

Salesforce connection with ROGER365.io



Written by Erwin Wiegman

Version 1.4



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High-level overview of the steps

The connection is made through the Salesforce API. This API is available automatically enabled for the following editions: Enterprise Edition, Unlimited Edition, Developer Edition and Performance Edition. In the Professional Edition the API access can be purchased. Please contact your Salesforce supplier for more information.

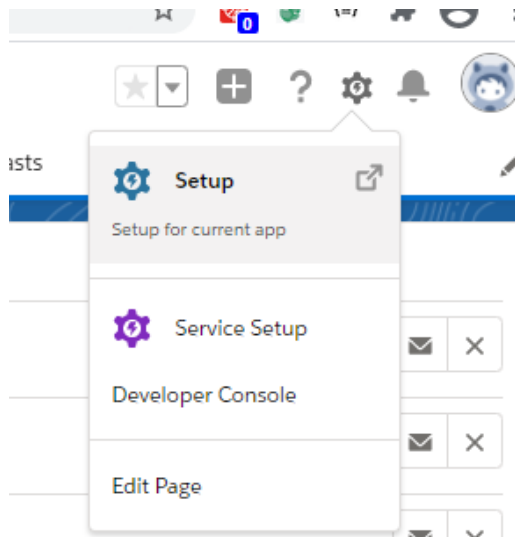
- 1) Create a Salesforce Roger365.IO user
- 2) Create a Salesforce External Client App
- 3) Place user in new group
- 4) Configure ROGER365.IO
- 5) (old way) Create a Salesforce Connected App

Create a Salesforce ROGER365.io user

Before we make a connection to Salesforce, a user must be created with the appropriate license.

<https://help.salesforce.com/articleView?id=000331470&type=1&mode=1>

Log into Salesforce with a user account with administrative right and go to the gear icon and choose setup



Choose for administration > Users > Users to get to the user account screen


Setup

Home

Object Manager ▾

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
▾ Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users



SETUP
Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit users.

View: All Users ▾ [Edit](#) | [Create New View](#)

☐ Action	Full Name ↑	Alias
☐ Edit	Chatter Expert	Chatter
☐ Edit	User Integration	integ
☐ Edit	User Security	sec
☐ Edit	Wiegman, Erwin	EWieg

Choose for a new user


SETUP
Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile device

View: All Users Edit Create New View

New User Reset Password(s) Add Multiple Users

☐ Action	Full Name ↑	Alias	Username
☐ Edit	Chatter Expert	Chatter	chatty.00d09000004tjkdeag.atmygrspjuuw@chatter.salesforce.com
☐ Edit	User Integration	inter	integration@00d09000004tjkdeag.com

Create a user to be used a service account user. The user will need a user license of the type salesforce.

The profile must be a profile where the API enabled permission has been set.


SETUP
Users

User Edit
Roger 365.IO Help for this Page

User Edit Save Save & New Cancel

General Information

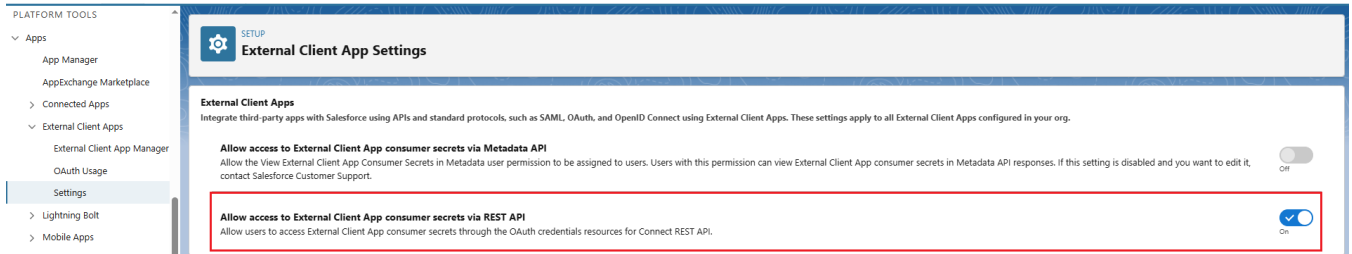
First Name
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division

Role
User License
Profile
Active ☒
Marketing User ☐
Offline User ☐
Knowledge User ☐
Flow User ☐
Service Cloud User ☐
Site.com Contributor User ☐
Site.com Publisher User ☐
WDC User ☐
Data.com User Type
Data.com Monthly Addition Limit

