



Connector Salesforce

**Configuration : Creating a connected
Salesforce application + getting Salesforce
URL server + Consumer key + Consumer
secret**

Summary

I.Context.....	3
II.Prerequisites.....	4
III.Salesforce server URL.....	5
IV.Consumer key and Consumer secret.....	6
IV.1Creating a connected application in Salesforce.....	6
IV.2Getting the Consumer key and the Consumer secret.....	10

I. CONTEXT

This document explains how to get authentication information that Digdash needs to connect to your Salesforce account.

We need the following information:

- URL serveur Salesforce
- Clé consommateur
- Secret consommateur

Note: the Salesforce version may vary from a user to another. The following instructions might not exactly correspond to the version the user is using.

II. PREREQUISITES

- A Salesforce account

III. SALESFORCE SERVER URL

It is the domain name you chose at the creation of your Ssalesfroce account. It is indicated in you address bar.

It is in the following form:

`https://{instanceDomain}.salesforce.com:{port}/...`

with {instanceDomain} your own instance domain
and {port} the listening port.

IV. CONSUMER KEY AND CONSUMER SECRET

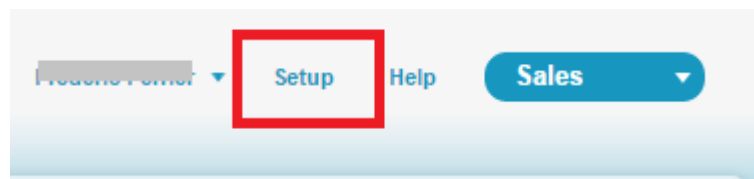
So Digdash can access to your Salesforce data, you need to create an entry point, creating a connected application in Salesforce.

At the end of this procedure, you will need to note two pieces of information that Digdash needs:

- The consumer key
- the consumer secret

IV.1 Creating a connected application in Salesforce

- Authenticate in Salesforce.
- Click on **Setup** in the upper right, next to your account name.



➤ In the left side bar, go to **Build > Create > Apps**. In the **Connected Apps** category, click on **New**.

The screenshot shows the Salesforce Admin console interface. At the top, there are navigation tabs: Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, and Contracts. Below these is a search bar labeled 'Quick Find / Search...' and a link to 'Expand All | Collapse All'.

The left sidebar contains several sections:

- Lightning Experience**
- Salesforce1 Quick Start**
- Force.com Home**
- Administer**
 - Manage Users
 - Manage Apps
 - Manage Territories
 - Company Profile
 - Security Controls
 - Domain Management
 - Communication Templates
 - Translation Workbench
 - Data Management
 - Mobile Administration
 - Desktop Administration
 - Lightning for Outlook
 - Lightning Sync
 - Email Administration
 - Google Apps
 - Data.com Administration
- Build** (highlighted with a red box)
 - Customize
 - Create** (highlighted with a red box)
 - Apps** (highlighted with a red box)
 - Custom Labels
 - Interaction Log Layouts

The main content area is titled 'Apps'. It includes a description: 'An app is a group of tabs that work as a unit to provide functionality. Users can... You can customize existing apps to match the way you work, or build new app...'. A yellow callout box states: 'Custom apps work in conjunction with User Profile Tab Visibility settings.' Below this is a table of existing apps:

Action	App Label	Console	Custom	Description
Edit	App Launcher	<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Call Center	<input type="checkbox"/>	<input type="checkbox"/>	State-of-the-Art On-De
Edit	Community	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Com
Edit	Content	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Cont
Edit	Marketing	<input type="checkbox"/>	<input type="checkbox"/>	Best-in-class on-dema
Edit	Platform	<input type="checkbox"/>	<input type="checkbox"/>	The fundamental Forc
Edit Del	Recruiting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Manage positions, car
Edit	Sales	<input type="checkbox"/>	<input type="checkbox"/>	The world's most popu
Edit	Salesforce Chatter	<input type="checkbox"/>	<input type="checkbox"/>	The Salesforce Chatte
Edit	Sample Console	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The out-of-the box cor
Edit	Site.com	<input type="checkbox"/>	<input type="checkbox"/>	Build pixel-perfect, da

Below the main apps table is a 'Subtab Apps' section with a similar table:

Action	App Label	Description
Edit	Profile (Others)	The tabs displayed when use
Edit	Profile (Self)	The tabs displayed when use

At the bottom of the main content area, there is a 'Connected Apps' section. It has a 'New' button highlighted with a red arrow. Below it is a table:




Action	Connected App Name
Edit Manage	test

- Enter the required basic information (**Connected App Name**, **API Name** and **Contact Email**).
- Select **Enable OAuth Settings** under **API (Enable OAuth Settings)**.

