

# Salesforce Integration

## Overview

The Salesforce integration enables you to monitor your Salesforce instance. Salesforce is a customer relationship management (CRM) platform that supports businesses in managing marketing, sales, commerce, service, and IT teams from a unified platform accessible from anywhere

- Make sure API Enabled permission is selected for the user profile in your Salesforce instance:
  1. Go to **Setup > Quick Find** and type **Users**.
  2. Select **Users** from the left navigation tree.
  3. In the **Full Name** column, select the name associated with the user account used for data collection
  4. Search for the **API Enabled** permission on the profile page. If it's not present, search under **System Permissions** and check if the API Enabled privilege is selected. If not, enable it for data collection.
- Make sure that collecting data using Real-Time Event Monitoring API (external, opens in a new tab or window) is enabled:
  1. Go to **Setup > Quick Find** and type **Event Manager**
  2. Select **Event Manager** from the left navigation tree
  3. To monitor an event, for example, Login Event, or Logout Event, click the dropdown arrow and select **Enable Storage**.
  4. Check if you have the required permissions: **View Real-Time Event Monitoring Data**

## Configuration

To configure the Salesforce integration, you need the following information:

- Salesforce instance URL
- Client key and client secret for authentication
- Username
- Password
- Token URL
- API version

### 1. Salesforce instance URL:

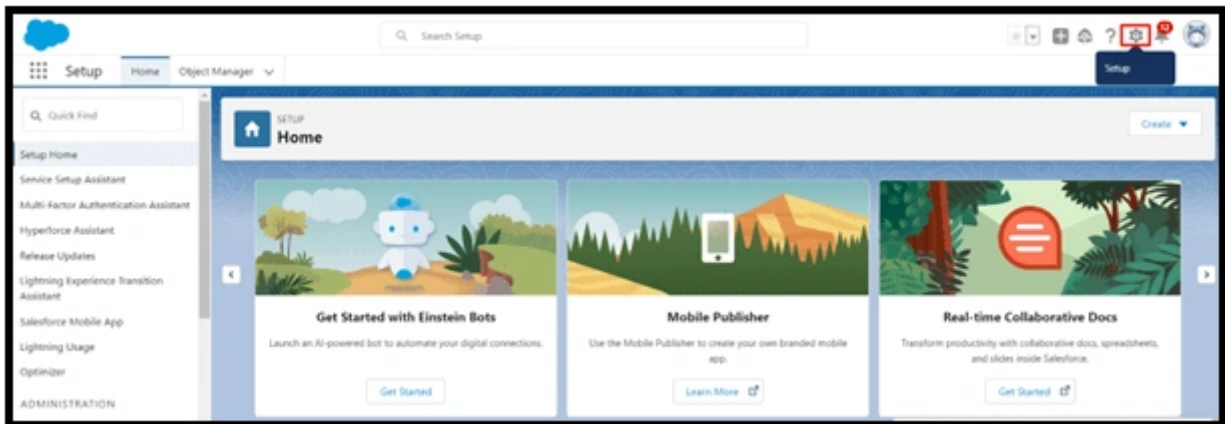
This is the URL of your Salesforce Organization.

- Salesforce Classic: Given the example URL **https://na9.salesforce.com/home/home.jsp**, the Salesforce Instance URL is extracted as **https://na9.salesforce.com**.

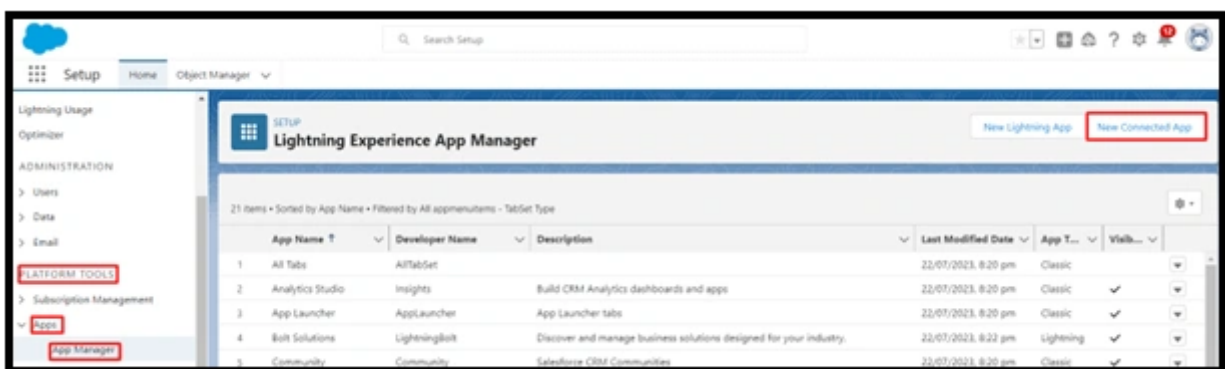
## 2. Client key and client secret for authentication

To use this integration, you need to create a new Salesforce Application using OAuth. Follow these steps to create a connected application in Salesforce:

- Log in to Salesforce with the user credentials you want to collect data with.
- Click **Setup** in the top right menu bar.



