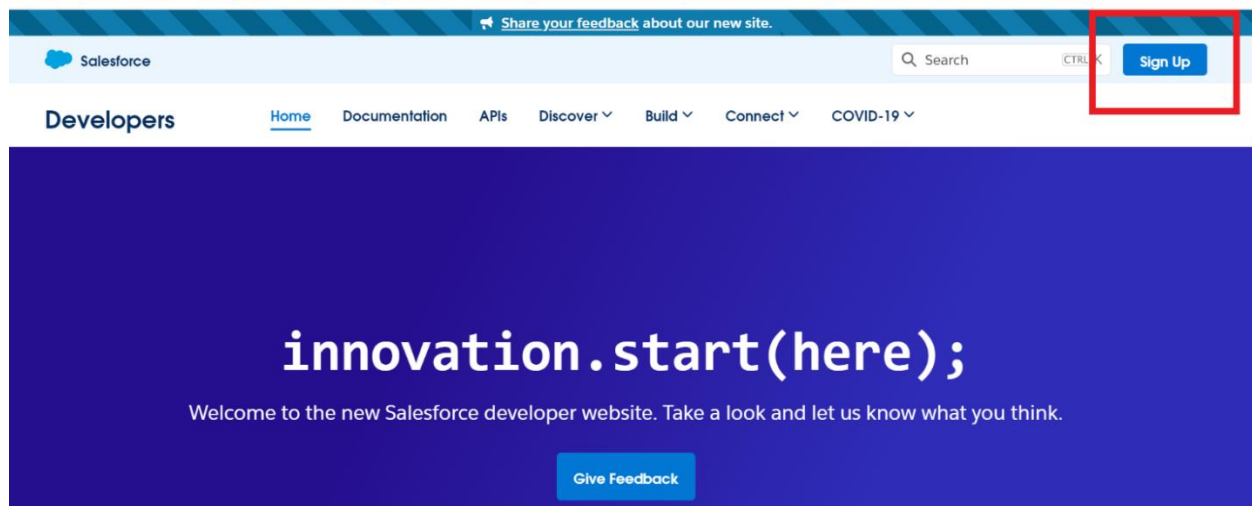


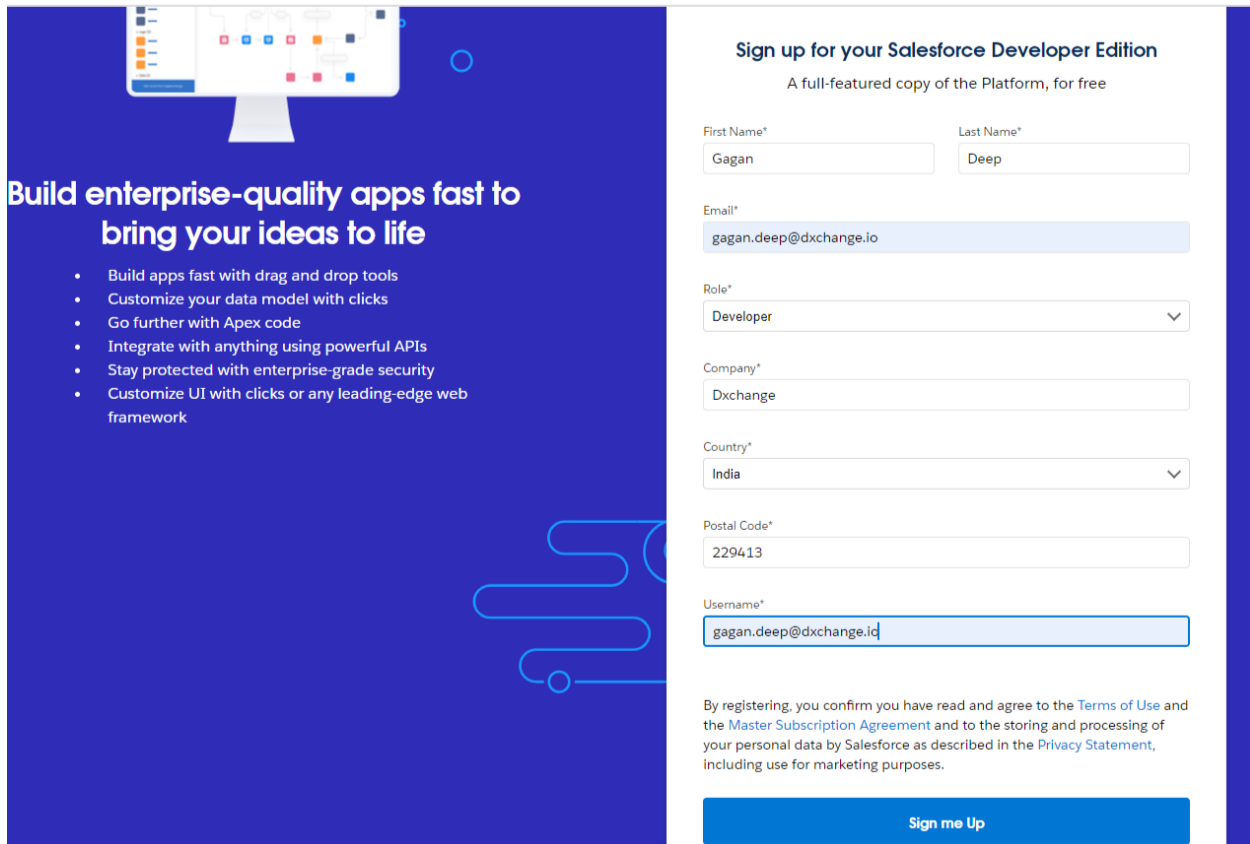
Salesforce

Salesforce Setup

- Sign up for a salesforce account using <https://developer.salesforce.com/>. If you use editions other than developer edition, you will have to request Salesforce support to enable API Access as it's not enabled by default.



- Provide all required fields and a valid email address.



