



## ITCurrency for Salesforce

(This guide is intended for Salesforce System Admins.)

### Installation

1. Package installation links – Login to salesforce as a System Administrator and select one of the links below:
  - Production/Developer Org -  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0Y000001pBkU>
  - SandBox Org –  
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0Y000001pBkU>
2. On the installation page - Select to "Install for Admins Only".
3. Click "Install", select "Yes, grant access to these third-party web sites" and hit "Continue".

### Post Installation Settings – Part 1


1. Go to setup → **Remote site settings**
2. Check if there's already an existing remote site with the following settings for your org, if not, create one:

Click on the "New Remote Site" button and fill in the following values -

- Remote Site Name – My Org Url
- Remote Site URL – <https://<instance>.salesforce.com>  
Replace the <instance> with your specific org instance details. locate your Org instance by looking at the URL while logged into Salesforce. It will be the first part of the URL. For example:

 Secure | <https://eu2.salesforce.com/home/home.jsp>

If you use a custom domain, your instance will be in the form of "CompanyName.my". For example:

 Secure | <https://itmyway.my.salesforce.com/home/home.jsp>

- Make sure the "Active" checkbox is checked and hit "Save"



3. Go to setup → **Certificate and Key Management**
4. Click on "Create a Self-Signed Certificate", fill in the following values -
  - Label – ITcurrency
  - Unique Name – ITcurrency
5. Save
6. Click on "Download Certificate"

## Post Installation Settings – Part 2

\* Pay attention to follow the instructions according to your Org Settings, Lightning or Classic.

1. **On Lightning** Go to setup → **App Manager** / **On Classic** Go to setup → Create → **Apps**
2. Click to create a "New Connected App", fill in the following values:
  - Connected App Name – ITcurrency
  - API Name – ITcurrency
  - Contact Email – [support@itmyway.com](mailto:support@itmyway.com)
  - Enable OAuth Settings – check
  - Callback URL – <https://itmyway.co.il>
  - Use digital signatures – check
  - Click "Choose file" button and choose the certificate file you downloaded in [Part 1.5](#)
  - Selected OAuth Scopes – choose the following from the "Available OAuth Scopes" column:
    - Perform requests on your behalf at any time (refresh\_token, offline\_access)
    - Provide access to your data via the Web (web)
    - Access and manage your data (api)
  - Enable Asset Tokens – Token valid for -1 Hour(s)
  - Asset Signing Certificate – Itcurrency
  - Asset Audiences – <https://login.salesforce.com> (in sandbox use "test" instead of login)
  - Click "Save" and "Continue"



**Basic Information**

Connected App Name

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 ☒

Choose File

Selected OAuth Scopes

Available OAuth Scopes		Selected OAuth Scopes
Access and manage your Chatter data (chatter_api)	<div>Add</div> <div>Remove</div>	Access and manage your data (api)
Access and manage your Eclair data (eclair_api)		Perform requests on your behalf at any time (refresh_token, offline_access)
Access and manage your Wave data (wave_api)		Provide access to your data via the Web (web)
Access custom permissions (custom_permissions)		
Access your basic information (id, profile, email, address, phone)		
Allow access to your unique identifier (openid)		
Full access (full)		
Provide access to custom applications (visualforce)		

Require Secret for Web Server Flow ☒

Include ID Tokens ☐

Enable Single Logout ☐

Enable Asset Tokens ☒

Token Valid for  Hour(s)

