

# SALESFORCE CRUD OPERATIONS

## SALESFORCE CONNECTION

The screenshot shows the 'My Salesforce account' connection page. The breadcrumb trail is 'Projects > salesforce > My Salesforce account'. The account name is 'My Salesforce account' with an edit icon, and the email is 'shreeja.yerla@gmail.com'. A 'Delete connection' button is in the top right. The main configuration area has three sections: 'Auth type' with a dropdown set to 'OAuth 2.0' and a note 'Default is OAuth 2.0'; 'Sandbox' with a dropdown set to 'No' and a note 'Is this connecting to a sandbox account?'; and 'Advanced settings' with a 'Show' button. A 'Disconnect' button is at the bottom. On the right, a 'Connected' status bar shows the location as 'salesforce', a 'Move' button, and connection details: 'Connected Jun 1 7:31 AM' and 'Created Jun 1 7:27 AM'. Below this, the 'Dependencies' section shows 'Used by 4 recipes'. The 'Latest activity' section shows a log entry: 'Connected by shreeja.yerla Jun 1 7:31 AM'. An 'AssistIQ' button is in the bottom right corner.

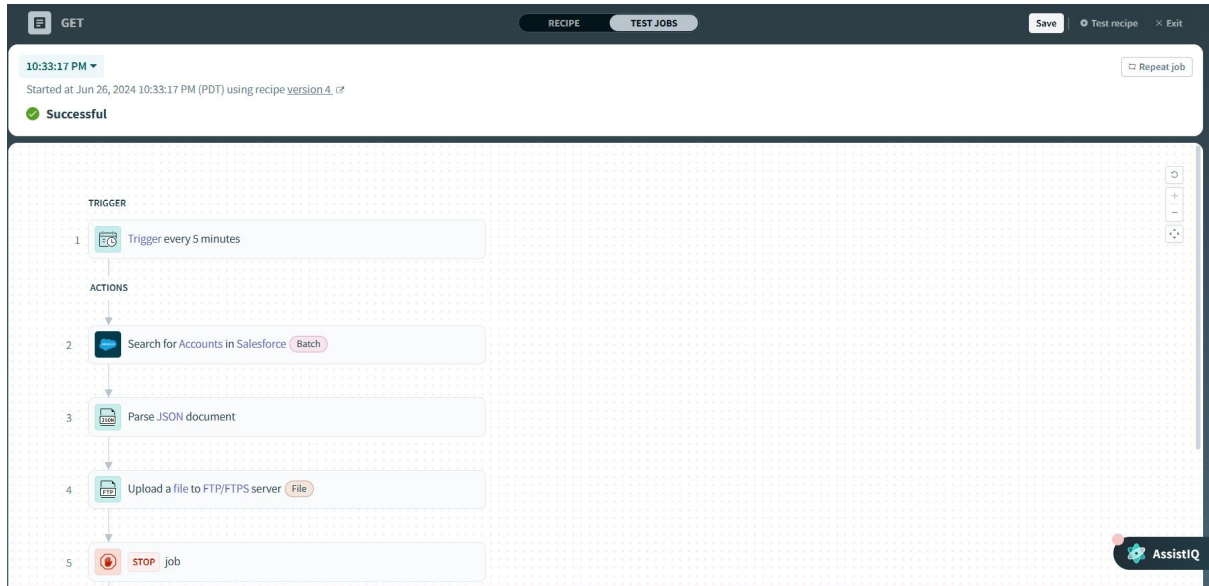
## CREATE ACCOUNT

The screenshot shows a workflow recipe in a tool. The top bar includes 'Import favorites', a list of open browser tabs (Gmail, YouTube, News, Amazon.com, Booking.com, Express VPN, McAfee Security, LastPass password...), and tabs for 'CREATE', 'RECIPE', and 'TEST JOBS'. The 'CREATE' tab is active, showing a status bar with the time '10:32:30 PM', a note 'Started at Jun 26, 2024 10:32:30 PM (PDT) using recipe version 3', a 'Repeat job' button, and a green 'Successful' status. The workflow canvas contains five steps: 1. 'TRIGGER' section with 'Trigger every 5 minutes'; 2. 'ACTIONS' section with 'Download file contents from FTP/FTPS server' (labeled 'File'); 3. 'Parse JSON document'; 4. 'Create Account in Salesforce'; and 5. 'STOP job'. An 'AssistIQ' button is in the bottom right corner.

