



# Americas Virtual Meetup #15

Jitterbit's LCAP Solution & Harmony

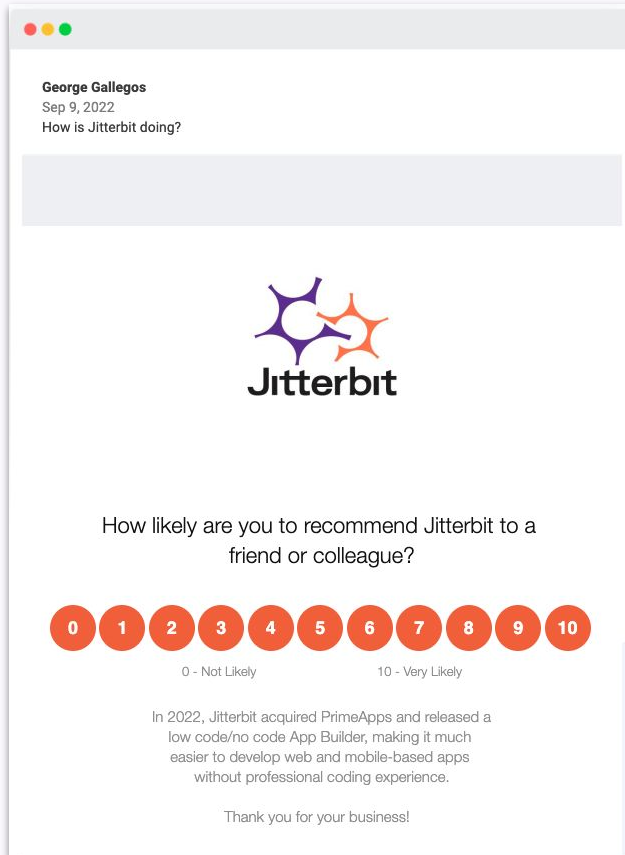
September 20, 2023

# Previous Virtual Meetup

Over the last couple of years we have covered the following Topics (all available @ [Jitterbit Customer Workshops](#))

- **Product Update**
- **Interacting with Instant Messaging Applications**
- Guided Tour to Harmony Implementation
- **Engineering, & Message Queueing**
- Merger and Acquisition Approaches and Salesforce Platform Events
- Jitterbit Marketplace, All Things Environmental, API Best Practices, Data Optimization, Getting Help
- **Data Filtering, Data Merging, In-Memory Data Lookup, Data Validation, Data Cleansing, and Data Enrichment**
- **Twelve Cloud Studio Tips for the Holidays**
- Using iPaaS to Drive Your API Connectivity Needs
- **Building Scalable Projects with Cloud Studio**
- Meetup on Best Practices, Tips and Tricks, Ask an Expert
- Enablement, Best Practices, and Top Tips
- Demonstration Project
- Cloud Studio and APIs

# Schedule



## Previous Virtual Meetup available on Success Central:

- Advanced Resources >> [Jitterbit Customer Workshops](#)

## Today's Agenda:

- Jitterbit's LCAP Solution: Vinyl – Building a simple App interacting with ZenDesk, & SFDC through Jitterbit APIs

## Event Schedule:

- Next: December 20, 2023
  - **What should we cover? What would be valuable?**

## Topics/Themes:

- Enablement, Best Practice & Top Tips
- Product Demos
- Cloud Studio & API's
- Real-time Dashboards
- System Monitoring



## TODAY'S SPEAKERS

# PROFILES



**Jaime Delgado**  
SENIOR CUSTOMER  
SUCCESS ARCHITECT

Jaime has 15 years of experience in the cloud application and integration technology space helping organizations through digital transformation and automation of processes. Jaime's interests are in advising organizations maximize their use of APIs to drive innovation and value for their customers.



**Roberto Espinosa**  
SENIOR CUSTOMER  
SUCCESS ARCHITECT

For over two decades Roberto has focused on customer and partner success through strategic IT recommendations and world-class solution delivery. He enjoys getting customers to transformative value.



