

AUTOMATION PRO I – BONUS LABS

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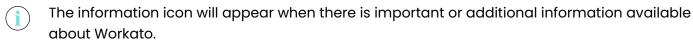
Bonus labs

The following series of labs takes you through a slightly more complex scenario than featured in the Automation Pro I course. While still focusing on core recipe concepts and basic recipe design, these labs present more use cases for Workato.

Notes

We recommend completing these labs in order as you will build on skills previously learned.

lcons









Lab 1: Create a contact in Salesforce

In this recipe, we'll explore the fundamental components of a recipe: the trigger, the connection, and actions. Through this recipe, we will create a contact in Salesforce with inputs from Workato.



A Salesforce account is **required** for this first recipe.

Create a Salesforce sandbox account

If you do not have a Salesforce sandbox account, **create** one at <u>developer.salesforce.com/signup</u>.

Save the username and password you create for your Salesforce account as you will need them to configure your Salesforce connection for this exercise.

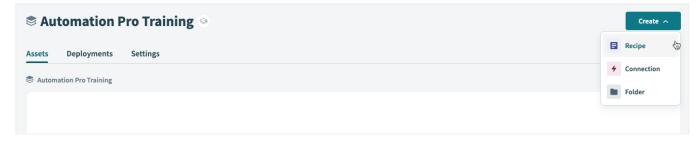
	+		lesforce
	O		asforce Developer Edition y of the Platform, for free
Build enterprise-quality apps fast to	h	omplete the form to start your elp you make the most of your	free trial. Our team will be in touch to trial.
bring your ideas to life	First	Nome'	Last Norrie*
Build apps fast with drag and drop tools	10	ur first name	Your last name
 Go further with Apex code Integrate with anything using powerful APIs 	Ema	i* ur email address	
Stay protected with enterprise-grade security Customize UI with clicks or any leading-edge web	Role		
	Yes	ur job role	~
	Com	pany*	
	Co	mpany Name	
	Cour	ntry/Region*	
		lect Country/Region	~
	Post	al Code"	
	Yo	ur postal code	
		name' w@company.sandbox	
	<u>~</u> O	username must be in the form of a	nemail address (it does not have to be real). It is with another Salesforce login credential. Real

Create a new recipe in Workato

To begin building your recipe, **navigate** to the training project we created earlier.

Click the Create button and choose Recipe.

This will begin a guided walkthrough of setting up your recipe.







We can name this recipe **Create a contact in Salesforce**.

Next, choose your training folder as the **location**.

Set up your recipe Name Create a contact in Salesforce Lacation* Automation Pro Training Pick a starting point* Figger from an app Trigger from an app Trigge	My new recipe					
Create a contact in Salesforce Location * Automation Pro Training Pick a starting point * Triggerfrom Run on a	Set up you	ur recipe				
Location * Automation Pro Training Pick a starting point * Trigger from Run on a Trigger from Manage other Build an API Build a Stack	Name					
Automation Pro Training Pick a starting point* Image: Comparison of the starting point*	Create a contac	t in Salesforce				
Pick a starting point*	Location*					
Image: Second	Automation Pr	ro Training			-	
	Trigger from	Run on a	Trigger from a	Manage other	Build recipe	Build a Slack

Configure your trigger

Triggers determine what event to listen to execute the actions described in a recipe.

As we will be using a scheduled trigger for this recipe, let's select the starting point as **Run on a schedule** and click the **Start Building** button.



You will then see the recipe edit mode with your trigger ready to run on a specified schedule.

eate a contact in Salesforce		Save 0 Test C Refresh
	App App	
TRIGGER	D + Trigger on a specified schedule	
1 Trigger on a specified schedule	C Find • Show optional fields	
ACTIONS	HELP A	
· · · · · · · · · · · · · · · · · · ·	Run your recipe on a regular interval (e.g. every 15 minutes). Mondayl. Users may also specify a cron expression by select The minimum accepted interval is every 5 minutes. Learn more (?	
	Time unit*	
	Minutes	>
	Select an interval or custom schedule to specify cron expressio	in.
	Trigger every*	
	123 5	min
	Define repeating schedule. Enter whole numbers only. This field	d can be set to a minimum of 5 minutes.
	+ 1 optional fiel	ld available
	Set trigger condition Only trigger events matching specified condition will be process	sed. Learn more rz
	Only trigger events matching specified condition will be proces	and the second s



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If you do not see your trigger ready to run on a specified schedule, navigate to the **Trigger** tab in the **Setup** menu and choose, **New Recurring Event**.

