

Salesforce OAuth2.0 Authentication

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Note: Hidden blocks/fields contains sensitive information

1. Salesforce Account Creation

Step 1: - Goto <https://developer.salesforce.com/> create developer account at salesforce console.

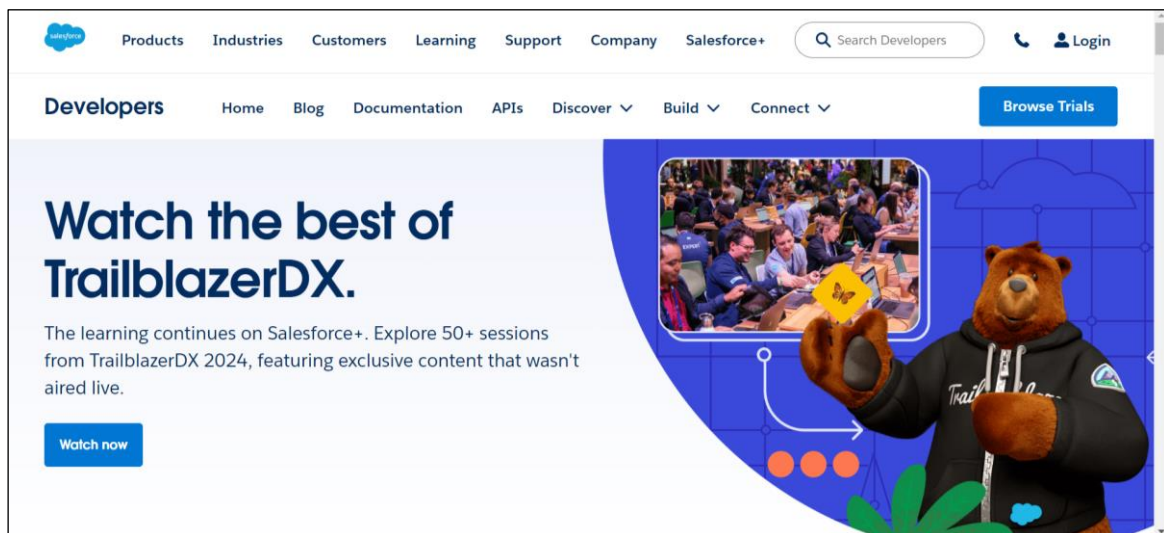


Fig. 1.1

Step 2: - Click on Login button of the Page and Select the Salesforce from the Products you will be redirect to login page at <https://login.salesforce.com/> if you have already created the developer then login, it with proper credentials otherwise create the New user.

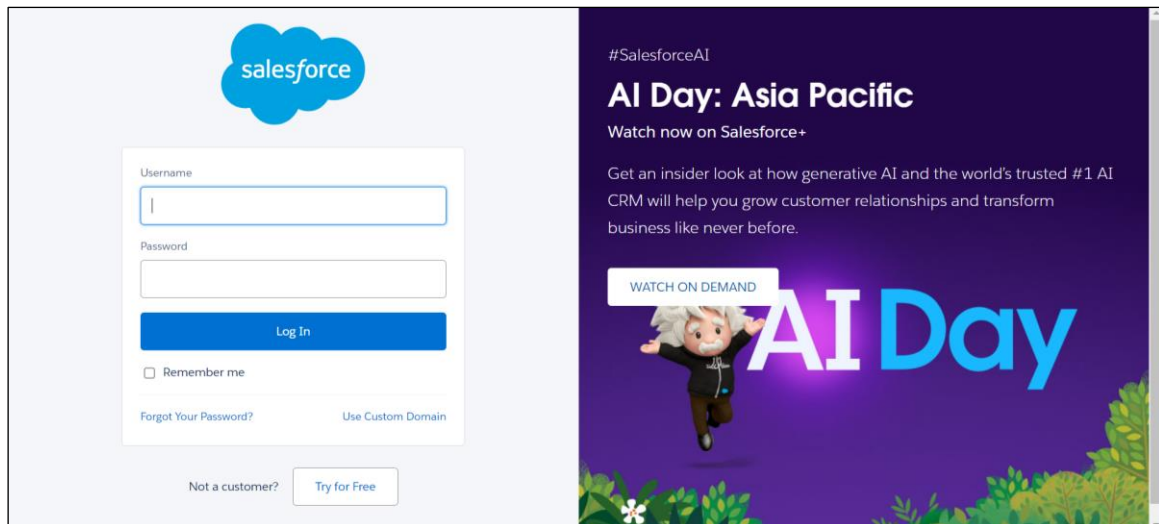


Fig. 1.2

Step 3: - If you created the new account, then verify that properly using the standard verification methods and after that verification then go to <https://login.salesforce.com/> this url of salesforce and then login to your developer account with the proper credentials.

You can also use the custom domain by using use custom domain option on salesforce login page you need to provide the custom domain name url you want.

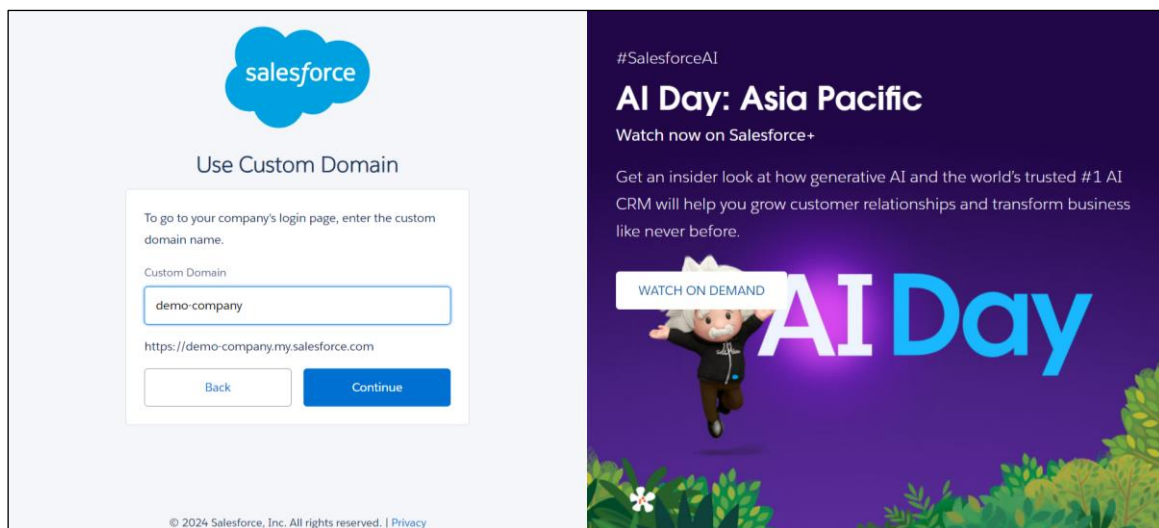


Fig. 1.3

Step 4: - After login you will receive the otp on registered email for verification after that you will be redirected to the home page of developer console of salesforce.

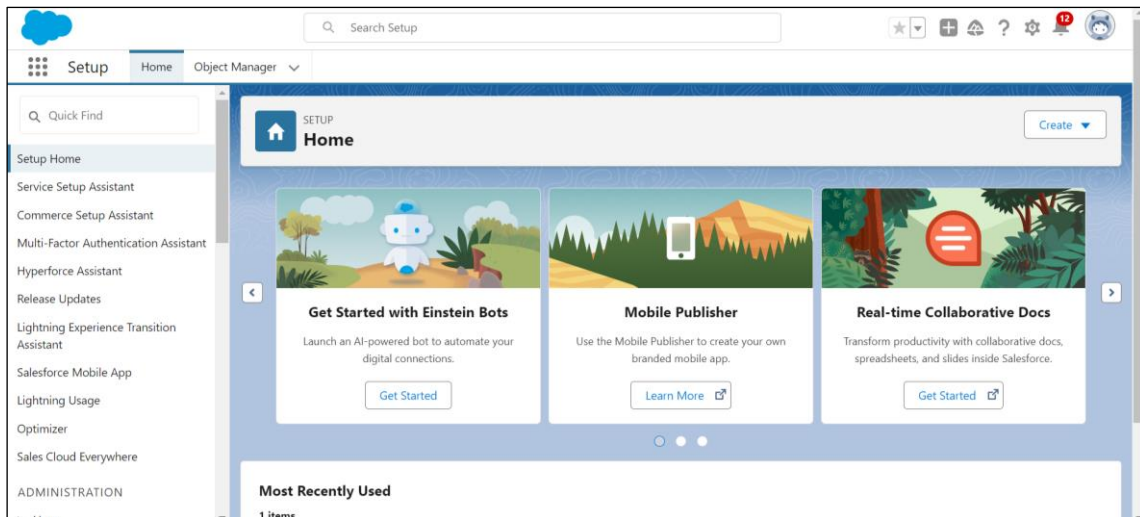


Fig. 1.4

Step 5: - If you are not getting this page then click on settings icon on top-right corner of webpage then click on Setup option you will be redirected to above home page shown in Fig.1.4.

2. Creation of Custom domain

Step 1: - If you want to create or edit your domain, then search in quick find for domain then go to MyDomain under Company Settings. Will see following screen.