**Mayank Bhasin**  
SENIOR CUSTOMER  
SUCCESS ARCHITECT

Mayank is an Enterprise Data Integration Architect by trade who has lead successful technology campaigns including software development and sales, business process improvements, data warehouse modernization on-prem and on-cloud, platform modernization on-prem and on-cloud, data engineering and streaming architectures, data governance, enterprise data cataloging, self-serve data-prep, and data science and advanced analytics; over 17 years of experience and focused mainly on healthcare, retail and utilities industries.

Jitterbit's LCAP Solution:

Vinyl

# Learnings

## Building a simple App in Vinyl interacting with ZenDesk and SFDC

1. Showcase the Jitterbit Cloud Studio operations and APIs (that are re-purposed from Virtual Meetup # 13) used to communicate with ZenDesk and SFDC to accomplish the use case below
2. Demo an example on:
  - a) create a ticket in ZenDesk using Vinyl UI
  - b) how to retrieve ticket information in spreadsheet-like/grid format in Vinyl UI from ZenDesk and SFDC
  - c) make changes to the ticket in Vinyl UI and how those changes are propagated to the respective endpoints
3. How to leverage Vinyl's components like Data Layer, UI Layer, App Workbench, etc. to accomplish the use case above

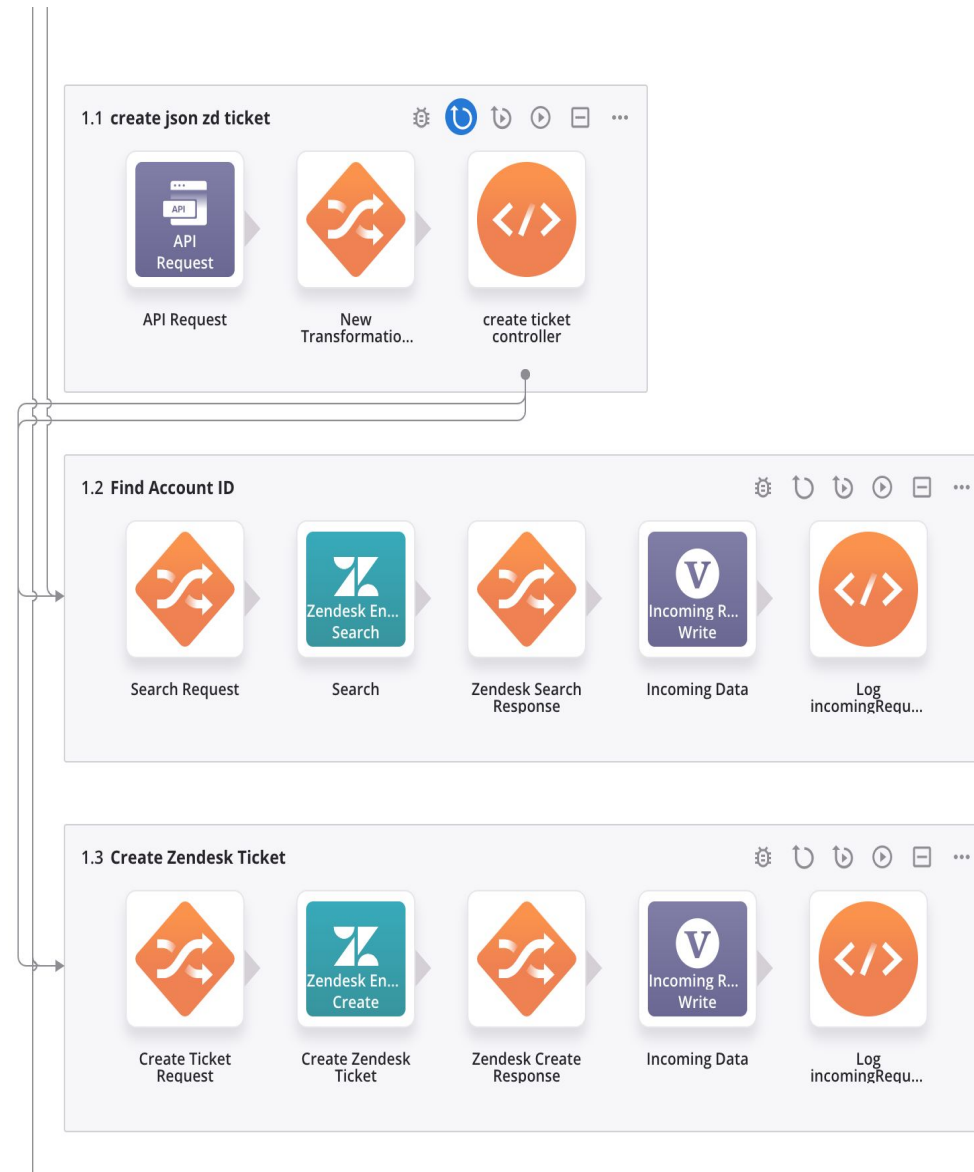
# [ Underlying APIs ]

