

Introducing Winshuttle Integration for Salesforce

Clinton Jones | Winshuttle



WINSHUTTLE
USER
GROUP CONFERENCE

The Winshuttle “Suite” spot

- Studio for Salesforce is a part of Studio
- The codebase is an early release of Studio 11
- For now, Studio for Salesforce is a separate product
- Studio for Salesforce has its own license
- The vision is for Salesforce to be a target System of Record like SAP



Licensing Options

- Available on perpetual license
- Available on subscription license
- For now a separate license needs to be assigned
- Existing Winshuttle Studio users are grandfathered in on request
- Existing Winshuttle Transaction customers can get an eval license



How is automation for SAP different to Salesforce

Salesforce is a modern cloud based solution

There is no transaction recording

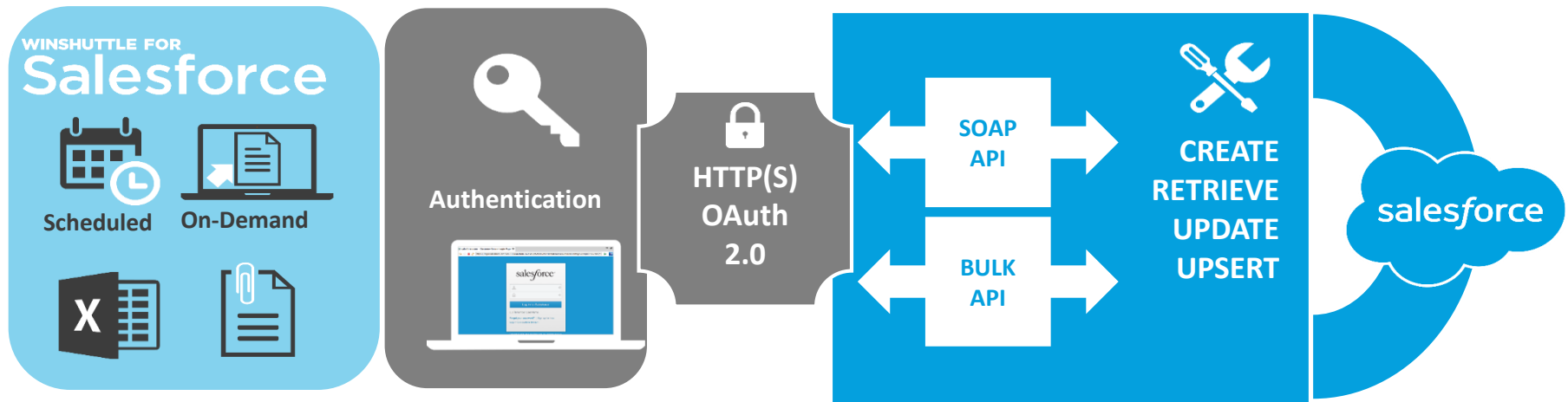
Salesforce offers two types of application interface options

- SOAP API - an acronym for Simple Object Access Protocol, a protocol specification for exchanging structured information; uses XML Information Sets for its message format; relies on application layer protocols, most notably Hypertext Transfer Protocol (HTTP) or Simple Mail Transfer Protocol (SMTP), for message negotiation and transmission, ideal for small datasets
- BULK API - is based on REST principles and is optimized for loading or deleting large sets of data. You can use it to query, insert, update, upsert, or delete many records asynchronously by submitting batches. Salesforce processes batches in the background.

