

Integration UiPath with Salesforce

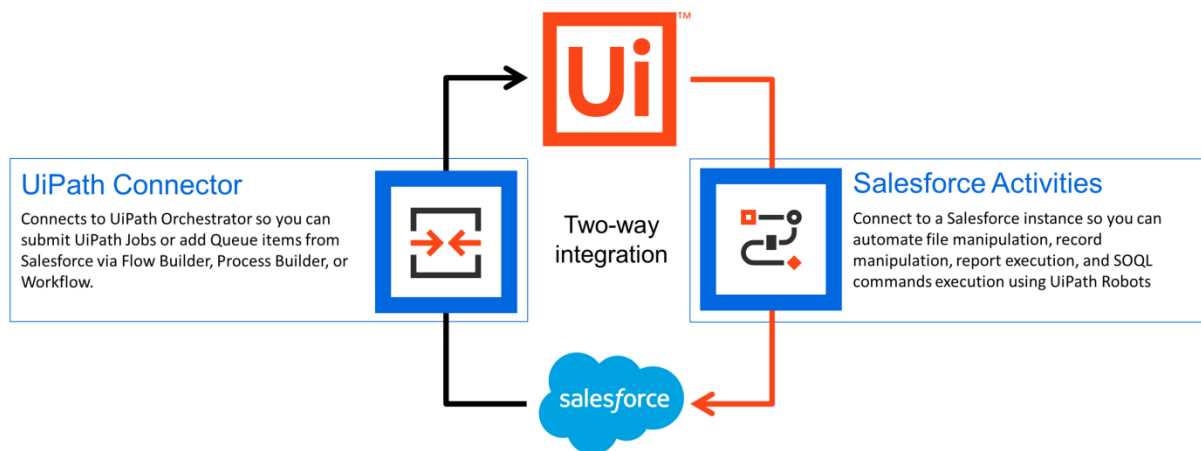
Salesforce CRM is a **cloud-based software that helps organizations to effectively streamline their sales and marketing operations**. Today, Salesforce is the customer relationship management (CRM) platform in the world. It also offers organizations easy access to web-based software over the internet.

Salesforce is a customer relationship management solution that brings companies and customers together .It's one integration CRM platform that gives all your departments-including marketing,sales,commerce, and service-a single ,shared view of every customer

“The integration between UiPath and Salesforce delivers more value to our joint customers and helps teams maximize productivity. With the UiPath Connector for Salesforce, users can streamline complex workflows with ease—all without custom development or invasive implementation.

The **UiPath.Salesforce.Activities** pack enables you to automate Salesforce processes. It can connect to a Salesforce Org via the **Salesforce Application Scope** and, alongside the rest of the activities, enable you to perform actions such as file manipulation, record manipulation, report execution, and SOQL commands execution.

Once established, the connection to the Salesforce Org can be stored into a **IConnectionService** object and easily reused in all subsequent child Scope activities



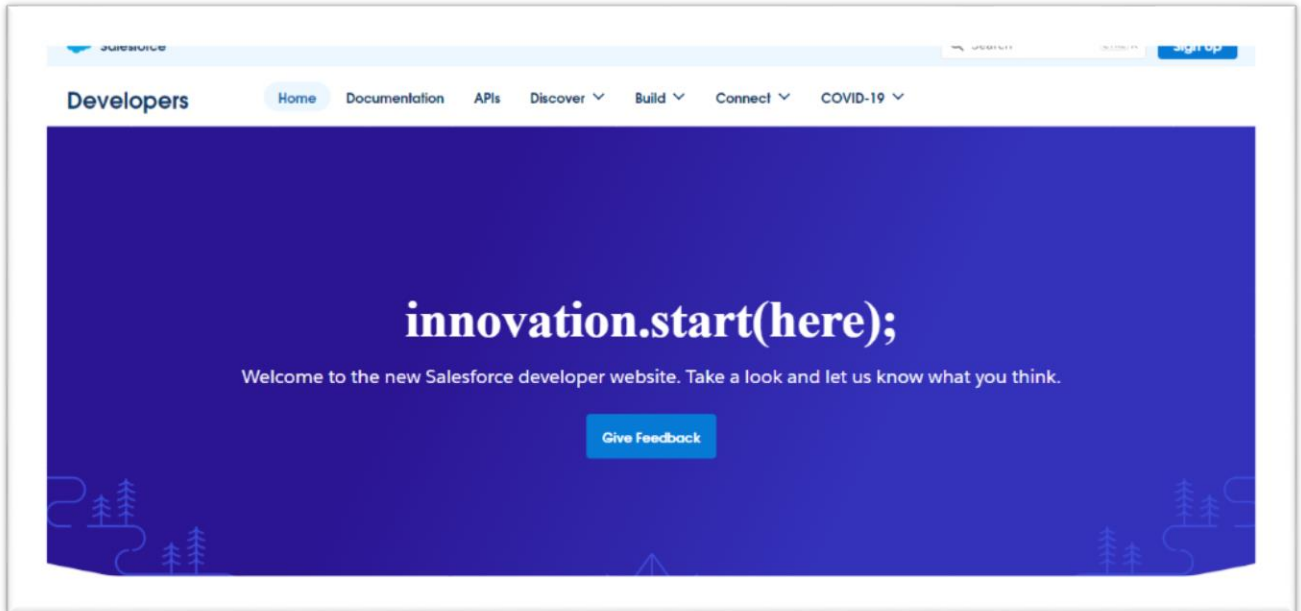
Prerequisites

A **Salesforce account** as well as a **Salesforce Connected App** are both required to use the Salesforce activities. These can be acquired from your Salesforce Administrator.