# Create Zendesk Ticket

[ Underlying APIs ]

## Cloud Studio Configuration:

- a. Set up an operation to receive an API Message
  - i. Parses the Message to get the Account/Customer Name and Ticket Description
  - ii. Controls the flow of execution for ticket creation
- b. Find Account ID
  - i. Searches Zendesk for the Account ID associated with the Account/Customer Name received.
- c. Create Zendesk Ticket
  - i. Creates ticket in Zendesk under aforementioned Account ID passing Ticket Description

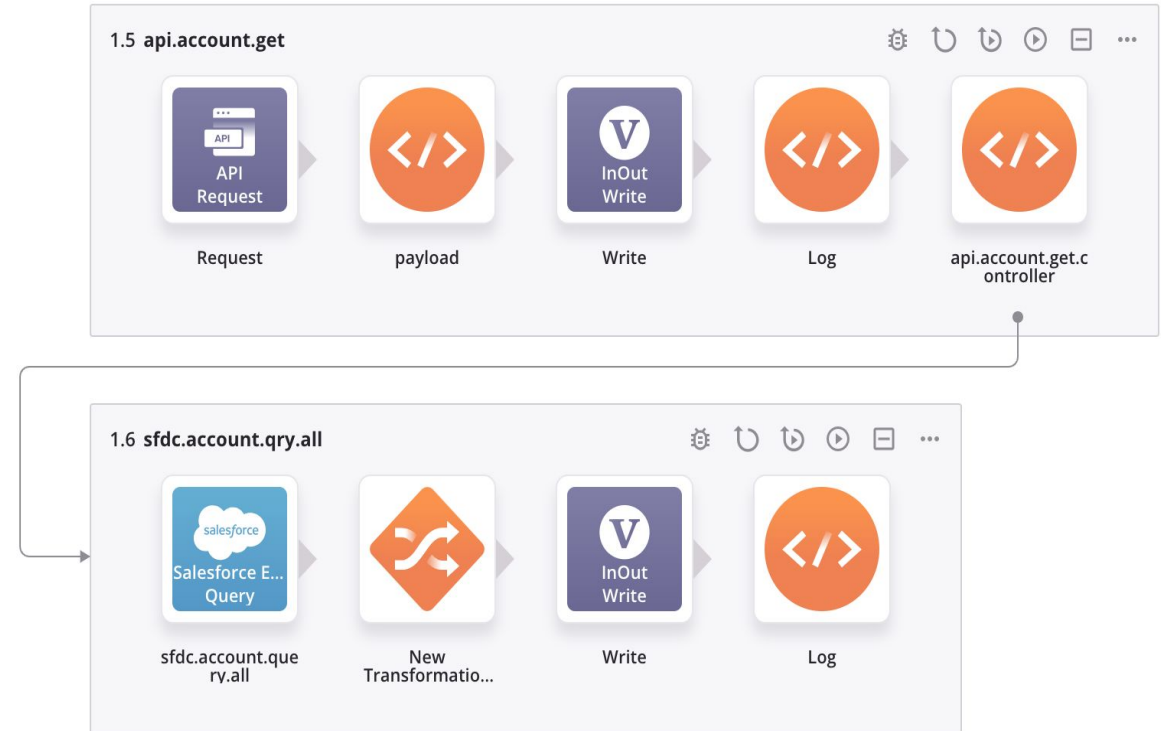


# Retrieve Salesforce Accounts

[ Underlying APIs ]

Cloud Studio Configuration:

- a. Set up an operation to receive an API Message
  - i. Parse HTTP GET Message
- b. sfdc.account.qry.all
  - i. Query All Active Salesforce Accounts in Salesforce returning name and ID



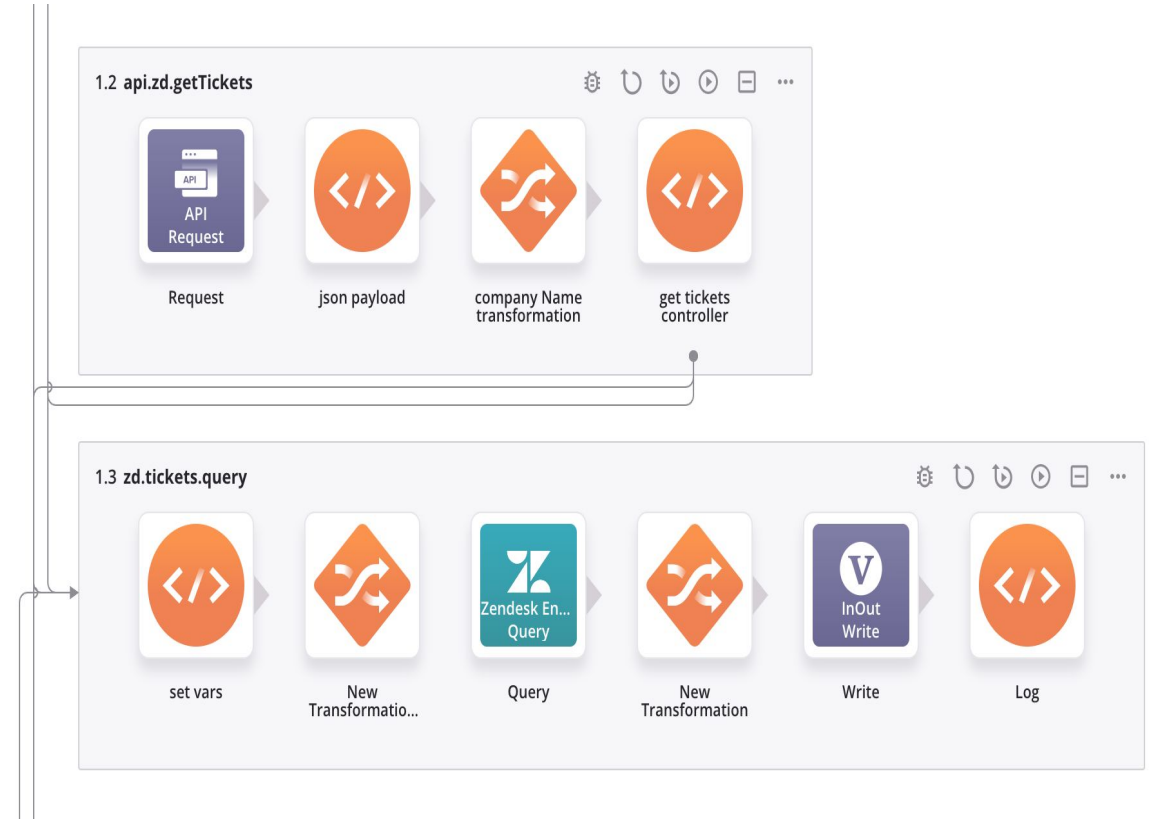


# Retrieve ZenDesk Tickets

[ Underlying APIs ]

## Cloud Studio Configuration:

- a. Set up an operation to receive an API Message
  - i. Parse JSON Payload
- b. `zd.tickets.query`
  - i. Query all tickets in Zendesk for a given CustomerID
  - ii. Return ticket subject, description, creation date, external id, etc