This will allow you to determine the interval at which to execute recipe actions.

This application requires the time interval between triggers. We will set our interval at **5 minutes** for this lab.

рр	→ Trigger → Setup
-0	Trigger on a specified schedule
Q	Search for an event
RIGO	Search for an event

Minutes		× •
elect an interval c	or custom schedule to specify cron expression.	
frigger every *		
123 5		minutes

You can toggle optional fields to view additional fields that are not required.

For example, in the **Start after** input field, you can specify the date and time to start the first trigger event.

• Show optional fields	5 ×
Q Search	Field: Currently hidden in step ×
1 of 1 result selected	
Select all	
✓	
	Cancel Apply changes

For this lab, we will leave this blank.

Start after		
Set date and time to s value cannot be char	start or leave blank to start immediately. Once recipe has nged.	been run or tested,
Set trigger co	ndition	
Only trigger events m	natching specified condition will be processed. Learn more	e rð



i



Why this is important

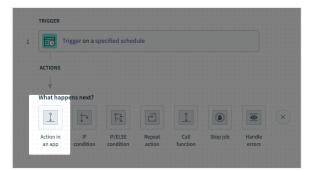
This feature is called the **Time Machine**. It makes it easy to capture business events that have already occurred, such as before the recipe is started. For example, you can set your recipe to poll for new or updated Salesforce cases since yesterday.

Add an action

Next, let's click the **plus (+) icon** to add an **Action in an app**, as our action will involve the application, Salesforce.



Select Action in an app to add the next step.



Search for and select the **Salesforce** application.







For action, choose **Create** record, which will allow us to create standard or custom records in Salesforce.

App \rightarrow Action \rightarrow Connection \rightarrow Setup
Choose an action
Q Search for an event
RECOMMENDED
Update record
Update any standard or custom record, e.g. lead, via its Salesforce ID.
Search records
Retrieve a list of standard or custom records, e.g. leads, that matches your search criteria
Search records (Contact)
Retrieve a list of standard or custom records, e.g. leads, that matches your search criteria
Create record
Create any standard or custom record, e.g. lead, in Salesforce
Search records (Account)

Connect to Salesforce

Next, let's establish a connection to our new Salesforce sandbox.

To create a new connection, give the connection a name, such as **My Salesforce account**, and click **Connect**.

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× •
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Then, input the username and password of the sandbox Salesforce account you just created to authenticate the connection.

sales	force
Username	1 Saved Username
Password	
Log	Ín
Remember me	
Forgot Your Password?	Use Custom Domain
© 2023 Salesforce, Inc. All	rights seeming 1 Drivery

When prompted to allow access via Workato, click the **Allow** button.

 Perform segmentation on data 	Customer Data Platform		
Manage Customer Data P	latform Identity Resolution		
Access Headless Forgot Pa	Access Headless Forgot Password API		
 Manage Customer Data P data 	latform Calculated Insight		
 Perform requests at any ti 	me		
Do you want to allow access			
	(Not you?)		
Deny	Allow		
To revoke access at any time, go	o to your personal settings.		

Input data

Once connected, we will set up our trigger.



Typically, your recipes should not have any hardcoded values, but we will make an exception for this lab.





In our scenario, we are creating a contact in Salesforce. For the Object input field, select **Contact**.

Additional available fields will then appear based on the object chosen.

LP ^	
Create any standard or custom record, e.g. lead, in Salesforce. Sele object to create, then provide the data for creating the record.	ct the
ject*	
Contact	
Account Contact Role	
Case Contact Role	
Contact	
Contact Point Address	
Contact Point Address Share	
Contact Point Consent	

For the purposes of this lab, let's hardcode the required **Last Name** field to your last name.

Object*	
Contact	× •
Select any standard or custom Salesforce object, e.g. lead	
Last Name *	Text Formula
ABC YourLastNameHere	ĥ
Email	

Next, fill in your **Email** and **First Name**.