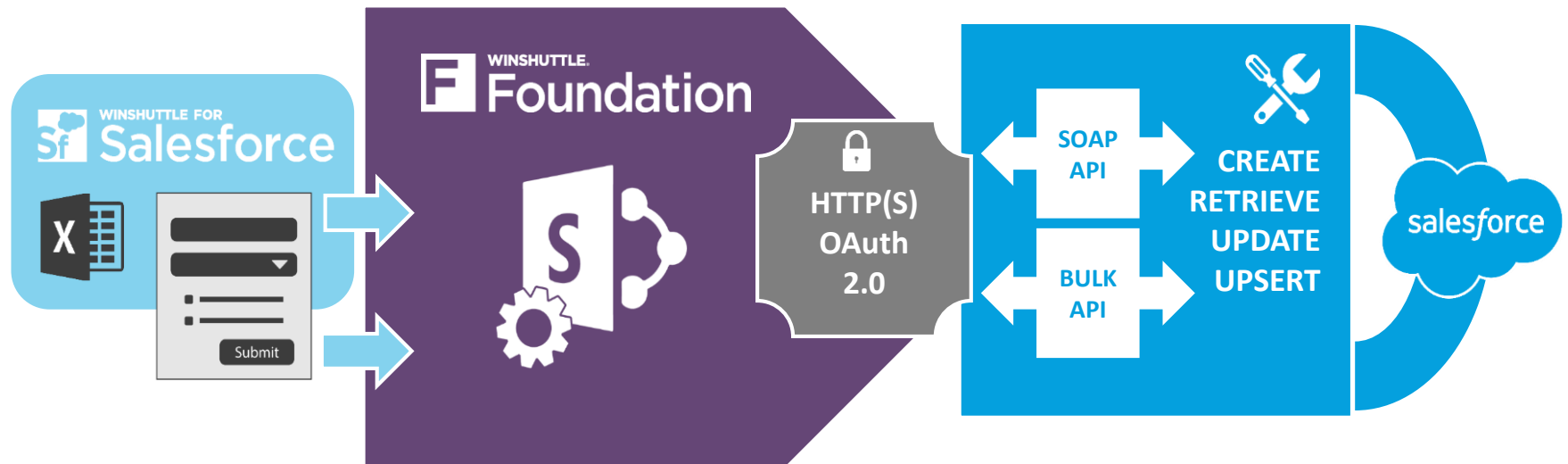
Winshuttle Studio for Salesforce supports both APIs