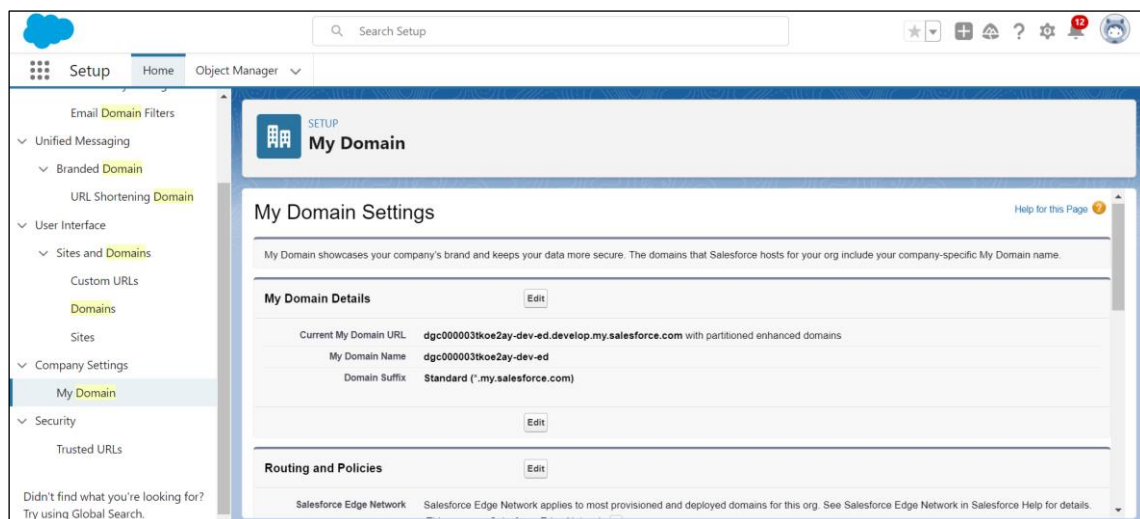


Fig. 2.1

Step 2: - Click on edit button near My Domain Details. Enter the domain name you want then check for availability then it will prompt you the availability of the domain availability.

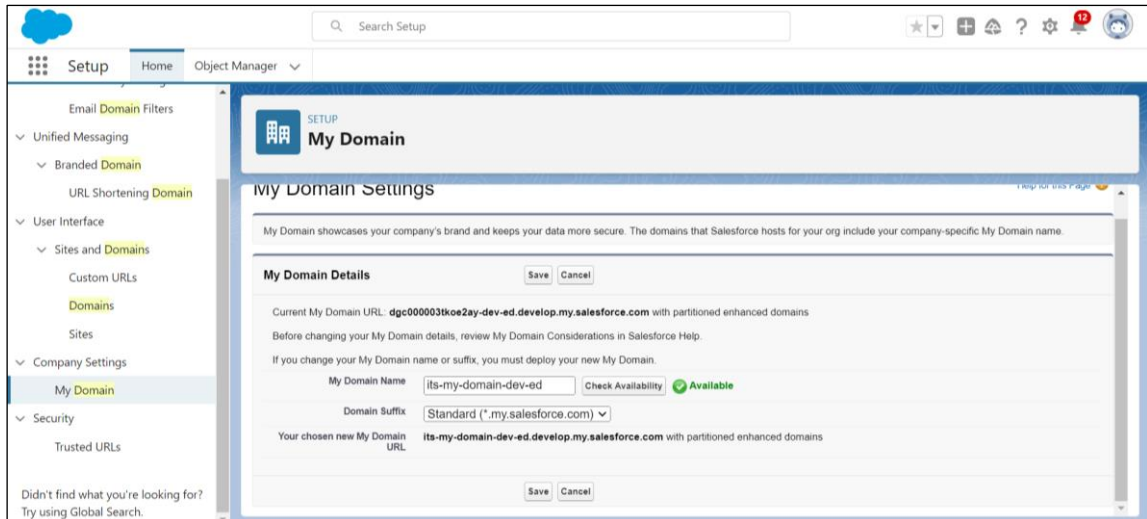


Fig. 2.2

Step 3: - Then click on save button it will prompt you to the below screen shown in Fig. 2.3.

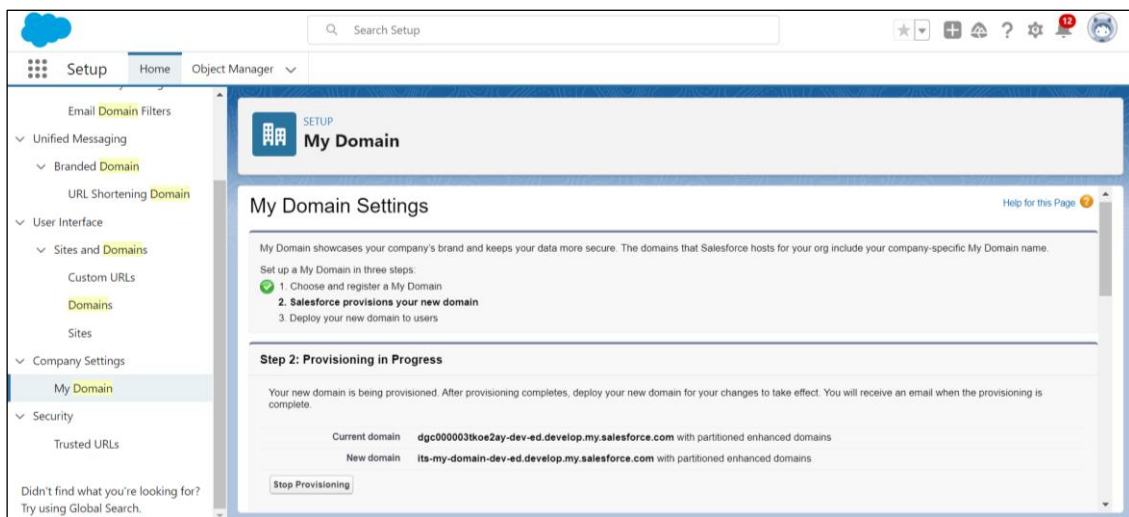


Fig. 2.3

Step 4: - It will take some time to deploy that domain. You will receive the mail on registered mail of test url and deploy url then to deploy the domain go to deploy url and go to developer console again by using setting icon setup option. And then search for domain option under the MyDomain Section.

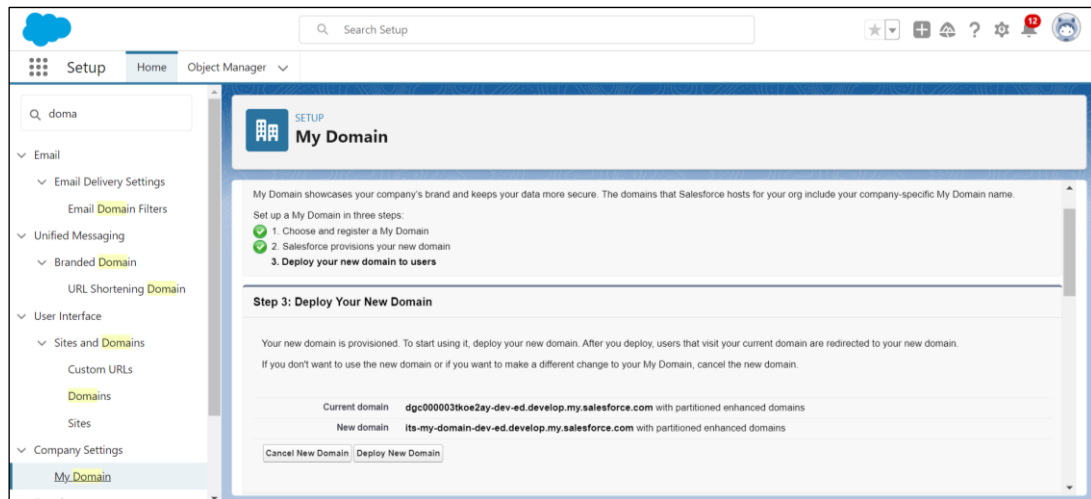


Fig. 2.4

Step 5: - You will see above screen shown in Fig. 2.4 then click on Deploy New Domain button it will redirect to login page with old domain then login into it after successfully login you will be redirected to the new domain login page <https://its-my-domain-dev-ed.develop.my.salesforce.com/> you will be redirected to home page. Your url will be different in case of domain.

3. Creation of Users for domain

Step 1: - To check the users, search Users in quick find then go to Users under Users where you can find all users in the org.