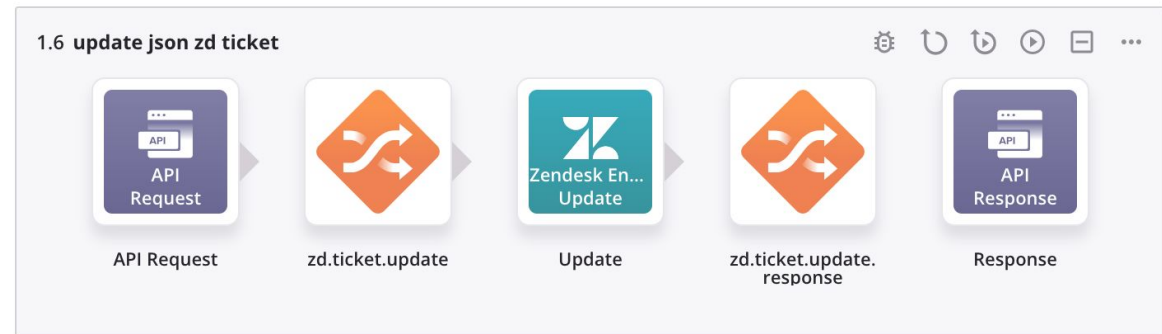


# Update(Close) ZenDesk Ticket

[ Underlying APIs ]

Cloud Studio Configuration:

- a. update json zd ticket
  - i. Receive ZenDesk ticket number
  - ii. Close ticket in ZenDesk



# Vinyl LCAP Use Case Demo

# Demo

Create a new ticket in ZenDesk using Vinyl App for an SFDC Account

The screenshot shows a Zendesk interface with a modal form for creating a new ticket. The form is titled "Ticket" and includes a "Save" button, a "Cancel" button, and a shield icon. The "Account" field is set to "Commodo Inc.", the "Subject" is "Virtual MeetUp", and the "Description" is "Virtual Meet Up on September 20th 2023". The background shows a sidebar with "Ticketing System", "Accounts", and "Tickets" sections, and a list of tickets.

# Demo...contd.

- Retrieve existing and newly created ticket information in Vinyl UI for all the active SFDC Accounts
- View all the tickets by status (status in Zendesk) on a pie chart for an SFDC account
- Close a ticket in Vinyl UI and have that change propagate to Zendesk

### Ticketing System

- Accounts
- Tickets

### Accounts

4 rows

Account
Aliquam Industries
Ante LLC
Commodo Inc.
United Oil & Gas Corp.

### Open Tickets By Account

9 rows

Ticket #	Subject	Status
148	Apartment 101 Refrigerator	new
120	TV is not working in...	pending
124	The lock is broken in unit 5C....	pending
125	The lock is broken in unit 5D...	new
126	The lock is broken in unit 7C....	new

### Ticket Details

[Close Ticket](#)

**Description**  
Apartment 101 needs a new Refrigerator

**Created On**  
2023-09-12T18:26:42Z

### All Tickets by Status

Status	Count	Percentage
closed	13	59%
new	6	27%
pending	2	9%
open	1	5%

# Vinyl Components

- App Workbench
  - Data Layer
    - Sources
      - JB Harmony Demo - REST API
    - Tables
      - Build to provide schema to Harmony API
      - Auto generated by Vinyl
  - Business Layer
    - Rules
      - Business Object
      - CRUD (create, read, update, delete)
- UI Layer
  - Pages (Accounts)
    - Controls
  - Menu (Home Page)
    - Order number defines order on page
- Security Layer *(not configured for this demo)*
  - Configure Duo Single Sign-On with SAML as an SSO Security Provider in Vinyl
  - Configure Google SAML as an SSO Security Provider in Vinyl

# Data Layer - Data Source Endpoints

Navigation bar with buttons and counts:

- Ticketing System App Settings
- Data Layer Data Sources** 2
- Data Layer Tables 14
- Business Layer Rules 11
- Business Layer Notifications 0
- UI Layer Pages 5
- UI Layer Menu 3
- Security Layer Roles 0

Web Service configuration and endpoint management interface.