New Connected App

Save Cancel

Basic Information

Connected App Name	<input type="text" value="My Application"/>
API Name	<input type="text" value="My_Application"/>
Contact Email	<input type="text" value="contact@contact.co"/>
Contact Phone	<input type="text"/>
Logo Image URL 	<input type="text"/> Upload logo image or Choose one of our sample logos
Icon URL 	<input type="text"/> Choose one of our sample logos
Info URL	<input type="text"/>
Description 	<input type="text"/>

API (Enable OAuth Settings)

Enable OAuth Settings

- Enter your callback URL (use the helper)
- Add **Provide access to your data via the Web (web)** to the **Selected OAuth Scopes** column
- Click **Save**.

New Connected App

Basic Information

Connected App Name
 API Name
 Contact Email
 Contact Phone
 Logo Image URL
 Icon URL
 Info URL
 Description

API (Enable OAuth Settings)

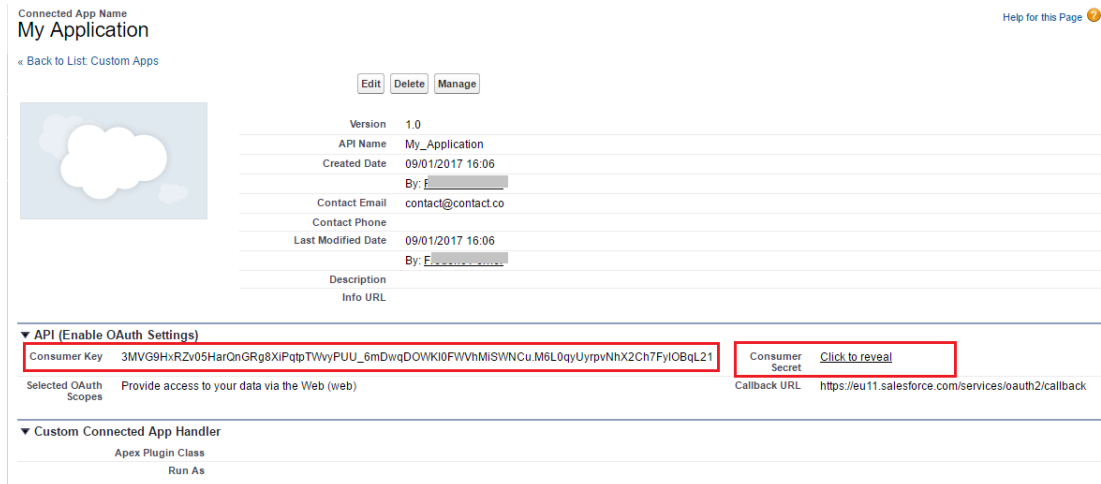
Enable OAuth Settings
 Callback URL
 Use digital signatures
 Aucun fichier choisi

Selected OAuth Scopes	Available OAuth Scopes	Selected OAuth Scopes
	Access and manage your Chatter data (chatter_api) Access and manage your Wave data (wave_api) Access and manage your data (api) Access custom permissions (custom_permissions) Access your basic information (id, profile, email, address, phone) Allow access to your unique identifier (openid) Full access (full) Perform requests on your behalf at any time (refresh_token, offline_access) Provide access to custom applications (visualforce)	Provide access to your data via the Web (web)

Include ID Token

IV.2 Getting the Consumer key and the Consumer secret

Once your app is registered, the page will display your **Consumer Key** and **Consumer Secret**:



The screenshot shows the Salesforce Connected App configuration page for an application named "My Application". The page includes a header with the app name and a "Help for this Page" link. Below the header, there are "Edit", "Delete", and "Manage" buttons. A placeholder image of a cloud is shown on the left. The main content area displays various fields for the application, including Version (1.0), API Name (My_Application), Created Date (09/01/2017 16:06), Contact Email (contact@contact.co), and Last Modified Date (09/01/2017 16:06). A section titled "API (Enable OAuth Settings)" is expanded, showing the Consumer Key (3MVG9HxRZv05HarQnGRg8XiPqtpTwyPUU_6mDwqDOWki0FWWhMISWNCu.M6L0qyUyrpvNhX2Ch7FyIOBqL21) and the Consumer Secret (Click to reveal). The Callback URL is https://eu11.salesforce.com/services/oauth2/callback. The "Selected OAuth Scopes" section shows "Provide access to your data via the Web (web)". The "Custom Connected App Handler" section shows the Apex Plugin Class and Run As settings.

Field	Value
Version	1.0
API Name	My_Application
Created Date	09/01/2017 16:06
Contact Email	contact@contact.co
Last Modified Date	09/01/2017 16:06
Consumer Key	3MVG9HxRZv05HarQnGRg8XiPqtpTwyPUU_6mDwqDOWki0FWWhMISWNCu.M6L0qyUyrpvNhX2Ch7FyIOBqL21
Consumer Secret	Click to reveal
Callback URL	https://eu11.salesforce.com/services/oauth2/callback
Selected OAuth Scopes	Provide access to your data via the Web (web)
Apex Plugin Class	Run As

Copy your Consumer Key and Consumer Secret to enter in Digdash.