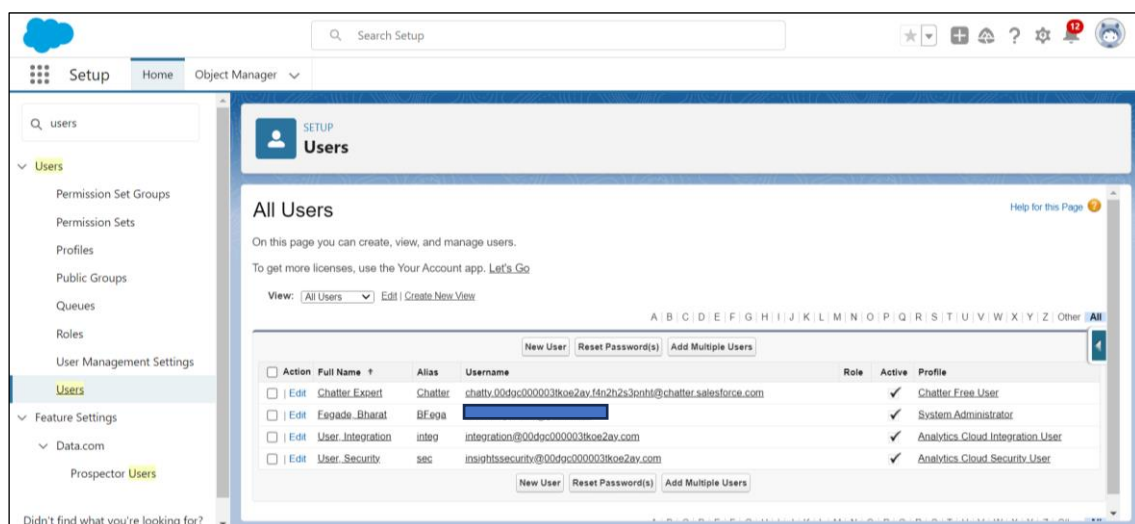


Fig. 3.1

Step 2: - Click on New User to create new user let's take example of Random name e.g., Little John

The screenshot shows the 'New User' form in the Salesforce Setup interface. The form is titled 'New User' and has a 'User Edit' tab. The 'General Information' section includes fields for First Name (Little), Last Name (John), Alias (ljohn), Email (ljohn@its-my-domain.cc), Username (ljohn@its-my-domain.cc), Nickname (User171035894002110468), Title, Company, Department, and Division. The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce', and 'Profile' is 'Standard User'. The 'Active' checkbox is checked. There are also checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User. The 'Save' button is highlighted in blue.

Fig. 3.2

Step 3: - Fill in the fields of the First name, last name, email that you want to register with user, username, nickname, role, User license, profile.

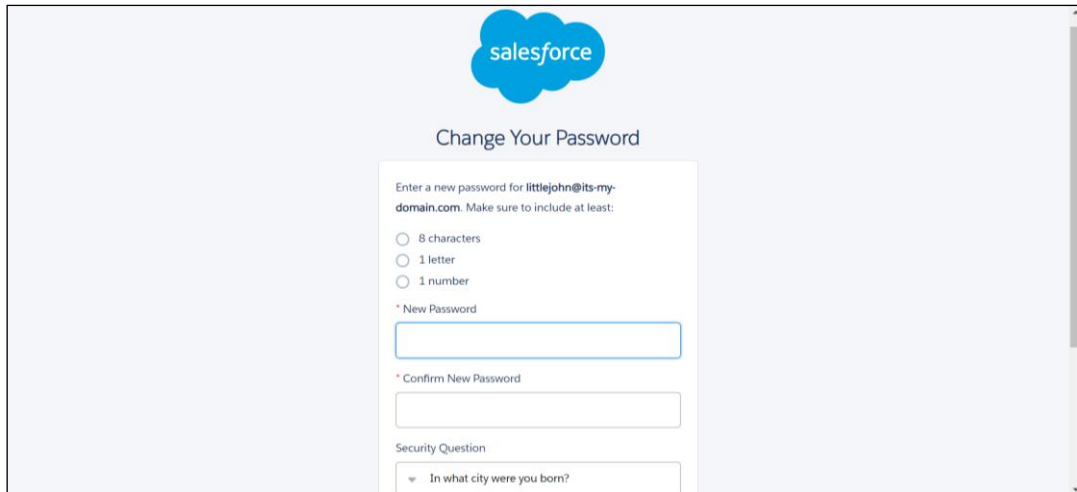
Once you click on Save you will see following page

The screenshot shows the 'User Detail' page for the newly created user. The user's information is displayed in a table-like format. The 'Name' is 'Little John', 'Alias' is 'ljohn', 'Email' is 'ljohn@its-my-domain.cc' (with a '(Verify)' link next to it), 'Username' is 'ljohn@its-my-domain.cc', 'Nickname' is 'User171035894002110468', 'Title' is empty, 'Company' is empty, 'Department' is empty, 'Address' is empty, 'Time Zone' is '(GMT+05:30) India Standard Time (Asia/Kolkata)', and 'Locale' is 'English (India)'. The 'Role' is 'Salesforce', 'User License' is 'Salesforce', 'Profile' is 'Standard User', and 'Active' is checked. There are also checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'Verify' button is highlighted in blue.

Fig. 3.3

Step 4: - After that you will receive the verification mail including login url and username of user you created if not received then click on [Verify] in front of email address.

Once you go to that received list you must reset the password for that user.



salesforce

Change Your Password

Enter a new password for **littlejohn@its-my-domain.com**. Make sure to include at least:

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

* New Password

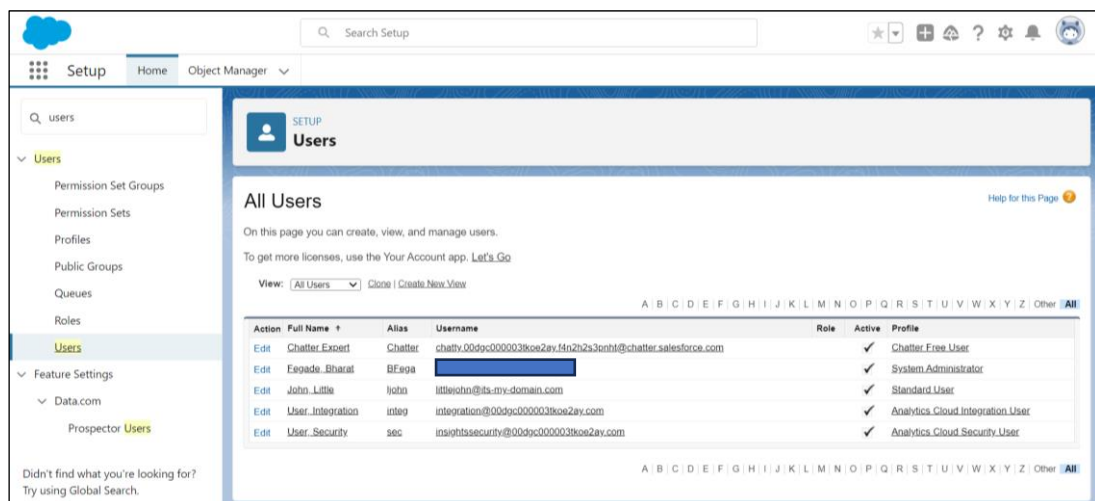
* Confirm New Password

Security Question

▼ In what city were you born?

Fig. 3.4

Step 5: - You can find newly created users in the below screen. To verify the System Administrator, it has limit of 5 verification otp per hour.



Setup Home Object Manager

Search Setup

users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- Users**
- Feature Settings
 - Data.com
 - Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

All Users [Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** | [Clone](#) | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.00dpc000003koe2ay.f4n2h2a3cnht@chatter.salesforce.com		✓	Chatter Free User
Edit	Ekapada, Bharat	BEkapa			✓	System Administrator
Edit	John Little	ljohn	littlejohn@its-my-domain.com		✓	Standard User
Edit	User Integration	integ	integration@00dpc000003koe2ay.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00dpc000003koe2ay.com		✓	Analytics Cloud Security User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Fig. 3.5

4. Creation of Connected App

Step 1: - To make the salesforce login works with the React-Native I considered OAuth 2.0 Authentication with the REST API. By using Client Secrets of the User. For that We need to create the Connected App inside Salesforce.

Step 2: - Search for App manager in salesforce home quick find, you will get below screen.

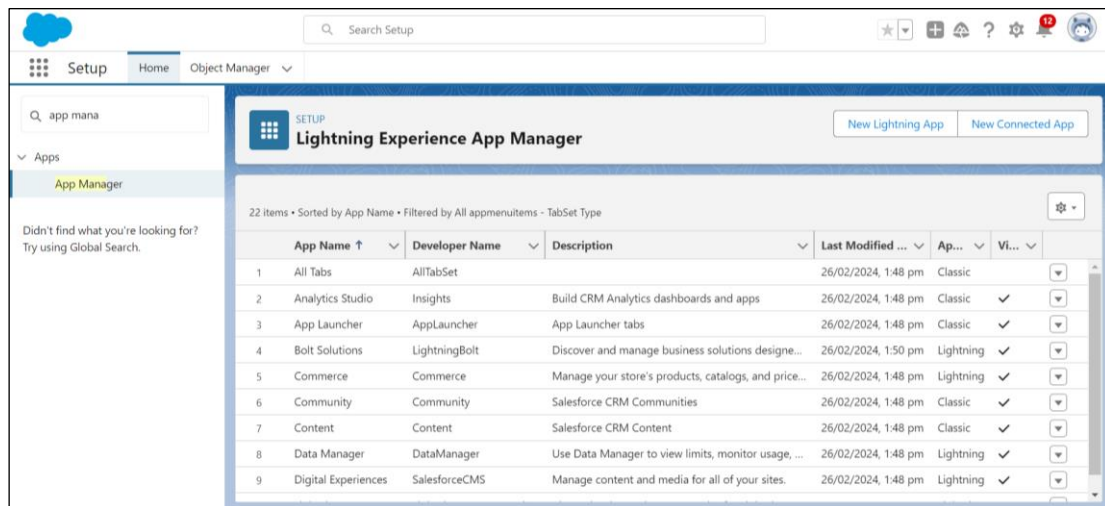


Fig. 4.1

Step 3: - Click on New Connected App

Step 4: - Set the connected App name and contact email that you want to register.