Alternatively, RPA Developers can use a **Salesforce Developer** account for automating processes in Salesforce.

Step1:

In order to integrate UiPath with Salesforce first thing what we must do is sign up to developer account <https://developer.salesforce.com/signup>




Step2:

Click on sign up and fill the form by giving the following details

Username should be in this formate name@companyname.com

Whatever the company name you are filling that should be given



Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

First Name*

Last Name*

Email*

Role*

Company*

Country*

Postal Code*

Username*

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

Already have a Salesforce Developer Environment?







[Log In](#)

After filling the form the otp will be send to the registered email id

Give that otp the below page will open



Search Setup

Quick Find

Setup

Home


Object Manager

Setup Home

Service Setup Assistant
 Multi-Factor Authentication Assistant
 Release Updates
 Lightning Experience Transition Assistant
 New Salesforce Mobile App QuickStart
 Lightning Usage
 Optimizer


ADMINISTRATION
 > Users
 > Data
 > Email

PLATFORM TOOLS
 > Apps
 > Feature Settings
 > Einstein
 > Objects and Fields
 > Events
 > Process Automation
 > User Interface
 > Custom Code
 > Navigation



SETUP
Home


Create



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital channels.


Get Started



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More



Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

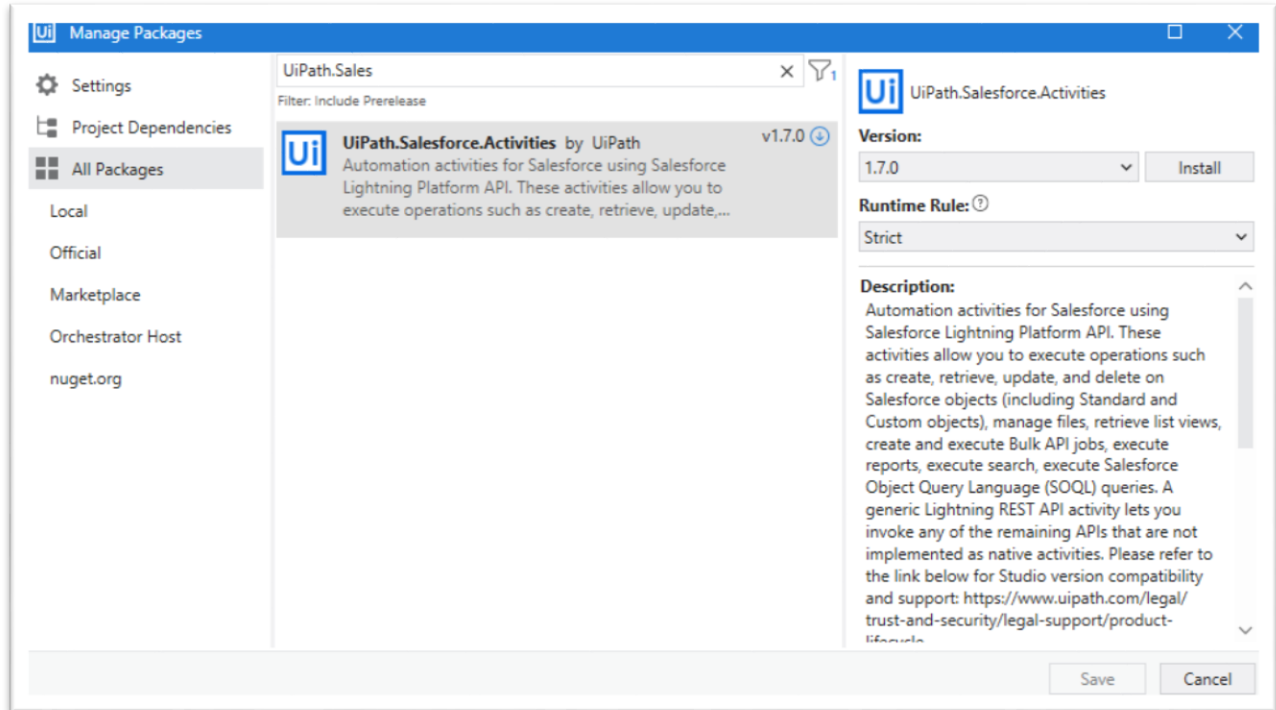
Most Recently Used

1 items

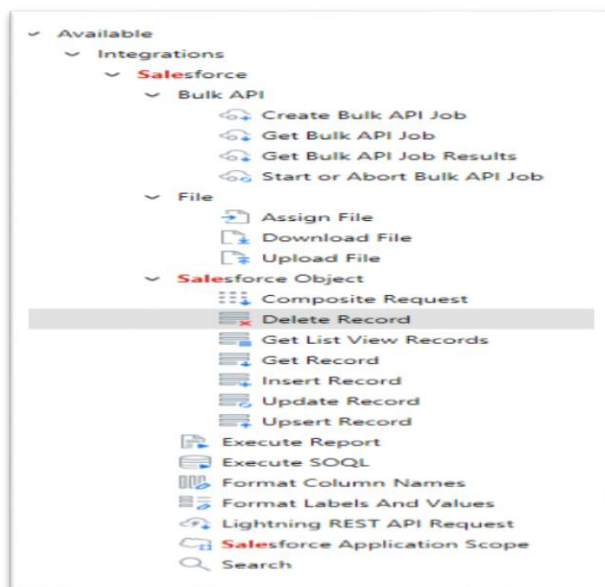
NAME	TYPE	OBJECT
Pydisetti Sujana	User	

Step3

In UiPath Studio create one new process Go to manage packages ->which is in the ribbon bar->All package install uipath.Salesforce.activities and save

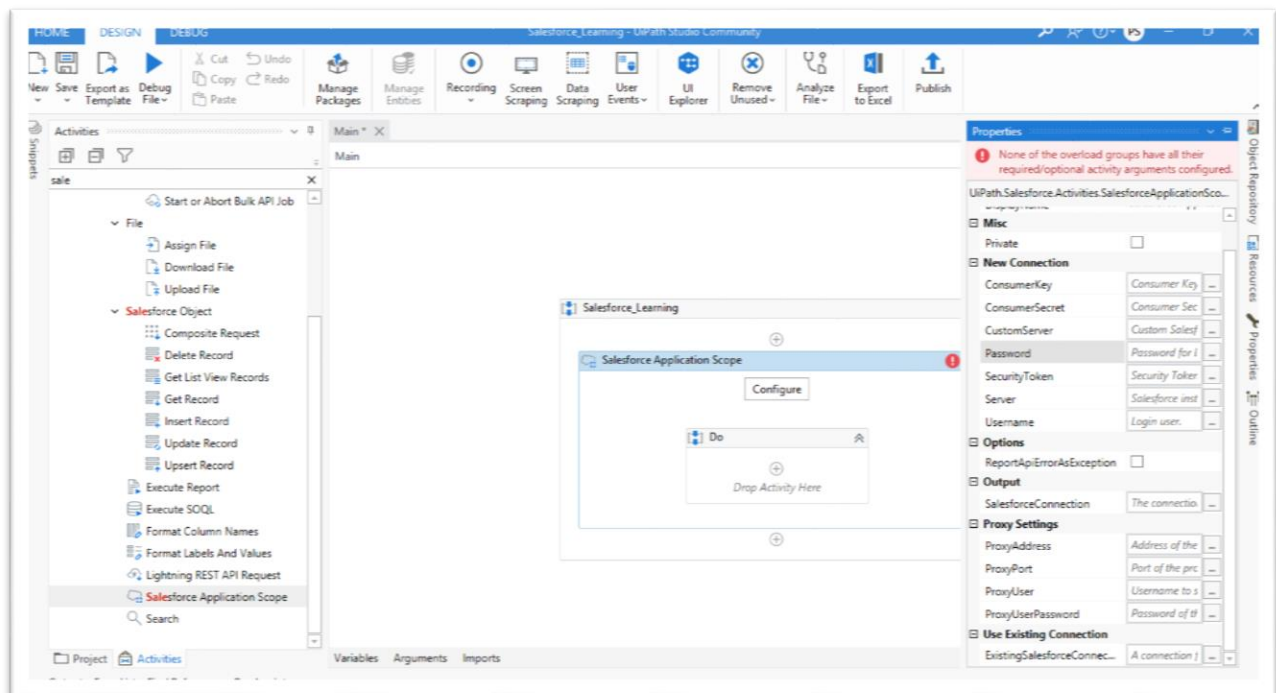


Activites present in UiPath.Salesforce.activity package



Step4:

In order to integrate Uipath with Salesforce, Salesforce application Scope Activity is used



This all properties are needed

- Consumer key(String)
- Consumer secret(Secure String)
- Security token (Secure String)
- Username(String)
- Password(Secure String)

Username:

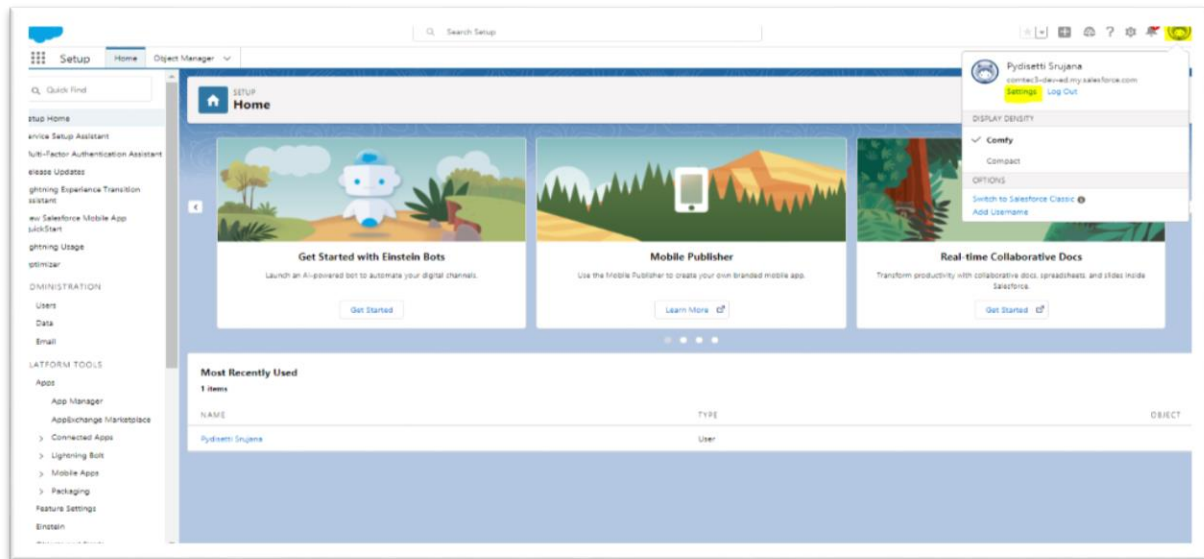
When you are creating Salesforce developer account whatever the username we are giving that must be provided here.

Password:

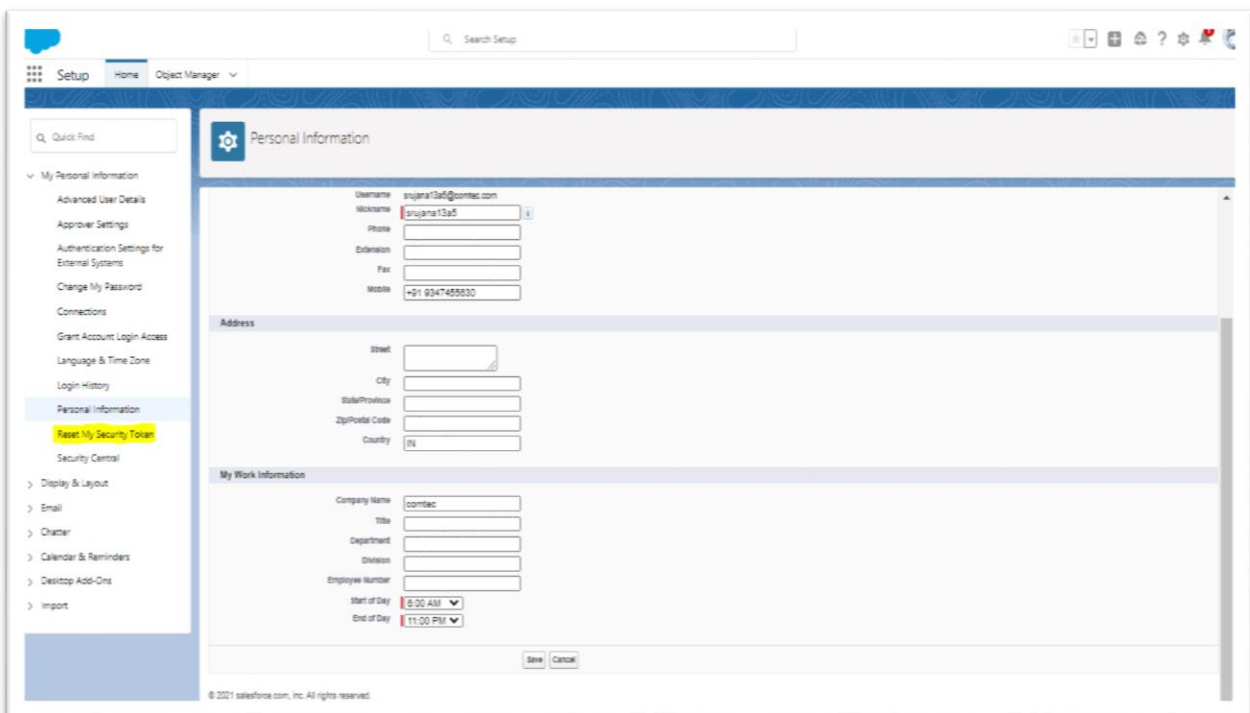
When you are creating Salesforce developer account whatever the password we are giving that must be provided here

Security token:

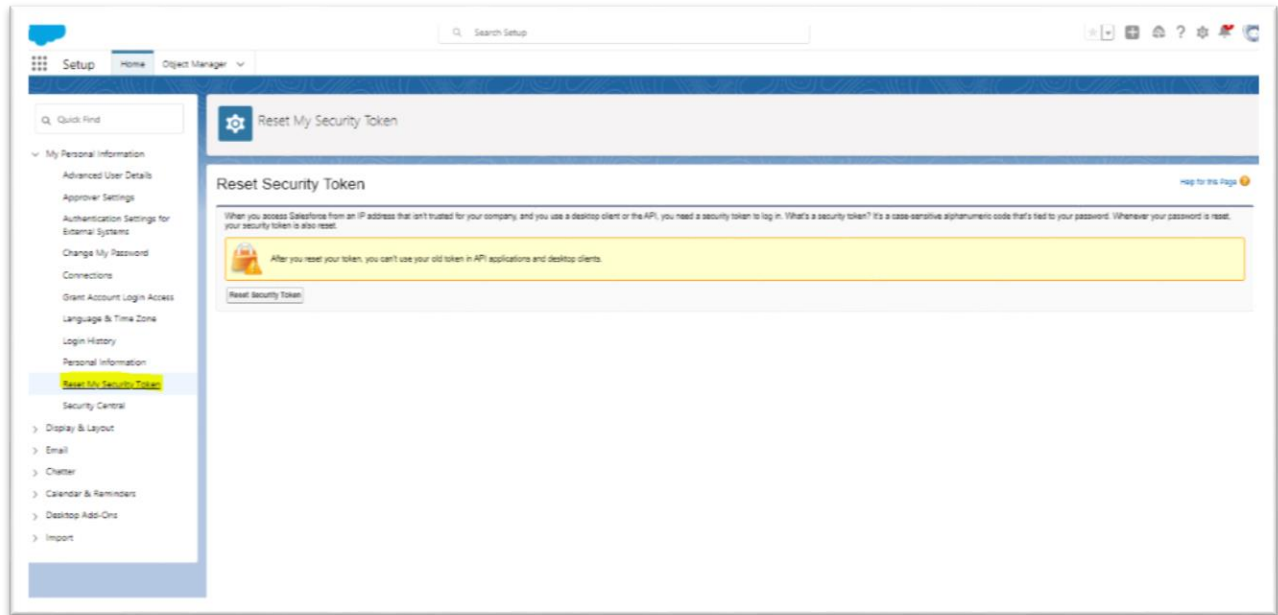
Go to profile -> settings



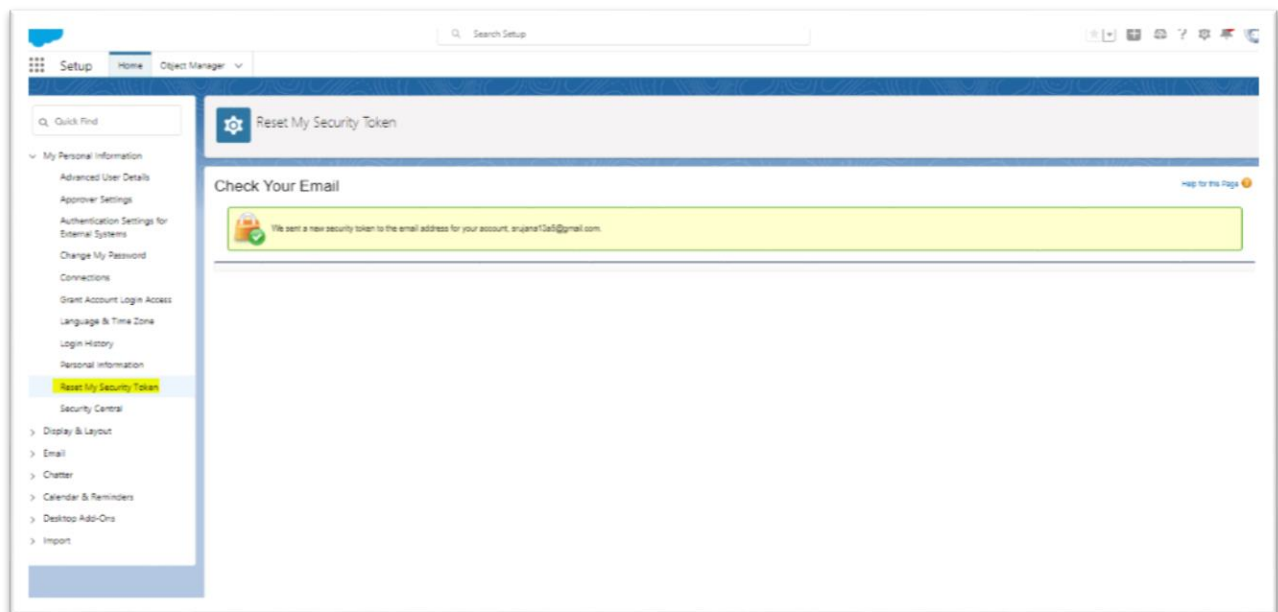
Go to Reset my Security token



After clicking on reset my security token the page appear like below

