

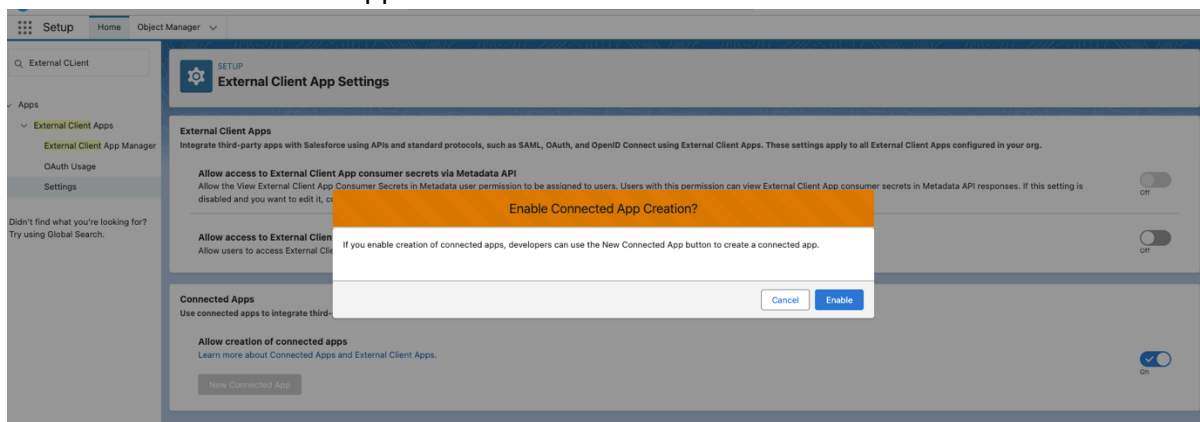
Watsonx Orchestrate x Salesforce integration

1. Salesforce setup

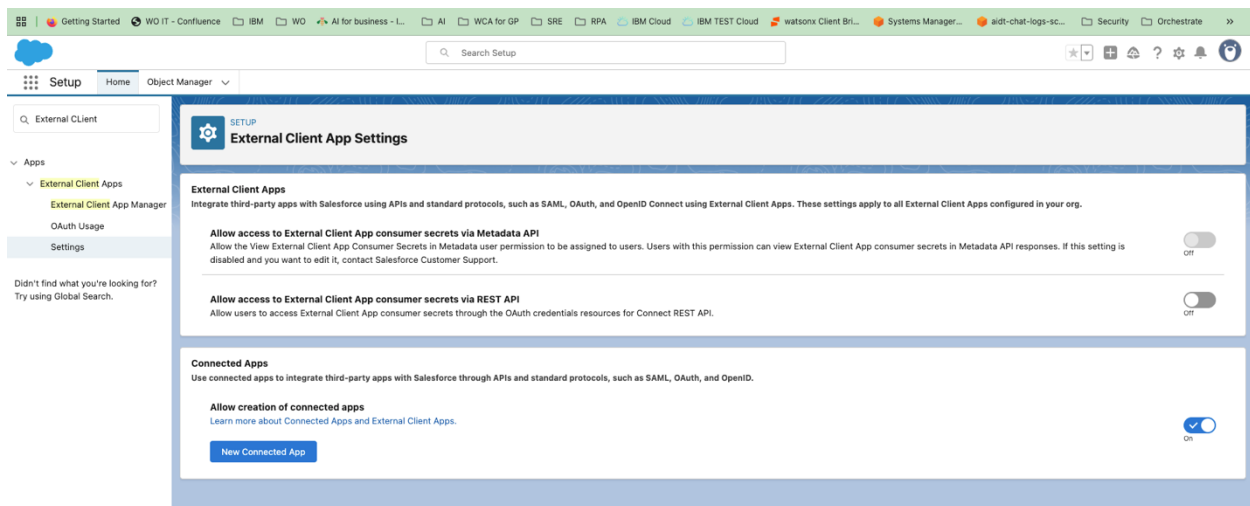
Generate Keys

Enable Connected Apps

1. **Go to Apps**→ External Client App→ Settings
2. **Enable Connected App**




3. **Click new connected App**



4. **Fill required fields**
 - a. **Connected App Name**
 - b. **Api Name**
 - c. **Contact Email**

Object Manager ▾


SETUP
App Manager

New Connected 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)

5. Enable "Enable OAuth Settings"

- a. Use "https://login.salesforce.com" in the callback url
- a. Available OAuth Scopes
 - i. Chatbot_api
 - ii. Sfap_api
 - iii. Api
 - iv. Refresh_token
- b. Disable
 - i. Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows
 - ii. Require Secret for Web Server Flow
 - iii. Require Secret for Web Server Flow
 - iv. Require Secret for Refresh Token Flow
- c. Enable
 - i. Enable Client Credentials Flow
- d. Issue JSON Web Token (JWT)-based access tokens for named users

orgfarm-fcb6b1b9af-dev-ed.develop.lightning.force.com/lightning/setup/ConnectedApplication/page?address=%2Fapp%2Fmgmt%2Fforceconnecte

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Setup Home Object Manager

External Client

Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

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

Manage Connected Apps

Back to List: Custom Apps

Edit Delete Manage Migrate to External Client App

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

| | |
|--------------------|------------------|
| Version | 1.0 |
| API Name | Demo |
| Created Date | 4/7/2025, 10:16 |
| By | Cristian Guillen |
| Contact Email | cguillen@ibm.com |
| Contact Phone | |
| Last Modified Date | 4/7/2025, 10:16 |
| By | Cristian Guillen |
| Description | |
| Info URL | |

API (Enable OAuth Settings)

Consumer Key and Secret Manage Consumer Details

Selected OAuth Scopes Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access) Access chatbot services (chatbot_api) Access the Salesforce API Platform (sfapi_api)

Callback URL https://login.salesforce.com

Enable for Device Flow ☐

Require Proof Key for Code Exchange (PKCE) ☐

f. Then click Manage, then Edit policies

g. Setup the user in Client Credentials Flow

orgfarm-fcb6b1b9af-dev-ed.develop.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2Fforceconnectedapplicationpage...