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- Integrate with anything using powerful APIs
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- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

First Name*
Gagan

Last Name*
Deep

Email*
gagan.deep@dxchange.io

Role*
Developer

Company*
Dxchange

Country*
India

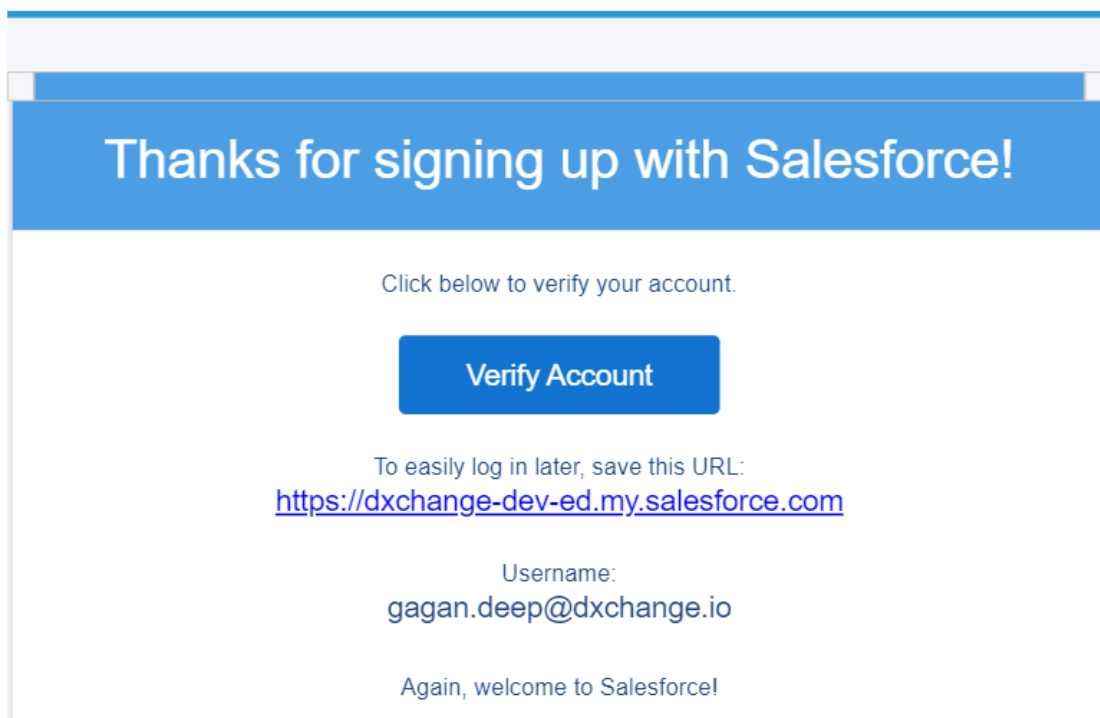
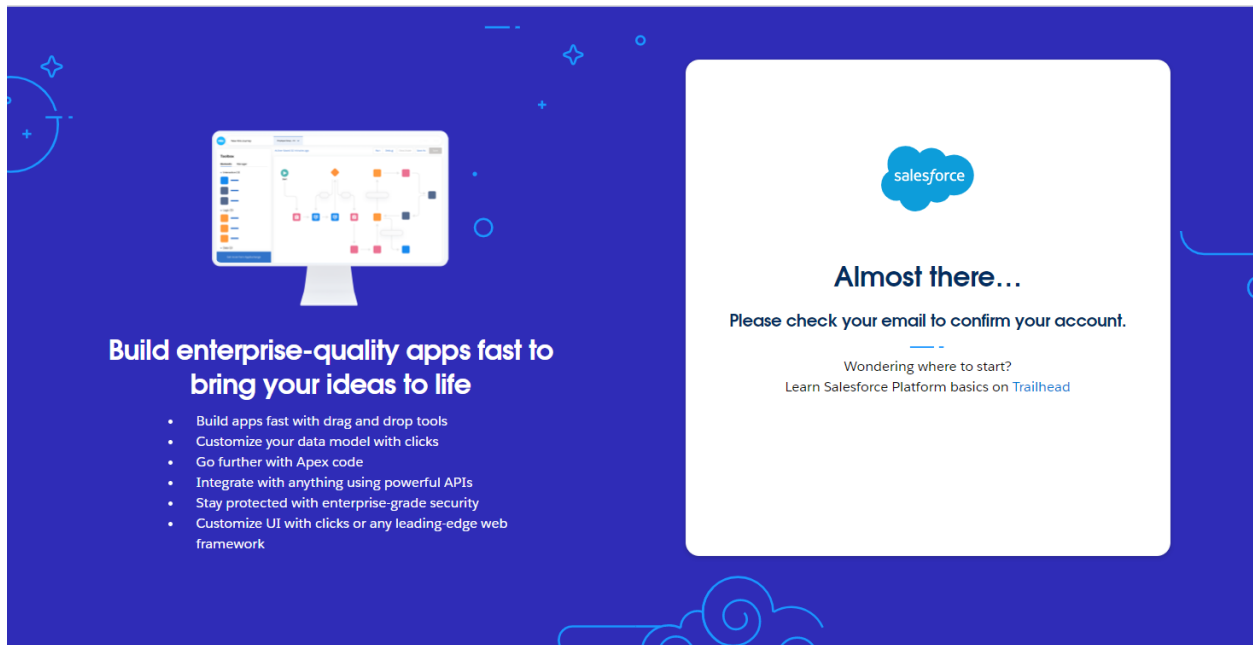
Postal Code*
229413