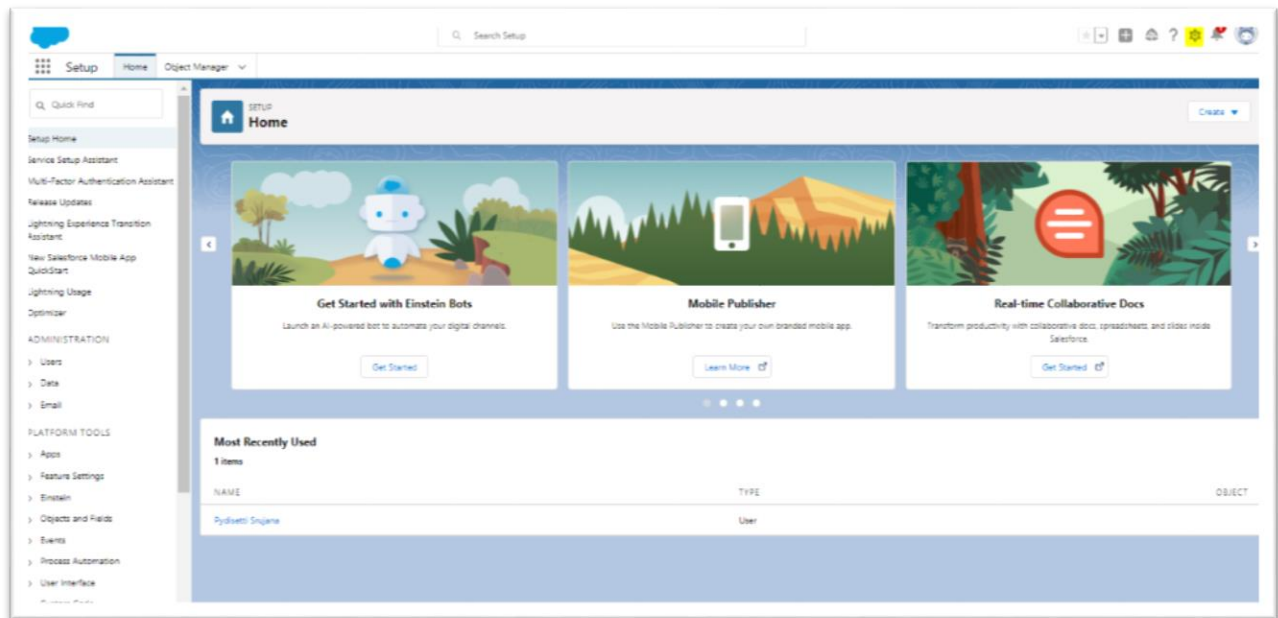


Here we can reset the security token and the security token is send to email id which you given for Salesforce developer account.