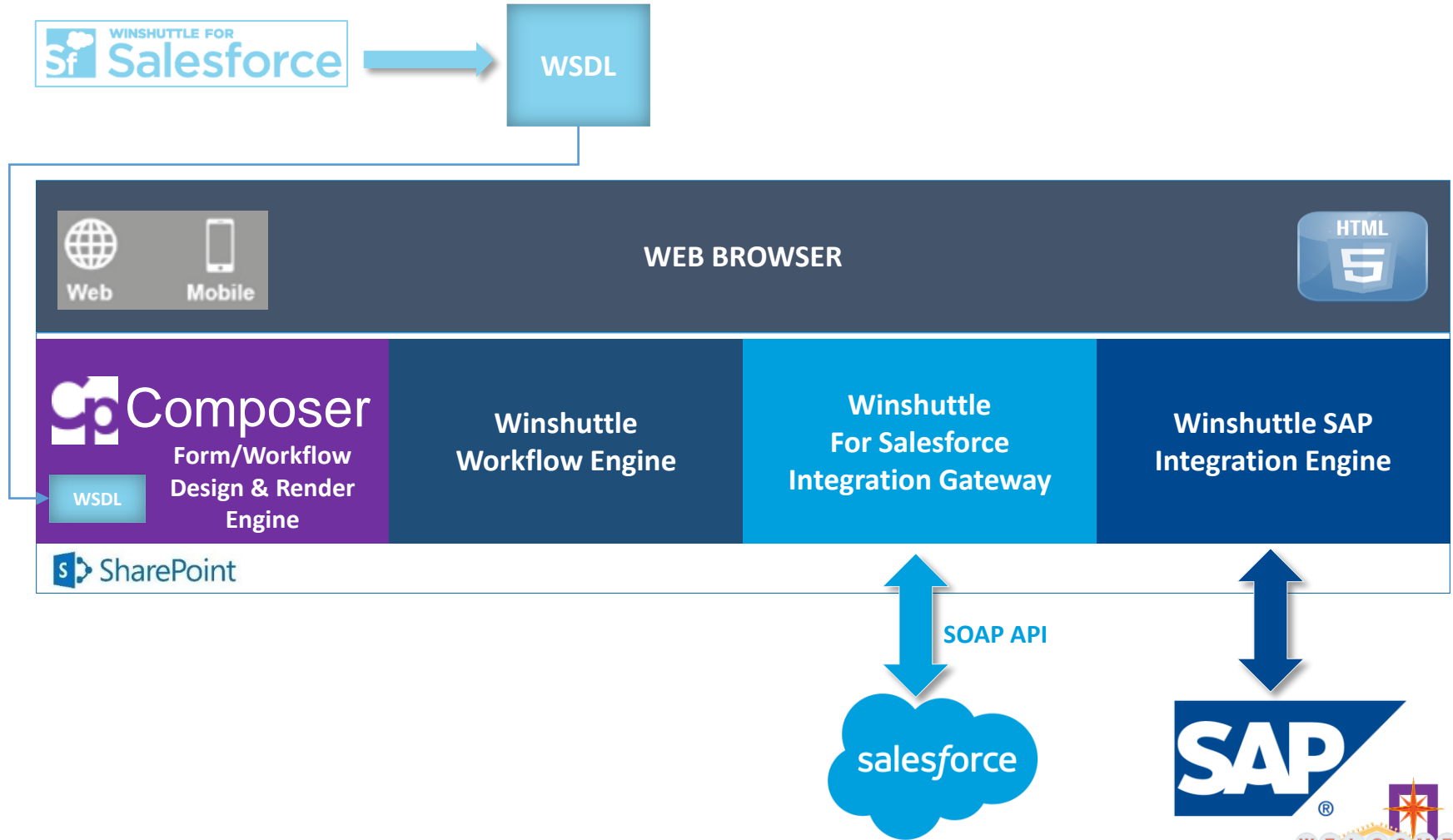
Working from Excel



Working with Foundation



Connecting to SAP and Salesforce in Foundation



Open



Recent Scripts



Computer



Winshuttle Server



Recent Scripts



Account_Create from SAP.stx

C:\Users\clintonj\Documents\Winshuttle\Studio\Script\Account_Create from SAP.stx



Account_Query Basic.stx

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Account_Query_lesfields.stx

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Account_Query.stx

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Account_Create_MD cell based.stx

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Account_Update_EE.stx

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Account_Create_EE.stx

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Account_Create_dd.stx

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Account_Upsert_dd.stx

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Account_Upsertgd.stx

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Account_Query FULL.stx

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Account_Create_MD.stx

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Account_Create.stx

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Task_Query.stx

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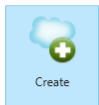
Account_Upsert All with rating missing.stx

C:\Users\clintonj\Documents\Winshuttle\Studio\Script\Account_Upsert All with rating missing.stx



New

Step 1: Select new Script type



Create



Update

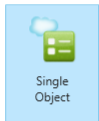


Upsert



Query

Select Operation type

Single
ObjectMaster
Detail

Step 2: Login to Salesforce

Connected with following details:

User Name: uploadsap1@gmail.com

Company Name: Winshuttle

User Type: Standard

Logout

Step 3: Select a Salesforce Object from Any of the Following List

Standard Objects Custom Objects All Objects

Search:

Object Description	Technical Name
Account	Account
Case	Case
Contact	Contact
Event	Event
Lead	Lead
Opportunity	Opportunity
Product	Product2
Task	Task
User	User

Step 4: Select Datasource

Select Data Source: Microsoft Excel - Column Based Mapping ▾

Next

FILE MAP RUN Script Data File Write Headers List of Values Look Up Attach Files Data Validation

Log Column: Start Row: Batch size: Use Bulk API

Validate Column: End Row: Bulk Manager Run Schedule

ID Column: Send email Run Settings Bulk API Actions Progress

Run-Account: Run complete. Record # Stop

Object: Account Action: Create Script: Account_Create from SAP.stx Data File: Table_20150901_092615.xlsx

