Getting Started

— with —

workato

COMMUNITY EDITION

Get integration superpowers with Workato!

Thanks for signing up for Workato! We are excited to help you connect your apps in minutes, so you can save time, eliminate manual data transfers and most importantly – get your life back!

Workato has also helped thousands of businesses cut down data errors, get better visibility across apps, and accelerated business processes.

We want to ensure that you get successful with Workato with minimum effort, so here's a step-by-step guide to get started.

1 COMPONENTS OF RECIPE

2 SEARCH RECIPES

3 GET RECIPES

4 TWEAK RECIPES

5 START RECIPES

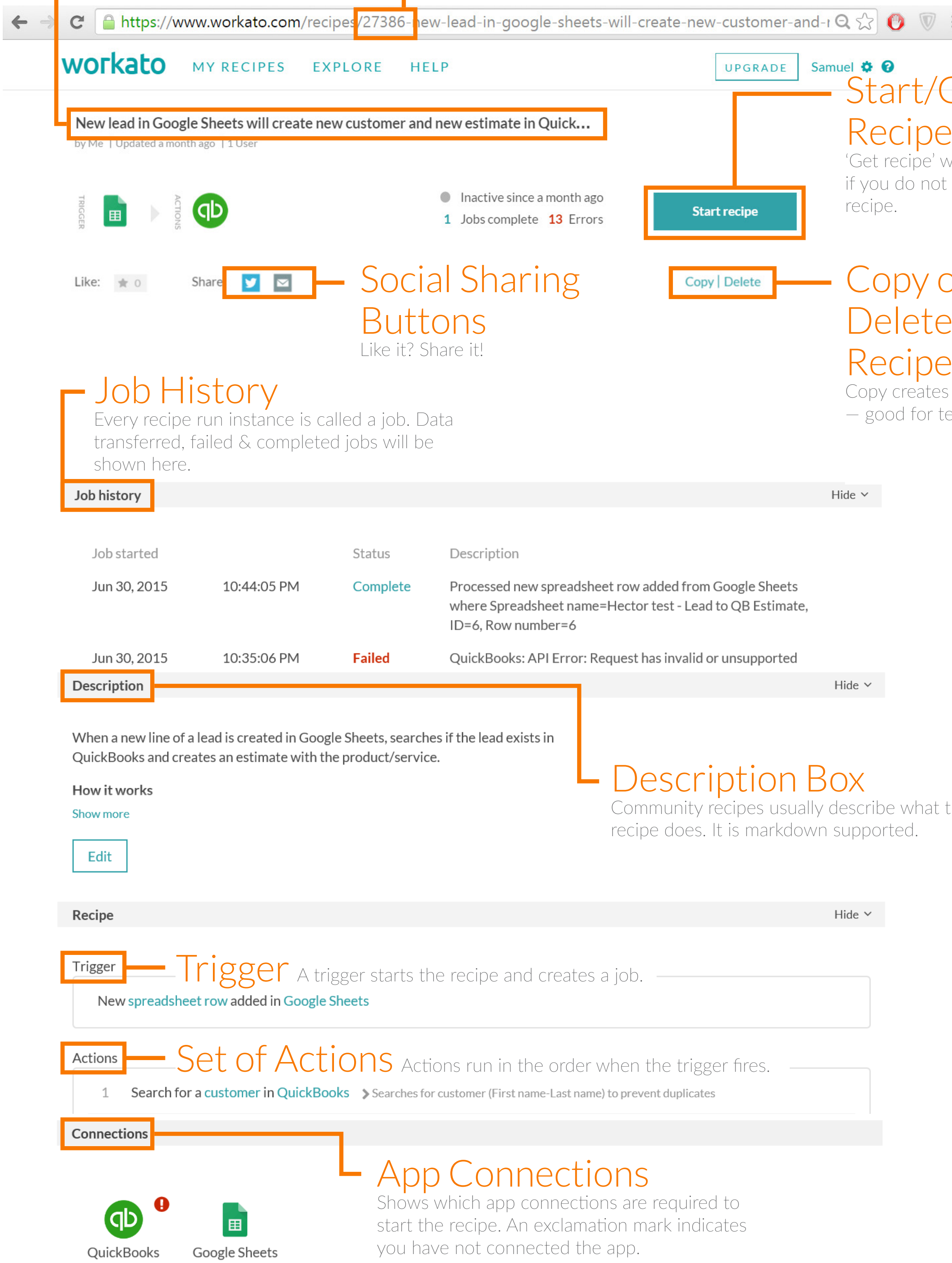
6 CHECK JOB HISTORY

7 ENABLE CUSTOM FIELDS

1 Understanding components of a recipe

Recipe Name
You can easily edit and rename your recipe to identify it at a glance.

Unique Recipe ID
Also known as the recipe number.



Start/Get Recipe
'Get recipe' will appear if you do not own the recipe.

Social Sharing Buttons
Like it? Share it!

Copy or Delete the Recipe
Copy creates a duplicate – good for testing.

Job History
Every recipe run instance is called a job. Data transferred, failed & completed jobs will be shown here.

Description Box
Community recipes usually describe what the recipe does. It is markdown supported.

Trigger
A trigger starts the recipe and creates a job.

Set of Actions
Actions run in the order when the trigger fires.

App Connections
Shows which app connections are required to start the recipe. An exclamation mark indicates you have not connected the app.

2 Searching for recipes

Why?