**Web Service** [More](#)

**Endpoints** [More](#)

**SQL Results** [More](#)

**Web Service Details:**

- Server Name: JB Harmony Demo
- Url: <https://jdelgado.jitterbit.net/meetup/1.0/>
- Type: REST API
- Sub Type: REST

**Endpoints Table:**

Name	Endpoint	Method
account query	accountGetAll	GET
close ticket	updateZdTicket	POST
create ticket	createZdTicket	POST
GetTicketsBy...	ticketsByAccount	GET

**SQL Results Table:**

Name	Direction	Result
account query	Input/Output	
account query/accounts	Output	
account query/Respon...	Output	

- Call a Jitterbit custom API from Vinyl UI
  - Use Vinyl App Workbench to establish connection to Harmony API as a Data Source
  - Example:
    - Jitterbit API Service URL: <https://jdelgado.jitterbit.net/meetup/1.0/accountGetAll>
    - Vinyl Web Service URL: <https://jdelgado.jitterbit.net/meetup/1.0/>
    - Vinyl Endpoint: accountGetAll (Jitterbit API URL Service Root)

# Level of Effort

Steps	Activity	Effort
A)	<b>Harmony APIs / Cloud Studio Project</b>	
1.	Retrieve Salesforce Accounts	30 minutes
2.	Create ZenDesk Ticket	1 hour
3.	Update ZenDesk Ticket	1 hour
4.	Retrieve ZenDesk Tickets By Account	1 hour
5.	Building custom API using Jitterbit APIM	4 minutes (1 minute each)
B)	<b>Vinyl LCAP</b>	
1.	Configuration <ul style="list-style-type: none"> <li>- Data Layer</li> <li>- Business Layer</li> <li>- UI Layer</li> </ul>	5 hours
	<b>TOTAL</b>	<b>8.5 hours</b>