First Na	me	
ABC	YourFirstName	

ABC youremail@address

Make note of this record as we will use this contact for subsequent labs.

Test your recipe

Once all fields have been filled, we can test the recipe which will pick up one trigger event to run and will stop thereafter.



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Click **Save** and **Test** in the upper right corner of your recipe.

Since our trigger is run by a scheduler, it will pick up a job immediately.

Once the recipe has run successfully, you will see a status message and have access to job details.



Create a contact in Salesforce
7:36:58 PM 👻
Started at 7:36:58 PM on Apr 27, 2023 (GMT+10) using recipe version 4 🗷
Successful
TRIGGER
1 Trigger on a specified schedule
ACTIONS
2 Create Contact in Salesforce
End

Click the Create record step.

In the **Input** tab, you will see hard coded data for the first and last name as well as for the email address.

In the **Output** tab, you will see details of the created record in Salesforce, such as the Object ID.

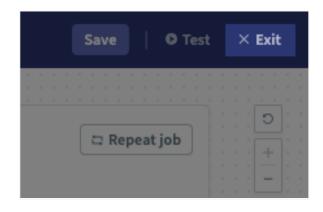
Q Search			~ ~	×	Copy raw JSON
1 • { 2 0bjec	t: "Contact",				
3 Last I	Name: "Kent",				
	Name: "Clark",				
5 Emart 6 }	: "training@autom	ationinstitute	.sandb	ox"	

Q Search	~	~ X	Copy raw JSON	🕆 Expand data
• { Object ID				
Object ID	"003Do00000H1;	woind ,		





Click **Exit** in the upper right corner to close your recipe. Now, let's take a look at the job report for this test.



Click the **Jobs** tab to view job reports.

Create a contact in Salesforce	/		Edit recipe Star	t recipe 🗸 🗸
Recipe Jobs Connections Versio	ons Settings			
Repeat job Q Search jobs	All job statuses * All job types * All periods *	C Fullscreen	Inactive	
Time (GMT+10)	Description		Successful jobs	Failed jobs
7:36:58 PM 🔳	Scheduler by Workato: new recurring event: Scheduled time=2023-04-27T19-36:57.957377+10:00, Scheduled day=Thursday, and Scheduled week=17		1	1
• • 7:35:59 PM 🔳	Scheduler by Workato: new recurring event: Scheduled time-2023-04-27T19-35:59.062421-10:00, Scheduled day=Thursday, and Scheduled week=17		Activity in the la	-
			20 Apr 22 Apr	24 Apr 26 Apr

Double-click the latest job to open its job details.

Here, you can see that each processed job has complete details such as the data input and output from every step.

	Projects) @ Automation Pro Training) Create a contact in Salesforce: Jobs) 7:36:58 PM 7:36:58 PM Started at 7:36:58 PM on Apr 27, 2023 (GMT+10) using recipe <u>Version 4</u> @			Repeat this job Edit recipe Repeats and edits always use the latest recipe version
m		C Fullscreen	Create Contact in Salesforce	Successful
4: *	TRIGGER 1 Trigger on a specified schedule ACTIONS) + - *	Input Output Debug Input Output Debug Q. Search ^ < Y (D Copy raw JSON) © Expand data 1 ~ { Object ID: "003000000H1zwbIAB", 3 successi true, 4 servers: _ _	Job ID j-AGr/AMbc-ftmzLG Description Scheduler by Workato: new recurring event: Scheduled time=2023-04-
	2 Create Contact in Salesforce	J		27119:36:57:957377+10:00, Scheduled day=Thursday, and Scheduled week=17 Duration 470ms Taskis used 1





See your results in Salesforce

Now, in your Salesforce account, let's find out if the contact has been created.

Under the **Contacts** tab, you will notice that a contact has been created with the last and first name, as well as the email address, that we have configured.

