CTX-Salesforce Deployment Plan

Contents

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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

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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.

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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.

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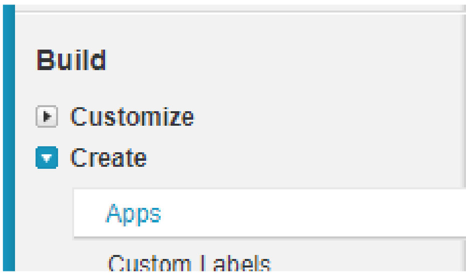
3 Salesforce Setup

3.1 Register Cortex as an External App

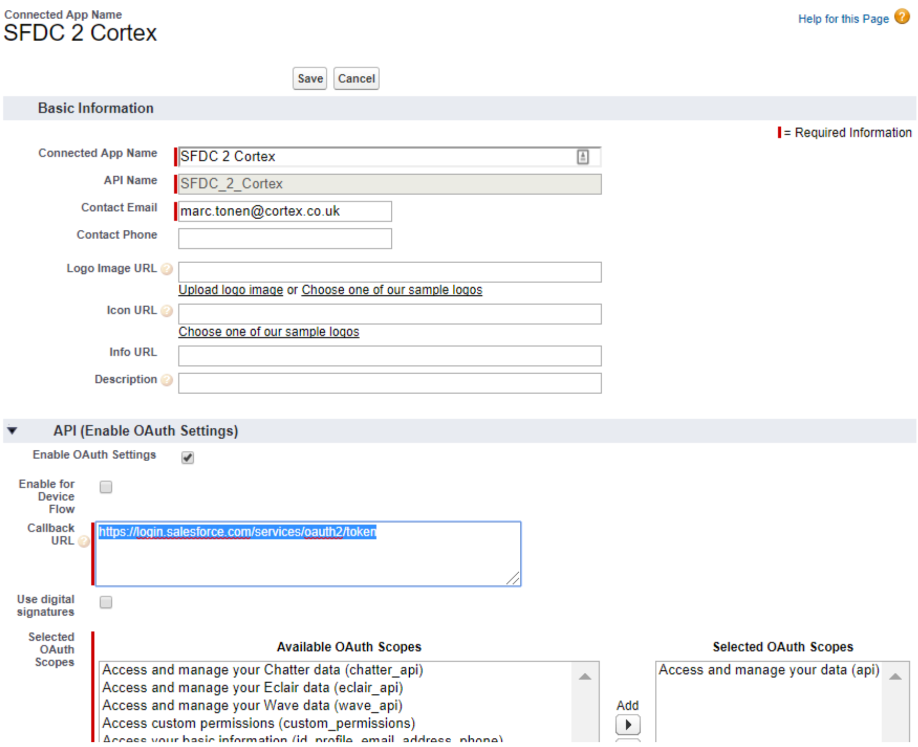
In order for a Salesforce instance to allow communication with Cortex, Cortex needs to be registered as an App in Salesforce.

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.



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

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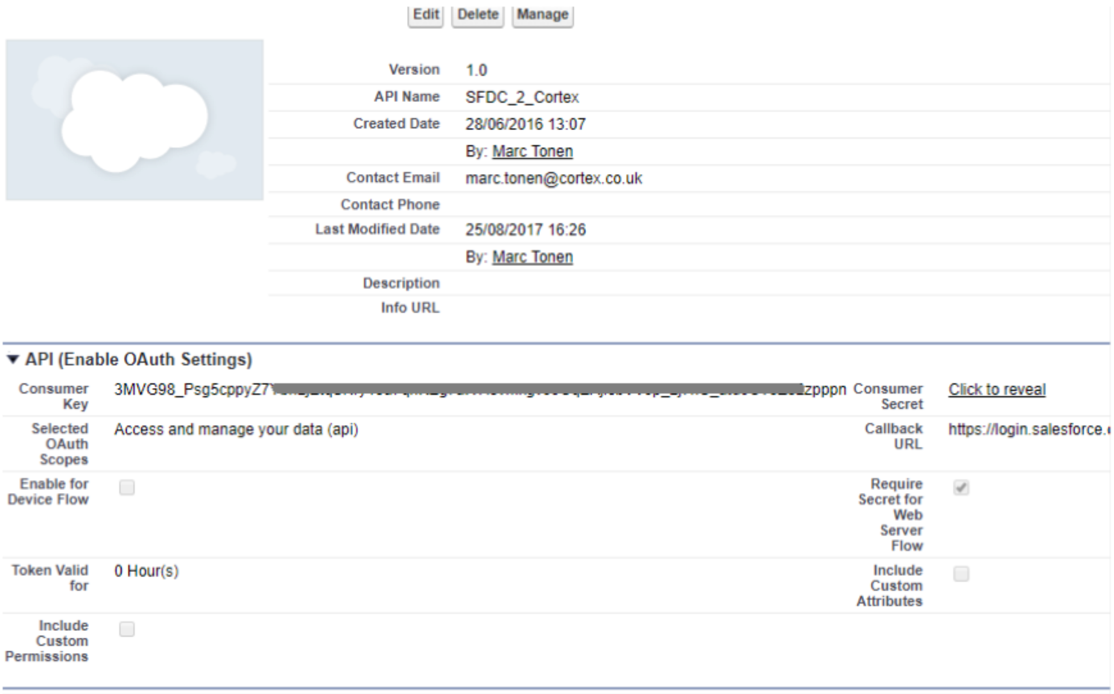
3.2 Obtain Credentials

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



2. The user should make a note of the following from this page:
   a. Consumer Key
   b. Consumer Secret (revealed by clicking the ‘click to reveal’ hyperlink)
   c. Callback URL

3. Finally, to obtain the security token, the user must take the following steps:
   a. Select the user icon in the top left hand corner of the page.
   b. Select **Settings**
   c. Select **My Personal Information**
   d. Select **Reset My Security Token**, then **Reset**
   e. The security token will be emailed to them.

4. 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.

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