

Salesforce Integration in wazzl

Introduction

To enable Salesforce integration in wazzl, The OAuth 2.0 Client Credentials Flow for Server-to-Server Integration is used. [sf](#)

Prerequisites

- Salesforce admin access.
- A Salesforce Developer, Enterprise, or Unlimited Edition organization.

Step-by-Step Guide

Step 1: Log in to Salesforce

1. Log in to your Salesforce account.
2. Navigate to the Salesforce Setup page by clicking on the gear icon in the upper-right corner and selecting Setup.

Step 2: Create a New Connected App

1. In the Setup page, enter App Manager in the Quick Find box and select App Manager.
2. Click on New Connected App in the top right corner.

Step 3: Configure the Connected App

1. Basic Information:
 - Connected App Name: Enter a name for your app.
 - API Name: This will auto-populate based on the connected app name.
 - Contact Email: Enter your email address.
2. API (Enable OAuth Settings):
 - Check the box Enable OAuth Settings.
 - Callback URL: Enter <https://login.salesforce.com/services/oauth2/callback> (will not be used but it is mandatory to be set).
 - Selected OAuth Scopes: Add full access (full) and any other required scopes.
3. Enable Client Credentials Flow:
 - Ensure Enable Client Credentials Flow is selected.
 - Select an execution user for the flow.
4. Save the Connected App:
 - Click Save.
 - After saving, you may need to wait a few minutes for the changes to take effect.

- click Continue to go to the connected app details page.

5. Manage Policies

- Once the connected app is created, go to the App Manager.
- Find your newly created connected app and click on the dropdown arrow at the end of the row, then select View.
- Click on Manage then on Edit Policies.
- Set the Permitted Users to Admin approved users are pre-authorized.
- Set the IP Relaxation to Relax IP restrictions.
- in Client Credentials Flow Section, select the profiles that can use the connected app.
- Save the changes.

Step 4: Retrieve Client ID and Client Secret

1. Once the connected app is created, go to the App Manager.
2. Find your newly created connected app and click on the dropdown arrow at the end of the row, then select View.
3. Under the API (Enable OAuth Settings) section, you will find your Consumer Key (Client ID) and Consumer Secret (Client Secret). Click on Manage Consumer Details to reveal to view the Client Secret.

Step 5: Get the Salesforce Instance URL

1. Log in to Salesforce.
2. Look at the URL in your browser's address bar. It should look something like this:
<https://yourInstance.salesforce.com>
3. The part before salesforce.com (e.g., yourInstance) is your instance URL.

Step 6: Configure Salesforce Integration in wazzl

1. In the wazzl application, login as a realm manager.
2. navigate to the configuration page for a realm.
3. Click on Integrations tab and then click on the Salesforce Icon.
4. Activate Salesforce by clicking on the Activate button.
5. Enter the Client ID, Client Secret, and Salesforce Instance URL.
6. Save the settings.

Step 8: Test the Salesforce Integration

1. In the wazzl application, login as a realm manager.
2. navigate to the contacts page for a realm.
3. Click on the button Export to Salesforce to upload contacts into Salesforce.