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
   - 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	ITcurrency
API Name	ITcurrency
Contact Email	support@itmyway.com
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)

Enable OAuth Settings	☑
Enable for Device Flow	☐
Callback URL	https://itmyway.co.il
Use digital signatures	☑
	Choose File ITcurrency.crt

Selected OAuth Scopes

Available OAuth Scopes:
- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- 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)

Add ▶
◀ Remove

Selected OAuth Scopes:
- Access and manage your data (api)
- Perform requests on your behalf at any time (refresh_token, offline_access)
- Provide access to your data via the Web (web)

Require Secret for Web Server Flow	☑
Include ID Token	☐
Enable Single Logout	☐
Enable Asset Tokens	☑
Token Valid for	1 Hour(s) ▼
Asset Signing Certificate	ITcurrency ▼
Asset Audiences	https://login.salesforce.com
Include Custom Attributes	☐
Include Custom Permissions	☐

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

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.

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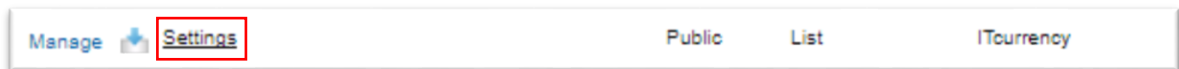
4. Click "New", fill in the following values:
   - Name – Your company name
   - Clientid – Copy the Consumer Key from the connected app here.
   - Username – Your username.

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
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