Username*
gagan.deep@dxchange.io


By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Sign me up

- Once you click on Sign me up, you will get an email.



- Verify account by clicking on Verify Account button in the email.
- Set password to your account



Change Your Password

Enter a new password for **gagan.deep@dxchange.io**.
Make sure to include at least:

- ☐ 8 characters
- ☐ 1 letter
- ☐ 1 number

* New Password

* Confirm New Password

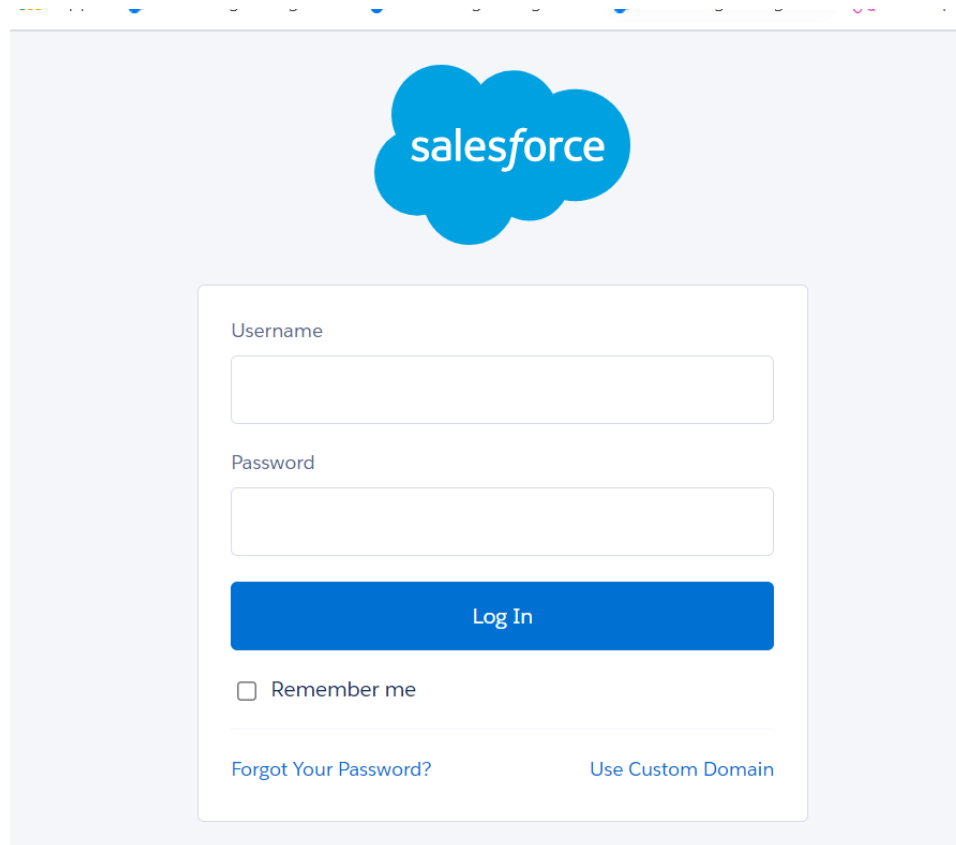
Security Question

▼ In what city were you born?

