

Simple SFDC

Need help?

Technical contact to tech@argos-labs.com

	Simple SFDC Author: Irene Cho This plugin can manipulate the data in salesforce items. Primary Features You can create, update, delete the data in salesforce items and select or search specific values. Prerequisite Salesforce development account.
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May you search all operations,

- [Actions](#)
- [Verifications](#)
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1. Create salesforce account (<https://developer.salesforce.com/signup>).

1) Fill out the Signup form.

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Name

Email

Role

Company

Country

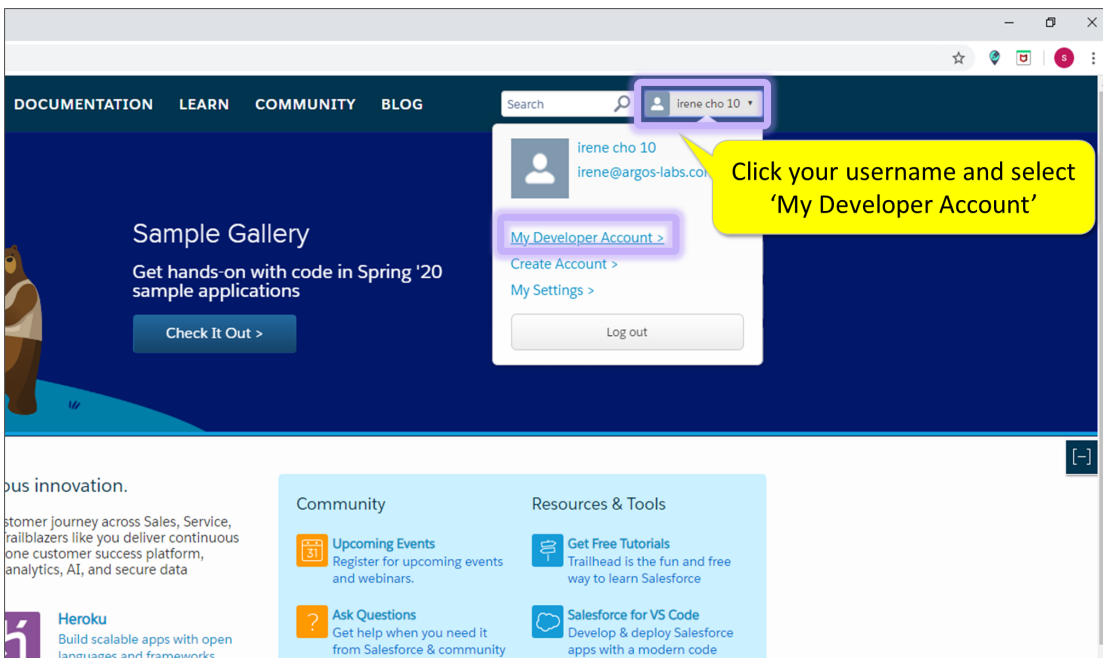
Postal Code

Username

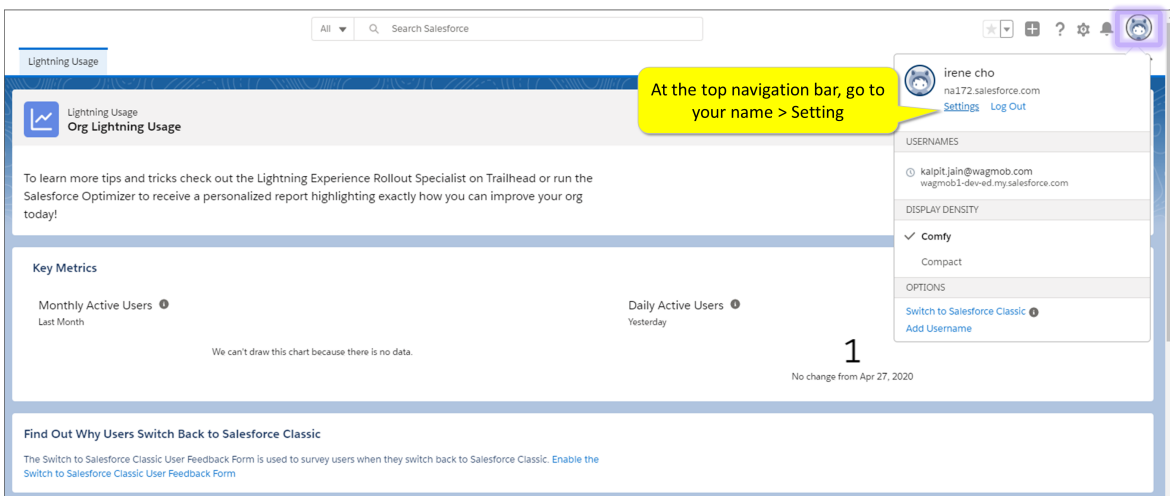
☐ By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is subject to the [Privacy Statement](#), including use for marketing purposes.

