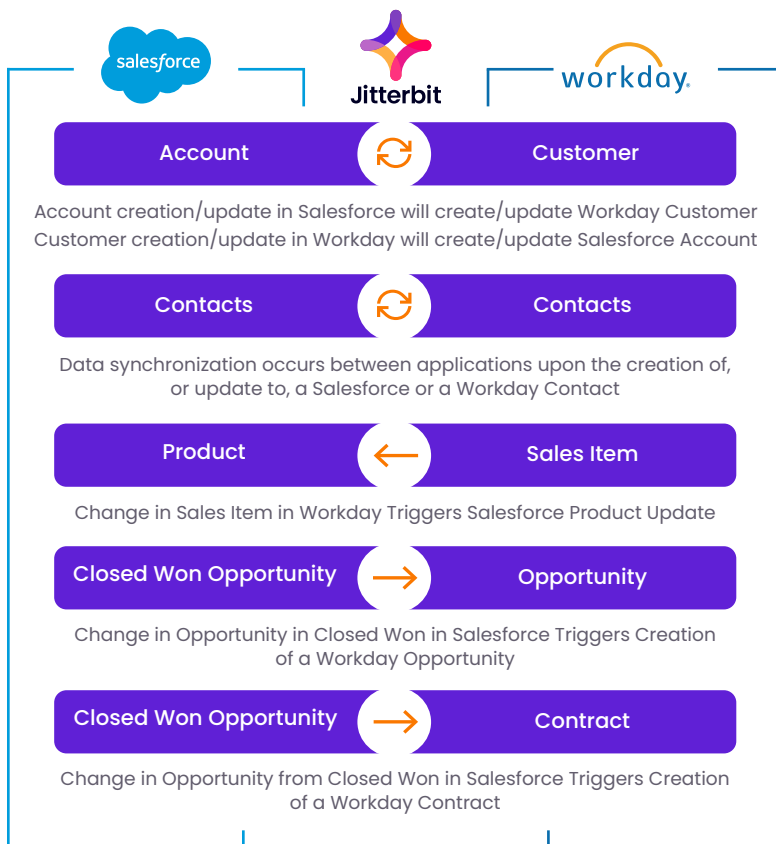


# Salesforce–Workday Financials Opportunity– to–Contract Process Template

## Introduction

Improve the speed and accuracy of creating your Contract with Jitterbit’s Salesforce and Workday Financials Opportunity–to–Contract Process Template. A packaged solution of pre-built integrations connects data and processes between applications right out of the box, significantly reducing integration efforts. Synchronize fields such as Account, Customer, Contact, Opportunity, and Contract items between systems. Automatically create a Contract once an opportunity closes. Connect your CRM and ERP systems quickly and easily with reusable integrations that speed implementation and streamline business processes.

This process template includes pre-built integrations that connect the following objects and fields between Salesforce and Workday:



### BUSINESS PROBLEMS SOLVED:

- Automatically create a Contract in Workday Financials when an opportunity closes in Salesforce
- Synchronize data and processes quickly and easily between systems

### PROCESS TEMPLATE PACKAGE:

- Two endpoints: Salesforce, Workday
- Four pre-built integration flows
- Implementation and post-implementation delivery services (optional)