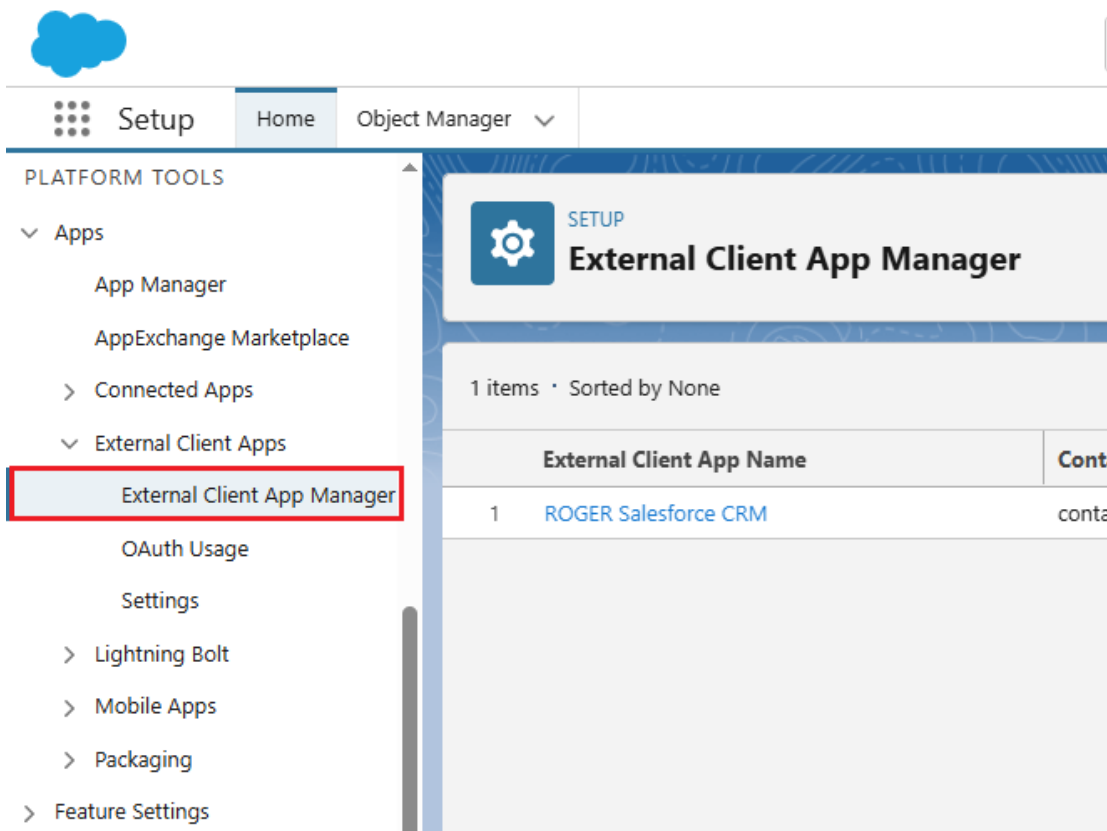
Create a Salesforce External Client App

Before proceeding, make sure that External Client App does have an access to the consumer secrets via REST API.

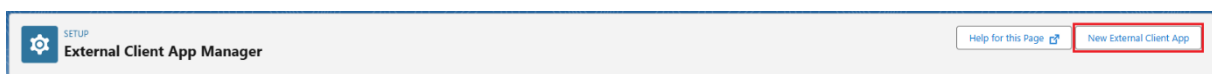
Go to gear icon -> Setup -> Platform Tools section -> External Client App -> Settings:



To create new External Client App, press on the Gear icon -> "Setup" -> choose under Platform Tools section -> Apps > External Client Apps -> External Client App Manager:

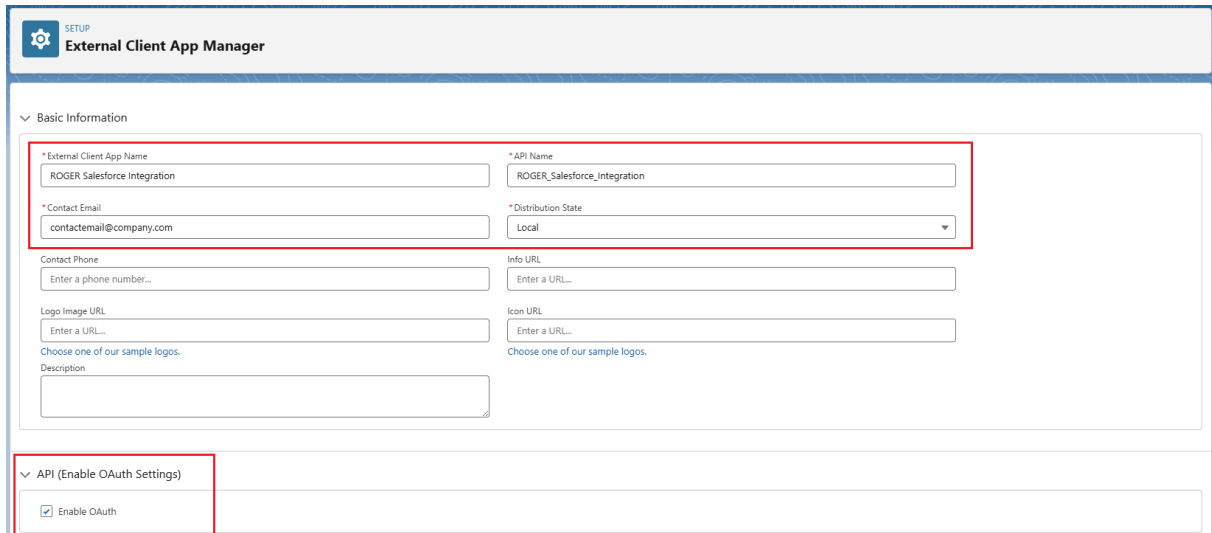


Choose to create new external client app from the button to the right of the page.



Create the app like the example below. Change the email address to your company's email address. Enable API (Enable OAuth Settings) checkbox.

As the Callback URL you can enter no:callback and give the OAuth scope "Manage user data via APIs (api)" & "Perform requests at any time (refresh_token, offline_access)" to the app.



SETUP
External Client App Manager

Basic Information

* External Client App Name
ROGER Salesforce Integration

* API Name
ROGER_Salesforce_Integration

* Contact Email
contactemail@company.com

* Distribution State
Local

Contact Phone
Enter a phone number...

Info URL
Enter a URL...

Logo Image URL
Enter a URL...

Icon URL
Enter a URL...

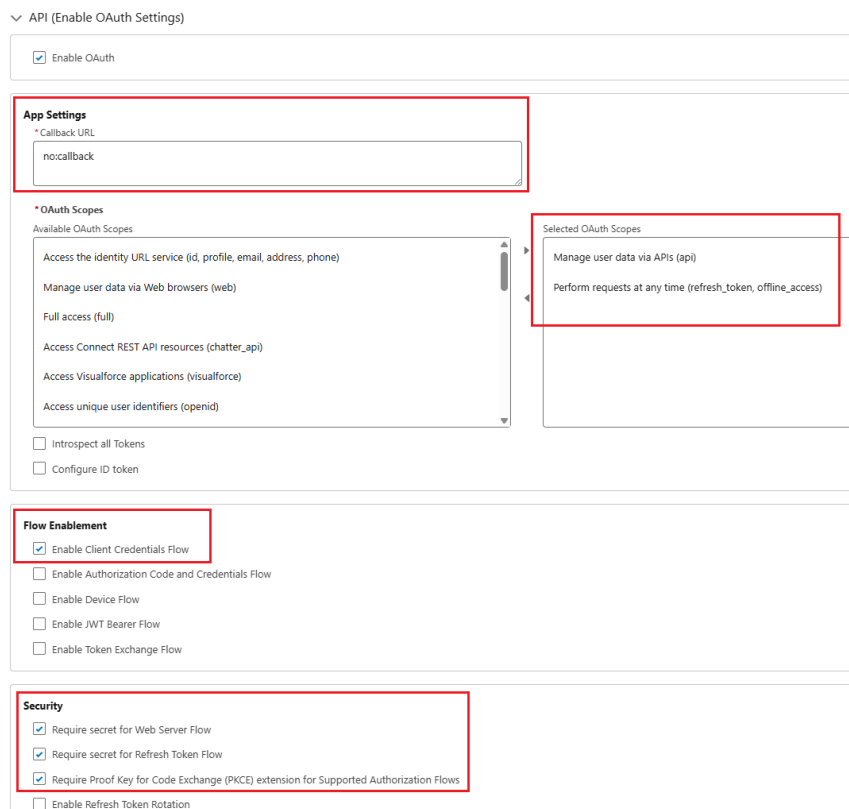
Choose one of our sample logos.

Description

API (Enable OAuth Settings)

☒ Enable OAuth

Make sure to check highlighted checkboxes under "Flow Enablement" & "Security" sections:



API (Enable OAuth Settings)

☒ Enable OAuth

App Settings

* Callback URL
no:callback

* OAuth Scopes

Available OAuth Scopes

- Access the identity URL service (id, profile, email, address, phone)
- Manage user data via Web browsers (web)
- Full access (full)
- Access Connect REST API resources (chatter_api)
- Access Visualforce applications (visualforce)
- Access unique user identifiers (openid)

Selected OAuth Scopes

- Manage user data via APIs (api)
- Perform requests at any time (refresh_token, offline_access)