Sign me up >

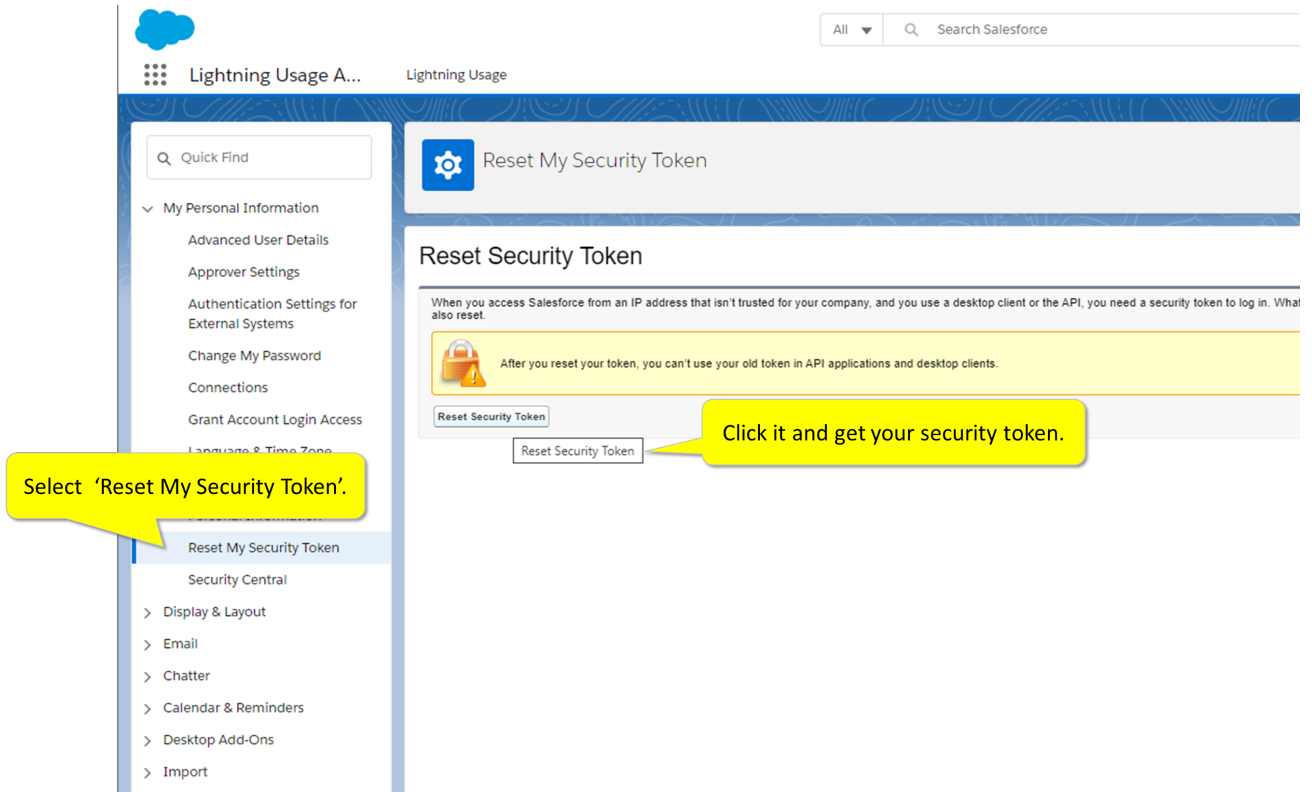
2) Click your username and select 'My Developer Account'.



3) Select 'Settings' at the top navigation bar.



4) Get your security token.



2. Simple-SFDC plugin Items and features.

Items	Required fields	Features
Account	Name	Include a current or potential client, a business partner, or a competitor.
Asset	AccountId (from Account), ContactId (from Contact)	Record the specific products customers have purchased.
Campaign	Name	Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral.
Case	Status (ex.'activated')	Customer's question, feedback, or issue.
Contact	LastName	Store information about the people you do business with.
Group	Name	Consists of a set of users.
Individual	LastName	Retrieve a customer's data privacy and protection preference.
Lead	LastName, Company	Represent people who are interested in your product and service.
Opportunity	StageName, CloseDate(ex.'2020-01-01'),Name	Track the details about deals, including which accounts they're for, who the players are, and the amount of potential sales.