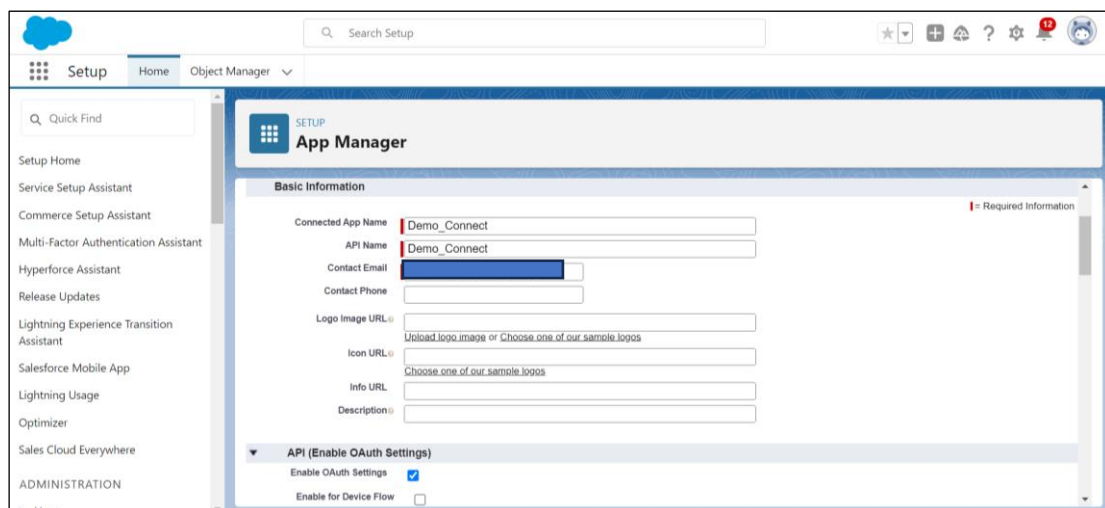


Fig. 4.2

Step 5: - Check on Enable Oauth settings enter the callback URL in the field For my connnected app I used my domain url preceedding with the /services/oauth2/success which is used to access the oauth 2.0 in mobile application as a callback url for REST APIs. Below I

have given the sample url your url domain will be change. The endpoints will be same /services/oauth2/success.

<https://its-my-domain-dev-ed.develop.lightning.force.com/services/oauth2/success>

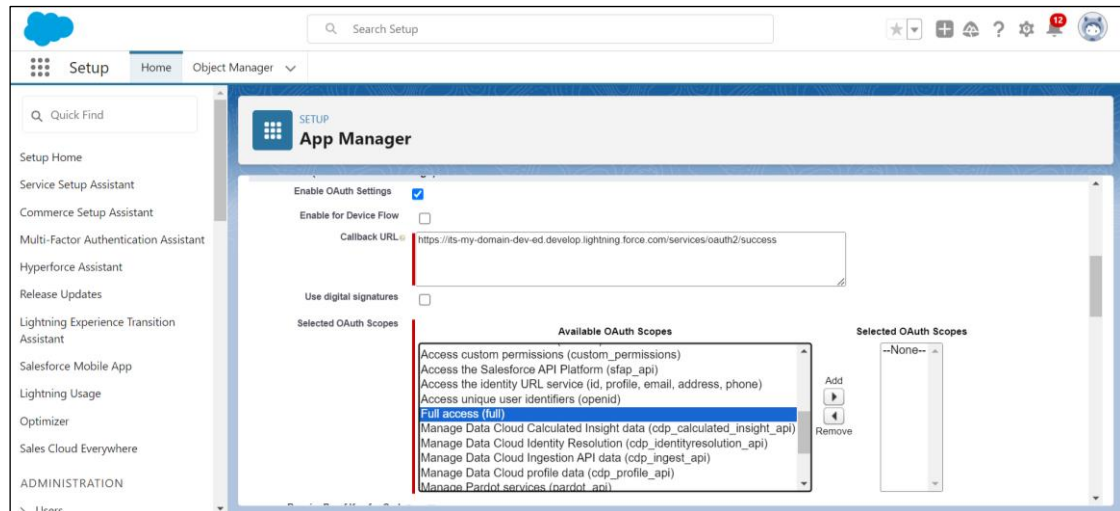


Fig. 4.3

Step 6: - Select the Oauth Scopes from Available Oauth Scopes for now I am selecting the Full Access you can select as per your requirement click on add it will reflect into Selected Oauth Scopes

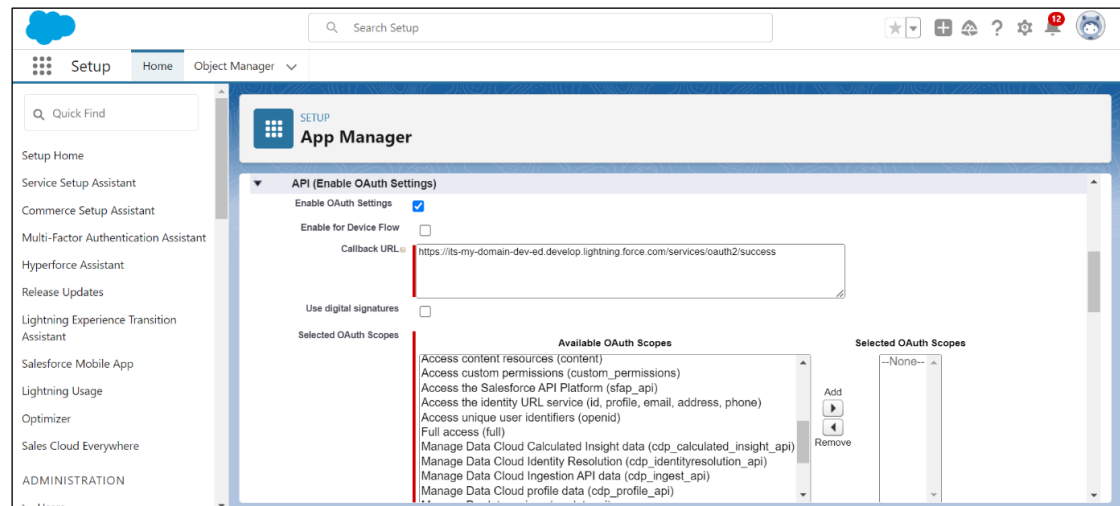


Fig. 4.4

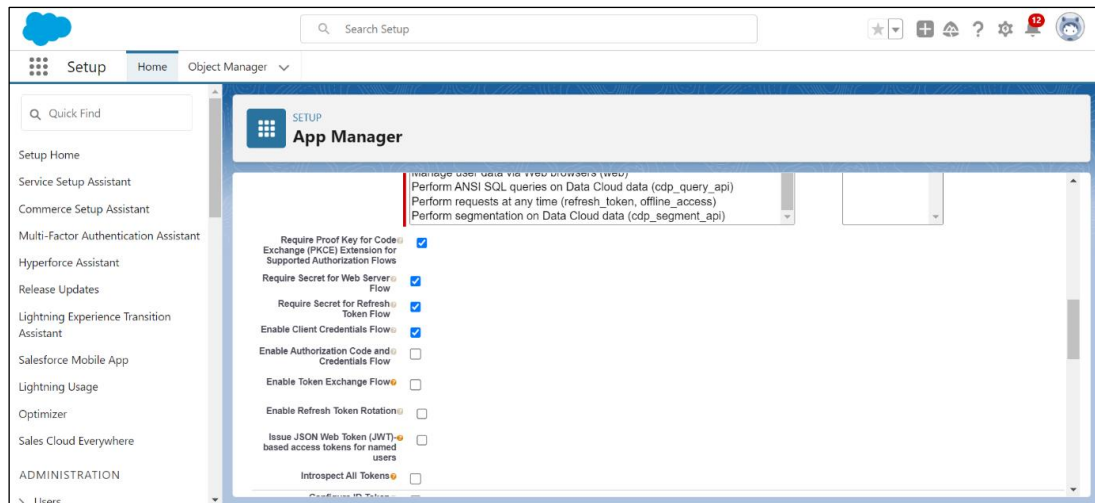


Fig. 4.5

Step 7: - Enable all checks as shown in above screen shown in Fig. 4.5 for OAuth2.0 authentication with REST API. Then Click on Save Button at the Bottom. You will prompt for the following screen.