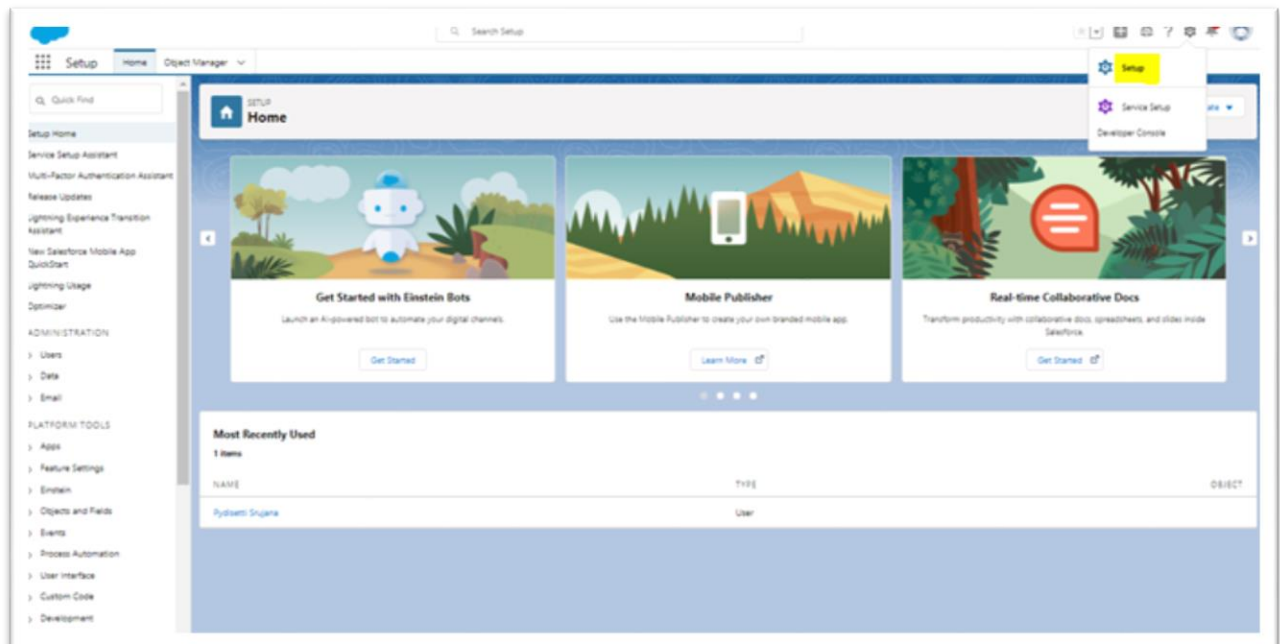


From that we can past the security token

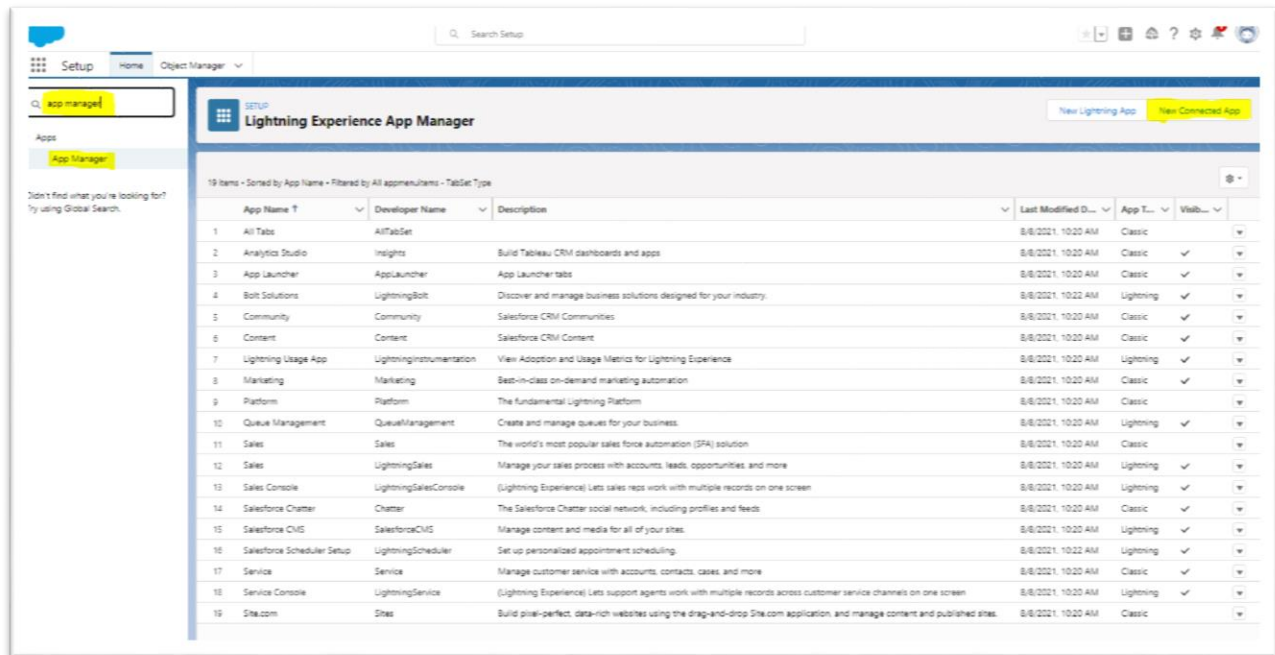
Consumer secret & Consumer key:



Go to set up



In the search bar enter APP manager go to that APP manager-> go to new connection APP



After click on new connection APP the page appear like below

The screenshot shows the 'New Connected App' form. It has a 'Basic Information' section and an 'API (Enable OAuth Settings)' section. The 'Basic Information' section includes fields for Connected App Name, API Name, Contact Email, Contact Phone, Logo Image URL, Icon URL, Info URL, and Description. The 'API (Enable OAuth Settings)' section includes checkboxes for 'Enable OAuth Settings' (checked), 'Enable for Device Flow', and 'Use digital signatures'. The 'Callback URL' field is set to 'https://localhost:8080'.

Basic Information

Connected App Name: * Required information

API Name:

Contact Email:

Contact Phone:

Logo Image URL:

Icon URL:

Info URL:

Description:

API (Enable OAuth Settings)

Enable OAuth Settings: ☒

Enable for Device Flow: ☐

Callback URL:

Use digital signatures: ☐

Here we have to provide connection app name, API Name, and should enable OAuth Settings, Call back URL->https://localhost.8080

App Manager

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Pardot services (pardot_api)
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Salesforce CDP Ingestion API data (cdp_ingest_api)
- Access and manage your Wave data (wave_api)
- Access and manage your data (api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to Lightning applications (lightning)
- Allow access to content resources (content)

Selected OAuth Scopes

None

Require Secret for Web Server Flow ☒

Require Secret for Refresh Token Flow ☒

Inspect All Tokens ☐

Configure ID Token ☐

Enable Asset Tokens ☐

Enable Single Logout ☐

Web App Settings

Start URL

Enable SAML ☐

Custom Connected App Handler

Apex Plugin Class

Run As

Selected OAuth Scope should be full access and click on add

What is OAuth and how it works?

OAuth doesn't share password data but instead uses authorization tokens to prove an identity between consumers and service providers. OAuth is an authentication protocol that allows you to approve one application interacting with another on your behalf without giving away your password