-		Q Search			* •	🗄 🚓 ? 🌣 🌲	6	
Sales Home Opportunities	\checkmark Leads \checkmark	Tasks 🗸 🛛 Files 🛇	 Accounts 	Contacts 🗸 Campaigns 🗸	Dashboards 🗸 F	Reports 🗸 More 🔻		
Contacts Recently Viewed	Recently Viewed F							
Name ~	Account Name 🗸 🗸	Account Site $~~ \lor~$	Phone \lor	Email	\sim	Contact Owner Al $ \smallsetminus $		
1 Clark Kent				training@automationinstitute.sa	ndbox	Training	•	

If you are unable to locate Contacts in your Salesforce dashboard, click the **App Launcher** and search for **Contacts** from the app launcher.

And that's it!

:	Sales	Home	Opportunities	\sim	Lead
5	///////		1188-71		2753
	Q Contacts			۲	
	Apps				
	No results				
	Items				Nar
1	Contacts				
	View All				



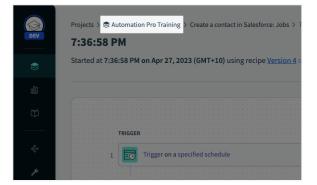
Lab 2: New/updated opportunity in Salesforce will create a case in Salesforce

In this recipe, we will explore frequently used functions in Workato recipes: trigger conditions, data mapping, and formula mode.

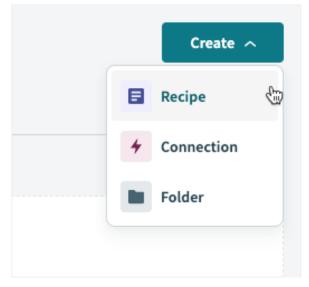
Create a new recipe and configure your trigger

First, let's return to the Automation Pro Training folder you created earlier.

You'll see a link to your folder in the recipe breadcrumb.



Click the Create button and choose Recipe. This will begin a guided walkthrough of setting up your recipe.



Remember: when naming your recipe, think of a name that makes it easy for you to find. We can name this recipe New/updated opportunity will create a case to onboard Customers.

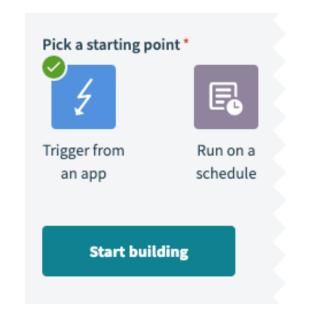
Name	
New/updated opportunity will create a case to onboard customers	
Location *	

Choose your training project for **Location**.





As a starting point, select **Trigger** from an app and click the **Start building** button.



Why this is important

Automations are typically started in response to business events. Workato triggers are a powerful and unique capability that makes it simple to detect business events, such as new hires, opportunities won, etc.

Next, let's search for and select **Salesforce** as the application.







ce object, e.g. lead, is created/updated

Choose a trigger

Q Search for an event

New/updated record

Connect to Salesforce

Q Search active connection

My Salesforce account
 Definition of the second se

New/updated record (Opportunity) Triggers when selected Salesforce object, e.

New/updated record (Account)

Triggers when selected Salesforce object, e.g. lead, is created/updated

Triggers when selected Salesforce object, e.g. lead, is created/updated

Choose **New/Updated Record (Opportunity)** as the trigger.

Then, select the **Salesforce** connection that you established in the previous lab for this recipe.

For the setup, let's leave the time at which the recipe should pick up events from as it is - **one hour ago**.

HELP ^				
Triggers when a record records every 5 minute		ected Salesforce object, e.g. lead, is created/updated. Checks for created/upda	ited	
Object*				
Opportunity			×	-
Select any standard or cu	tom Sales	force object, e.g. lead		
Fields to retrieve				
Select a value				-
Improve recipe performat returned in the data tree i		cting only the fields that are relevant to the recipe. All selected object fields as G.	e	
When first started, this re	cipe shou	ld pick up events from *		
Select from list	-	An hour ago	×	-
When starting the recipe f has been run or tested, t		time, picks up Salesforce records from the specified date and time. Once the annot be changed.	reci	pe

Scroll down to toggle Trigger conditions.

Set trigger condition

Only trigger events matching specified condition will be processed. $\underline{\mathsf{Learn}\ \mathsf{more}}$ &

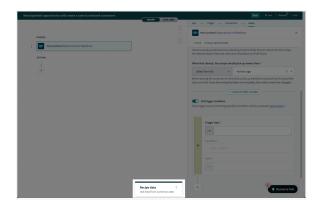


C Refresh list

Details ~



Locate and maximize the Recipe Data window in the lower middle area of your recipe.



