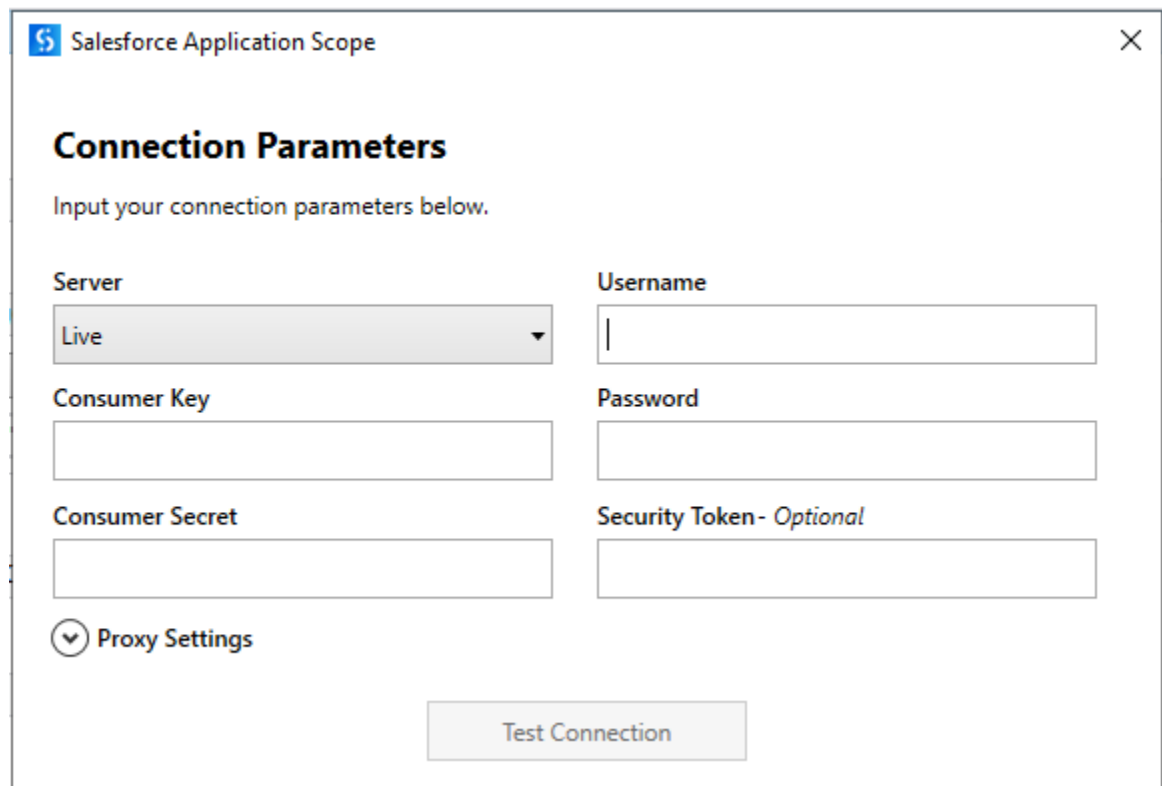# UiPath Salesforce API Automation

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

   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

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

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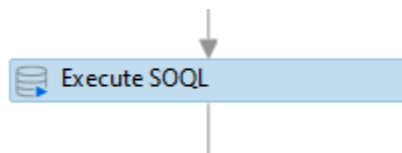
Before using the SOQL query we can use Work bench application to check the reference and get confirmation on which query to use for fetching the dynamic records from Salesforce.

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

Enter or modify a SOQL query below:

SELECT Pr***** ***_c FROM Cl**********_c

reference selection
for element in the
object

[Query]   ?

Query Results

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

[More...]

1	0012w00000EXmcOAAT
2	0012w00000EXmcOAAT
3	0012w00000EXmcOAAT
4	0012w00000EXmcOAAT
5	0012w00000EXmcOAAT

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

Workbench home screen after logging in:

workbench ▼   info ▼   queries ▼   data ▼   migration ▼   utilities ▼

SOQL Query

Choose SOQL Query in
Queries section

Contact for more information: 7975938055, Pavan H.