	M	N	O	P	Q	CC	CP	FJ	FK
1	Billing City	Billing State/Province	KNA1.STRAS House number and street	Account Phone	Account Fax	Employees	Annual Revenue	Data Validation Winshuttle Studio for Salesforce (v3.8) Date-Time: 06/01/2016 20:03:13 Script: Account_Create from SAP.stx {Create} Txns processed: 19, Errors: 1	Result
2	PHILADELPHIA	PA	1 1 113 Germantown Ave	(215) 665 4534		000000	0	Success	0012400000ThhrvAAB
3	Walldorf	08	Astorstrasse 34			000000	0	Mandatory field Account Name is left empty.	0012400000Thhs0AAB
4						000000	0	Success	0012400000ThhsAAAR
5	München	09	Bert-Brecht-Allee 29	089/93534	089/93530	000000	0	Success	0012400000ThhsFAAR
6	Havana		789 Calle Obispo			000000	0	Success	0012400000ThhsKAAR
7	Pyongyang		786 Taedong River Road			000000	0	Success	0012400000ThhsPAAR
8	Mexico City	MEX	Cd Mexico Piso 3			000000	0	Success	0012400000ThhsLAAR
9	LOS ANGELES	CA	Baker Street			000000	0	Success	0012400000ThhsUAAR
10	DENVER	CO	145 145 West 51 th street (TEST)	303-297-4568---	303-298-89654---	000000	0	Success	0012400000ThhsZAAR
11	BOULDER	CO	661 661 28 Street	3034493800		000000	0	Success	0012400000ThhsaAAB
12	NEDERLAND	CO	60 60 Lakeview Drive	3032889463	3032880413	000000	0	Success	0012400000ThhsaAAB
13	ALBUQUERQUE	NM	12990 12990 Central Northeast	505-292-7426	505-291-0212	000000	0	Success	0012400000ThhsqAAB
14	GREELEY	CO	610 610 8th Street	9703738444	9703734269	000000	0	Success	0012400000ThhsjAAB
15	ALBUQUERQUE	NM	4650 4650 Pan American Freeway NE	505-870-0950	505-870-4560	000000	0	Success	0012400000Thhs0AAB
16	ALBUQUERQUE	NM	1030 1030 Rio Grande Boulevard	505-843-9577		000000	0	Success	0012400000ThhstAAB
17	CANON CITY	CO	1934 1934 Fremont Drive	719-775-3377		000000	0	Success	0012400000ThhsyAAB
18	ALBUQUERQUE	NM	30 30 Winrock Center	505-883-5286	505-889-3222	000000	0	Success	0012400000Thht3AAB
19	SALIDA	CO	380 380 West Rainbow	719-689-2514	719-699-4316	000000	0	Success	0012400000Thht8AAB
20	RUIDOSO	NM	1600 1600 Mechem Drive			000000	0	Success	0012400000ThhrmAAB

https://eu5.salesforce.com/0012400000ThrvAAB

Nelson Tax & Associates

Post | File | New Task | More

Write something...

Share

No followers.

There are no updates.

Contacts | Opportunities | Cases | Open Activities | Activity History | Notes & Attachments | Partners

Account Detail

Account Owner	Clinton Jones [Change]	Rating	
Account Name	Nelson Tax & Associates [View Hierarchy]	Phone	(215) 665 4534
Parent Account		Fax	
Account Number	0000000001	Website	
Account Site		Ticketing	
Type		Owners	
Industry		Employees	
Annual Revenue	€0	SIC Code	
Billing Address	PHILADELPHIA, PA 19115 US	Shipping Address	
Customer Priority		SLA	
SLA Expiration Date		SLA Serial Number	
Number of Locations		Unsell Opportunity	