App Manager

Web App Settings

Start URL

Enable SAML ☐

Custom Connected App Handler

Apex Plugin Class

Run As

Mobile App Settings

Mobile Start URL

PIN Protect ☐

App Platform

Restrict to Device Type

App Version

Minimum OS Version

Private App ☐

App Binary URL

Push Messaging Enabled ☐

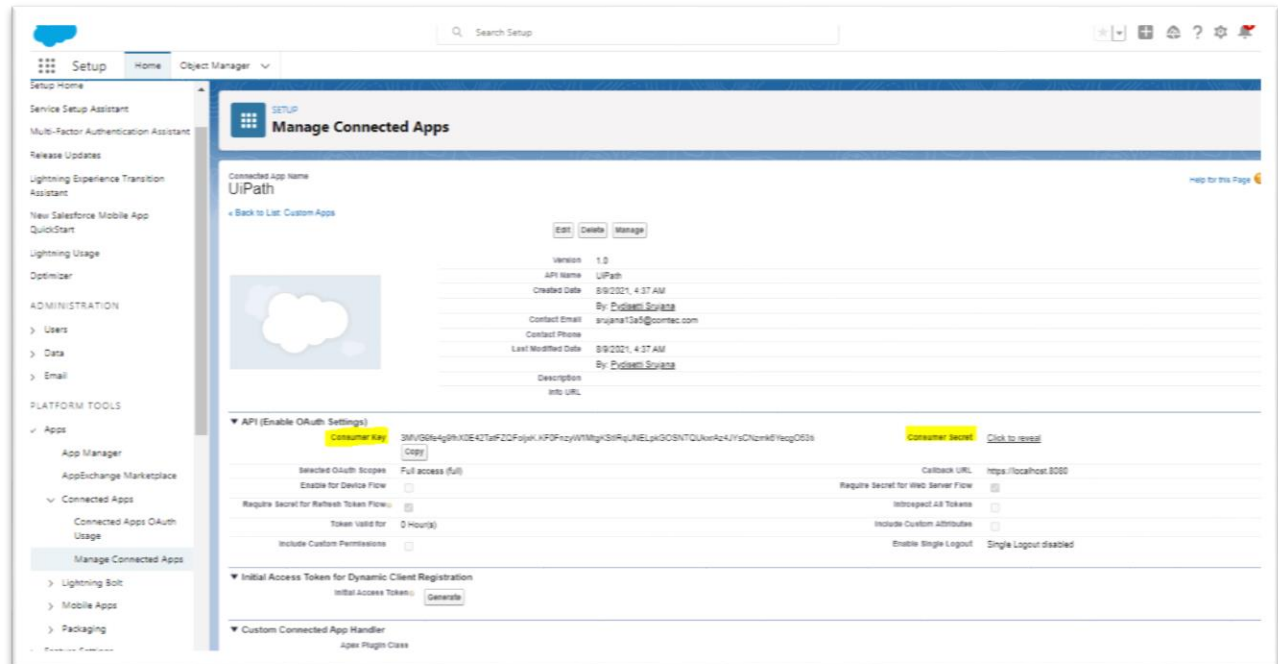
Enable subscription to notification types ☐

Canvas App Settings

Canvas ☐

Save Cancel

Click on save the following page should appear



From here we must copy the consumer key and consumer secret

consumer key:

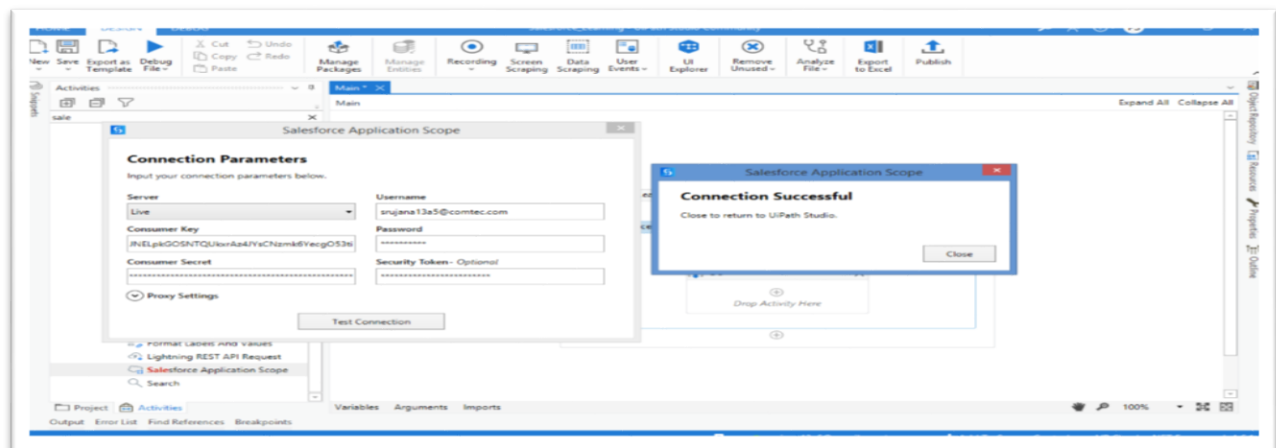
3MVG9fe4g9fhX0E42TatFZQFoljxK.KF0FnyW1MtgKStIRqUNELpkGOSNTQUkxrAz4JYsCNzmk6YecgO53ti

consumer secret:

7D4F82468200C0EAEA7D8A65322B032FFFFD5D9BD45742D81B4AEF37708F111E

Security token:

eFhNHs3KIE9qZvZFZ9JfrgJJ



By providing all the filled we can successfully make the connection

For any RPA Implementations/ resources in your organization please reach out to rpa@gxplabs.com