# THOUSANDS OF USE CASES | Endless Possibilities!

SALES	MARKETING	SERVICES	HUMAN RESOURCES	FINANCE	RETAIL
<ul style="list-style-type: none"> <li>• Customer Account (CRM)</li> <li>• Field Roster Accelerator</li> <li>• Loan Documents</li> <li>• Partner Agreements</li> <li>• Provisioning</li> <li>• Referral Agreements</li> <li>• Reseller Agreements</li> <li>• Sales Order Processing</li> <li>• Sales Support</li> <li>• Special Deal Terms</li> <li>• Support Agreements / Renewals</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising Contracts</li> <li>• Brand Licensing Agreements</li> <li>• Customer Communication Approval</li> <li>• Event Registration</li> <li>• Event Vendor Agreements</li> <li>• Mass Mailing / Email Approval</li> <li>• Media Plan Sign-Off</li> <li>• Press Release Approvals</li> <li>• Promotion Agreements</li> <li>• Rebate Agreements</li> <li>• Sponsorship Agreements</li> </ul>	<ul style="list-style-type: none"> <li>• Account Change</li> <li>• Compliance</li> <li>• EFT Authorization</li> <li>• Field Service</li> <li>• Independent Agency Licensing</li> <li>• New Policy Applications</li> <li>• Policy Cancellations/ Suspensions</li> <li>• Self-Service Requests</li> <li>• Service / Work Orders</li> <li>• Suspensions</li> <li>• Terms Change</li> </ul>	<ul style="list-style-type: none"> <li>• Background Checks</li> <li>• Benefits Admin</li> <li>• Contractor Agreements</li> <li>• Covid-19 Tracing / Wellness</li> <li>• Diversity (DEI)</li> <li>• Employee Policy Distribution / Signature</li> <li>• Non-Disclosure / Candidate NDAs</li> <li>• Offer Letters / New Hire Paperwork</li> <li>• On / Off Boarding Checklist</li> <li>• Performance Appraisal</li> <li>• PTO Management</li> </ul>	<ul style="list-style-type: none"> <li>• Asset Transfer / Retirement</li> <li>• Audit Sign-Off</li> <li>• Capitalization Management</li> <li>• Consumer Account Opening</li> <li>• Deposit Products</li> <li>• Expense Processing</li> <li>• Grant Applications</li> <li>• Inventory Sign-Off</li> <li>• Invoice Processing</li> <li>• Policy Management</li> <li>• Sales / Use Tax Return</li> </ul>	<ul style="list-style-type: none"> <li>• Consumer Snapshots</li> <li>• Customer Pickup Workflow</li> <li>• Direct to Consumer (DTC) Allocation</li> <li>• Discount Monitor</li> <li>• Inventory Reporting / Analytics</li> <li>• Made to Measure</li> <li>• Merchandising</li> <li>• Purchase Order Tracking</li> <li>• Third Party Logistics (3PL) Validation</li> <li>• Vendor File Management</li> <li>• Wholesale Bookings / Sales</li> </ul>
IT / OPERATIONS	LEGAL	FACILITIES	PRODUCT MANAGEMENT	PROCUREMENT	HEALTHCARE
<ul style="list-style-type: none"> <li>• Access Management</li> <li>• Asset Tracking</li> <li>• Authorization</li> <li>• Change Requests</li> <li>• Incident Reporting</li> <li>• Maintenance Authorization</li> <li>• Production Change Authorization</li> <li>• Project Budget Approvals</li> <li>• Real Estate Approval</li> <li>• Requirements Sign-Off</li> </ul>	<ul style="list-style-type: none"> <li>• Affidavits</li> <li>• Board Minutes</li> <li>• Contract Management</li> <li>• Engagement Letters</li> <li>• Equity Trade Requests</li> <li>• Internal Compliance</li> <li>• IP Licensing</li> <li>• Memoranda of Understanding</li> <li>• NDAs</li> <li>• Patent Applications</li> <li>• Summons</li> </ul>	<ul style="list-style-type: none"> <li>• Asset System Dashboards</li> <li>• Equipment Tracking</li> <li>• Hazard Signaling / Notifications</li> <li>• Incident Tracking</li> <li>• Inspection Management</li> <li>• Meter Monitoring / Maintenance</li> <li>• Preventative Maintenance</li> <li>• Schedule Maintenance</li> <li>• Space Occupancy Dashboards</li> <li>• Stock Monitoring / Usage</li> <li>• Walk Around Checklists</li> <li>• Work Safety / Compliance Management</li> </ul>	<ul style="list-style-type: none"> <li>• Beta / SDK Agreements</li> <li>• Change Management</li> <li>• Code Review Reporting</li> <li>• Developer Program Enrollment</li> <li>• New Offering Announcement</li> <li>• New Product Evaluation</li> <li>• Policy Approval</li> <li>• Product Development Methods</li> <li>• Release Management</li> <li>• Release Scope Commitment</li> <li>• Requirements Acceptance</li> </ul>	<ul style="list-style-type: none"> <li>• Invoice Processing</li> <li>• Master Services Agreement</li> <li>• Purchase Order</li> <li>• Rate Cards</li> <li>• RFP Sign-Off</li> <li>• Service Level Agreements</li> <li>• Software License Agreements</li> <li>• Statement of Work</li> <li>• Subcontractor Agreements</li> <li>• Supplier Compliance</li> <li>• Termination Letters</li> <li>• Vendor Contracts</li> </ul>	<ul style="list-style-type: none"> <li>• Checklists</li> <li>• Documentation</li> <li>• Feedback</li> <li>• Insurance Reporting / Data Management</li> <li>• Management / Organization Review (MOR)</li> <li>• Support Requests</li> <li>• Project Management</li> <li>• Provider Reporting</li> <li>• Recall Services</li> <li>• Trip Reporting</li> <li>• Value Based Care (VBC) Services</li> </ul>

# Vinyl Webinar: Pet Genomics Organization BioPet Automates Data Management with Low-Code Application Building

**September 28, 2023 @ 1:00pm ET / 10:00am PT**

Registration @

<https://www.jitterbit.com/webinar/case-study-demo-webinar-pet-genomics-organization-biopet-automates-data-management-with-low-code-application-building/>

# Other Ways to Get Help from Jitterbit

Interested in any of the following ⇒ Please reach out to your CSM:

- Learn more about our Solutions (Integration, Automation, App Building with Vinyl, & EDI)
- Best Practices session with Customer Success Architect (CSA)
- Health Check review with CSA
- Architecture assessment with CSA
- Working session with CSA for Jitterbit examples and/or development activities
- CSA office hours every Wednesday @ 10am Pacific Time
- Customer workshops or customized training with CSA or TAM (customized to your use cases)
  
- **Contact:**
  - <https://success.jitterbit.com/>
  - Unsure who your CSM is ⇒ email [Success@jitterbit.com](mailto:Success@jitterbit.com) or [phil@jitterbit.com](mailto:phil@jitterbit.com)



# QUESTIONS & FEEDBACK

Rock your workflow!