Run	Account Number	Billing Country	Billing Zip/Postal Code	Account Name	Billing City	Billing State/Province	KN11STRAS House number and street	Account Phone	Account Fax	Emp	Annu	Data Validation Winshuttle Studio for Salesforce (v3.8)	Result	
Winshuttle Studio for Salesforce (v3.8) User: uploadsap1@gmail.com Date-Time: 06/01/2016 20:08:01 Script: Account_Create from SAP:stx (Create) Txns processed: 19, Errors: 0 API Call Count: 19														
Created	0000000001	US	19115	Nelson Tax & Associates	PHILADELPHIA	PA	11 113 Germantown Ave	(215) 665 4534			000000	0	Success	0012400000ThrvAAB
Created	0000000002	DE	69190	Wett	Walldorf	08	Astorstrasse 34				000000	0	Mandatory field	0012400000ThrvAAB



- Create New...**
- Recent Items**
- Nelson Tax & Associates
 - Hanna Moog
 - University of Arizona
 - North/South
 - Trail's Head Gourmet Provisioners
 - Folk och fa HB
 - Magazzini Alimentari Riuniti
 - United Oil & Gas_Singapore
 - United Oil & Gas_UK
 - The Big Cheese

Nelson Tax & Associates

Post File New Task More

Write something...

Show All Updates

There are no updates.

Account Detail

Account Owner: [Clinton Jones \[Change\]](#)

Account Name: Nelson Tax & Associates [\[View Hierarchy\]](#)

Parent Account

Account Number: 000000001

Account Site

Type

Industry

Annual Revenue: £0

Billing Address: 1 1 113 Germantown Ave PHILADELPHIA, PA 19115 US

Customer Priority

SLA Expiration Date

Number of Locations

Active

Created By: [Clinton Jones](#), 06/01/2016 20:18

Description

Custom Links: [Billing](#)

Account_Create from SAP.stx - Winshuttle Studio for Salesforce

Object: Account Action: Create Script: Account_Create from SAP.stx Data File: Table_20150901_092615.xls

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1	PHILADELPHIA	PA	1 1 113 Germantown Ave	(215) 665 4534		000000	0	Success	001240000ThhxKAAR
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4	München	09	Bert-Brecht-Allee 29	089/93534	089/93530	000000	0	Success	001240000ThhxZAAR
5	Havana		789 Calle Obispo			000000	0	Success	001240000ThhxJAAR
6	Pyongyang		786 Taedong River Road			000000	0	Success	001240000ThhxJAAB
7	Mexico City	MEX	Cd Mexico Pliso 3			000000	0	Success	001240000ThhxXAAR
8	LOS ANGELES	CA	Baker Street			000000	0	Success	001240000ThhxTAAR
9	DENVER	CO	145 145 West 51 th street	303-297-4568---	303-298-89654---	000000	0	Success	001240000ThhxYAAR
10	BOULDER	CO	661 661 28 Street	3034493800		000000	0	Success	001240000ThhxZAAB
11	NEDERLAND	CO	60 60 Lakeview Drive	3032889463	3032880413	000000	0	Success	001240000Thhx8AAR
12	ALBUQUERQUE	NM	12990 12990 Central North	505-292-7426	505-291-0212	000000	0	Success	001240000Thhy9AAR
13	GREELEY	CO	610 610 8th Street	9703738444	9703734269	000000	0	Success	001240000ThhyDAAR
14	ALBUQUERQUE	NM	4650 4650 Pan American F	505-870-0950	505-870-4560	000000	0	Success	001240000ThhyIAAR
15	ALBUQUERQUE	NM	1030 1030 Rio Grande Bou	505-843-9577		000000	0	Success	001240000ThhyNAAR
16	CANON CITY	CO	1934 1934 Fremont Drive	719-775-3377		000000	0	Success	001240000ThhySAAR
17	ALBUQUERQUE	NM	30 30 Winrock Center	505-883-5286	505-889-3222	000000	0	Success	001240000ThhyXAAR
18	SALIDA	CO	380 380 West Rainbow	719-689-2514	719-699-4316	000000	0	Success	001240000ThhyvAAR

QA