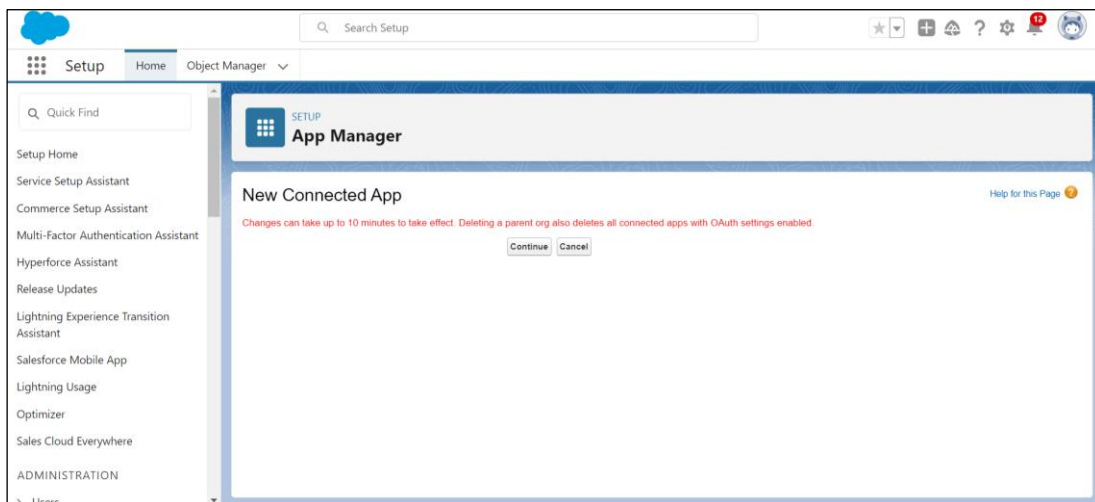


Fig. 4.6

Step 8: - Click on continue. After that you will see following screen

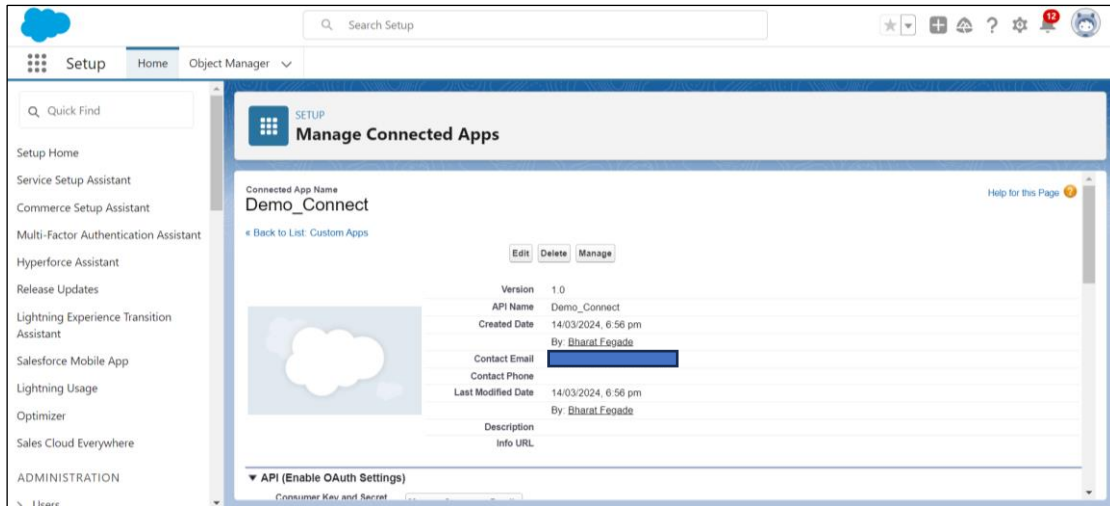


Fig. 4.7

Step 9: - Click on Manage Consumer Details button under API (Enable OAuth Settings) to view the client credentials.

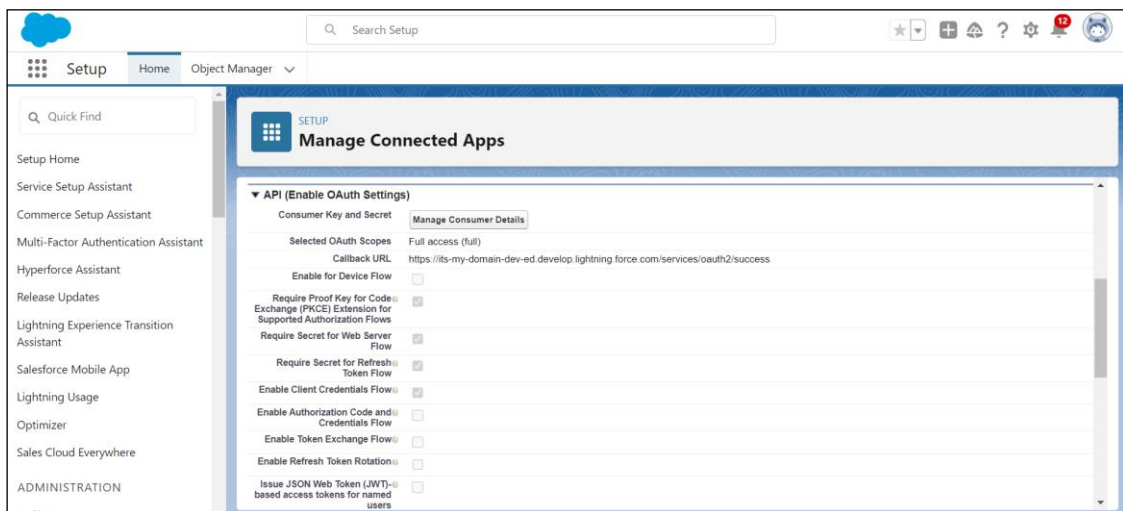


Fig. 4.8

Step 10: - On the next page you can see client credentials on below screen.

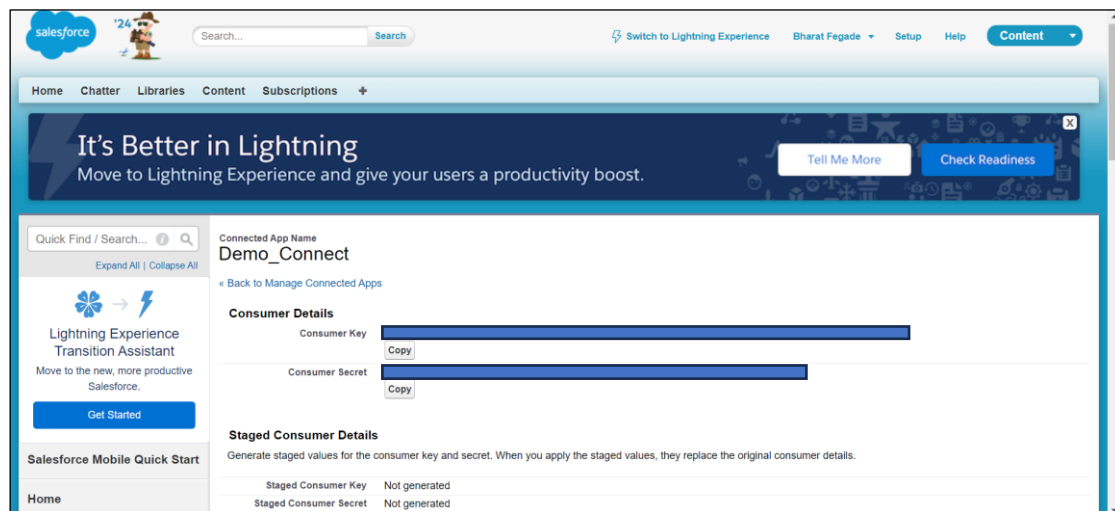


Fig. 4.9

Step 11: - Click on Edit Policies → Then select the Relax IP restrictions in IP Relaxation field to access the API through Oauth2.0. Then Click on Save button at the Bottom.

