Workato Partner Delivery Bootcamp

Exercise Prerequisites

- Create Slack Account
  - Create a Slack Workspace from this [URL](#):
    - (https://slack.com/get-started#create)
    - Enter your email (can be work or personal email)
    - Select a name for your workspace such as "<TeamName>_training_2024"
    - Note the name of your workspace as you will need it later on
  - Refer to the [link](#) to establish a connection to Slack from Workato
    - https://docs.workato.com/connectors/slack.html#how-to-connect-to-slack-on-workato

- Create Salesforce Account
  - Create a developer account in Salesforce [here](#) (https://developer.salesforce.com/signup)
    - *Note- You can use your personal or official email address. Both works.*
  - After account creation, you will receive an email in your inbox to access your account. Next, make sure you can log in to Salesforce with the newly created account using - https://login.salesforce.com
  - Once the Salesforce account is ready, log in to Workato and create a Salesforce connection under your folder as given below:
    - Toggle the Green "Create" button and select Connection
    - For the Application, select **Salesforce**.
    - Name the connection however you want (e.g. John Smith Salesforce Account).
    - Select Location as a folder with **Your Name**.
    - Keep the Sandbox input field: No.
    - Click Connect
    - Enter the credentials of your Salesforce account and you are now ready to build your recipe.

- **Create Google Drive Account**
  - Sign up for a new Gmail account [here](). (https://shorturl.at/jKJfv)
  - Using the same Gmail account make a connection to Google Drive
  - Refer to the steps given [here]() to create a Google Drive connection in Workato (https://shorturl.at/cHoFF)
  - Create a folder named "Partner Delivery Training".

- **Create JIRA Account**
  - Sign up for a new account [here](). Also, follow on-screen instructions, enter the desired site name, Take note of the site name, as this is needed for the hostname part for the Jira connection, etc
  - Log in to JIRA with your newly created account as below: https://*<yourAccountName>*.atlassian.net/jira/projects?selectedProjectType=software
  - After entering your email and site name, you are prompted with a few preferences (we can skip these), and then on the next splash screen, you get to choose the
    - 1.) Template (choose "Kanban" under the "Software development" category),
    - 2.) Create a project screen, in which we can enter a relevant project name for this training session (e.g. Delivery Training), and click 'Create Project'
    - 3.) The Project board is now visible, w/ To-do, In Progress, Done
  - Finally, in Workato, create a new JIRA connection using OAuth 2.0 and enter your Jira Service Desk subdomain. Click "Connect" and you will be prompted to log into your Jira Service Desk instance using the account username and password in a separate window.
  - Authorize Workato's request to access your Jira instance.
  - If you need more details refer to the documentation [here](https://docs.workato.com/connectors/jira.html) (https://docs.workato.com/connectors/jira.html)