

Young Audiences New York Salesforce-Xero Payroll Workato Recipe

Draft Recipe: Post Salesforce Contract Dates to Draft Pay Stub in Xero

KEY: Workato / Salesforce / Xero.

Every 14 days on Monday, do:

Trigger: Contract Date is created/updated:

IF Contract Date's Approval Status equals Approved AND Contract Date's Submission Status does not equal Entered in payroll:

Search Xero for an Employee with a name that matches Program Name

If the search returns an Employee ID:

Search Xero for the Employee's most recently created Pay Stub
(i.e. the draft)

If the search does not return an Employee ID

Email yany-workforce@artspool.co

If Contract Date's Submission Status = Completed

If Program Component Type (General) of the Contract Date is not Travel

add Earnings line to Pay Stub.

Search Xero for Earnings Type called Teaching Artist Hours

Earnings type ID: EarningsTypeID from search

of units = [Standard length/60] (lookup in Salesforce)

Rate: [artist fee/(standard length/60)] (lookup in Salesforce)

If Earnings line is successfully created:

Change Contract Date Submission Status to "entered in payroll"

Set Pay Period End Date of Contract Date to Xero Pay Period End Date

If Program Component Type (General) of the Contract Date is Travel

add Reimbursement line to Pay Stub

Search Xero for Reimbursement Type called Travel/Per Diem

Reimbursement type ID: ReimbursementTypeID from search

Description: PC component description; if none: add boilerplate description

Amount: artist fee for program component

If Reimbursement line is successfully created:

Change Contract Date Submission Status to “entered in payroll”

Set Pay Period End Date to Xero Pay Period End Date

If Contract Date’s Submission Status is Sick Day:

Add Earnings line

Search Xero for Earnings Type called Sick Pay

Earnings Type ID: EarningsTypeID from search

of Units: Standard Length/60

Rate: [artist fee/(standard length/60)]

If Earnings line is successfully created:

Change Contract Date Submission Status to “entered in payroll”

Set Pay Period End Date to Xero Pay Period End Date