On Workato, there are *thousands* of recipes built by the community. Searching for a recipe and then copying it will save you time and effort from building one from scratch!

How?

Searching for recipes is simple!
Just click on ‘Explore’ at the top of the page.

You can search using keywords like *salesforce*, *quickbooks*, *invoice*, *closed won opportunities* or even search users like *user_name:will*

TIP

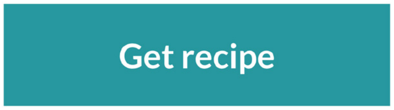
In some of your search results, you may notice that some recipes are labelled as workato featured. These are high quality recipes that are widely used in the Workato community.

3 Getting recipes

Why?

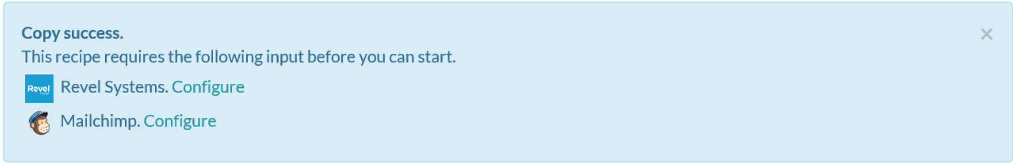
When you “Get” a recipe, a copy of the recipe will be added into your Workato account. Copying someone’s recipe instead of building one from scratch saves you a lot of time and effort. If someone else has already done the hard work, why not take it?

How?



1. Look for the large button at the top right of a recipe page. Click on ‘Get Recipe’ to obtain a copy of it.

2. Configure your app connections.



Configuring and adding your app connection allows Workato to gain access to your app. A pop-up will ask you to provide your app credentials. Rest assured that your data is safe with us!

TIP

If you do not see anything that exactly fits your need, search and ‘get’ a recipe that does something similar. You can then tweak that recipe to your needs and liking.

4 Checking and tweaking recipes

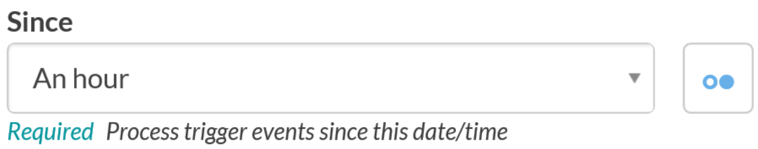
Why?

If the copied recipe does exactly what you want it to, great! However, on most occasions, copied community recipes may not work exactly in the way you intended it to.