☐ Introspect all Tokens

☐ Configure ID token

Flow Enablement

☒ Enable Client Credentials Flow

☐ Enable Authorization Code and Credentials Flow

☐ Enable Device Flow

☐ Enable JWT Bearer Flow

☐ Enable Token Exchange Flow

Security

☒ Require secret for Web Server Flow

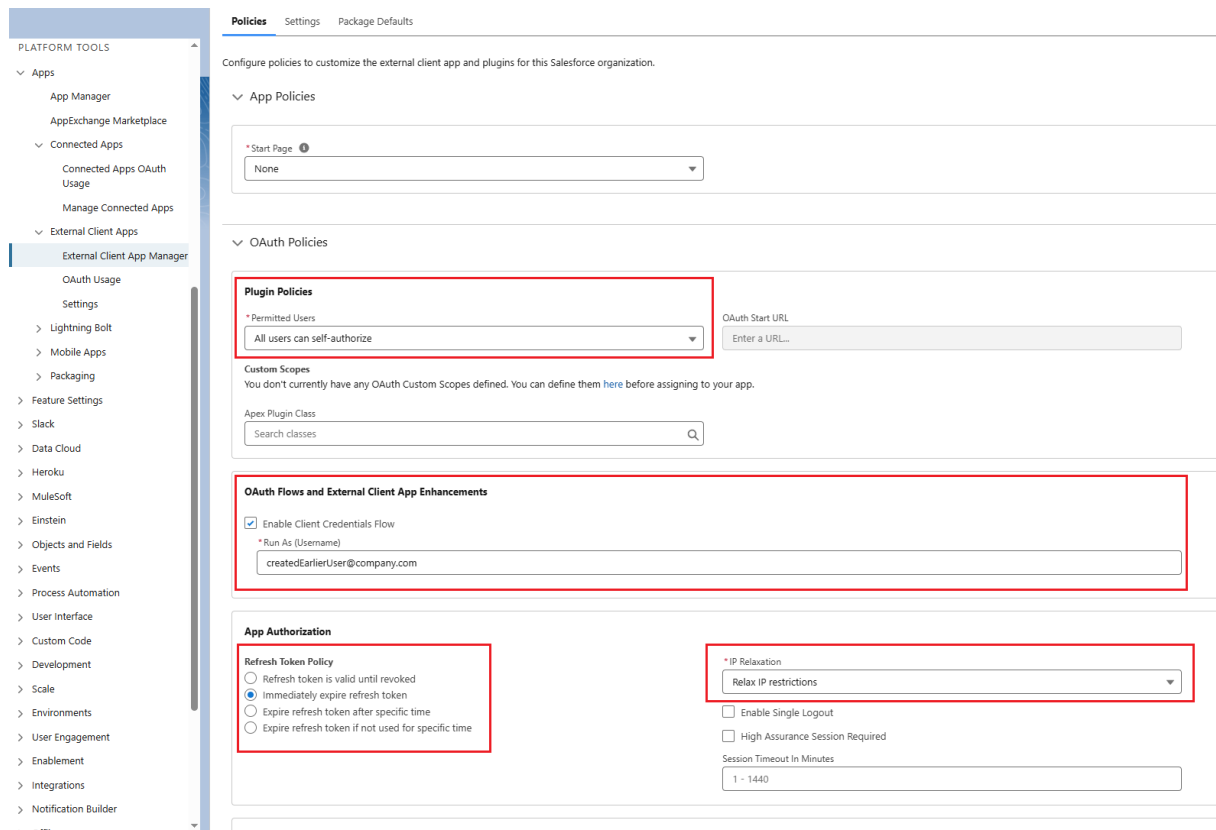
☒ Require secret for Refresh Token Flow

☒ Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows

☐ Enable Refresh Token Rotation

Create External Client App via "Create" button, afterwards you will be redirected to App's overview page.

Navigate to “Policies” tab, press Edit button and configure following options:



PLATFORM TOOLS

- Apps
 - App Manager
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - External Client Apps
 - External Client App Manager**
 - OAuth Usage
 - Settings
 - Lightning Bolt
 - Mobile Apps
 - Packaging
 - Feature Settings
 - Slack
 - Data Cloud
 - Heroku
 - MuleSoft
 - Einstein
 - Objects and Fields
 - Events
 - Process Automation
 - User Interface
 - Custom Code
 - Development
 - Scale
 - Environments
 - User Engagement
 - Enablement
 - Integrations
 - Notification Builder

Policies Settings Package Defaults

Configure policies to customize the external client app and plugins for this Salesforce organization.

App Policies

* Start Page

None

OAuth Policies

Plugin Policies

* Permitted Users

All users can self-authorize

OAuth Start URL

Enter a URL...

