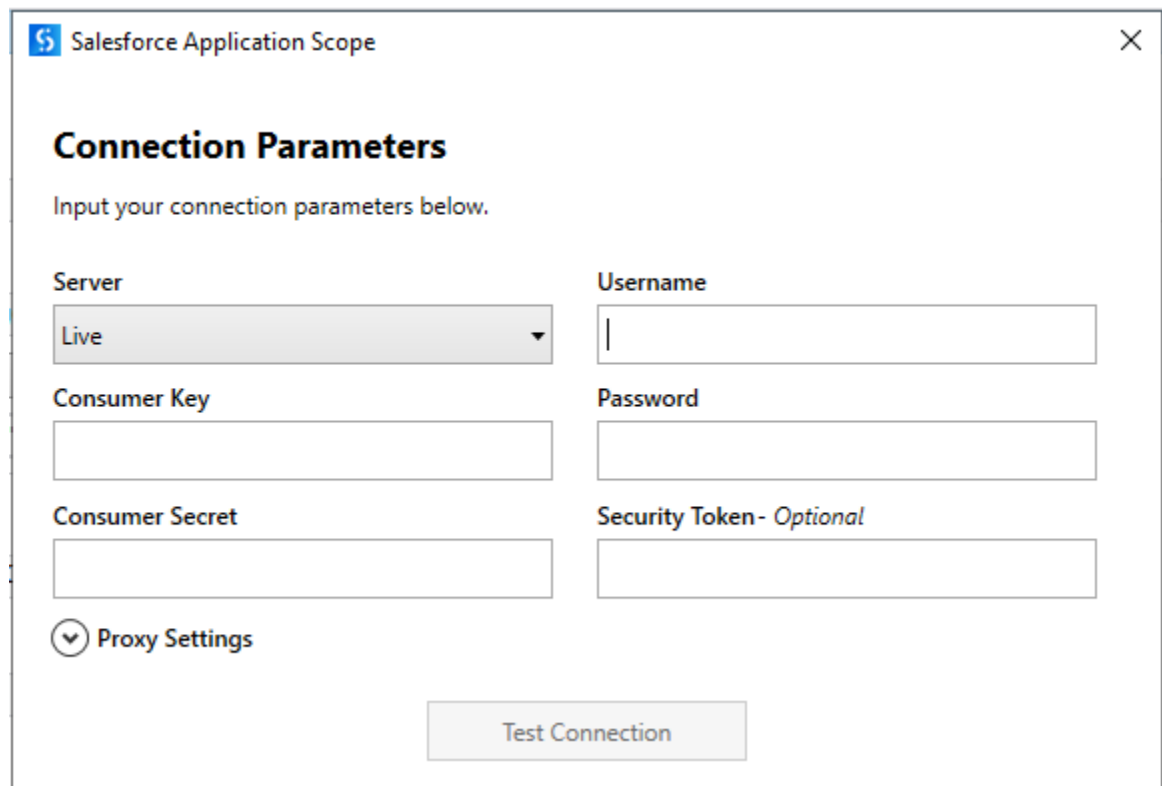


# UiPath Salesforce API Automation

The account should have admin permission to perform API automation

- 1) Get Consumer Key from salesforce
- 2) Get Consumer secret key from salesforce
- 3) Get security token for the account from salesforce (Email will be sent to account on security token)
- 4) Use workbench application to get the references for the elements for which the input will be of type reference
- 5) Each section of salesforce will be considered as object in UiPath
- 6) Use the below activities from UiPath to connect to Salesforce
  - 1) Salesforce application scope



**Salesforce Application Scope**

**Connection Parameters**

Input your connection parameters below.

**Server**  
Live

**Username**  
|

**Consumer Key**  
[Empty text box]

**Password**  
[Empty text box]

**Consumer Secret**  
[Empty text box]

**Security Token - Optional**  
[Empty text box]

Proxy Settings

Test Connection

Here you can select Server type as Live, Test or Custom.

- 2) To Insert the record: Insert Record activity inside salesforce application scope  
While inserting the records, we must consider the object for which we are inserting the records into and also the ui elements in the screen of salesforce application can be seen for the corresponding object in UiPath salesforce insert record activity, out of which we can

select set of activities as per the requirement from the list as shown in an example

Salesforce Object - Insert Record

Salesforce Object

Object

Field	Display Name	Data Type	Value	Sample Value	
Id		id	Enter a VB expression	a112w000000rKjcAAE	
		reference	"00.....IA"	0012w00000EXmcOAAT	
		reference	"00.....IA"	0012w00000EXmcOAAT	
Co		reference	str_id	a0V2w0000057nvnEAA	

To add Additional Fields

Add Single Field Add Multiple Fields

reference data type which needs input as Id that we can fetch from workbench application Test Done Cancel

Here you can add other elements corresponding to your object by clicking on Add Multiple Fields inside the insert Record activity.

3) To Update the record: Update record activity inside Salesforce application scope

Salesforce Object - Update Record

Salesforce Object

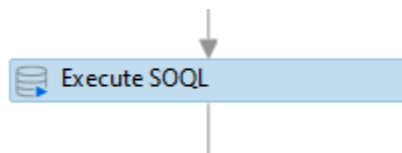
Field	Display Name	Data Type	Value	Sample Value	
	Operations ID	id	str_OperationsID	a0W2w000002NsTREA0	
Needs Inspection	Needs inspection	boolean		true	
Order Description	Order description	textarea			
Client Reference	Client reference	textarea		HHH	
Age	Age	textarea			

Field names as in salesforce

Add Single Field Add Multiple Fields Test Done Cancel

Similar to insert record activity but here we are going to update the existing record in salesforce application.

- 4) Both insert record and Update record activity should be inside the container: **Composite Request** which will give the response in a data table having columns: Id, Success/Failure, Error Reason.
- 5) Use **Get list item** activity to get the list of records for corresponding objects.
- 6) In order to dynamically get the value for the element of data type: Reference we can use SOQL Query to fetch the reference.



Before using the SOQL query we can use Work bench application to check the reference and get confirmation on which query to use for fetching the dynamic records from Salesforce.

Workbench application URL: <https://workbench.developerforce.com/query.php>

Enter or modify a SOQL query below:

```
SELECT Product__c FROM ClientContract__c
```

Query

reference selection  
for element in the  
object

## Query Results

Returned records 1 - 200 of 84288 total records in 2.453 seconds:

More...

1	0012w000000EXmcQAAT
2	0012w000000EXmcQAAT
3	0012w000000EXmcQAAT
4	0012w000000EXmcQAAT
5	0012w000000EXmcQAAT

In this example I am trying to search for element inside ClientContract object.

Workbench home screen after logging in:



SOQL Query

Choose SOQL Query in  
Queries section

Visual Studio Code now includes a SOQL Builder. Try it today!

Contact for more information: 7975938055, Pavan H.