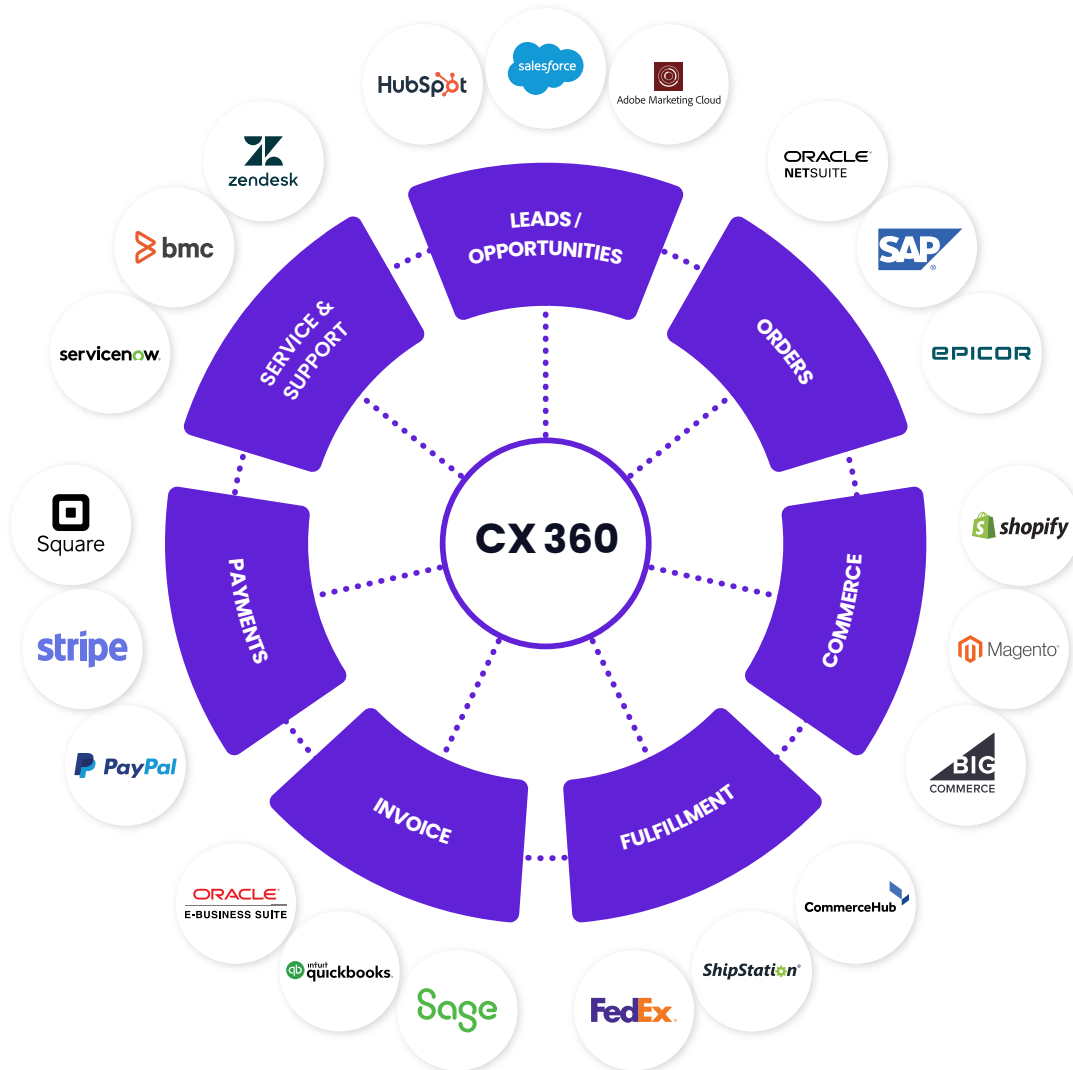
### VALUE TO CUSTOMERS:

1. Easy setup for customer’s integration projects (days, not weeks or months)
2. Mitigate risk by automating the contract process and having a single source of truth
3. Sync objects such as Account, Contact, Opportunity, Product, and Contract in Salesforce with equivalent objects in Workday Financials
4. 50-80% faster time-to-value with a pre-packaged Opportunity-to-Contract process template
5. Standard objects are used for this process template to minimize additional customization

### BUSINESS BENEFITS:

- Improved customer experience providing faster and more accurate orders, while reducing operational costs
- Quickly implement Opportunity-to-Contract integration between Salesforce and Workday Financials for fast time to value
- Pre-packaged synchronization between Salesforce and Workday Financials
- Enable teams to focus on business opportunities, and provide the correct contract renewals, discounts, and modifications

# The API Lifecycle of a Customer



## Opportunity-to-Contract

When sales opportunities close, orders need to be processed as efficiently and quickly as possible, with 100% accuracy. Providing a seamless customer order experience requires integrating data and processes across multiple systems – when sales opportunities close in your CRM system, Contracts are automatically created in your ERP system. With Jitterbit's Salesforce-Workday Financials Opportunity-to-Contract Process Template, you can use pre-built integrations to jumpstart integrations in your order lifecycle, reduce the time required to connect and automate your systems, and accelerate your time to market.



Jitterbit empowers businesses to optimize their connectivity and scalability through a single integration and workflow automation platform. Our mission is to turn complexity into simplicity so your entire organization can work faster and more efficiently.

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