To specify the trigger condition, let's search for the **Stage** datapill under **New/updated Opportunity** (Step 1 output) and drag and drop it in the **Trigger Data** input field.

		rting the recipe for the first time, picks up Salesforce records from the specified time. Once the recipe has been run or tested, this value cannot be changed.
Recipe data To use data from a previous step, drag its datapill into a field		+ 5 optional fields available
New/updated Opportunity (Step 1 output)		er events matching specified condition will be processed. <u>Learn more</u> &
Q stage 1/2 ~ ×		Trigger data *
Private false		ABC
ABC Probability (%) 60		Condition*
123 Push Count 0	IF IF	Select condition
0.00 Quantity		Value *
ABC Stage Id. Decision Makers		
System Modstamp 2023-04-27T04:52:52.000+00:00		
CO Won false		
ABC Current Generator(s)	+	🖞 🔮 Resource hub





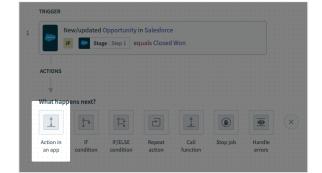
We will select **Equals** as the condition type and input **Closed Won** as the value.

	Trigger data *	
IF	Condition *	~
	Value*	Text Formula
	ABC Closed Won	

Add actions to your recipe

Now that we have configured the trigger, let's look at making actions.

For the first part of this recipe, we want to search for contacts in Salesforce. Let's click the **plus (+) icon** to add an **Action in an app**.



Search for and select the **Salesforce** application.







Scroll and choose **Search records** as the action.

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•	Choose an action
	Reject record in approval process Reject a record in the approval process in Salesforce
	Retry bulk job for failed records from CSV file Bulk Retry bulk job in Salesforce for failed records
	Search records
	Retrieve a list of standard or custom records, e.g. leads, that matches your search criteria
	Search records in bulk using SOQL query (API 1.0) Bulk
	Retrieve a CSV stream of records that match your SOQL WHERE clause with Salesforce bulk API

Select **Contact** as the object so as to search within contacts in Salesforce.

Next, in choosing the field to match, we will search by the **Email** input field, as email addresses are usually unique to every contact.

Let's enter the email address of the contact that we've created in the previous lab.

If you do not see the Email input field, toggle to show **optional fields available** and add the field.

We will leave the other fields as is.

We will now configure the next action to create a case.

To do so, click the **plus (+) icon** to add another **Action in an app**.

Search for * Contact Select the Salesforce object to search for, then specify at least one field to match Fields to retrieve Kemail

Improve recipe performance by selecting only the fields that are relevant to the recipe. All selected object fields are returned in the data tree if left blank.

Limit					
123 150	1,				
Enter the number of records to be returned with the matching search criteria. Maximum supported limit is 2000. Note: Salesforce might return less records than the limit specified.					
Email	Text Formula				
ABC	1.				
+ 59 optional fields available					

TRIGGER	
New/updated Opportun	aity in Salesforce
······································	ing in outcolored
IF 🗢 Stage Step 1	equals Closed Won
IF Stage Step 1	equals closed won
ACTIONS	
Actions	
· · · · · <u>· · · · · · · · · · · · · · </u>	
2 Search for Contacts in S	alesforce
+	
(±)	



×



Select **Salesforce** as the application and **Create record** as the action.

Then, select **Case** as the object, since we want to create a case.

Workato might suggest some datapills for different fields. For this lab, you can **Ignore all** suggestions as we will manually add all the datapills we will need for this recipe.