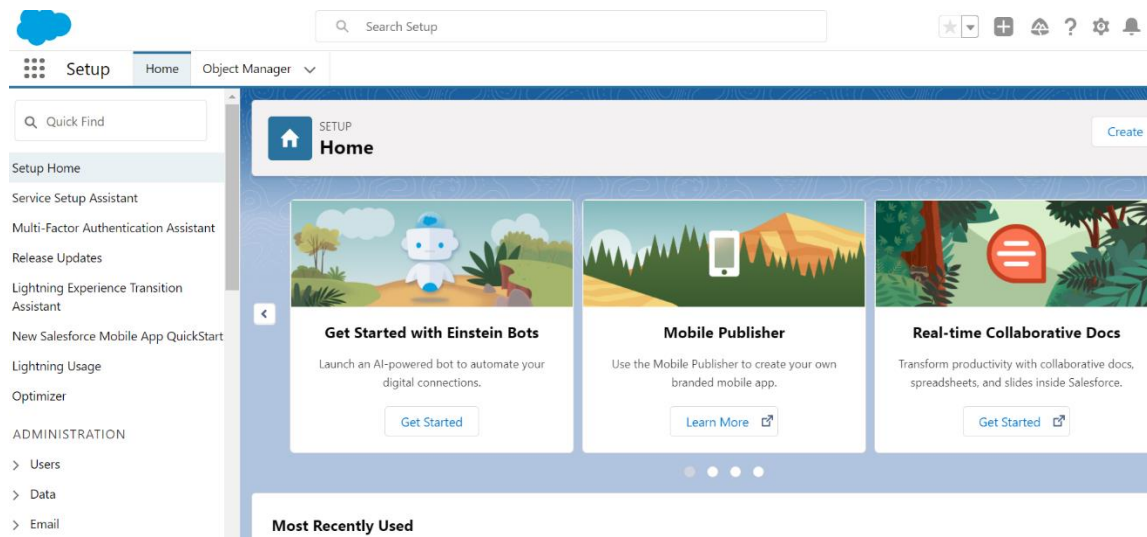
* Answer

Change Password

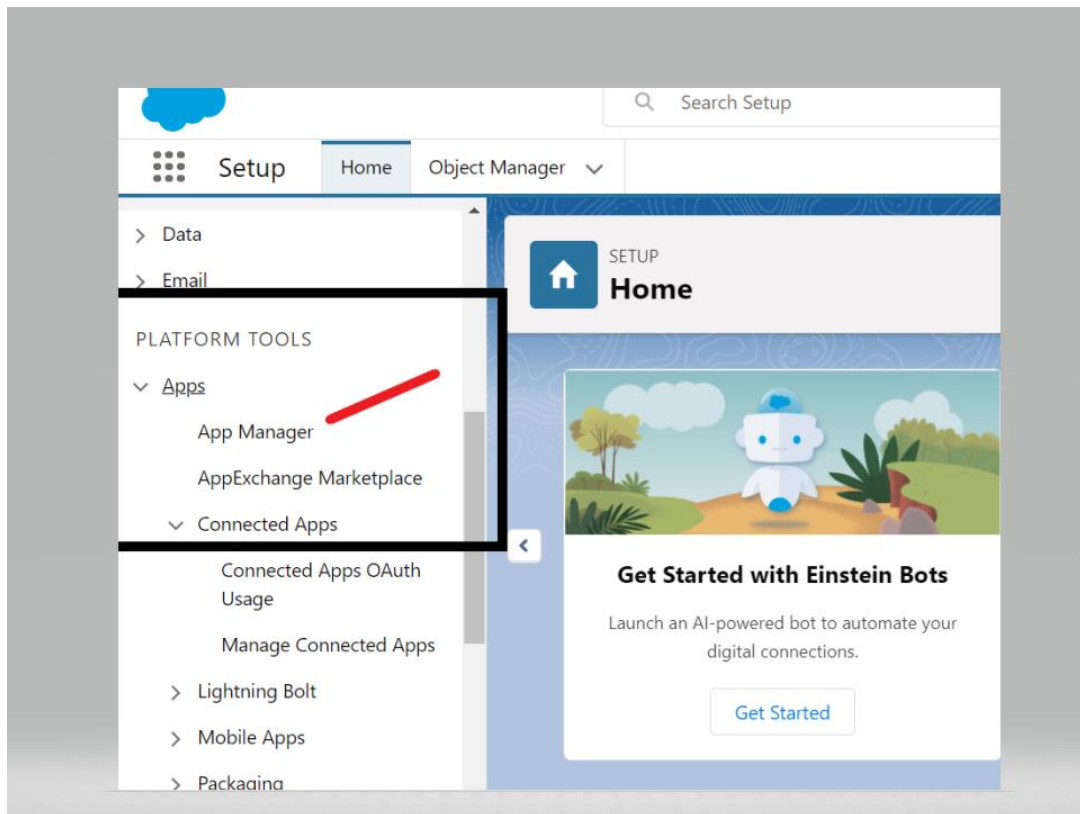
- Now you are able to login to your salesforce developer account.
- Go to <https://login.salesforce.com>.
- Enter your Username and Password click on Login.