- In the **Search Setup** box, search for **App Manager** and select it.
- Click **New Connected App**, and fill in the details:
- Enter the API name. The default is a version of the name without spaces. Only letters, numbers, and underscores are allowed. If the original app name contains any other characters, edit the default name.
- Enter the contact email for Salesforce.



- Under the **API (Enable OAuth Settings)** section, check the box for **Enable OAuth Settings**.
- In the **Callback URL** field, enter the instance URL as specified in **Salesforce instance URL**
- Select the following OAuth scopes to apply to the connected app:
  - **Manage user data via APIs (api)**
  - **Perform requests at any time (refresh\_token, offline\_access)**
  - (Optional) If you encounter any permission issues during data collection, add the **Full access (full)** scope.

- Select **Require Secret for the Web Server Flow** to require the app's client secret in exchange for an access token.
- Select **Require Secret for Refresh Token Flow** to require the app's client secret in the authorization request of a refresh token and hybrid refresh token flow.
- then select **Manage Consumer Details** under **API details**. Verify the user account by entering the Verification Code.
- Copy the **Consumer Key** and **Consumer Secret** from the Consumer Details section. These values should be used as the Client ID and Client Secret, respectively, in the configuration.
- Click **Save**. It may take approximately 10 minutes for the changes to take effect. Then Click **Continue**.

**SETUP**  
**Manage Connected Apps**

Connected App Name  
**Integration App**

[Save](#) [Cancel](#)

**Basic Information**

Connected App Name

API Name

Contact Email

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

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 Headless Forgot Password API (forgot\_password)
- Access Headless Registration API (user\_registration\_api)
- Access Interaction API resources (interaction\_api)
- Access Lightning applications (lightning)

**Selected OAuth Scopes**

- Full access (full)

[Add](#) [Remove](#)

- Then select **Manage Consumer Details** under **API details**. Verify the user account by entering the Verification Code.

## Verify Your Identity

You're trying to **Access a Connected App**. To make sure your Salesforce account is secure, we have to verify your identity.

Enter the verification code we emailed to sh\*\*\*\*\*@\*\*\*il.com.

Verification Code

Back

Verify

[Resend Code](#)

- Copy the **Consumer Key** and **Consumer Secret** from the Consumer Details section.

Connected App Name

Integration App

[« Back to Manage Connected Apps](#)

Consumer Details

Consumer Key

Copy

Consumer Secret

Copy

Staged Consumer Details

Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

Staged Consumer Key

Not generated

Staged Consumer Secret

Not generated

Generate

Apply

Cancel

### 3. Username

The User ID of the registered user.

## 4. Password

The password used to authenticate the user with your Salesforce instance.

Note:

When using a Salesforce instance with a security token, append the token directly to your password without spaces or special characters. For example, if your password is **Password** and your security token is **12345** enter: **Pasword12345**

## 5. Token URL

- Use the token URL to obtain authentication tokens for API access.
- For most Salesforce instances, the token URL follows this format:  
<https://login.salesforce.com/services/oauth2/token>.
- If you're using a Salesforce sandbox environment, use <https://test.salesforce.com/services/oauth2/token> instead.
- For custom Salesforce domains, replace **login.salesforce.com** with your custom domain name. For example, if your custom domain is **mycompany.my.salesforce.com**, the token URL becomes **https://mycompany.my.salesforce.com/services/oauth2/token**. This applies to Sandbox environments as well.
- In the Salesforce integration, we internally append **/services/oauth2/token** to the URL. Make sure that the URL you provide in the Salesforce integration is the base URL without the **/services/oauth2/token** part. For example, if your custom domain is **mycompany.my.salesforce.com**, the complete token URL would be **https://mycompany.my.salesforce.com/services/oauth2/token**, but the URL you provide in the Salesforce integration should be **https://mycompany.my.salesforce.com**. In most cases, this is the same as the Salesforce instance URL.

NOTE: Salesforce Lightning users must use URL with \*.salesforce.com domain (similar to the Salesforce instance URL) instead of \*.lightning.force.com because the Salesforce API does not work with \*.lightning.force.com.

## 6. API Version

To find the API version:

- Go to **Setup > Quick Find > Apex Classes**.
- Click **New**.
- Click the **Version Settings** tab.
- Refer to the **Version** dropdown for the API Version number.

**Please provide these credential requirements to CyTech Support:**

- Salesforce instance URL
- Client key and client secret for authentication
- Username

- Password
- Token URL
- API version

References: <https://www.integrate.io/blog/salesforce-rest-api-integration/>

*If you need further assistance, kindly contact our support at [support@cytechint.com](mailto:support@cytechint.com) for prompt assistance and guidance.*

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Revision #4

Created 16 July 2025 12:21:38 by Albert Alombro

Updated 17 July 2025 12:57:57 by Richmond Abella