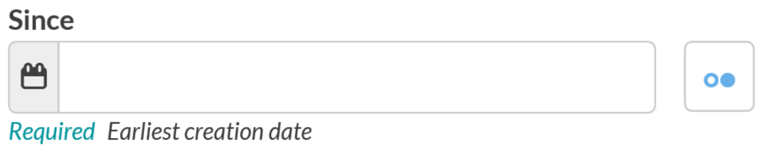
Tweaking recipes to suit your integration needs is fairly simple. You can change the ‘Since’ parameter, add or remove steps, change the apps used or even change the mapping of data depending on the app used.

How?

1. Check the ‘Since’ parameter in the *Trigger* step. This parameter specifies how far back to check (upon start) to pick up records in the app.



Toggle the button with dots to specifiy a fixed date instead.



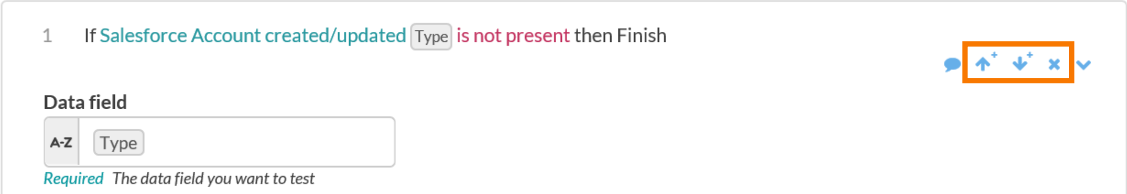
2 Change ‘Since’ to a short period of time (*e.g.* an hour) if it is not already done so.

TIP

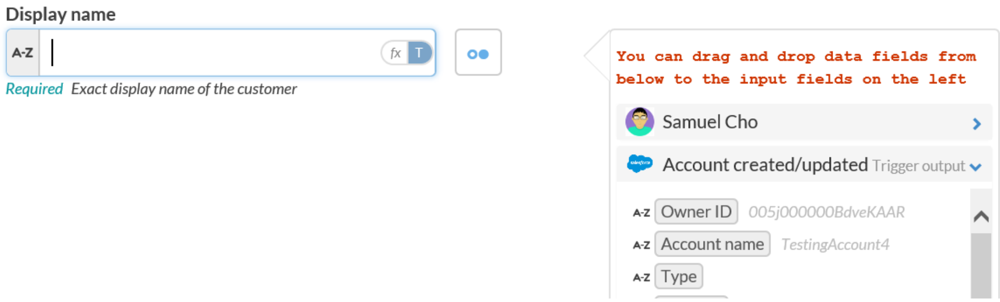
Use a short relative time frame when testing recipes, especially if you do not have a sandbox account. This ensures that a limited number of records are transferred — preventing accidental transfer of unwanted data to other apps.

3 Check to see if the actions in the recipe suit your integration needs.

4 Make appropriate changes to the recipe.



Add actions above or below the current step using the arrows to the right of each step. ✖ deletes the step.

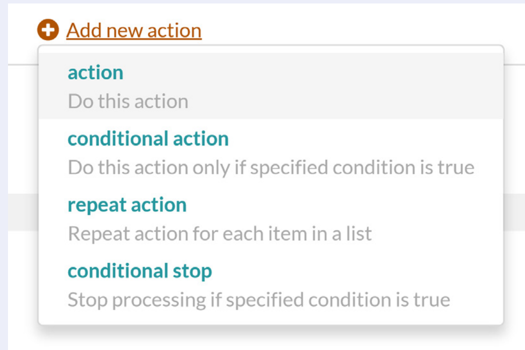


You can re-map data to make sure the right data is transferred.

UNDERSTANDING ACTIONS

There are 4 types of actions in each step of a recipe.

Actions run when a trigger is fired.



CONDITIONAL-TYPE ACTIONS

conditional action
Do this action only if specified condition is true

1 If QuickBooks Updated invoice Balance greater than 0 then do

This action will only perform actions under it if the condition is met.

In this case, the actions under this conditional step will only execute if the balance of the updated invoice is greater than the value of 0.