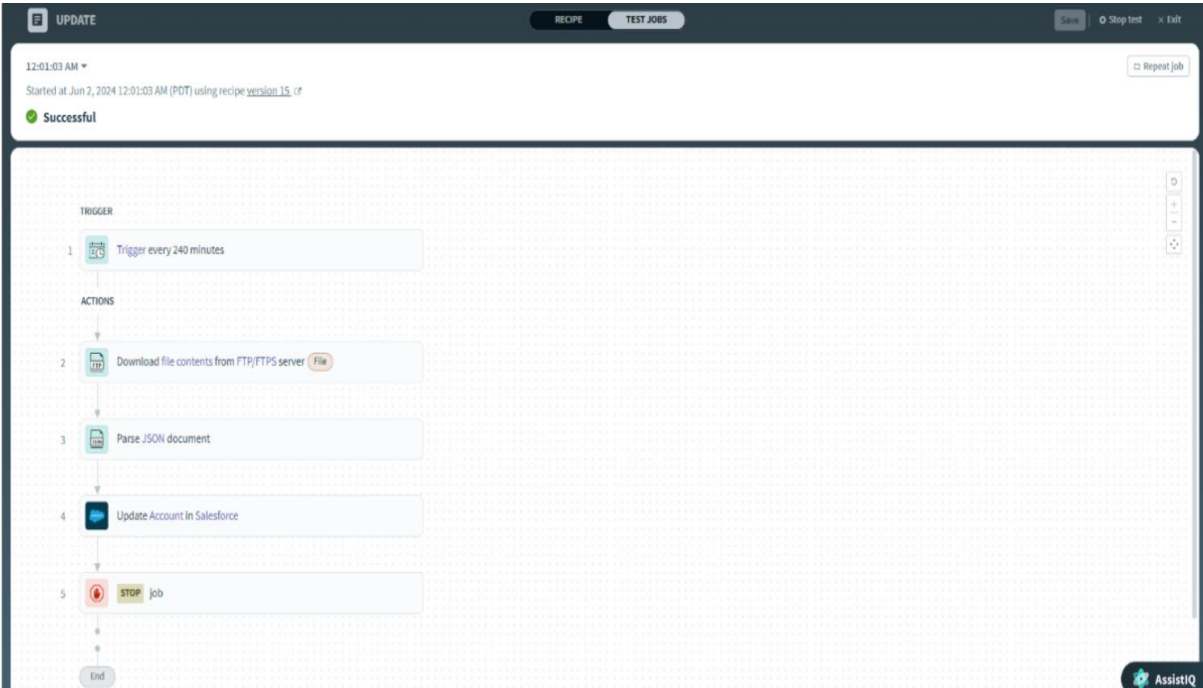
<div> <div> <div></div> <div>Sales</div> </div> <div> <div>Home</div> <div>Opportunities</div> <div>Leads</div> <div>Tasks</div> <div>Files</div> <div>Accounts</div> <div>Contacts</div> <div>Campaigns</div> <div>Dashboards</div> <div>Reports</div> <div>Chatter</div> <div>Groups</div> <div>People</div> <div>More</div> </div> </div>					<div> <div>Q Search...</div> <div> <div>★</div> <div>+</div> <div>🔍</div> <div>?</div> <div>⚙️</div> <div>🔔</div> <div>👤</div> </div> </div>				
<div> <div>Accounts</div> <div>Recently Viewed</div> <div> <div>New</div> <div>Import</div> <div>Assign Label</div> </div> </div>					<div> <div>Q Search this list...</div> <div> <div>⚙️</div> <div>🔍</div> <div>🔄</div> <div>✎</div> <div>🗑️</div> <div>⌵</div> </div> </div>				
<div>1 Item • Updated a few seconds ago</div>									
<div> <div><input type="checkbox"/></div> <div>Account Name</div> <div>▼</div> </div>					<div> <div>Account Site</div> <div>▼</div> </div>				
					<div> <div>Phone</div> <div>▼</div> </div>				
					<div> <div>Account Owner Alias</div> <div>▼</div> </div>				
<div>1</div>					<div> <div><input type="checkbox"/></div> <div>Shreeja</div> <div>SYERL</div> <div>⌵</div> </div>				

## GET

```
/shreeja/CREATE/create.json – u834518050.workato@eaiesb.com – Editor – WinSCP
{
  "Name": "Shreejaa",
  "City": "Hyderabadd",
  "Country": "Indiaa"
}
```



# UPDATE



salesforce

Download

Edit

Properties

New

Find Files

+

-

v

/shreeja/salesforce/

Name	Size	Changed	Rights	Owner
..				
update.json	1 KB	04-06-2024 22:59:40	rw-r--r--	u83451...

Search...

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboard

Account

Shreeja

Account Owner

SHREEJA YERLA

Account Name

Shreeja

Parent Account

Account Number

Account Site

Type

Industry

Annual Revenue

Billing Address

Hyderabad  
India

Rating

Phone

Fax

Website

Ticker Symbol


Ownership

Employees

SIC Code


Shipping Address


# DELETE

DELETE

RECIPETEST JOBS


11:19:00 PM ▾

Started at Jun 26, 2024 11:19:00 PM (PDT) using recipe [version 3](#) 

 **Successful**


TRIGGER

1


Trigger every 5 minutes

ACTIONS


2

Delete Account in Salesforce


3

STOP job

End



Q Search...

Sales

Home

Opportunities ▾

Leads ▾

Tasks ▾

Files ▾

Accounts ▾


Contacts ▾


Campaigns ▾

Dashboards ▾

Reports ▾

C

Accounts

Recently Viewed ▾ 

0 items • Updated a few seconds ago

Q Search this list..

<input type="checkbox"/> Account Name ▾	Account Site ▾	Phone ▾
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