

Workday / SpryPoint Integration

SpryPoint

Partner Value & Use Case Overview: Why this partner, why now, why this solution?

SpryPoint and Workday: A unified, scalable, and secure cloud platform for modern utilities

SpryPoint is the leading cloud-native utility billing, customer engagement, and work order and asset management solution for North American water, gas, electric, telecom, and multi-service utilities. Our utility clients match Workday's municipal and cooperative target accounts, which demand enterprise-grade, cloud-native solutions and are upgrading from on-premise and legacy solutions nearing their end of life.

According to [Morgan Stanley](#), organizations are undergoing an enterprise technology super-cycle, moving away from on-premises vendors towards modern cloud-based systems that support digital transformation and AI readiness. The super-cycle creates ongoing market demand for Workday's solution and SpryPoint's modern Customer Information System (CIS) for utility organizations.

The integrated Workday and SpryPoint solution is complementary and differentiated, creating a unified end-to-end meter-to-cash-to-ledger process. Workday is the system of record for finance and HR operations, while SpryPoint manages the front-end customer service, meter data, utility billing, and field service processes. Combined, the solution creates a seamless bi-directional data flow between the systems for stronger financial integrity, accurate and auditable reporting, and enhanced business visibility across the organization's front- and back-office operations.

SpryPoint fills the industry-specific Customer Information System (CIS) and Meter Data Management (MDM) gaps. While Workday remains the "System of Record" for Financials and People, SpryPoint handles the complex, high-volume utility billing and field service logic, ensuring a seamless, integrated flow of data without custom middleware.

SpryPoint Products

SpryPoint's utility billing, customer engagement, and work order and asset management solution

SpryPoint is a modern utility billing, customer engagement, and operations software, purpose-built for government and utilities to keep pace with the industry's rapid change.

SpryPoint's cloud-native SaaS platform delivers a process-focused, user-centric design to streamline operations, empower employees, and better serve customers.

The SpryPoint platform includes the following essential capabilities:

- **SpryCIS** (Customer Information System) is the core of your meter-to-cash lifecycle, unifying customer service and operations to drive productivity.
- **SpryEngage** is an omnichannel customer portal that empowers customers with 24/7, immediate access to account information, billing, usage trends, analytics, payment processing, and proactive notifications and alerts to meet customer demands.
- **SpryMobile Mobile Field Service** is a mobile-optimized and configurable platform that empowers technicians to make real-time updates to customer service orders in the field and provides dispatchers with a unified dashboard to manage schedules, dynamically assign team members, and make informed resource allocation decisions.
- **SpryMobile Work Orders & Asset Management** empowers technicians to make real-time updates to work orders in the field and provides dispatchers with a unified dashboard to maximize productivity and ensure distribution and vertical asset compliance.
- **SpryBackflow** is the platform for utility teams, customers, and testers to verify equipment, manage testing, and track regulatory compliance all in one place, streamlining processes, notice management, and test entry and submissions electronically.
- **SpryWallet** is a secure and seamless payment-processing feature within SpryCIS and SpryEngage, making payment flows and reconciliation first-class citizens in meter-to-cash processes.
- **SpryIDM** is an interval data management solution that integrates with Advanced Metering Infrastructure (AMI) head-end systems, as well as SpryCIS and SpryEngage, to deliver meter data to customers and utility teams, enabling informed decision-making.
- **SpryAssist** is a conversational AI-powered assistant that handles routine inquiries and ensures 24/7 customer support.