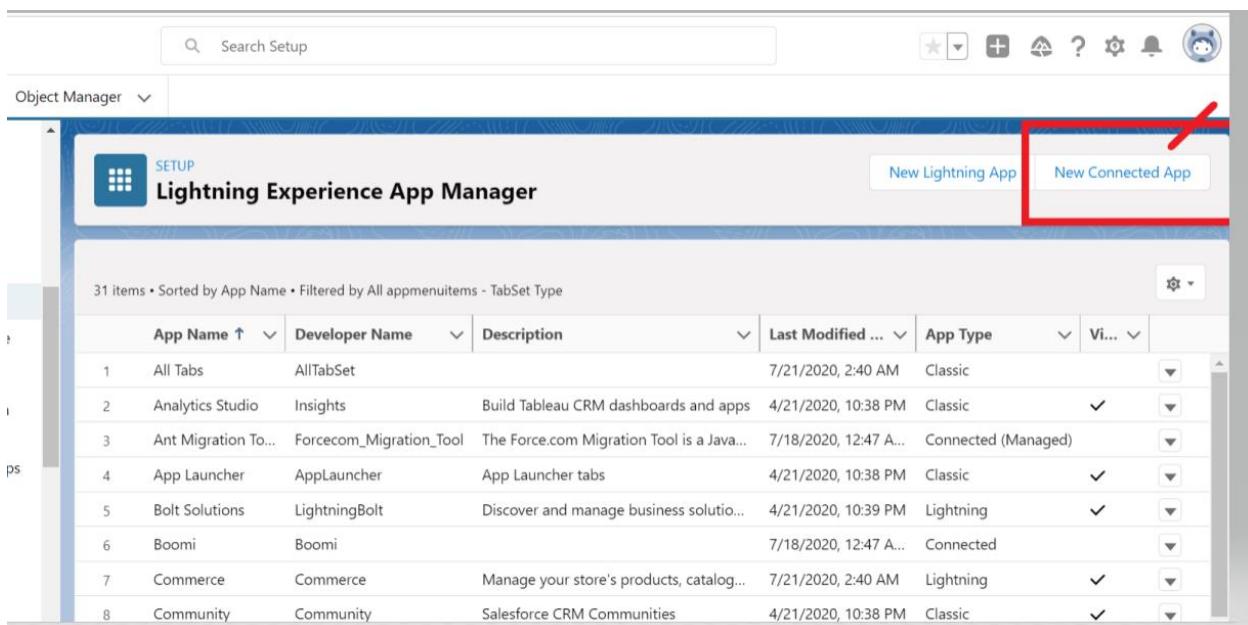
- After Login, you will get verification code to your registered email account. Fill the code and verify.



- In the left navigation panel, Under Apps, Click on App Manager to create a new app or edit existing app



➤ Click New connected App for creating a new app



- Fill up the required fields in the Basic Information

The screenshot shows the 'Manage Connected Apps' setup page with the 'Basic Information' tab selected. The page has a blue header with a 'SETUP' button and the title 'Manage Connected Apps'. A legend indicates that red bars next to field labels denote 'Required Information'. The fields are as follows:

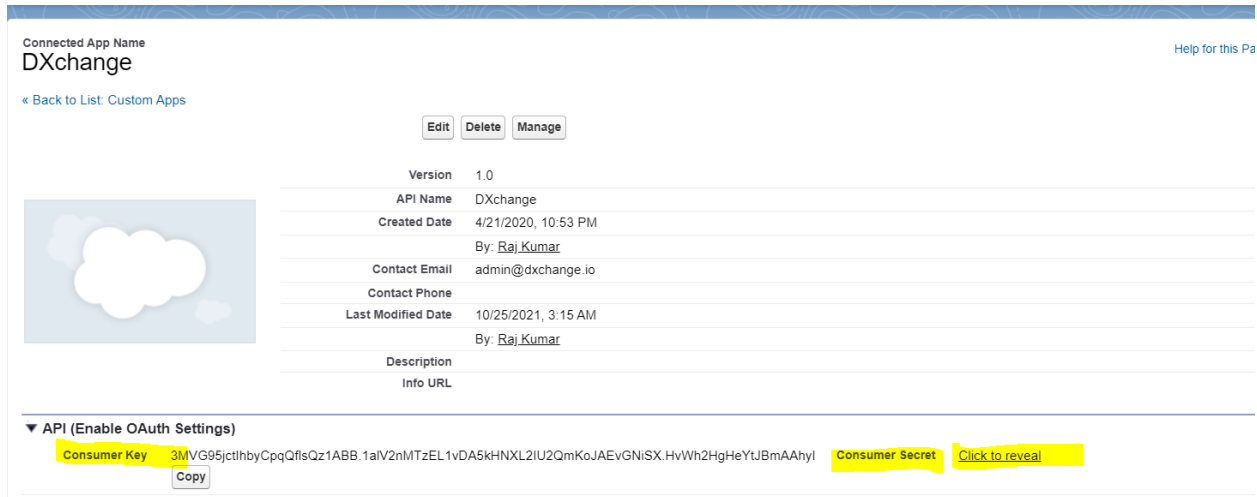
- Connected App Name: DXchange (required)
- API Name: DXchange (required)
- Contact Email: admin@dxchange.io (required)
- Contact Phone: (empty)
- Logo Image URL: (empty, with a link to 'Upload logo image or Choose one of our sample logos')
- Icon URL: (empty, with a link to 'Choose one of our sample logos')
- Info URL: (empty)
- Description: (empty)