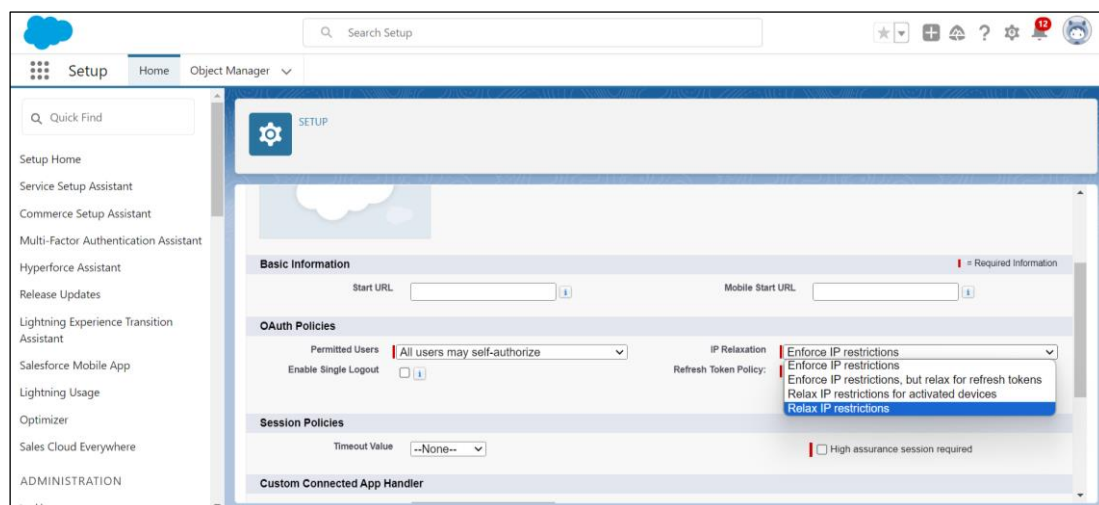


Fig. 4.10

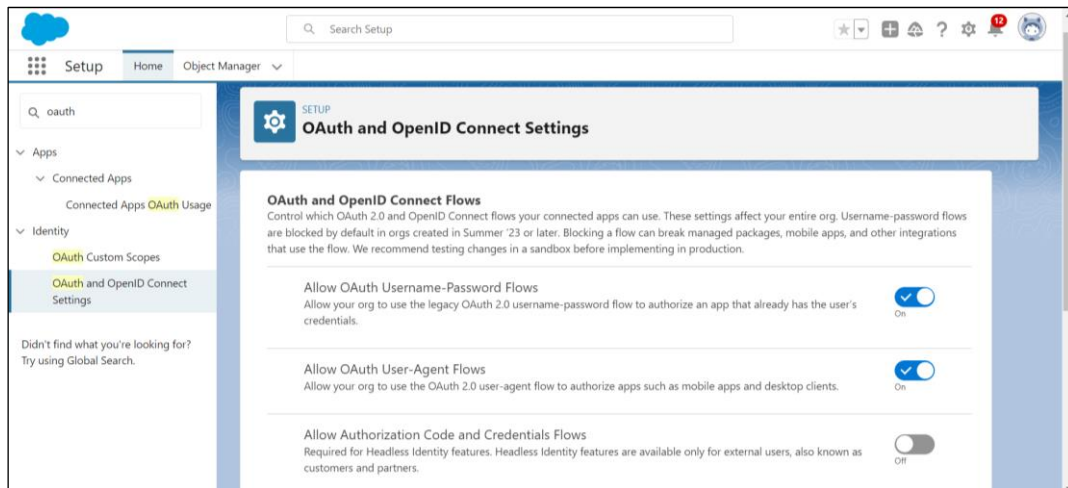


Fig. 4.11

Step 12: - Search for OAuth in quick find and select the OAuth and OpenID connect Settings and turn on the “Allow OAuth Username-Password Flows” toggle if it is turned off.

5. Creation of Custom Assets

Step 1: - To create the new tab login on <https://its-my-domain-dev-ed.develop.lightning.force.com/> (Your domain url will be change here I have given the sample url) with created user. You can see below window Fig. 5.1.

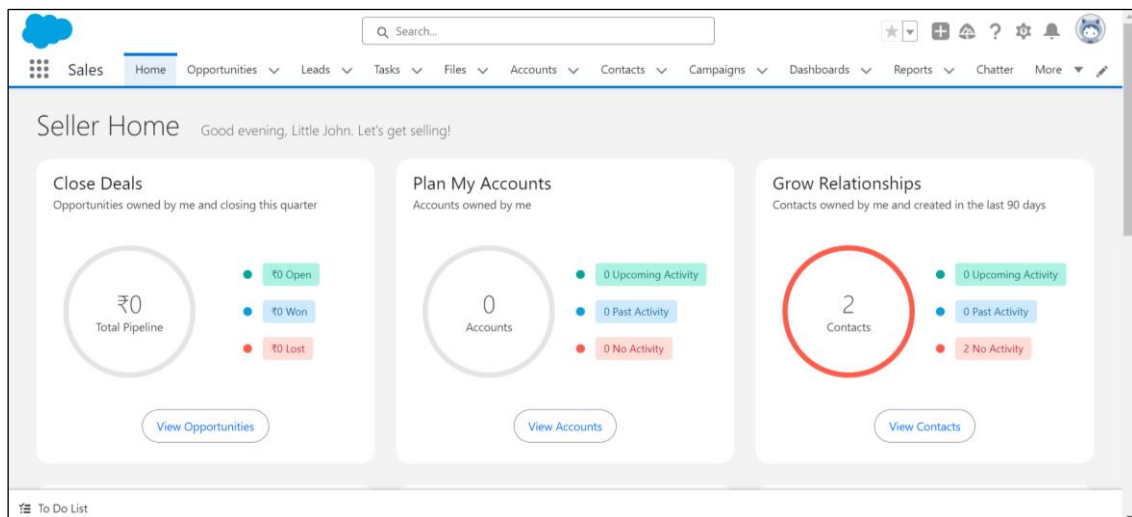


Fig. 5.1

Step 2: - Click on the pencil icon near the More option on top right corner you will see the more navigation options to add there you can add your custom options. Here you can see there are different options created by default by Salesforce.

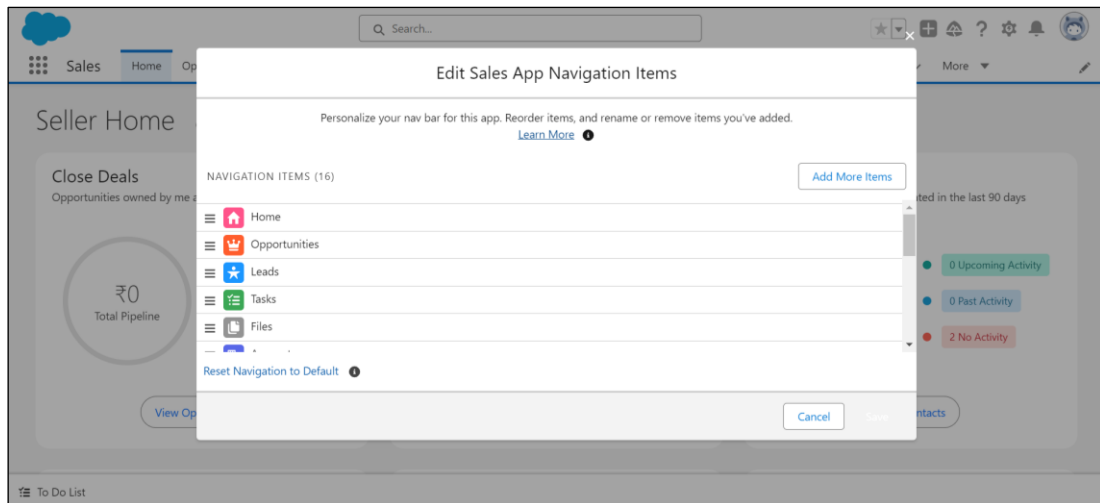


Fig. 5.2

Step 3: - Click on Add More Items If you want to add more then there you must select the Item you want to add then you can save it will be added.

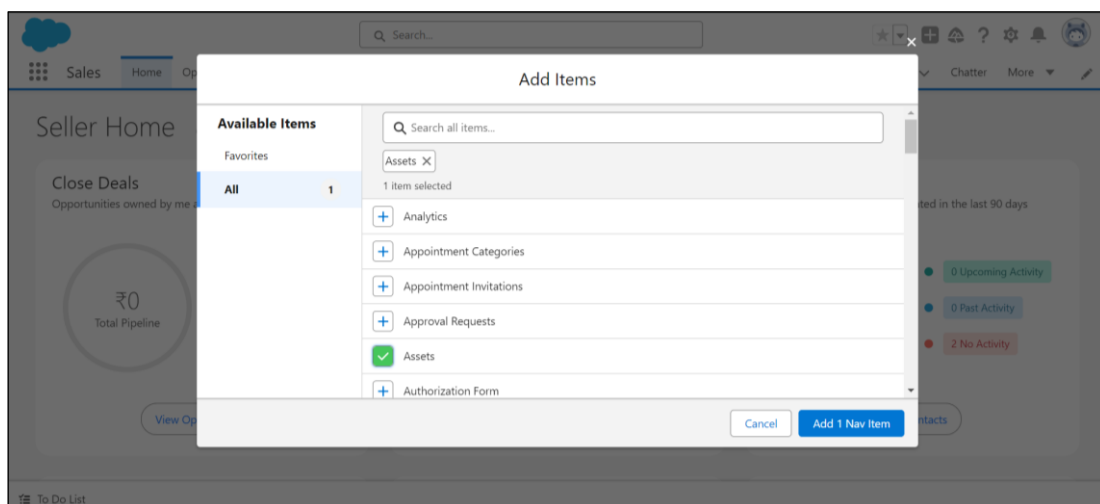


Fig. 5.3

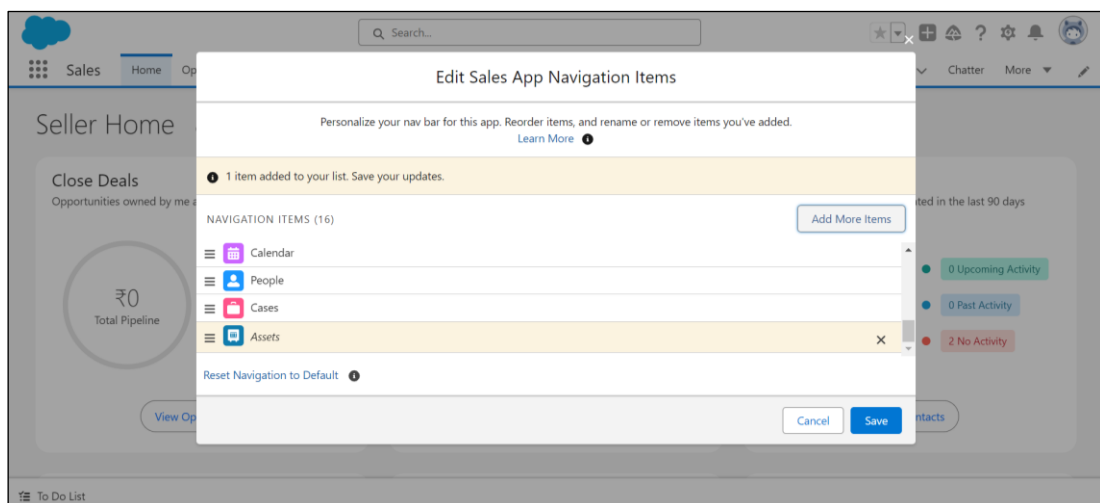


Fig. 5.4

Step 4: - Once you clicked on save it will be created on navigation tabs on the top.