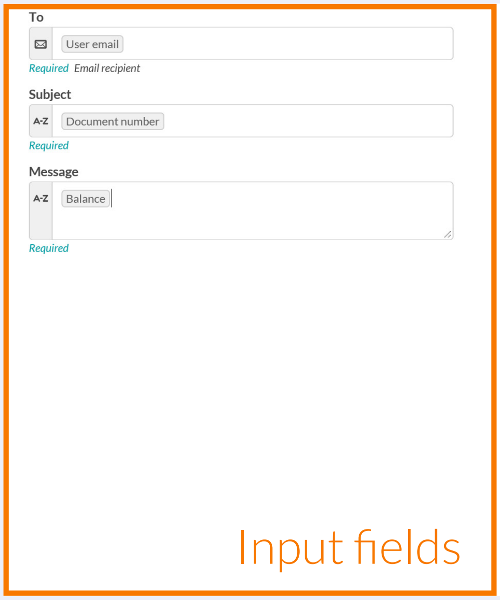
conditional stop
Stop processing if specified condition is true

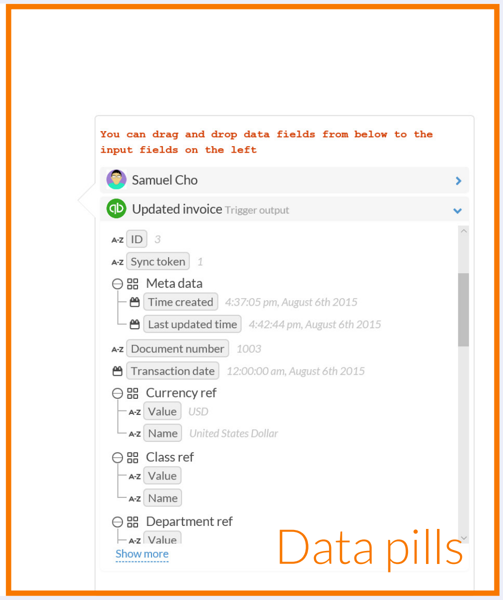
1 If QuickBooks Updated invoice Balance equals 0 then Finish

This action will cause the recipe to stop processing any more data if the condition is met.

In this case, the recipe will stop processing when the balance of the updated invoice has a value of 0.

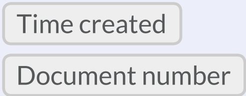
UNDERSTANDING INPUT FIELDS AND DATA PILLS

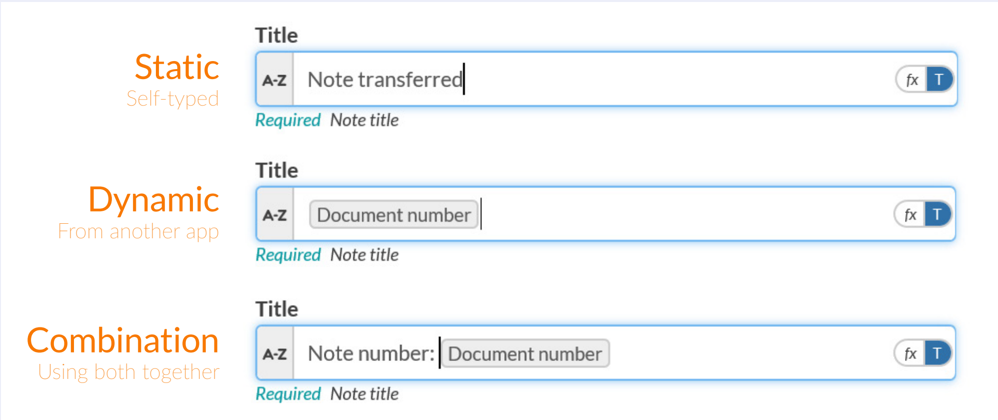




In every recipe, there are input fields (on the left) where you can provide the relevant data (on the right) in the recipe for data transfer to occur.