- Enable OAuth Settings should be checked.
- Enter the Callback URL. For example, if your access URL is <https://test.dxchange.cloud>, your callback URL will be <https://test.dxchange.cloud/design/oauth2/callback>
- Choose the following scopes in the Selected available OAuth Scopes.
 - Full access (full)
 - Manage user data via APIs (api)
 - Perform requests at any time (refresh_token, offline_access)

The screenshot shows the 'API (Enable OAuth Settings)' configuration page. The 'Enable OAuth Settings' checkbox is checked. The 'Callback URL' field is populated with a list of URLs, including 'https://dev.cloud.dxchange.io/design/oauth2/callback'. The 'Selected OAuth Scopes' section shows a list of available scopes, with 'Full access (full)', 'Manage user data via APIs (api)', and 'Perform requests at any time (refresh_token, offline_access)' selected. The 'Require Secret for Web Server Flow' checkbox is also checked.

- Save all settings and then click Continue.

- Save the Consumer Key (Client ID) and Consumer Secret (Client Secret) displayed after clicking Continue.



Connected App Name
DXchange

« Back to List: Custom Apps

Edit Delete Manage

Version 1.0

API Name DXchange

Created Date 4/21/2020, 10:53 PM

By: Raj Kumar

Contact Email admin@dxchange.io

Contact Phone

Last Modified Date 10/25/2021, 3:15 AM

By: Raj Kumar

Description

Info URL

▼ API (Enable OAuth Settings)

Consumer Key 3MVG95jctlhbyCpqQflsQz1ABB.1aIV2nMTzEL1vDA5kHNXL2IU2QmKoJAEvGNISX.HvWh2HgHeYtJBmAAhyl