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```
Ehoose an action
                                                                                   ×
    Update record (Opportunity)
    Update any standard or custom record, e.g. lead, via its Salesforce ID.
    Upsert record (Opportunity)
    Create record if it doesn't already exist, otherwise, update existing record
    Update record (Contact)
    Update any standard or custom record, e.g. lead, via its Salesforce ID.
    Create record (Contact)
    Create any standard or custom record, e.g. lead, in Salesforce
ALL ACTIONS
    Approve record in approval process
    Approve a record in the approval process in Salesforce
    Create record
    Create any standard or custom record, e.g. lead, in Salesforce
    Create records in batches Batch
    Create up to 2,000 standard or custom records per batch
   🧭 Review 5 datapill suggestions to ge... 1/5 \land 🗸 🛛 Ignore all
                                                                     Accept all
```

Create any standard or custom record, e.g. lead, in Salesforce. Select the object create, then provide the data for creating the record.	to
Object*	
Case	~
Select any standard or custom Salesforce object, e.g. lead	
Account ID	
ABC Step 1	





Map and transform data through your recipe

Let's now make use of data mapping and data transformation.

Why this is important

Data mapping is essential for the flow of data from one step in a recipe to another. Workato's RecipeIQ will make data mapping suggestions and next steps/business logic recommendations to accelerate the build process and improve productivity.

In the **Contact ID** input field, let's drag and drop the **Contact ID** datapill from the Step 1 output so that the case will be linked to the contact that was created in the previous lab.

	Account to		
New/updated Opportunity (Step 1 output)	ABC		
Q Search A X	Case Origin		
ABC Campaign ID	Select from list Select a value		
🕨 🏭 Campaign	Case Type		
Close Date 2023-04-29	Enter custom value 🔹 🔺		
Closed false			
ABC Contact ID	Contact ID		
ABC Created By ID 005Do00000wSByIAM	ABC Contact ID Step 1		

Let's also fill in the **Description** input field by mapping in the **Description** of the opportunity from the **Step 1** output.

)		
Recipe data To use data from a previous step, drag its datapill into a field	Case Type	
New/updated Opportunity (Step 1 output)	Contact ID	,
Q Search A X	ABC 😓 Contact ID Step 1	,
Created Date 2023-04-27704:52:52.000+00:00	Description	
Deleted false	ABC Description Step 1	
0.00 Expected Amount 21000		,



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Next, let's leave the **Owner ID** input field blank and set the **Priority** for these cases to be created as **High** by selecting from a list.

Let's also set the status of these cases as **New** by selecting from a list.

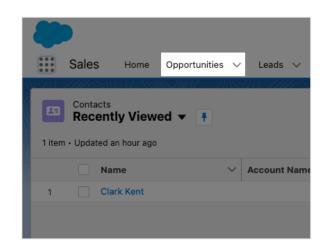
For the **Subject** of the case, we will use a combination of static and dynamic input, by mapping the opportunity's **Name** from the Step 1 output as well as input **-onboarding** to indicate that this is a case about onboarding.

If any of these input fields are missing, you may add them by choosing from the list of optional fields.

Add an opportunity to Salesforce

Now that we are done, before testing our recipe, let's go into our Salesforce account to create an opportunity that's marked as Closed Won.

In your Salesforce homepage, click the **Opportunities** tab.



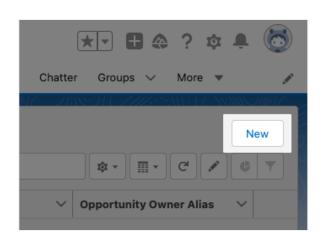


ABC		
Priority		
Select from list	▼ High	× •
Status		
Select from list	• New	× •

Subject		
ABC	Step 1 -onboarding	
	+ 15 optional fields available	



Next, click **New** to fill in information about the opportunity.



Amount

\$15,000.00

Close Date

4/10/2023

Opportunity Name

ABC Company

Closed Won

Files 🗸

Accounts 🗸

Opportunity "ABC Company" was created.

Contacts 🗸

Campaigns 🗸

Stage

Tasks 🗸

Let's key in **15,000** for the amount, and select any date as the close date.

We will also name the opportunity as **ABC Company** and select **Closed Won** as the stage.

Let's also input a simple description such as **5** licenses purchased and click **Save**.

Test your recipe and see your results in Salesforce

Now that a Closed Won opportunity is created, let's go back to the Workato platform to test the recipe.

Why this is important

It's important to know that our recipe does what is expected. Workato can run tests jobs and re-un the same trigger event as you change the recipe logic.