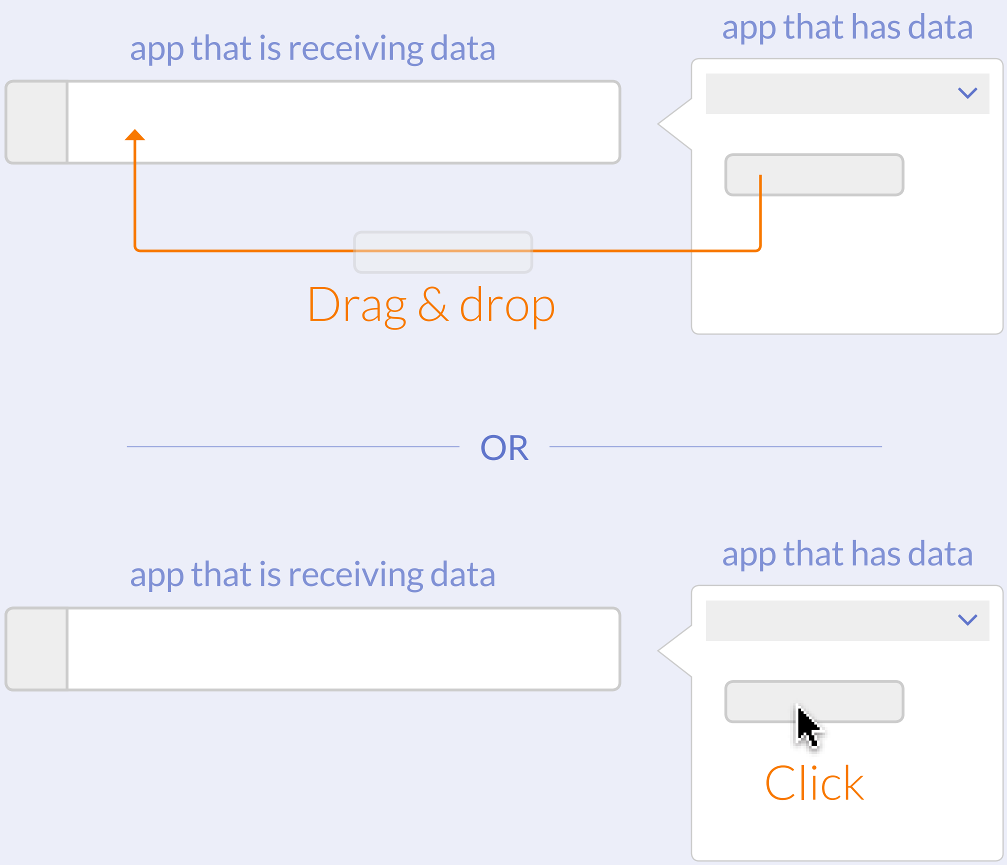
Each gray rounded box is called a data pill and it corresponds to the data you have in that respective app.





Values can be entered in multiple ways. You can either enter *static* text/numbers, select from dropdowns, or map data from *dynamic* available data fields on the right (or a combination of both).

POPULATING INPUT FIELDS WITH DATA PILLS



It is important that you take note of what is populated in the input field to prevent bad data from being transferred to another app!

5 Starting your recipes

How?

Start recipe

1 Click the 'Start recipe' button to run your recipe. Data will be moved if a trigger is detected!

Stop recipe

2 Click 'Stop recipe' button when you want it to stop running.

TIP

If you restart your recipes again, it will only pick up data according to what is defined in the 'Since' parameter. If you do not want to miss out any data, select an appropriate field in the 'Since' parameter that corresponds with when you last stopped your recipe to ensure it picks up those records.

6 Checking your job history

Why?

Workato allows you to retrospectively check what was processed by the recipe. In the job history, you will be able to check when the job(s) started, status of the job, as well as the description of the job details.