Asset Signing Certificate

Asset Audiences

Include Custom Attributes ☐

Include Custom Permissions ☐



1. Click "Manage" from the App side Menu (**Lightning**) / Click on the "Manage" button (**Classic**)

APP Icon	APP Name	DESCRIPTION	LAST MODIFIED DATE	APP TYPE	VISIBLE IN CUSTOMER
	Force.com Migration Tool	The Force.com Migration Tool is a desktop...	28/12/2013 09:52	Connected (Managed)	
	Chatter Desktop	Chatter Desktop is an Adobe AIR-based des...	14/06/2017 12:25	Connected (Managed)	
	Chatter Mobile for BlackBerry	The Salesforce.com Chatter Mobile app lets...	14/06/2017 12:25	Connected (Managed)	
	Gongos Composer	Gongos Composer makes it easy for salesfo...	17/12/2016 12:23	Class (Managed)	✓
	Gongos Composer	Gongos Composer makes it easy for salesfo...	17/12/2016 14:35	Connected (Managed)	
	Gongos Composer Offline	Gongos Composer makes it easy for salesfo...	17/12/2016 13:27	Connected (Managed)	
	Gongos Composer SPS	Gongos Composer makes it easy for salesfo...	17/12/2016 13:27	Connected (Managed)	
	Data Assessment	Understand the completeness and quality o...	15/06/2016 13:04	Class	✓
	Data Loader Bulk	The Data Loader is an easy-to-use graphica...	28/12/2013 09:51	Connected (Managed)	
	Data Loader Partner	The Data Loader is an easy-to-use graphica...	28/12/2013 09:51	Connected (Managed)	
	Declarative Lookup Backup Summary	DeclarativeLookupBackupSummary	24/04/2017 13:31	Class (Managed)	✓
	Force.com IDE	The Force.com IDE is a powerful client appl...	28/12/2013 09:51	Connected (Managed)	
	Gridfinity	Multi-object editable grids for Salesforce	19/04/2017 10:30	Class (Managed)	✓
	ITcurrency		06/10/2017 08:53	Connected	✓
	Marketing	Both in-class on-demand marketing schema...	15/06/2013 10:27	Class	✓
	Revel	Prospect Insight	26/04/2017 07:03	Class (Managed)	✓
	Platform	The fundamental Force.com platform	15/06/2013 10:27	Class	

Connected App Name  
**ITcurrency**

[Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)

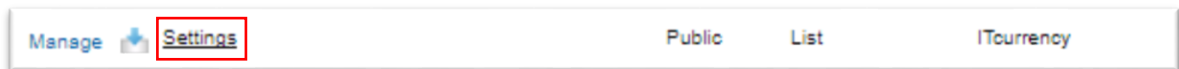
Allow from 2-10 minutes for your changes to take effect on the server before using the connected app.

Version	1.0
API Name	ITcurrency
Created Date	14/12/2017 16:56
By:	<a href="#">Eyal Zarankin</a>
Contact Email	support@itmyway.com
Contact Phone	
Last Modified Date	14/12/2017 16:56
By:	<a href="#">Eyal Zarankin</a>
Description	
Info URL	

2. Click "Edit Policies" and change "IP Relaxation" to "Relax IP restrictions" → Save



3. Go to setup → Custom Setting → Search the "Settings" row and click on the "Manage" link on the left.



4. Click "New", fill in the following values:
  - Name – Your company name
  - Clientid – Copy the Consumer Key from the connected app here.
  - Username – Your username.

### Post Installation Settings – Part 3

1. Schedule the Currency update – go to Setup → Apex Classes
2. Click "Schedule Apex", fill in the following values and Save:
  - Job Name - ITcurrency
  - Apex Class - "Scheduler" from namespace: ITcurrency
  - Frequency - Make it Daily (check all days)
  - Start – Today's Date
  - End – dd/mm/3055
  - Preferred Start Time - 06:00 am (Recommended)
3. Copy the following URL to your browser URL address bar -  
[https://<1>.salesforce.com/services/oauth2/authorize?response\\_type=code&client\\_id=<2>&redirect\\_uri=https://itmyway.co.il](https://<1>.salesforce.com/services/oauth2/authorize?response_type=code&client_id=<2>&redirect_uri=https://itmyway.co.il)
4. Replace the <> Fields with the following information:
  - <1> – your Instance - for example "eu2.salesforce.com"
  - <2> – Your Consumer Key – from "View" in the Connected App.
5. Click "Allow"

#### **Example –**

[https://itmyway.my.salesforce.com/services/oauth2/authorize?response\\_type=code&client\\_id=3MVG9HxRZv05HarSul8yWpq1o6cmczkgcZ.wZ26m83TqdstuJRTGPncOKaBap5wVrooQO4rnwEHNylvcwanTt&redirect\\_uri=https://itmyway.co.il](https://itmyway.my.salesforce.com/services/oauth2/authorize?response_type=code&client_id=3MVG9HxRZv05HarSul8yWpq1o6cmczkgcZ.wZ26m83TqdstuJRTGPncOKaBap5wVrooQO4rnwEHNylvcwanTt&redirect_uri=https://itmyway.co.il)