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Dashboards

Click Test Recipe and one job should be processed.

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If a successful test has been completed, you may click each step in your recipe to expand the input, output, and debug tab for your steps.

This is useful for any debugging and record checking of synced records.

Now back in the Salesforce platform, let's click **Cases**.

Don't forget: if you don't see **Cases** in your Salesforce dashboard or menu bar, you can search for it in the **App Launcher**.

Under **Cases**, you will notice that a case with the subject **ABC Company-onboarding** has been created. Click it to view the case information.

New/updated opportunity will create a case to onboard customers				
8:46:17 PM 🔻				
Started at 8:46:17 PM on Apr 27, 2023 (GMT+10) using recipe version 3 I				
🖉 Successful				
TRIGGER				
New/updated Opportunity in Salesforce				
IF Stage Step 1 equals Closed Won				
ACTIONS				
· · · · · · · · · · · · · · · · · · ·				
2 Search for Contacts in Salesforce				
Search for contacts in satesforce				
Create Case in Salesforce				
End				

(
		Sales	Home	Opportunities	\sim	Lei
23		1111.5	IG LE XVX	M M M C M	115-77	
Ì		Case			⊗	
	Ap	os				
(No	results				nt
0	Iter	ns				oc
	Cas	es				
1	Vie	w All				\checkmark
	Cases					

R	eses ecently Viewed 👽 👎 odated a few seconds ago				
	Case Number	\sim	Subject	\sim	Status
1	00001026		ABC Company-onboarding		New



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We will notice that the contact name for this case is the contact we created in our previous lab, meeting the requirements of our scenario.

Details	
Case Owner	
Clark Kent	
Case Number	
00001026	

And it contains other data that we have mapped from the opportunity, such as the description.

And that's it! You've just successfully added multiple actions to your recipe, and mapped and transformed data between steps. Subject

ABC Company-onboarding

Description

5 licenses purchased

Internal Comments

Lab 3: Modify your job report

Why this is important

A job is created every time a recipe processes a trigger event. The job logs provide seamless access to the input and output of every step and are useful for troubleshooting issues and auditing data.

Add columns

Using the recipe that we just created, go into the **Jobs** tabs and click the **More** icon at the top right corner of the job report. Click **Customize Job Table**.



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Column value

лвс 😓 Name | Step 1

Projects > Automation Pro Training > New/updated op New/updated opportunity will cr	portunity will create a case to onboard customers : Jobs eate a case to onboard customers ×	C
Recipe Jobs Connections Versions	Settings	
Repeat job Q Search jobs	All job statuses 👻 All job types 👻 All periods 👻	C Fullscreen
Time (GMT+10)	Description	
B:46:17 PM	Salesforce: new/updated opportunity: Name=ABC Company	

Column name

Opportunity Name

We want to display fields that help us identify data mapped within the recipe.

First, let's specify the first column name as **Opportunity Name** and map in the **Name** datapill coming from the Step 1 output in the recipe data box.

Next, let's add another column called **Contact Name** and search for and map in the **Full Name** datapill coming from Step 1.

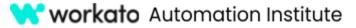
Column name	Column value	
Opportunity Name	ABC 💓 Name Step 1	
Contact Name	ABC 😻 Full Name Step 1	

Last, let's add a **Case ID** column with the **Object ID** mapped from Step 3.

Column name	Column value	Recipe data To use data from a previous step, drag its datapill into a field
Opportunity Name	ABC Name Step 1	Properties >
Contact Name	ABC Full Name Step 1	New/updated Opportunity (Step 1 output)
Case ID	ABC Object ID Step 3	Search Contacts (Step 2 output)
	+ Add a new column	Create Case (Step 3 output)
		Q. full name 1/1 ^ ~ × Asc Object ID 500Do0000049bgnIAA

Do note that there can only be a maximum of ten columns in the customized job report.





Click **Apply Changes** and the job report will reflect changes according to what we have customized. However, the columns are blank.

Showing 1 job				
Time (GMT+10)	Opportunity Name	Contact Name	Case ID	
□ 8:46:17 PM ▲				

Let's repeat the job to refresh the job report so that the column values will be refreshed to reflect the accurate values. You can do this by selecting the checkbox next to the job and clicking the **Repeat Job** button.

You'll see your columns filled in as appropriate!

Showing 1 job
Time (GMT+10)
8:46:17 PM