Custom Scopes

You don't currently have any OAuth Custom Scopes defined. You can define them [here](#) before assigning to your app.

Apex Plugin Class

Search classes

OAuth Flows and External Client App Enhancements

☒ Enable Client Credentials Flow

* Run As (Username)

createdEarlierUser@company.com

App Authorization

Refresh Token Policy

☐ Refresh token is valid until revoked
☒ Immediately expire refresh token
☐ Expire refresh token after specific time
☐ Expire refresh token if not used for specific time

* IP Relaxation

Relax IP restrictions

☐ Enable Single Logout

☐ High Assurance Session Required

Session Timeout In Minutes

1 - 1440

Permitted Users must be **All user can self-authorize**

Enable Client Credentials Flow **must be enabled**, in Run As field provide created earlier user who has appropriate licenses and rights.

Refresh Token Policy must be set to **Immediately expire refresh token**

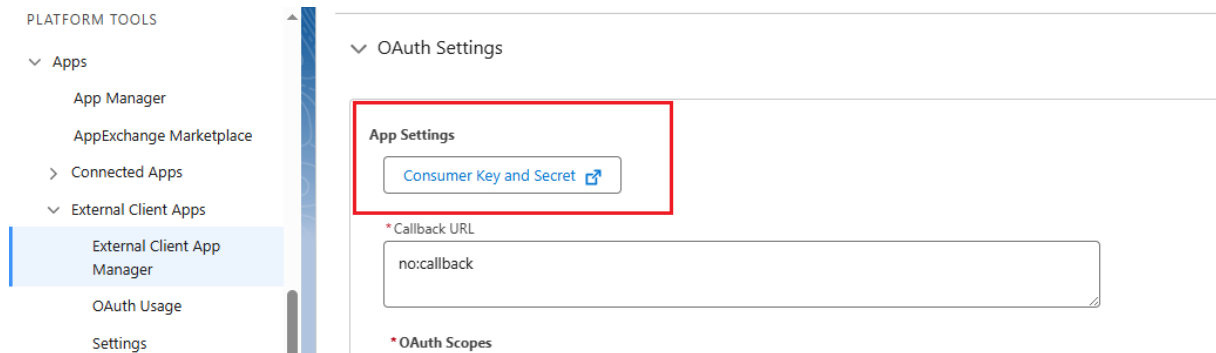
IP Relaxation must be **Relax IP restrictions**

Get the Salesforce Client Id and Client Secret from the External Client App

After creating the External Client App and configuring all required settings, the Client Id and Client Secret must be retrieved for use in ROGER365.io.

Go to Setup -> Apps -> External Client Apps -> External Client App Manager -> go to freshly made application -> Settings

Press the Edit button, open "OAuth Settings" section and locate "Consumer Key and Secret" button:



From the new page, copy and save values of Consumer Key and Consumer Secret.



Create replicator in ROGER365.io

 Create a new Replicator

Name*

Description

Connection configuration

Type*
 Salesforce

Connection Url*

☒ Use Client Credentials Flow

ClientSecret*

ClientId*

Replication configuration

Start Time*

Frequency*
 Day

Interval*
 10

Contact Url

Country Code *
 Netherlands (+31)

Action Buttons

In this screen all the configuration from the previous steps will be used. The red part of the URL must be changed to reflect your environment. **Make sure the 'Use Client Credentials Flow' is enabled to not use the old method.**