Key Benefits

- **Best-in-class modern platform:** unified, scalable, and secure cloud platform for modern utilities provided by industry leaders Workday and SpryPoint
- **End-to-end meter-to-cash-to-ledger process:** streamlined workflows and seamless data flows between Workday and SpryPoint, ensuring stand-out customer care, strong financial integrity, and accurate, auditable reporting
- **Business visibility and operational efficiency:** Centralize front-and-back-end data and processes, enhancing business visibility and operational efficiencies across the organization

- **More confident decision-making:** Empower clients with real-time data insights to make better, more informed decisions across the utility.
- **Modern architecture designed for integration and scale:** Built on modern AWS architecture and a unified, API-first approach to integrate with modern ERPs like Workday.
- **Updates not Upgrades:** Deploys tools and process improvements through continuous updates, delivering incremental value with each release without the resource-consuming preparation, testing, retraining, and interruption.
- **Configuration over Customization:** With best-in-class configuration management, enabling you to innovate your business processes while ensuring consistency, reliability, and efficiency in an increasingly complex meter-to-cash lifecycle.
- **Built from the ground up for utilities:** SpryPoint's solutions were built from the ground up to meet the needs of modern utilities.
- **SpryPoint compared to competitors:**
 - **Oracle and SAP:** SpryPoint offers a true cloud-native platform with faster implementation, lower total cost of ownership, and best-in-class configuration management.
 - **Harris' companies and mid-market providers:** SpryPoint has a process-centric approach, an intuitive user experience, and specialized utility functionality, such as interval data management and AMI integrations that general-purpose government technology platforms lack.

Customer Success

- Together, Workday and SpryPoint support a growing list of forward-thinking utilities, including:
 - City of Aurora, CO
 - City of Grand Prairie, TX
 - Coachella Valley Water District, CA
 - City of Boynton Beach, FL
 - City of Akron, OH
 - City of Salem, OR
 - Irvine Ranch Water District, CA
 - City of West Jordan, UT
 - Multiple other organizations across the Americas

Workday Product Alignment

- SpryPoint integrates seamlessly with Workday's financial, HR, and workforce planning products—eliminating data silos and manual reconciliation with unified, automated workflows.

- SpryPoint extends the power of Workday as the system of record by adding a utility-industry-specific CIS and Meter Data Management (MDM) solution that handles complex, high-volume utility billing and field service requirements, ensuring seamless data flow.
- All SpryPoint applications run on multi-tenant cloud infrastructure, with each client maintaining its own single-tenant application and database instance. Customer data is isolated both logically and physically, ensuring the highest standards of security and compliance.
- SpryPoint is delivered as SaaS, continuously providing new features, performance enhancements, and support updates without disruptive upgrade cycles, ensuring clients always have the latest solution.
- SpryPoint's structured release management process provides clients the opportunity to validate and influence functionality prior to production rollout through a sandbox environment for all new features.
- SpryPoint has best-in-class configuration management, enabling clients to innovate business processes while ensuring consistency, reliability, and efficiency in an increasingly complex meter-to-cash lifecycle.

Target Market Industries/Geos

Industry Segments:

- SpryPoint can scale across small and medium-sized government (SMG), middle and large enterprises (ME and LE) and special districts in Workday SLED.

Geographies:

- State and local public sector (SLED) and utility organizations across counties, municipal governments, special districts, and Co-ops across the United States, Canada, and the Caribbean.

Technical Requirements

The SpryPoint and Workday integration combines two best-in-class platforms to create a cloud-native, unified, scalable, and secure platform that ensures utility billing operations are tightly aligned with financial systems. Built on a modular, production-tested architecture, the integration supports secure, bi-directional data flows. It enables SpryCIS to validate GL account structures, cost centers, and worktags against Workday configurations, as well as pushing journal entries, maintenance of up-to-date chart-of-account references, ad hoc bank transactions, and real-time handling of refunds and government rebates directly through Workday's APIs. This eliminates overnight batch processing delays, reduces manual reconciliation effort, and positions SpryCIS for Workday certification as a "best practice" integration that can be reused across all Workday clients. Utilities benefit from immediate data