Job history Hide

Job started		Status	Description
Jun 30, 2015	10:44:05 PM	Complete	Processed new spreadsheet row added from Google Sheets where Spreadsheet name=Hector test - Lead to QB Estimate, ID=6, Row number=6
Jun 30, 2015	10:35:06 PM	Failed	QuickBooks: API Error: Request has invalid or unsupported property
Jun 30, 2015	10:32:18 PM	Failed	QuickBooks: API Error: Request has invalid or unsupported property

Checking your job history gives you a better understanding of the data transferred by the recipe. If the job was unsuccessful, you can click each job to see the problem in detail. Here's an example:

Job report #2856602

[SFDC+QBO]: New account in Salesforce creates a new customer in Quickbooks

Failed Jun 26, 2015 8:44:19 PM

QuickBooks: API Error: Duplicate Name Exists Error

Error	Duplicate Name Exists Error
Error type	API Error
Source	QuickBooks
Error ID	b9820145-ef71-4512-a7f2-beeb015a90fa
Detail	{"Error":[{"Message":"Duplicate Name Exists Error","Detail":"The name supplied already exists. : Another customer, vendor or employee is already using this \nname. Please use a different name.","code":"6240","element":""}],"type":"ValidationFault"}

Learn more about this error in our **support database.**

For more help file a ticket or chat live with the Workato support team

File ticket Chat now

Trigger

Account is created/updated in Salesforce

Actions

2 Search for a customer in QuickBooks

4 Create customer in QuickBooks

Input Error

```
⊖{
    Notes:"type: SIC Code: ",
    Sales term:"2",
    Phone:"",
    Display name:"Betty Fung",
    First name:"Accounts",
    Family name:"Payable",
    Company name:"Betty Fung",
    Mobile:"",
    Fax:"",
```

How?

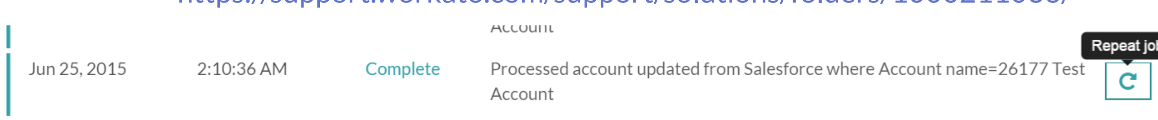
1. Expand the 'Job history' column if is not already expanded.

TIP

Jobs have 4 states. They may not refresh instantly, so you may need to manually refresh the page. Alternatively, minimize the 'Job history' section and open it again.

Processing	Complete	Error	Warning
Some entries take longer to process if the recipe involves many steps. Wait for or refresh it.	The job has completed successfully. Note that this includes conditionally stopped recipes.	The recipe has run into an error. The transferred record may be incomplete.	There was an error starting the trigger. No action is necessary.

2. Troubleshoot the failed jobs. Use the following link to see what the error messages mean.
https://support.workato.com/support/solutions/folders/1000211036/



Repeat the failed jobs using the 'Repeat job' function on the right of each job.

When repeating jobs, there are two situations:

Repeating a job when the recipe is *stopped* uses the *new* recipe definition

Repeating a job when the recipe is *running* uses the *old* recipe definition

7

Enabling your custom fields and objects

How?

Workato is able to automatically pull out the custom fields from your apps. It is displayed with a 'Custom' label beneath the field.

Your custom fields may not show up at times because:

1. **You connected to the app *after* you had selected the action**
   To resolve this, refresh the action — change the action to another action and then back again.

2. **You changed the custom fields *after* you had selected the action**
   To resolve this, refresh the action — change the action to another action and then back again.

3. **The app connection has broken or expired**
   Simply reconnect or establish a new connection with the app.

4. **Salesforce-related issues**
   Sometimes, Updated Opportunity does not pick up custom fields. Therefore you may need to use Updated Object > Object-type Opportunity instead.

We hope you have enjoyed this guide.
Now you are all set for connecting your apps!

If you would like more information on recipes or Workato in general, please refer to our Success Community, or check out the video links below.

Workato Tutorial Series

Workato Webinar Series

Let Workato automate your business.

Schedule a demo session with us

workato

1601 S De Anza Blvd, Suite 270
Cupertino, CA 95014
(884) 469-6752