Deployment Guide

SalesForce <–> Google Sheets | Data Synchronization

# Heroku Sync Proxy

This is a node.js server that acts as a broker between SalesForce and Google Sheets. It handles all the requests from both sides, manages credentials, and displays progress to the user during exports.

The source code (and an up-to-date version of this document) can be found on GitHub: <https://github.com/TractionOnDemand/TractionSyncProxy>

## Install/Setup instructions

Refer to the official Heroku documentation for detailed help: <https://devcenter.heroku.com>

1. Create a new Heroku App <https://dashboard.heroku.com/new>
   1. On the Settings tab of your new app, the Domain field shows your <HEROKU\_APP\_URL>
   2. Add PostgreSQL to the app
      1. From the ‘Resources’ tab, enter ‘Postgres’ into the Add-ons search and select ‘Heroku Postgres’ from the search results.
      2. Pick your plan name and click the ‘Provision’ button.
      3. From the new datastore page, click the ‘View Credentials’ button.

The URI value is your <DATABASE\_URL>

* 1. Add Heroku App Config Vars (from the Settings tab, click ‘Reveal Config Vars’)
     1. DATABASE\_URL = <DATABASE\_URL>
     2. NODE\_PATH = ./server
     3. SF\_LOGIN\_URL = https://login.salesforce.com/services/oauth2
     4. SF\_REDIRECT\_URI = <HEROKU\_APP\_URL>/salesforce/oauth
     5. SF\_KEY = <SF\_OAUTH\_KEY>
     6. SF\_SECRET = <SF\_OAUTH\_SECRET>
     7. GOOGLE\_CALLBACK\_URL = <HEROKU\_APP\_URL>/google/callback
     8. GOOGLE\_WEBAPP\_URL = <GOOGLE\_WEBAPP\_URL>
     9. GOOGLE\_CLIENT\_ID = <GOOGLE\_CLIENT\_ID>
     10. GOOGLE\_CLIENT\_SECRET = <GOOGLE\_CLIENT\_SECRET>

1. Checkout the node.js server from GitHub
2. Add heroku as a remote
   1. git remote add heroku https://git.heroku.com/<HEROKU\_APP\_NAME>.git
3. Push to your heroku app
4. Run the database setup
   1. <HEROKU\_APP\_URL>/pg/setup\_db
   2. Optionally disable the setup in ./router/pg.js to prevent setup from running again. (need to commit/push the change).

# SalesForce Setup

1. Install Managed Package
   1. <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t50000000RRgr>
   2. Password is **traction**
2. Update the Custom Setting
   1. Google Sheet Sync -> Endpoint URL = <HEROKU\_APP\_URL>/salesforce

(e.g. <https://my-new-app.herokuapp.com/salesforce>)

1. Add Heroku App as a Connected App in SalesForce
   1. Give an appropriate name
   2. Enable OAuth Settings
      1. Callback URL = <HEROKU\_APP\_URL>/salesforce/oauth
      2. Selected OAuth Scopes

* Full access (full)
* Perform requests on your behalf at any time (refresh\_token, offline\_access)

1. Add Heroku App as a Remote Site
   1. Remote Site URL = <HEROKU\_APP\_URL>

# Google Web App

This web app is used to detect change events on the Google Sheet and send notifications to Heroku when such changes occur.

1. Create a project:
   1. open the Developer Console: <https://console.developers.google.com>
   2. select ‘Create project’ from the menu dropdown.
   3. Enter a project name then click ‘Create’ (this might take a few minutes)
2. Enable Drive API and Sheets API
3. Click ‘Credentials’ from the nav menu.
4. Setup OAuth consent screen
   1. On the ‘OAuth consent screen’ tab, enter all appropriate fields then Save.
5. Setup Credentials
   1. On the Credentials tab, select ‘OAuth client ID’ from the ‘Create credentials’ dropdown.
   2. Select ‘Web application’
   3. Enter a name for the web application
   4. Set the ‘Authorized redirect URI’ to: <HEROKU\_APP\_URL>/google/callback
   5. Click Save.
   6. Copy the Client ID and Client Secret as <GOOGLE\_CLIENT\_ID> and <GOOGLE\_CLIENT\_SECRET>
6. Follow Google’s documentation to create a Google App Script:  
   <https://developers.google.com/apps-script/guides/web>
7. Open the new Google App Script and copy/paste the contents of google\_sync\_apps.gs into Code.js
8. Add URL to Script Properties. (just update the hard-coded heroku app URLs in the script)
9. Publish the App
   1. Publish -> Deploy as web app
      1. Project version : New
      2. Execute the app as: User accessing the web app
      3. Who has access to the app: Anyone
   2. Copy the web app URL as: <GOOGLE\_WEBAPP\_URL>

### Appendix

<HEROKU\_APP\_URL>

This is the URL of your Heroku App. It is listed by the Domain on the Settings tab of your app.

<DATABASE\_URL>

This is the URL of the PostgreSQL database. It should be setup automatically when you add a datastore to your app. It can be found under the settings of your datastore.

<SF\_OAUTH\_KEY>

<SF\_OAUTH\_SECRET>

<GOOGLE\_WEBAPP\_URL>

<GOOGLE\_CLIENT\_ID>

<GOOGLE\_CLIENT\_SECRET>