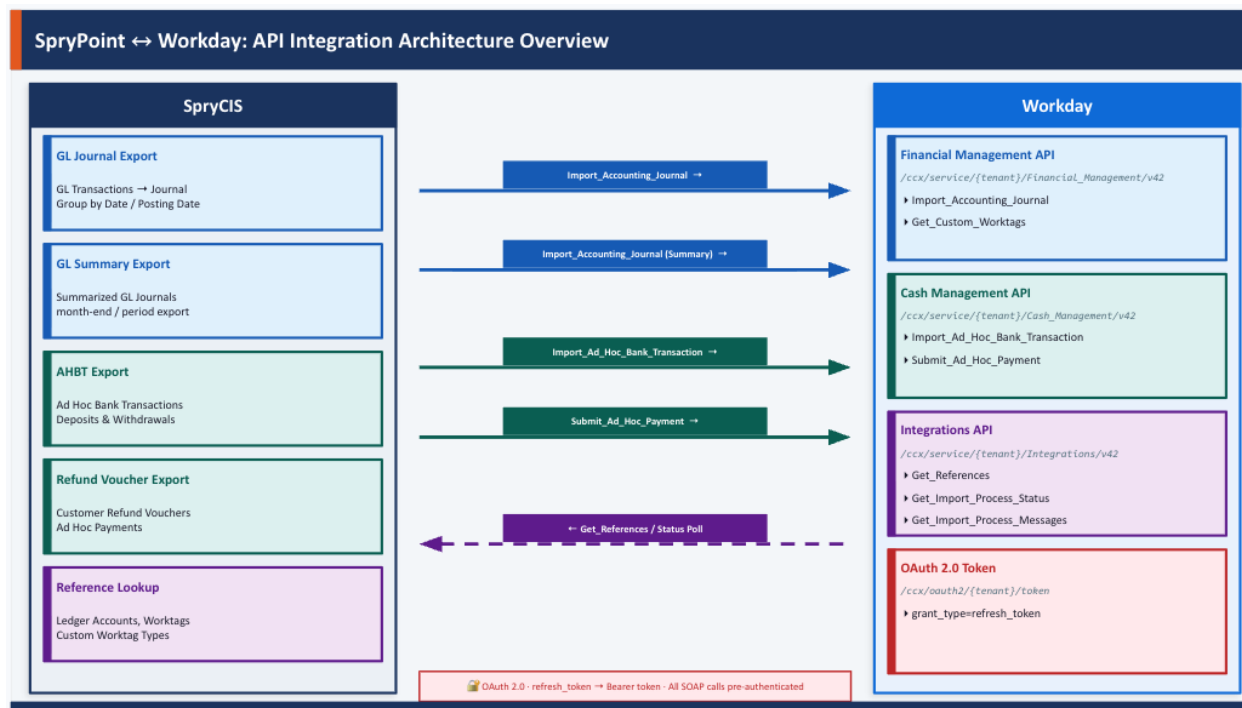
synchronization, fewer integration points to manage, minimizes manual effort, and ensures accurate, auditable reporting, all while improving customer experience and utilizing a more modern, supportable architecture.

Key Integration Points Between SpryCIS and Workday ERP

- Service & Work Orders Inbound: Field service and work order completions from SpryCIS are transmitted into Workday to initiate financial and asset-related workflows.
- Asset Adjustments & Inventory Movement: Field asset changes (e.g., meter swaps, transformer updates) are sent to Workday to update asset registers and inventory.
- Procurement Alignment: Materials and items issued through Workday's procurement modules are synced with SpryCIS to align field activity, job costing, and material usage.
- Employee Demographics & Time Tracking: Employee records and labor-tracking data are shared across systems to support scheduling, payroll, and labor cost recovery.

All integrations are delivered using standard REST/SOAP APIs and secure HTTPS/SFTP protocols. SpryPoint's API-first architecture ensures extensibility and effortless interoperability with third-party applications—now and in the future.