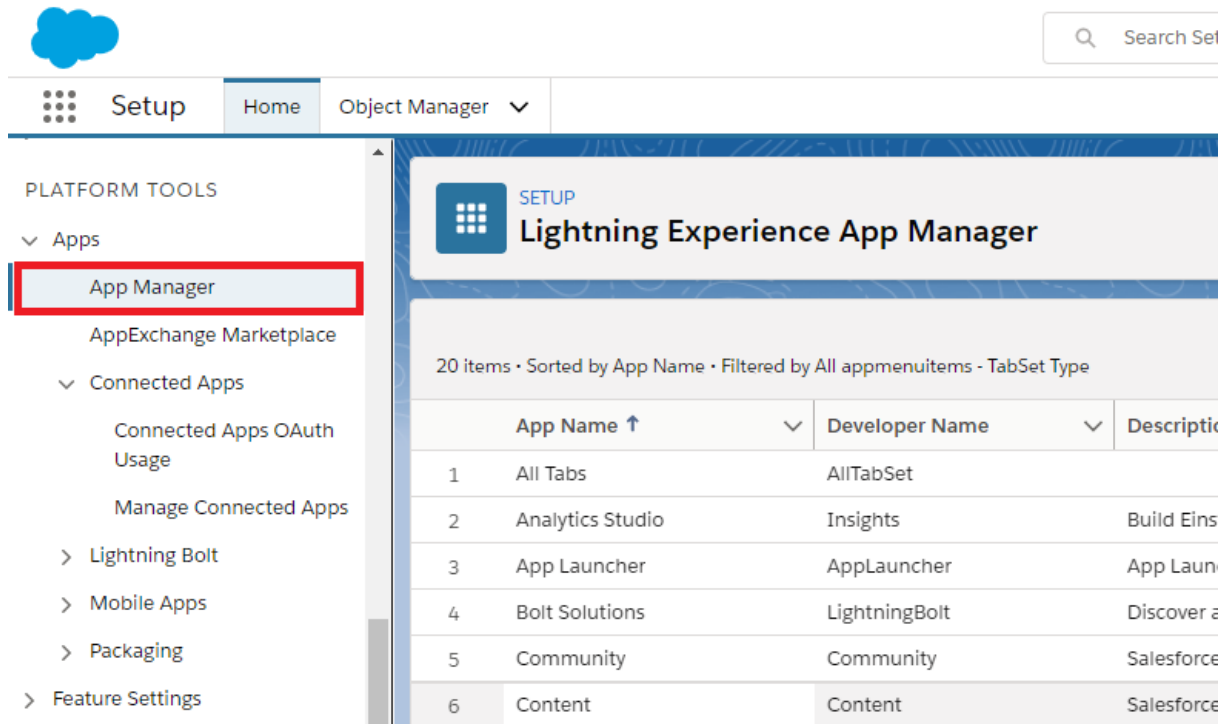
Setting	Value
Connection URL	URL to your Salesforce installation for example: https://<yoururl>.my.salesforce.com/
ClientSecret	Client Secret made earlier with the connected app
ClientId	ClientId made earlier with the connected app
Contact URL	URL to your Salesforce installation for example: https://<yoururl>lightning.force.com/lightning/r/Contact/{contactid}/view
Country Code	All phone numbers must be in E164 format. This setting gives the default country if local phone numbers are used. For more information see ask.roger365.io

(Old method) Create a Salesforce Connected App

Note: Due to changes to Salesforce platform, the Connected App method of integrating Salesforce CRM with ROGER365.io will be deprecated in future. However, you can still configure Connected App until final retirement.

Make sure that your environment allows the creation of Connected App!

Go to gear > setup choose under platform > apps > app manager



Search Set

Setup Home Object Manager

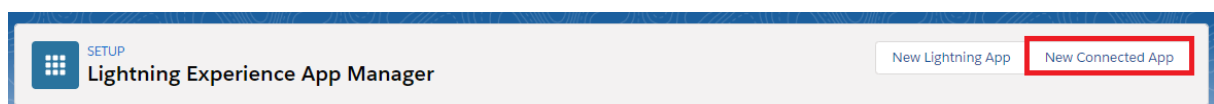
PLATFORM TOOLS

- Apps
 - App Manager**
 - AppExchange Marketplace
- Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
- Lightning Bolt
- Mobile Apps
- Packaging
- Feature Settings

20 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description
1	All Tabs	AllTabSet	
2	Analytics Studio	Insights	Build Eins
3	App Launcher	AppLauncher	App Laun
4	Bolt Solutions	LightningBolt	Discover a
5	Community	Community	Salesforce
6	Content	Content	Salesforce

Choose to create a new connected app from the button to the right of the page.



Lightning Experience App Manager

New Lightning App New Connected App

Create the app like the example below. Change the email address to you companies email address. As the Callback URL you can enter no:callback and also give the OAuth scope “access and manage your data (api)” to the app.



SETUP

App Manager

Connected App Name

Roger365.IO

API Name

R365IO

Contact Email

email@example.com

Contact Phone

Logo Image URL

[Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL

[Choose one of our sample logos](#)

Info URL

Description

API (Enable OAuth Settings)

Enable OAuth Settings

☒

Enable for Device Flow

☐

Callback URL

no:callback

Use digital signatures

☐

Selected OAuth Scopes

Available OAuth Scopes

Access Pardot services (pardot_api)

Access and manage your Chatter data (chatter_api)

Access and manage your Eclair data (eclair_api)

Access and manage your Wave data (wave_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)

Selected OAuth Scopes

Access and manage your data (api)

Add

Remove

Require Secret for Web Server Flow

☒

In some (newer) versions of Salesforce the OAuth scope above is not enough. In that case the following scopes should be chosen.

