# Salesforce

Available

(i) Client Integration - VoIPcube client mandatory

### Introduction

User will get a pop-up on incoming calls

- Can make a note directly from the popup
- deeplink to contact page in salesforce
- (optional) auto-open deeplink to contact page
- Option to directly create a contact when no match is found

## Configuration

The Salesforce koppeling works with Oauth2.0. This means that users will log in with their own credentials. VolPcube will automatically present the login screen when required.

A one-time configuration in Salesforce is needed.

Get administration rights in the Salesforce account, or let the salesforce administrator execute the steps below).

• Go to Setup > Apps > App Manager

Setup	Home	Object M	lanager 🦄
Service Setup Assistan Multi-Factor Authentic Release Updates	t ation Assis	;tant	
Lightning Experience T Assistant New Salesforce Mobile	ransition	kStart	28 items
Lightning Usage Optimizer			1
ADMINISTRATION			3
> Data > Email			5
PLATFORM TOOLS			7 8
App Manager			9 10

#### • Top right click 'New Connected App'

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	SETUP Lightning Exp	erience App Mana	ager	Nev	v Lightning App Ne	w Connect	ted
28 ite	ms • Sorted by App Name • f	iltered by All appmenuitems - 1	abSet Type				
	App Name † 🛛 🗸	Developer Name $~~ \lor$	Description	∠ Last Modifi ∨	Арр Туре 🗸 🗸	Vi V	,
1	All Tabs	AllTabSet		18-03-2022 20:07	Classic		
2	Analytics Studio	Insights	Build Tableau CRM dashboards and apps	18-03-2022 20:07	Classic	~	
3	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based command-line utility for moving metadata between a local directory and a Salesforce organization.	21-03-2022 10:29	Connected (Managed)		
4	App Launcher	AppLauncher	App Launcher tabs	18-03-2022 20:07	Classic	~	
	Della Coloriana	LinhtningDalt	Discourse and measure business solutions designed for your industry	10.02.2022.20:00	Linhtaina		

• Enter the mandatory fields. E.g.

Connected App Name	Dstny VolPcube	1
API Name	Dstny_VolPcube	
Contact Email	support@dstny.nl	

- At the API section API. click on 'Enable OAuth settings'.
  - for callback url enter the following https://voipcube.nl/authorize
  - for scopes choose: Manage user data via APIs (api) + Perform requests at any time (refresh\_token, offline\_access)
  - Check require secret for web server flow
  - Check require secret for refresh token flow

API (Enable OAuth Settings)		
Enable OAuth Settings		
Enable for Device Flow		
Callback URL®	https://voipcube.nl/authorize	
	1	
Use digital signatures		
Selected OAuth Scopes	Available OAuth Scopes	Selected OAuth Scopes
	Access Analytics REST API Charts Geodata resources (eclair_api) Access Analytics REST API resources (wave_api) Access Connect REST API resources (charter_api) Access Lightning applications (lightning) Access Visualforce applications (visualforce) Access charbot services (charbot_api) Access content resources (content) Access content resources (content) Access the identity URL service (id, profile, email, address, phone) Access unique user identifiers (openid)	Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access) Add Remove
Require Secret for Web Server Flow		
Require Secret for Refresh Token Flow		
Introspect All Tokenso		
Configure ID Token 🖗		
Enable Asset Tokens		
Enable Single Logout	0	

- Leave the other options unmarked and press 'save'
- After saving you can see the consumer key + consumer secret. Make sure to store these.

Changes can take up to 10 minutes to take effect. Dele	Edit Dele sting a parent org also deletes all connected apps with C	te Manage Auth settings enabled.				
	Version	1.0				
	API Name	Dstny_VolPcube				
	Created Date	18-03-2022 21:16				
		By: Menno Janssen				
47	Contact Email	menno.janssen@dstny.nl				
	Contact Phone	+31880551615				
	Last Modified Date	21-03-2022 15:04				
		By: Menno Janssen				
	Description					
	Info URL					
▼ API (Enable OAuth Settings)						
Consumer Key	3MVG9t0sl2P.pByoDrBXAOzbUkDo8rj6e8paePKypYI0 Copy	CIQaJ13KguXb8V2hiFrZvGymPm_huAYfcLwD01iyPw	Consumer Secret	B0E9134FA82CA59527850F2A0EFF503E0BCE634B60F72E4A4D3786F923CB7A49 Copy		
Selected OAuth Scopes	Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_ar	ccess)	Callback URL	https://voipcube.nl/authorize		
Enable for Device Flow			Require Secret for Web Server Flow			

• Go to Setup > Apps > Connected Apps > Manage Connected Apps



- Click on the connected app you just created and click 'edit policies'
  Data
  System Info
- Adapt the configuration with the options provided below:
  - Permitted Users > All users may self authorize
  - → Appimeout Value > 24 hours
  - Refresh Token Policy > expire terms token if not used for 10 days

₽ ₽			Version 1 Description		
sic Information					= Required
	Start URL	<u> </u>	Mobile Start URL	1	
Auth Policies					
Er	Permitted Users nable Single Logout	All users may self-authorize	IP Relaxation Refresh Token Policy:	Enforce IP restrictions	
ssion Policies					
	Timeout Value	24 hours v		High assurance session required	
stom Connected App Hand	ller				
	Apex Plugin Class Run As	1 2 a			
ser Provisioning Settings					
Enable User Provisioning 1					
		Save			

- Click Save.
- Lastly we need the Salesforce domain of the customer. You can find this in the URL. See below example where the domain is between https:// and .lightning.so for this example destinybv-dev-ed

https://destinybv-dev-ed.lightning.force.com/lightning/r/Contact/0037Q000007CLL8QAO/view

• We now have all the info to configure salesforce\

#### Assignment