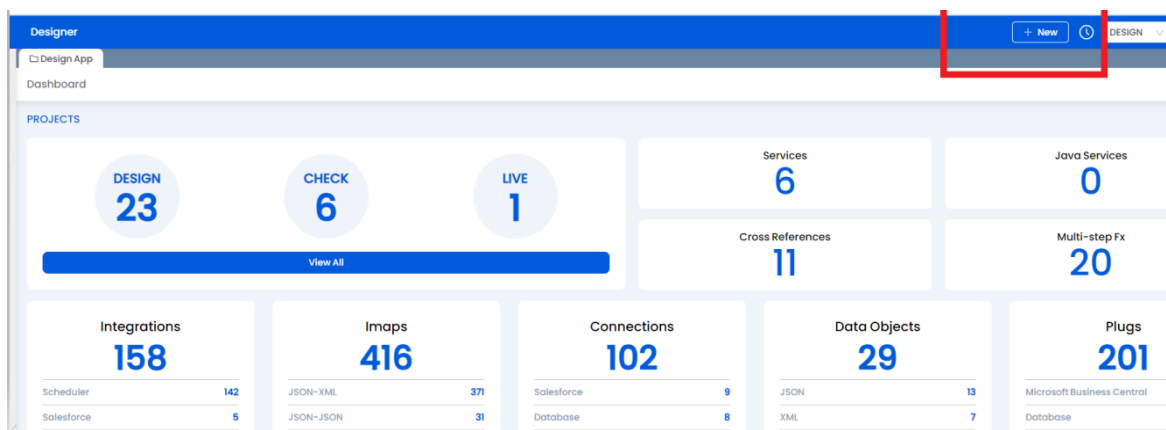
Copy

Consumer Secret Click to reveal

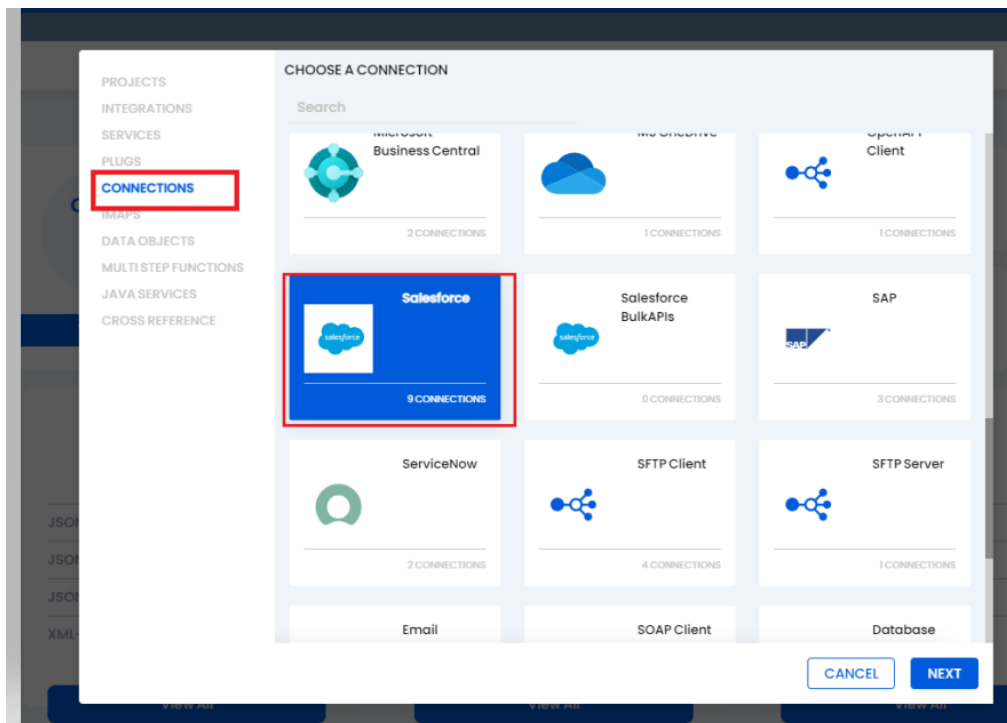
- These above details must be used when creating your Salesforce connection on Amplify Integration

Amplify Integration Setup

- You must configure Salesforce Connection to connect to your Salesforce instance.
- Navigate to **New** in the top right corner.



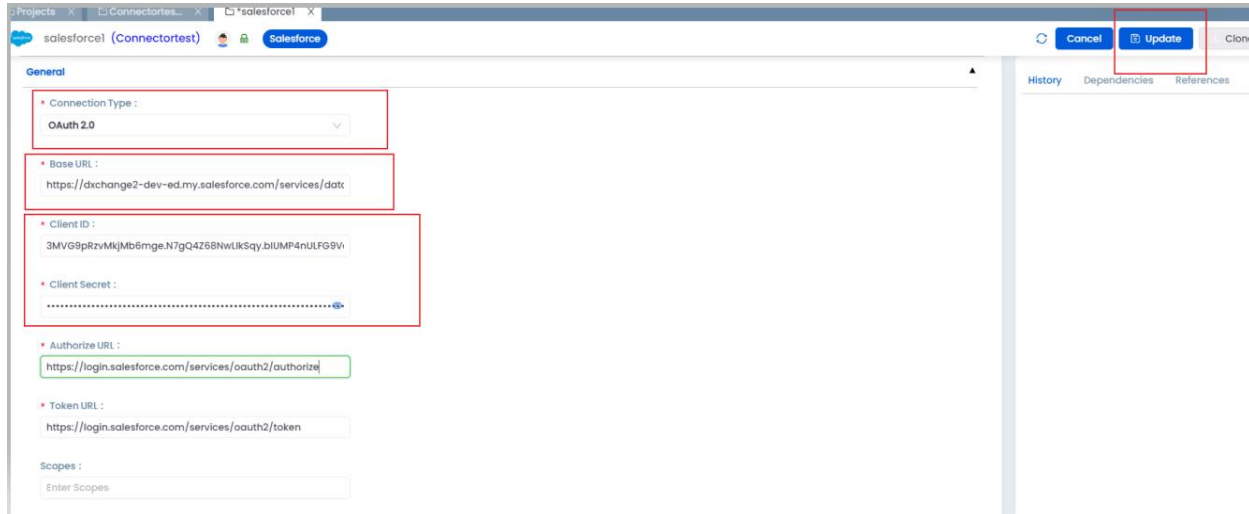
- Select the **Connections** tab from the left side menu, choose the **Salesforce** connection and then click **Next**.



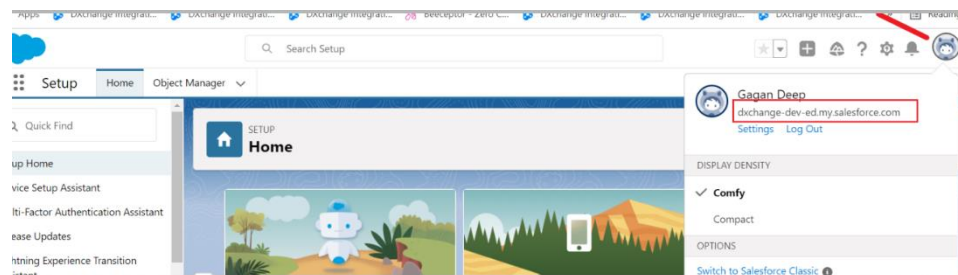
- Enter the **Name**, **Description**, select the **Project** and then click **Create**.