You will be seeing empty data in asset after creating asset tab then you must add the record inside that asset tab. Click on New Button to create the New Asset Over there.

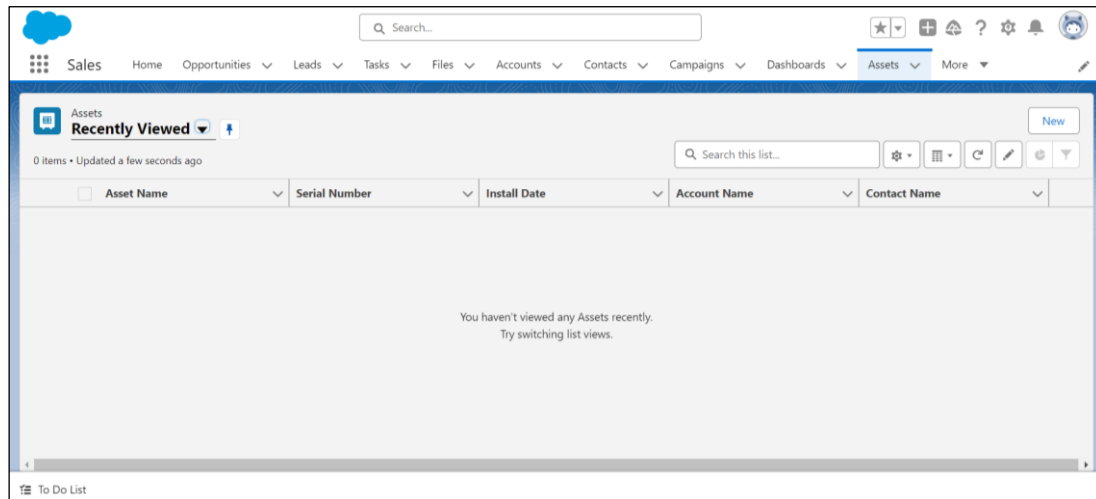


Fig. 5.5

Step 5: - Fill the details required in the given form. If you want, you can take any dummy details it is not necessary to add only prior details over there.

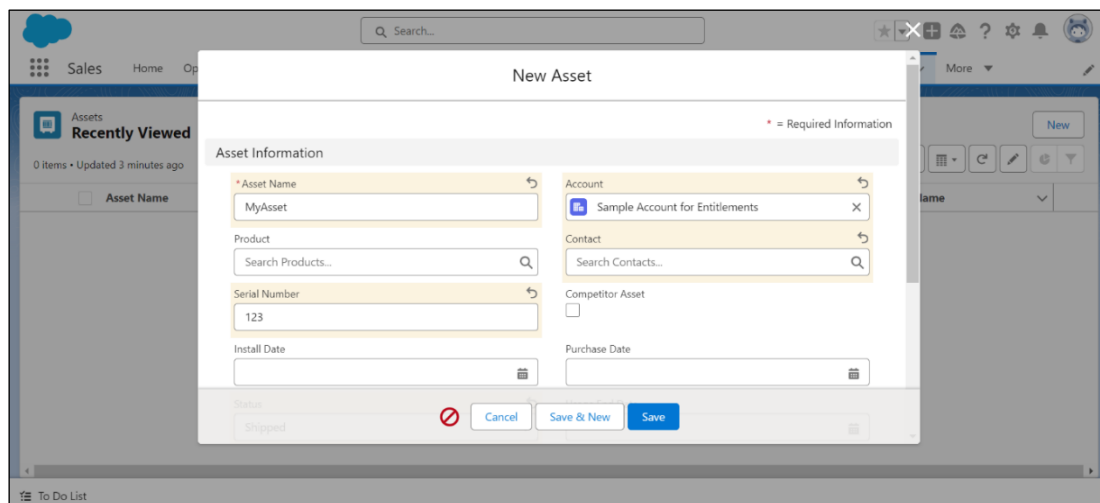


Fig. 5.6

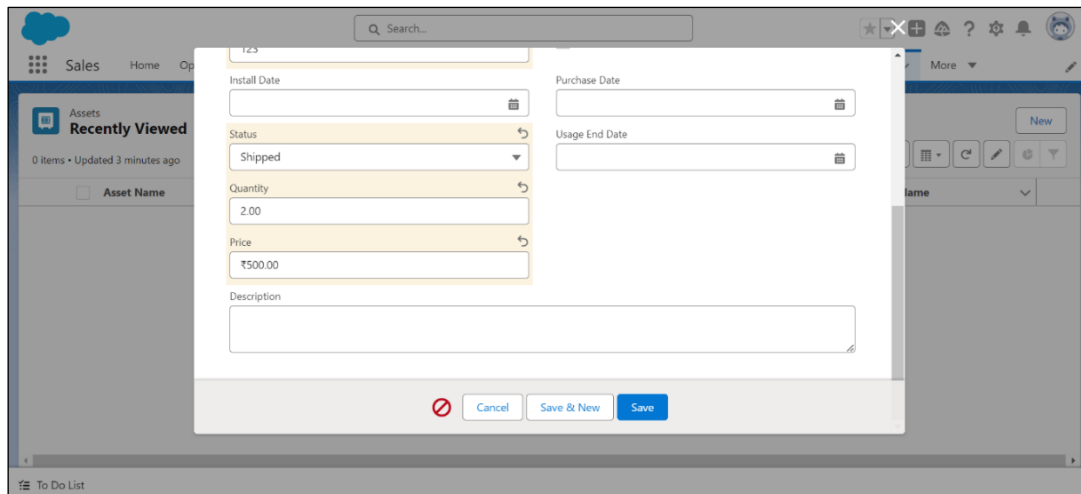


Fig. 5.7

Step 6: - You can see the asset is created with MyAsset Name.

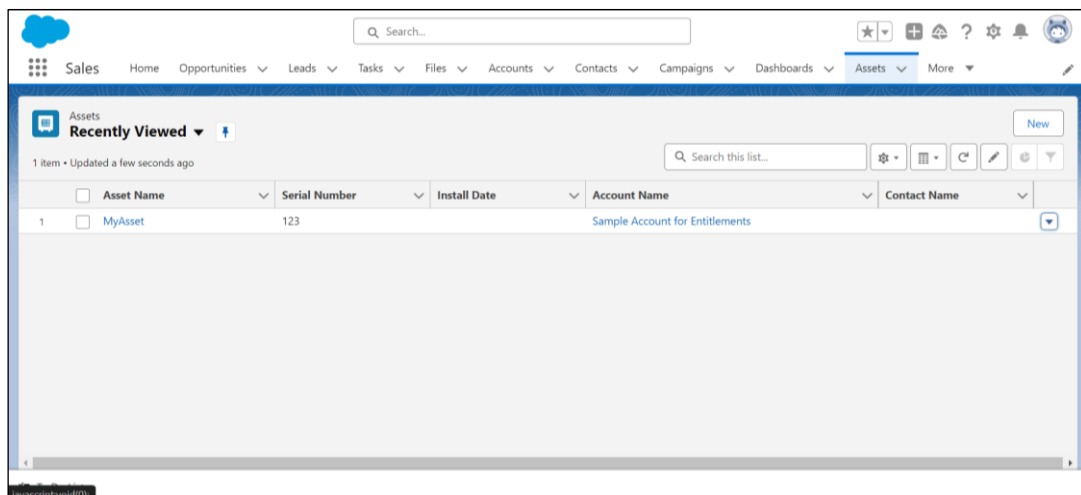


Fig. 5.8

Now you can access the Asset data as well of the user.

6. Verification of Connected App

Step 1: - Now we have completed all steps to access the Services of Salesforce By using Connected App and OAuth2.0 Authentication. Now it's time to verify whether all things are working as expected or not. Then to check the Authentication and REST API calling. I am using POSTMAN tool If you have not downloaded then download it from <https://www.postman.com/downloads/> this link and install it.