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Setup Home Object Manager

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Manage Connected App

Start URL Mobile Start URL

OAuth Policies

Permitted Users All users may self-authorize

Enable Single Logout ☐

IP Relaxation Enforce IP restrictions

Refresh Token Policy Refresh token is valid until revoked

Immediately expire refresh token

Expire refresh token if not used for Day

Expire refresh token after Day(s)

Session Policies

Timeout Value --None--

High assurance session required ☐

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

Enable User Provisioning ☐

Client Credentials Flow

Run As Cristian Guillen

JWT-Based Access Token Settings for Named Users

Token Timeout 30 Minutes

Save Cancel

h. Then come back to app manager

i. Look for Demo app and click view

The screenshot shows the Lightning Experience App Manager interface. The left sidebar contains a search bar and a navigation menu with 'Apps' and 'External Client App Manager'. The main content area displays a table of 29 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in Lig... (likely 'Visible in Lightning Experience').

| App Name | Developer Name | Description | Last Modified Date | App Type | Visible in Lig... |
|--------------|----------------|---|--------------------|-----------|-------------------|
| Content | Content | Salesforce LHM Content | 24/6/2025, 11:01 | Classic | ✓ |
| Data Cloud | Audience360 | Build a thorough and complete understanding of your customers. | 24/6/2025, 11:01 | Lightning | ✓ |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 24/6/2025, 11:01 | Lightning | ✓ |
| Demo | Demo | | 4/7/2025, 14:20 | Connected | |
| Demo2 | Demo22 | | 4/7/2025, 14:13 | Connected | |

j. Click manage Consumer Details

The screenshot shows the 'Manage Connected Apps' interface for the 'Demo' app. The left sidebar is the same as the previous screenshot. The main content area displays the app details for 'Demo'. At the top, there are buttons for 'Edit', 'Delete', 'Manage', and 'Migrate to External Client App'. Below these, there is a section for 'API (Enable OAuth Settings)' with various configuration options.

Connected App Name: Demo

API (Enable OAuth Settings):

- Consumer Key and Secret: [Manage Consumer Details](#)
- Selected OAuth Scopes: Manage user data via APIs (api), Perform requests at any time (refresh_token, offline_access), Access chatbot services (chatbot_api), Access the Salesforce API Platform (sfap_api)
- Callback URL: https://login.salesforce.com
- Enable for Device Flow: ☐
- Require Proof Key for Code Exchange (PKCE): ☐
- Extension for Supported Authorization Flows: ☐
- Require Secret for Web Server Flow: ☐
- Require Secret for Refresh Token Flow: ☐

k. Copy the two keys provided and saved in a secure location

Look for the domains

Look for “my domain” save the “Current My Domain URL” in the same pace than the keys above

Connections

Then create the following keys in the draft/live setting of watson orchestrate:

- **base_url**, use the domain above with the <https://> prefix

- **token_url**, use the domain above with this path `/services/oauth2/token`
- **client_id**, use the consumer key
- **client_secret**, use the consumer secret
- **domain**, use the domain above **without** `salesforce.com` suffix

Example

```
"base_url": "https://orgfarm-fcb6b1b9af-dev-ed.develop.my.salesforce.com",
"token_url": "https://orgfarm-fcb6b1b9af-dev-ed.develop.my.salesforce.com/services/oauth2/token",
"client_id": "xxx",
"client_secret": "xxxx",
"domain": "orgfarm-fcb6b1b9af-dev-ed.develop.my"
```

2. watsonx Orchestrate integration

Create connection

To connect watsonx Orchestrate to Salesforce:

1. From the main menu, select **Manage > Connections**.
2. Search for **Salesforce**.
3. Find the connection ID with the following structure: **salesforce_key_value_ibm_184bdbd3**.
4. For the matched connection ID, click **Edit**.
5. Choose the environment to create the connection: draft or live.
6. Select the **Authentication Type** as **Key Value Pair**.
7. Provide the following **Keys**, click **Add new field** to add additional key-value pairs:
 - base_url
 - token_url
 - client_id
 - client_secret
 - domain

For all **Value** fields insert the value corresponding to the key.

8. Select the [credential type](#).
9. Click **Save**.

Source: <https://www.ibm.com/docs/en/watsonx/watson-orchestrate/base?topic=agents-salesforce>

Create Salesforce agent

To import prebuilt Salesforce agent:

1. From the main menu, select **Manage > Connections**.
2. Search for **CRM Management**.
3. Click **Use as template**.
4. (optional) Update agent's parameters
5. Test your agent in Preview window

Example: list 5 opportunities