



CTX-Salesforce Deployment Plan

Contents

CTX-Salesforce Deployment Plan	1
Contents.....	2
Preface	3
About this Manual	3
Audience	3
Related Material.....	3
Abbreviations used in this Document	3
Versions	4
Document Revisions.....	4
Module Versions	4
1 Requirements	5
2 Import CTX-Salesforce.....	6
3 Salesforce Setup.....	7
3.1 Register Cortex as an External App	7
3.2 Obtain Credentials	8

Preface

About this Manual

This document provides a guide on how to import CTX-Salesforce subtasks.

Audience

This document is intended for those who require integration of Salesforce with Cortex.

Related Material

Document
CTX-Salesforce - User Guide
CTX-Salesforce.studiopkg

Abbreviations used in this Document

None

Versions

Document Revisions

The following revisions have been made to this document

Date	Revision	Notes
10/06/2019	1.0	First Release

Module Versions

This version of the CTX-Salesforce deployment plan is relevant up to version 1.0 of the CTX-Salesforce module.

1 Requirements

This document details all the steps required to deploy the Salesforce Subtasks.

Requirements:

- An instance of Salesforce Spring '19 or later
- Cortex connectivity to this instance
- A minimum of Cortex v6.5 installed on the Cortex Server
- A minimum of PowerShell v5 installed on the Cortex Server

2 Import CTX-Salesforce

To deploy the CTX-Salesforce module on your Cortex system, the CTX-Salesforce Studio Package needs to be imported on your Cortex system. To do this:

- Download the CTX-Salesforce Studio Package
- Import the Studio Package in Cortex Gateway
- Ensure the relevant users have the required permissions in 'Studio Authorisation'

After this, all users in the authorised groups will be able to view and execute the subtasks.

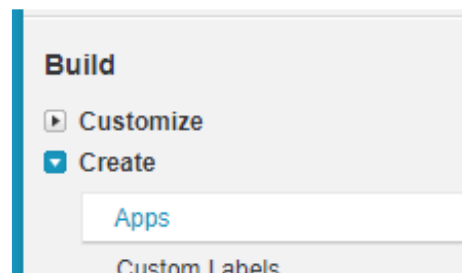
3 Salesforce Setup

3.1 Register Cortex as an External App

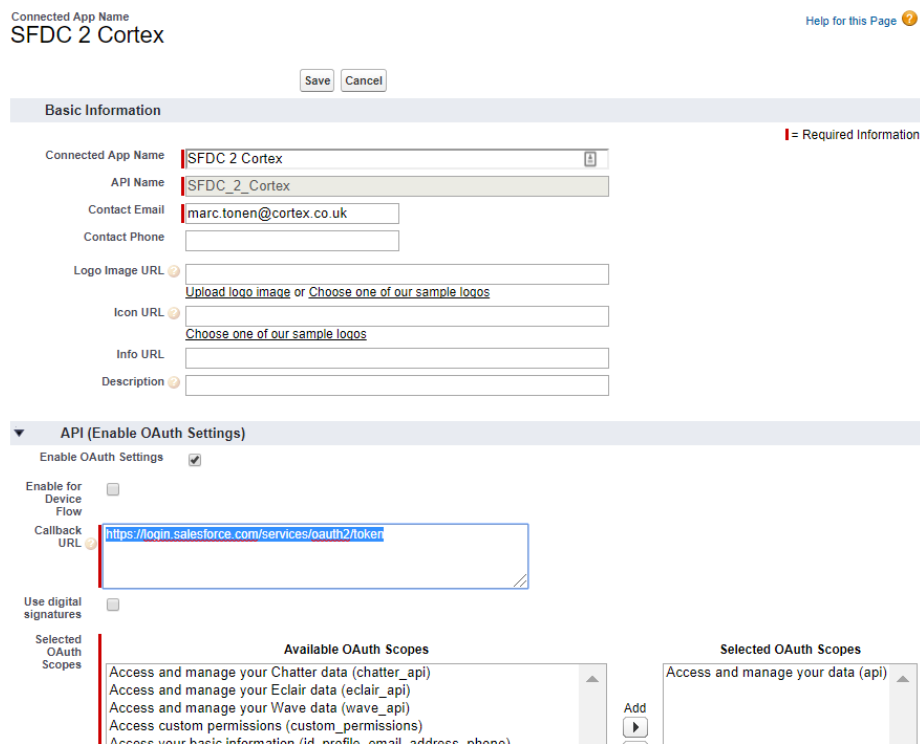
In order for a Salesforce instance to allow communication with Cortex, Cortex needs to be registered as an App in Salesforce.