Create a new POST Request as per shown in below screen send the username, password, grant_type, client_id and client_secret in the body of formdata.

Username: - Username of created user

Password: - Password of that user

Grant_type:- We are using password type

Client_id and client_secret: - Keys of Consumer details in connected APP.

You can use <https://its-my-domain-dev-ed.develop.my.salesforce.com/services/oauth2/token> this url to POST request change url before /services as with your url.

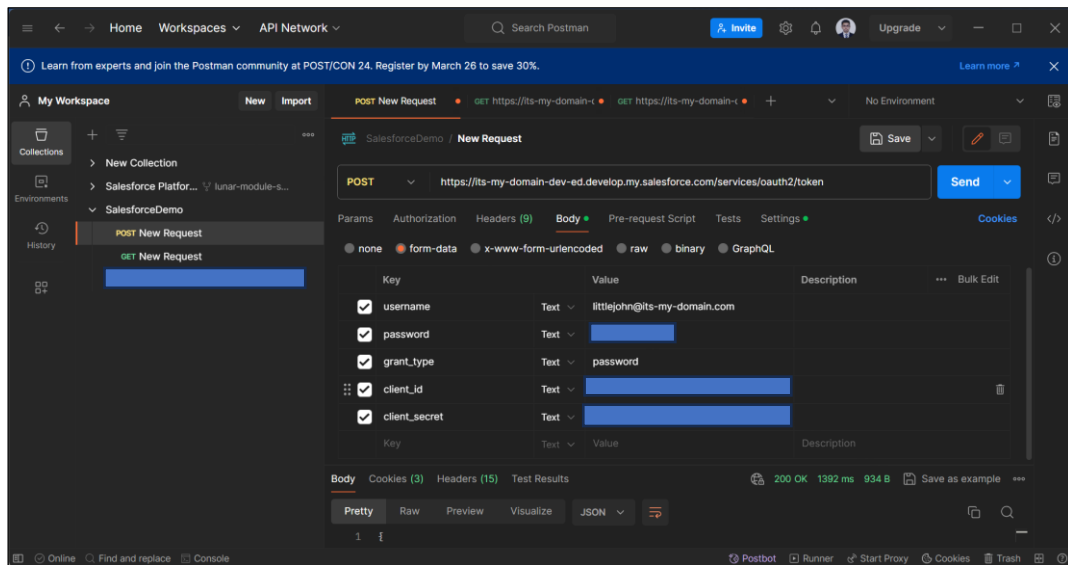


Fig. 6.1

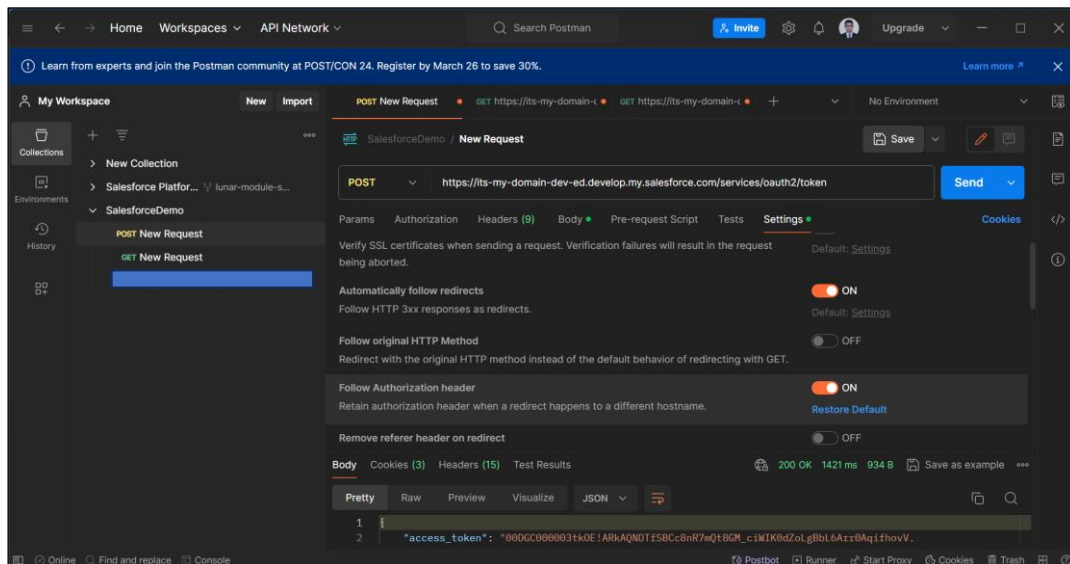


Fig. 6.2

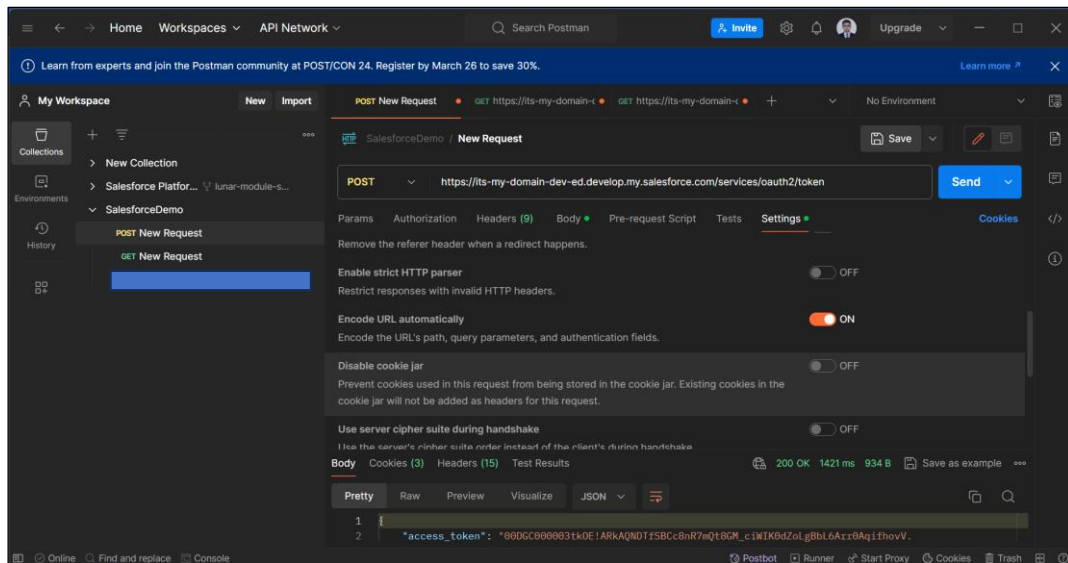


Fig. 6.3

Step 2: - In the settings tab of POSTMAN enable the Automatically follow redirects, Follow Authorization Header, Encode URL automatically toggles. After that send the Request it will return you a response along with `access_token` which means all is working fine. By using that `access_token` we can access the Salesforce Salesforce like Authentication, Push Notification, Headless APIs, etc.

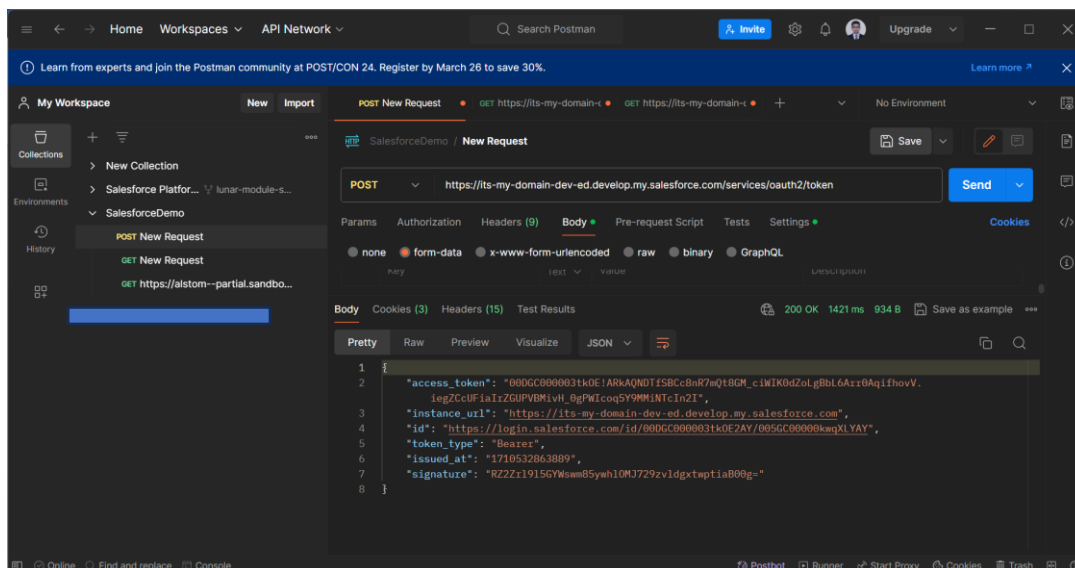


Fig. 6.4

Step 3: - Now we have completed the Salesforce Configuration and Verification to check How we can achieve it by using React-Native Please check below repository url on that I have given demo of the OAuth2.0 Implementation for Salesforce.

<https://github.com/Bharatfegade/Salesforce-Oauth2.0>