API (Enable OAuth Settings)

Enable OAuth Settings

☒

Enable for Device Flow

☐

Callback URL

no:callback

Use digital signatures

☐

Selected OAuth Scopes

Available OAuth Scopes

Access Analytics REST API Charts Geodata resources (eclair_api)

Access Analytics REST API resources (wave_api)

Access Connect REST API resources (chatter_api)

Access Lightning applications (lightning)

Access Visualforce applications (visualforce)

Access content resources (content)

Access custom permissions (custom_permissions)

Full access (full)

Manage Pardot services (pardot_api)

Manage Salesforce CDP Ingestion API data (cdp_ingest_api)

Add

Remove

Selected OAuth Scopes

Access the identity URL service (id, profile, email, address, phone)

Access unique user identifiers (openid)

Manage user data via APIs (api)

Require Secret for Web Server Flow

☒

After saving the connected API. You have to click **manage** to change some setting to get it to work.

 **SETUP**
Manage Connected Apps

Connected App Name
Roger365.IO2

[Help for this Page](#)

[« Back to List: Custom Apps](#)

Edit

Delete

Manage

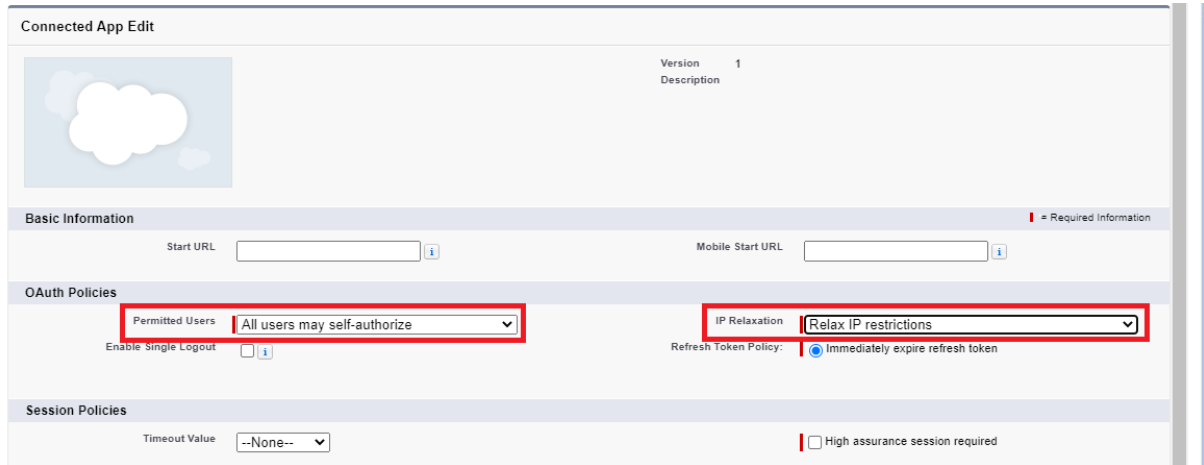


Version	1.0
API Name	R365IO2
Created Date	30-11-2020 09:49
	By: Erwin Wiegman
Contact Email	email@example.com
Contact Phone	
Last Modified Date	30-11-2020 09:49
	By: Erwin Wiegman
Description	
Info URL	

And after that the **edit policies** button to get to the screen below. Please change the following settings under the OAuth Policies:

Permitted Users must be **All user may self-authorize**

IP Relaxation must be **Relax IP restrictions**

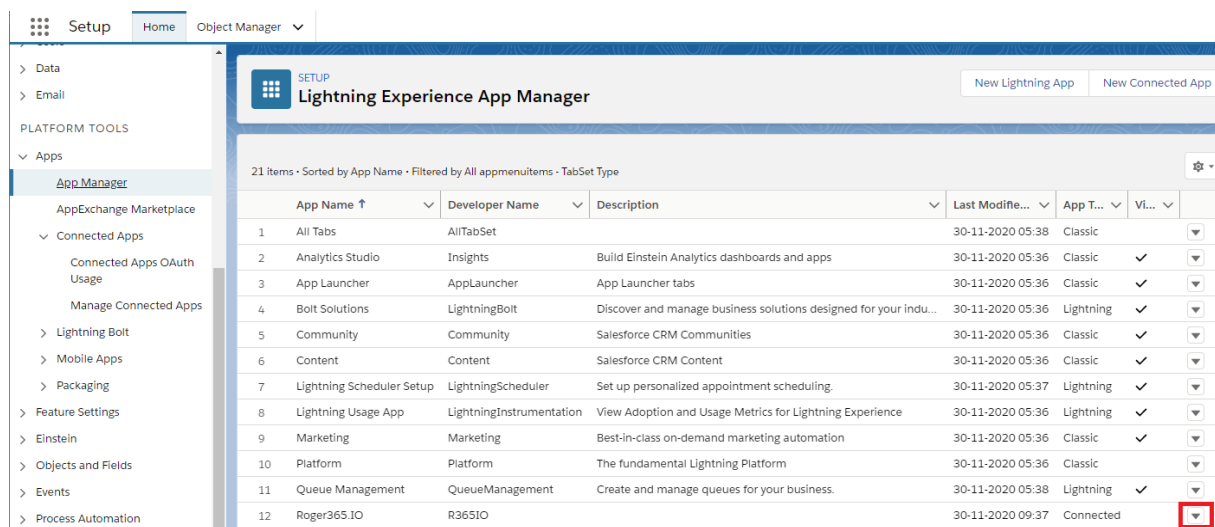


The screenshot shows the 'Connected App Edit' interface. Under the 'OAuth Policies' section, the 'Permitted Users' dropdown is set to 'All users may self-authorize' and the 'IP Relaxation' dropdown is set to 'Relax IP restrictions'. The 'Refresh Token Policy' is set to 'Immediately expire refresh token'. The 'Session Policies' section shows 'Timeout Value' set to '--None--' and 'High assurance session required' is unchecked.

Get the Salesforce client id and client secret from the connected App

After creating the connected app and changing the oAuth policies, the client id and client secret can be retrieved for use in ROGER365.io.

Go to setup > apps > App Manager and click on the icon behind the ROGER365.io app created earlier. Choose the view option from the pull down menu at the end of the line.



The screenshot shows the 'Lightning Experience App Manager' interface. A table lists 21 items, sorted by App Name. The 'Roger365.io' app is highlighted at the bottom of the list. A red box highlights the view icon (three dots) at the end of the 'Roger365.io' row.

	App Name	Developer Name	Description	Last Modified	App Type	Visible	
1	All Tabs	AllTabSet		30-11-2020 05:38	Classic		
2	Analytics Studio	Insights	Build Einstein Analytics dashboards and apps	30-11-2020 05:36	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	30-11-2020 05:36	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your indu...	30-11-2020 05:36	Lightning	✓	
5	Community	Community	Salesforce CRM Communities	30-11-2020 05:36	Classic	✓	
6	Content	Content	Salesforce CRM Content	30-11-2020 05:36	Classic	✓	
7	Lightning Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	30-11-2020 05:37	Lightning	✓	
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	30-11-2020 05:36	Lightning	✓	
9	Marketing	Marketing	Best-in-class on-demand marketing automation	30-11-2020 05:36	Classic	✓	
10	Platform	Platform	The fundamental Lightning Platform	30-11-2020 05:36	Classic	✓	
11	Queue Management	QueueManagement	Create and manage queues for your business.	30-11-2020 05:38	Lightning	✓	
12	Roger365.io	R365IO		30-11-2020 09:37	Connected		

After the selection of the view option in the pull down menu, the screen below is shown



SETUP

Manage Connected Apps

Connected App Name
Roger365.IO

Help for this Page

[Back to List: Custom Apps](#)

EditDeleteManage

Version	1.0
API Name	R365IO
Created Date	30-11-2020 07:16
By:	Erwin Wiegman
Contact Email	ewiegman@askroger.nl
Contact Phone	
Last Modified Date	30-11-2020 09:37
By:	Erwin Wiegman
Description	
Info URL	

API (Enable OAuth Settings)

Consumer Key3MVG9S0w8KEROMvRvCopy

Consumer SecretClick to reveal

Selected OAuth ScopesAccess and manage your data (api)

Enable for Device Flow☐

Introspect All Tokens☐

Include Custom Attributes☐

Enable Single LogoutSingle Logout disabled

Callback URLno:callbackurl

Require Secret for Web Server Flow☒

Token Valid for0 Hour(s)

Include Custom Permissions☐

You can get the Customer Key (client id) and the Consumer secret (client secret) from the interface.

(Old method) Create replicator in ROGER365.io


Create a new Replicator

Name*

Description

Connection configuration

Type*
SalesForce

Connection Url*

☐ Use Client Credentials Flow

Username*

ClientSecret*

Password*

ClientId*

Replication configuration

Start Time*

Frequency*
Day

Interval*
10

Contact Url

Country Code *
Netherlands (+31)

In this screen all the configuration from the previous steps will be used. The red part of the URL must be changed to reflect your environment.

Setting	Value
Connection URL	URL to your Salesforce installation for example: https://<yoururl>.my.salesforce.com/
Username	Username of the Salesforce user made earlier
ClientSecret	Client Secret made earlier with the connected app
Password	Password of the Salesforce user made earlier
ClientId	ClientId made earlier with the connected app
Contact URL	URL to your Salesforce installation for example:



Country Code <https://<yoururl>lightning.force.com/lightning/r/Contact/{contactid}/view>
All phone numbers must be in E164 format. This setting gives the default country if local phone numbers are used. For more information see ask.roger365.io