A Salesforce Admin user should perform the following steps:

1. Login as the Admin user
2. In the right hand upper corner, they should select **Setup**.
3. From the left-hand menu under **Build** select **Create**, then **Apps**



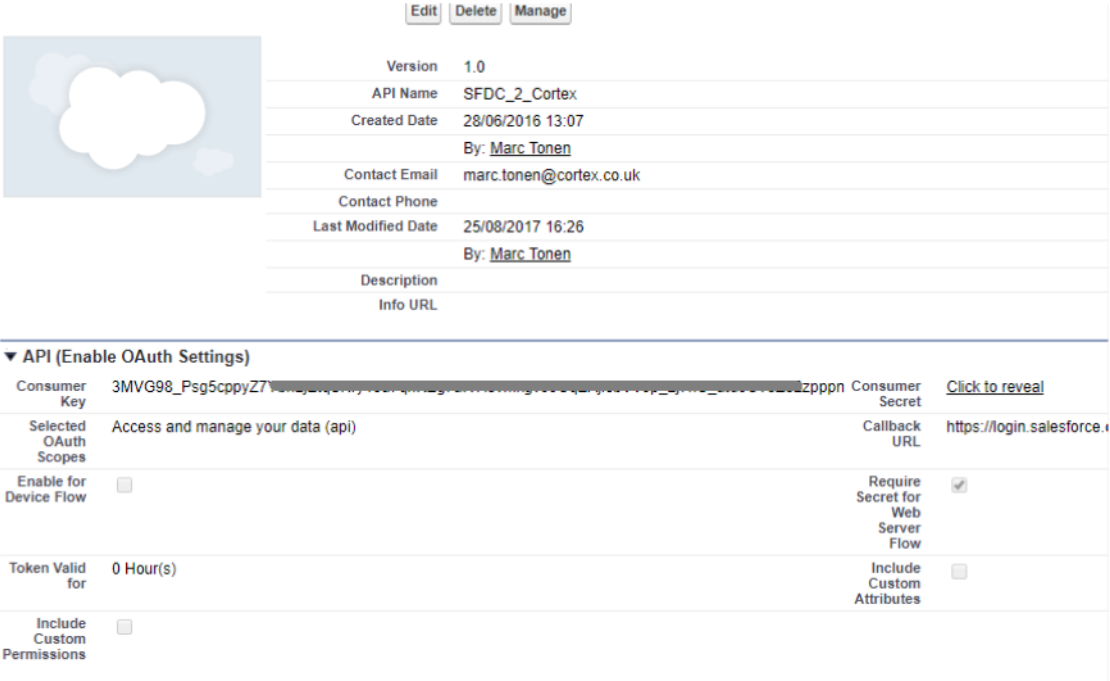
4. Under **Connected Apps** select **New**
5. Enter the details as per the figure below (using applicable credentials) and click the Save button.


 A screenshot of the 'New Connected App' form in Salesforce. The form is titled 'Connected App Name' with the value 'SFDC 2 Cortex'. There are 'Save' and 'Cancel' buttons. The form is divided into sections: 'Basic Information' and 'API (Enable OAuth Settings)'. In the 'Basic Information' section, fields include 'Connected App Name' (SFDC 2 Cortex), 'API Name' (SFDC_2_Cortex), 'Contact Email' (marc.tonen@cortex.co.uk), 'Contact Phone', 'Logo Image URL' (with a link to upload or choose a sample logo), 'Icon URL' (with a link to choose a sample logo), 'Info URL', and 'Description'. In the 'API (Enable OAuth Settings)' section, 'Enable OAuth Settings' is checked. There are checkboxes for 'Enable for Device Flow' and 'Use digital signatures'. The 'Callback URL' field contains 'https://login.salesforce.com/services/oauth2/token'. Below this, there are two lists: 'Available OAuth Scopes' and 'Selected OAuth Scopes'. The 'Available OAuth Scopes' list includes 'Access and manage your Chatter data (chatter_api)', 'Access and manage your Eclair data (eclair_api)', 'Access and manage your Wave data (wave_api)', 'Access custom permissions (custom_permissions)', and 'Access your basic information (id, profile, email, address, phone)'. The 'Selected OAuth Scopes' list contains 'Access and manage your data (api)'. An 'Add' button is located between the two lists.

6. It might take some time to create the Connected App, they will be notified once this has happened.

3.2 Obtain Credentials

- Once the connected app has been created, the following screen will be displayed.



API (Enable OAuth Settings)	
Consumer Key	3MVG98_Psg5cppyZ7...zpppn
Consumer Secret	Click to reveal
Selected OAuth Scopes	Access and manage your data (api)
Callback URL	https://login.salesforce.com
Enable for Device Flow	<input type="checkbox"/>
Require Secret for Web Server Flow	<input checked="" type="checkbox"/>
Token Valid for	0 Hour(s)
Include Custom Attributes	<input type="checkbox"/>
Include Custom Permissions	<input type="checkbox"/>

- The user should make a note of the following from this page:
 - Consumer Key
 - Consumer Secret (revealed by clicking the 'click to reveal' hyperlink)
 - Callback URL
- Finally, to obtain the security token, the user must take the following steps:
 - Select the user icon in the top left hand corner of the page.
 - Select **Settings**
 - Select **My Personal Information**
 - Select **Reset My Security Token**, then **Reset**
 - The security token will be emailed to them.
- The Consumer Key, Consumer Secret, Callback URL and Security Token, as well as the user's username and password, are used as inputs to the GSCD-Get-Salesforce-Connection-Details. This will generate the details used by other subtasks to interact with the correct Salesforce instance.