

Salesforce

Available

 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

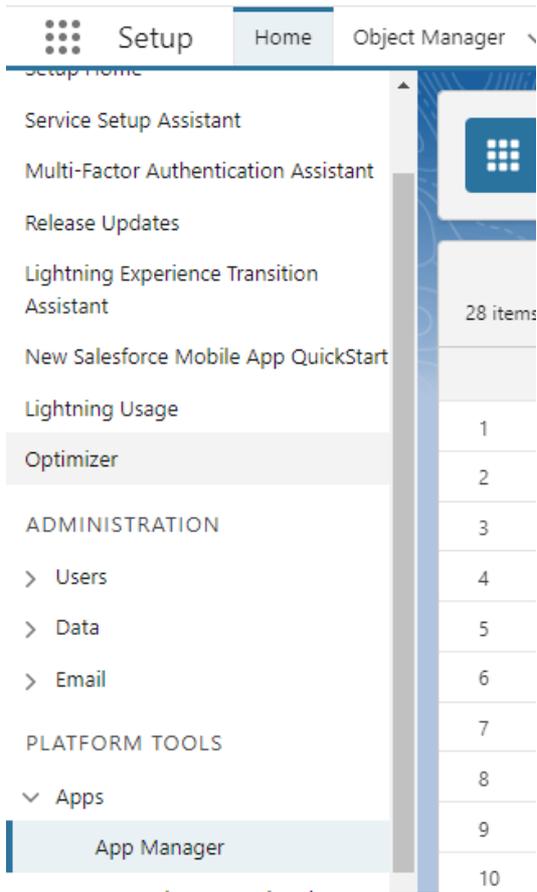
Configuration

The Salesforce koppeling works with Oauth2.0. This means that users will log in with their own credentials. VoIPcube 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



- Top right click 'New Connected App'



- Enter the mandatory fields. E.g.

Connected App Name

API Name

Contact Email

- 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

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 chatbot services (chatbot_api)
- Access content resources (content)
- Access custom permissions (custom_permissions)
- Access the identity URL service (id, profile, email, address, phone)
- Access unique user identifiers (openid)

Selected OAuth Scopes

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

Require Secret for Web Server Flow

Require Secret for Refresh Token Flow

Introspect All Tokens

Configure ID Tokens

Enable Asset Tokens

Enable Single Logout

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

dstny voip cube

[Back to List](#) [Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

Version 1.0

API Name Dstny_VoIPcube

Created Date 18-03-2022 21:18

Contact Email memo.janssen@dstny.nl

Contact Phone +31820551615

Last Modified Date 21-03-2022 15:04

Description

Info URL

API (Enable OAuth Settings)

Consumer Key [Copy](#)

Consumer Secret [Copy](#)

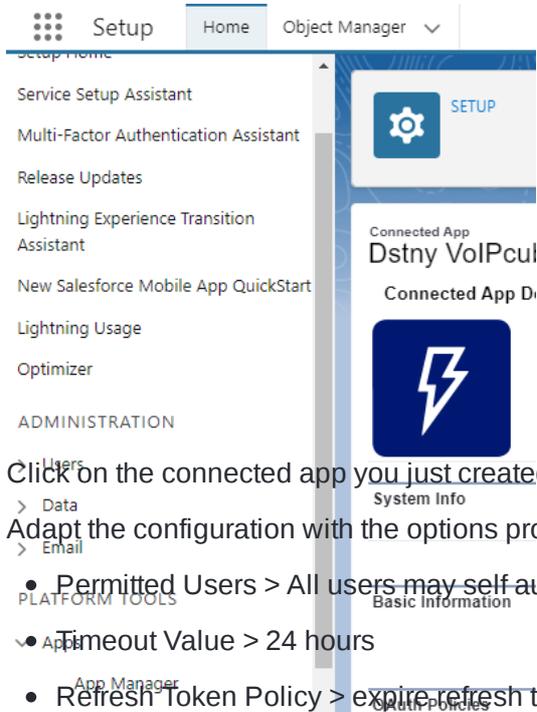
Selected OAuth Scopes Manage user data via APIs (api)
Perform requests at any time (refresh_token, offline_access)

Callback URL

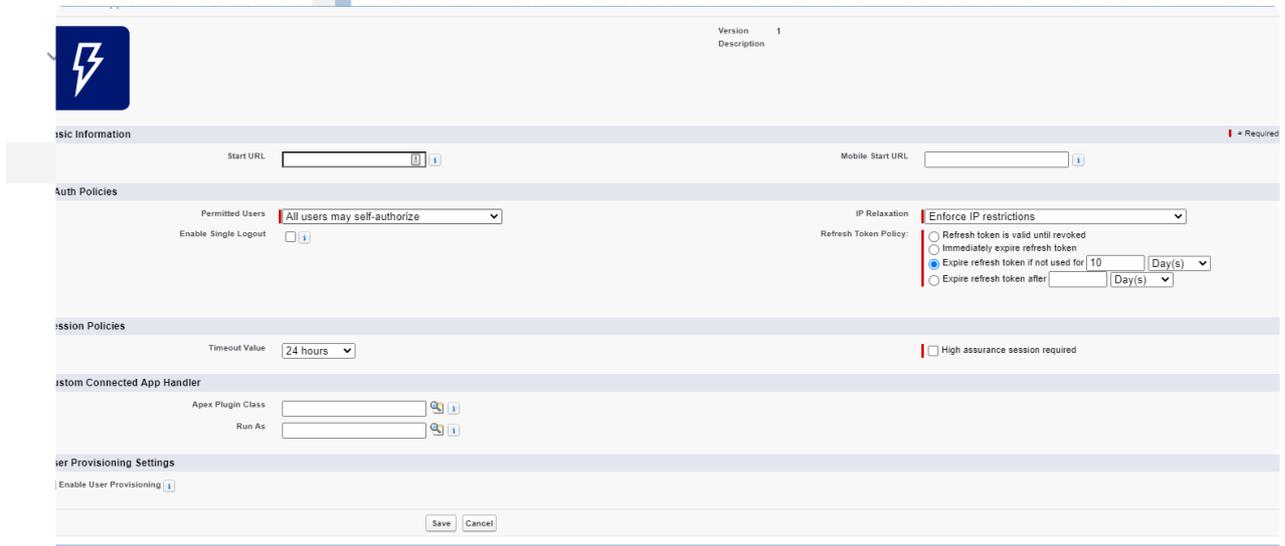
Enable for Device Flow

Require Secret for Web Server Flow

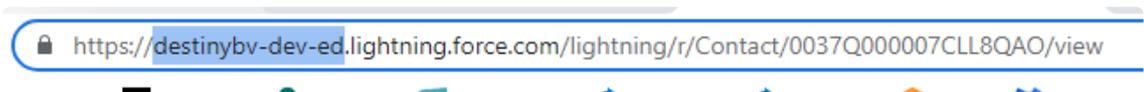
- Go to Setup > Apps > Connected Apps > Manage Connected Apps



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



- 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`



- We now have all the info to configure salesforce!

Assignment