The screenshot shows a 'GIVE A NAME' form. It contains three fields: 'Artifact Name' with the value 'salesforce', 'Description' with the value 'salesforce', and 'Project' with the value 'ConnectorGagan'. At the bottom right, there are 'CANCEL' and 'CREATE' buttons, with the 'CREATE' button highlighted by a red box.

- To configure the connection, enter the following details:



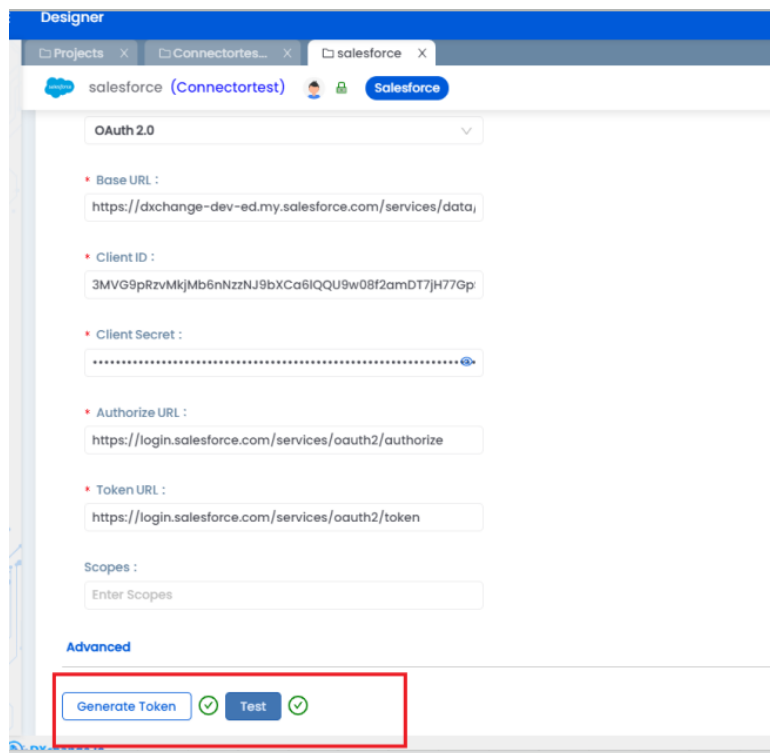
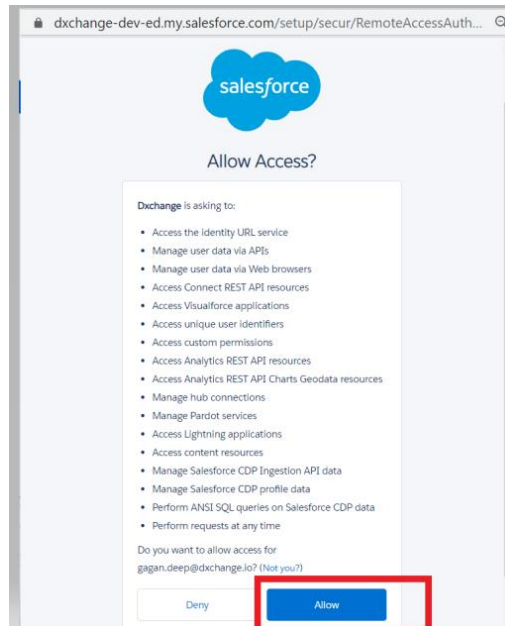
- Select the OAuth2.0 connection type
- Base URL (Required) –
 - Subdomain – You can get your domain by clicking on the Avatar on the top right corner of Salesforce application
 - Version – 46.0, 52.0 etc



Replace your subdomain and version in the below URL

<https://{subdomain}.my.salesforce.com/services/data/v{version}>

- ClientID (Required) – Enter ClientID of the salesforce instance
- Client Secret (Required) – Enter Client Secret of the salesforce instance, which will be saved in the encrypted format.
- After entering the above details, click **Update** to save the connection details.
- Click on **Generate token** to Allow access. Once token is generated, click on **Test button** as shown below.



- **Note:** A **Green Tick** mark indicates a successful Connection Test, while an **Error Popup** indicates wrong connection details as shown in the screenshots below.

salesforce (Connectortest)

Salesforce

OAuth 2.0

Base URL :

https://dxchange-dev-ed.my.salesforce.com/services/data,

Client ID :

3MVG9pRzvMkjMb6nNzzNJ9bXCa6lQQU9w08f2amDT7jH77Gp

Client Secret :

.....

Authorize URL :

https://login.salesforce.com/services/oauth2/authorize

Token URL :

https://login.salesforce.com/services/oauth2/token

Scopes :

Enter Scopes

Advanced

Generate Token

Test