Architecture



Integration Connection Points: Data Flow & Payload Detail

Financial Management · Import_Accounting_Journal

SOAP endpoint: /ccx/service/(tenant)/Financial_Management/(version)

- Journal Number (GL Summary Transaction #)
- Company Reference ID · Currency ID · Ledger Type ID
- Journal Source ID · Accounting Date (posting or transaction date)
- External Reference ID · Document Link (deep link to SpryCIS)
- Debit / Credit Lines: Ledger Account ID, Amount, Worktags
- Optional: Balancing Worktag Reference · Parent Ledger Account Set ID

Triggered By

- WorkdayJournalWebServiceImpl → per GL Summary Transaction
- WorkdaySummaryWebServiceImpl → period-end summary export
- Groups GL transactions by date → one journal per date/tx
- Dispatches AHBT if "Include AHBT" flag is enabled
- Audit log entry: PENDING → ACCEPTED / FAILED

Cash Management · Import_Ad_Hoc_Bank_Transaction · Submit_Ad_Hoc_Payment

SOAP endpoint: /ccx/service/(tenant)/Cash_Management/(version)

- AHBT: Bank Account ID, Transaction Date, Amount
- AHBT: Deposit or Withdrawal flag, Journal Source ID
- AHBT: Transaction Lines with Ledger Account, Worktags
- AHBT: Spend Category, Revenue Category, Purpose Reference
- Voucher: Payee name, Address, Bank settlement account
- Voucher: Invoice lines (Spend Category, Cost Center worktag)

Triggered By

- WorkdayAhbtWebServiceImpl → after GL Journal export if AHBT flag ON
- WorkdayVoucherWebServiceImpl → per posted Refund Voucher
- Voucher response is synchronous → COMPLETED / COMPLETED_WITH_ERRORS
- Parses <bsvc:Message> from response for exception detail
- Audit log: PENDING → COMPLETED / FAILED_TO_SEND

Integrations API · Reference Lookups & Status

/ccx/service/(tenant)/Integrations/(version)

- Get_References → Ledger Accounts, Worktags (paginated 250/page)
- Get_Custom_Worktags → via Financial Management endpoint
- Get_Import_Process_Status → polls async import result by WID
- Get_Import_Process_Messages → retrieves error summaries
- Cache: 24-hour TTL, bulk-cleared on config update

OAuth 2.0 Authentication

/ccx/oauth2/(tenant)/token

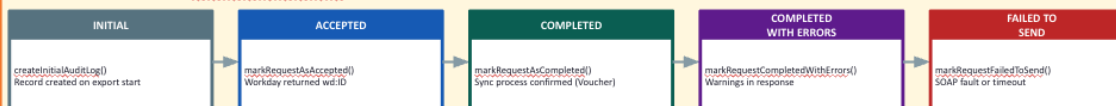
- grant_type=refresh_token → Bearer access_token
- clientid + clientSecret → HTTP Basic Auth header
- Credentials stored in WorkdayConfiguration (per-tenant)
- Token fetched before every outbound SOAP request
- Passed as Authorization: Bearer <token> header

GL Account Structure, Worktag Mapping & Audit Logging

GL Account Number Structure · Segment → External Reference Code Mapping



Integration Process Audit Log · IntegrationProcessAuditLog



WorkdayConfiguration: Key Settings

Connection	Journal / Ledger	Worktag Options	Behaviour Flags
· workDayEndpoint	· companyRefId	· balancingWorktagReferenceId	· includeAhbtFile (bool)
· tenantId	· currency	· balancingWorktagReferenceIdType	· useTransactionDateForGLExport (bool)
· apiVersion (e.g. v42)	· journalSource	· ahbtPurposeReferenceId	· defaultAccountNumber
· clientid / clientSecret	· receiptsJournalSource	· removeBankAccountWorktagOnOffset	· defaultGLAccountNumber
· refreshToken	· ledgerType		
	· parentLedgerAccountId		

Conclusion (optional) 50-70 characters

Modern utilities doing game-changing transformational work trust and rely on Workday and SpryPoint as their long-term partner. To schedule a conversation, visit [SpryPoint.com/](https://sprypoint.com/)