3. Simple-SFDC plugin operations and examples.

Operations	Required Parameter	Example	Output	Notes
Create	Single data or Json File	Lastname=Lopez Firstname=Jennifer or 'simple.json'	Data Id	The data Id can be used for 'update' and 'delete' operation.
Update	Single data, Data Id or Json File	Single data : Lastname=Lopez Data Id: 0035w0000342D4cAAE or 'simple.json'		The data Id can be obtained from 'search' operation.
Delete	Data Id	0035w0000342D4cAAE		
Select Query	Select fields	Email Name	CSV File	
Search	Search value	John	CSV File	

4. Examples of JSON Format.

Jsonfile – Json format 1

```

sample_short - Notepad
File Edit Format View Help
{
  "firstName": "Rack1's",
  "lastName": "Jackon1",
  "Phone": "73836276271"
}

```

Jsonfile – Json format 2

```

sample_json - Notepad
File Edit Format View Help
{
  "data1": {
    "firstName": "Rack1's",
    "lastName": "Jackon1",
    "Phone": "73836276271"
  },
  "data2" : {
    "firstName": "Rack2's",
    "lastName": "Jackon2",
    "Phone": "73836276272"
  }
}

```

5. Plugin Examples.

Plugin: (P)Simple-SFDC

Operation name: Operation 1

Plugin version: 2.430.1505

Properties:

Items: Contact

Operations: Select-Query

Username: irene@argos-labs.com

Password: [Redacted]

Security token: [Redacted]

Advanced:

☐ Input data

☐ Json file: C:\work\rpa-modules\arg...

☐ Data Id

☒ Select fields: name, id

☐ Search value

Return value:

Result type: File

File Name: C:\Users\MyGuide\Desl...

Variable for file: {{my.a}}

Annotations:

- Select Items.
- Salesforce username, password and security token.
- Choose Operations.
- Required parameters by each operations.

6. Example of create operation.

Plugin: (P)Simple-SFDC

Operation name: Operation 1

Plugin version: 2.430.1505

Properties:

Items: Contact

Operations: Create

Username: irene@argos-labs.com

Password: [Redacted]

Security token: [Redacted]

Advanced:

☐ Input data

☒ Json file: C:\work\rpa-modules\arg...

☐ Data Id

☐ Select fields: name, id

☐ Search value

Return value:

Result type: File

File Name: C:\Users\MyGuide\Desl...

Variable for file: {{my.a}}

Input:

Input data or Json file.

Output:

Data ID

test - Notepad

File Edit Format View Help

0035w00003420opAAE

All Plugins

- ABBYY Download
- ABBYY Status
- ABBYY Upload
- AD LDAP
- Adv Send Email
- API Requests
- ARGOS API
- Arithmetic Op
- ASCII Converter
- Attach Image
- AWS S3
- AWS Textra Rekog
- Base64
- Basic Numerical Operations
- Basic String Manipulation
- Bot Collabo
- Box
- Box II
- Chatwork GetMessage
- Chatwork Notification
- Citizen Log
- Clipboard
- Codat API
- Convert CharSet
- Convert Image
- Convert Image II
- Create Newfile
- CSV2XLSX
- Data Plot I
- DeepL Free
- Detect CharSet
- Dialog Calendar
- Dialog Error
- Dialog File Selection
- Dialog Forms
- Dialog Info
- Dialog Password
- Dialog Question
- Dialog Text Entry
- Dialog Text Info
- Dialog Warning
- DirectCloud API
- Doc2TXT
- DocDigitizer Get Doc
- DocDigitizer Tracking
- DocDigitizer Upload
- Docker Remote Service
- Drag and Drop
- Dropbox
- Dynamic Python
- Email IMAP ReadMon
- Email Read Mon
- Env Check
- Env Var

- Excel2Image
- Excel Advanced
- Excel Advance IV
- Excel AdvII
- Excel AdvIII
- Excel Copy Paste
- Excel Formula
- Excel Large Files
- Excel Macro
- Excel Newfile
- Excel Simple Read
- Excel Simple Write
- Excel Style
- Excel Update
- Fairy Devices mimi AI
- File Conv
- File Downloader
- File Folder Exists
- File Folder Op
- File Status
- Fixed Form Processing
- Floating Form Processing
- Folder Monitor
- Folder Status
- Folder Structure
- FTP Server
- Git HTML Extract
- Google Calendar
- Google Cloud Vision API
- Google Drive
- Google Search API
- Google Sheets
- Google Token
- Google Translate
- Google TTS
- GraphQL API
- Html Extract
- HTML Table
- IBM Speech to Text
- IBM Visual Recognition
- Java UI Automation
- JP Holiday
- JSON Select
- JSON to from CSV
- Lazarus Forms
- Lazarus Invoices
- Lazarus RikAI
- Lazarus Riky
- LINE ID Card OCR
- LINE Notify
- LINE Receipt OCR
- Microsoft Teams
- MongoDB
- MQTT Publisher
- MS Azure Text Analytics
- MS Word Extract
- NAVER OCR
- Newuser-SFDC
- OCI
- OCR PreProcess
- OpenAI API
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- Outlook Email
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- pandas II
- pandas III
- PANDAS profiling
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- Path Manipulation
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- PDF2Table
- PDF2TXT
- PDF Miner
- PDF SplitMerge
- PostgreSQL
- PowerShell
- PPTX Template

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