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Section: Integrations



Salesforce

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Welcome

We're delighted that you're exploring how to bring the intelligence of your Salesforce reporting to the reach and engagement of your Vizia platform.



This document provides you and your Customer Success Manager (CSM) with the blueprint to go from nowhere to everywhere.

How it works

Follow these 8 steps and you'll be up and running.

1. Check your Salesforce account type

To use the Salesforce integration you will need a Salesforce account with REST API access. At the time of writing this includes the following types of Salesforce account:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

More information is available [here](#)

2. Install the Vizia Salesforce Reports Connected App

As a Salesforce administrator in Salesforce, now install the App:

<https://login.salesforce.com/package/installPackage.apexp?p0=04t0Y000000Vz2d>

3. Whitelist the Vizia CORS domains:

As a Salesforce administrator, in Salesforce:

1. Click Setup
2. Type “CORS” in the quick find bar and select the first and only result
3. In the “Whitelisted Origin(s)” View that appears, click “new”
4. Add the https://*.vizia.brandwatch.com domain (Note: please add the asterisk - it is not a placeholder)

CORS

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This page lists origins that are whitelisted for cross-origin resource sharing (CORS).

To allow code (such as JavaScript) running in a Web browser to communicate with Salesforce from a specific origin, whitelist the origin.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Whitelisted Origins New					
Action	Origin URL Pattern ↑	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	https://*.vizia.brandwatch.com	GrahamS	08/12/2016 09:41	GrahamS	22/02/2017 17:34

4. Create a Salesforce Vizia user

We strongly recommend that you create a Salesforce user with access only to the reports that you wish to share with Vizia.

When a user authenticates a Vizia Scene with Salesforce, Vizia keeps that user’s authentication token so that subsequently created scenes of the same type can use that same authentication. This is convenient by design, but allows **all** other users of Vizia admin in your organisation to use the same token.

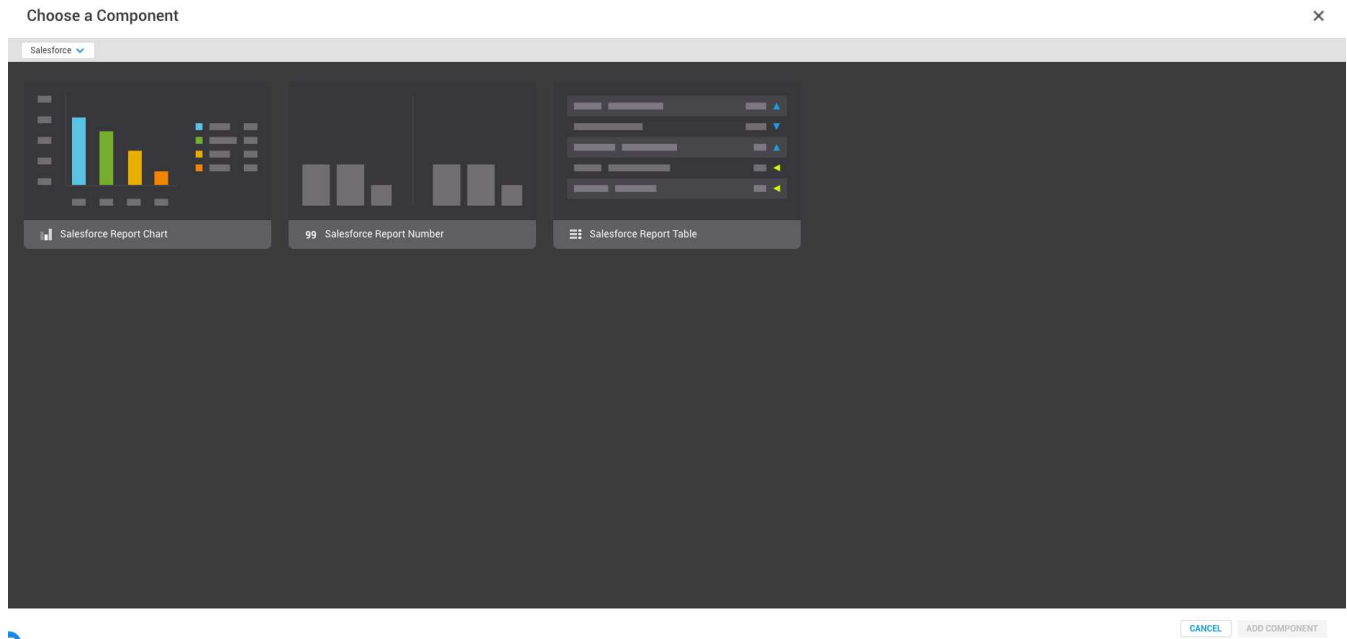
For some organisations this may present an information security hurdle that is easily mitigated by creating a Salesforce account that can **only** access the reports that you wish to share across your organisation, and using that account to authenticate Vizia with Salesforce.

5. Now notify your Brandwatch CSM, who will enable the Salesforce Integration in Vizia admin for you to use.

Your Customer Success Manager will now:

1. Make a request to the support team for the Salesforce integration to be turned on and double check that Steps 1-4 have been completed.
2. They will share the User Guide for Salesforce integration (the steps below)

3. Once completed, you will have access, and the next time you log in the Salesforce components will appear in the components sub menu in the Vizia Admin interface:

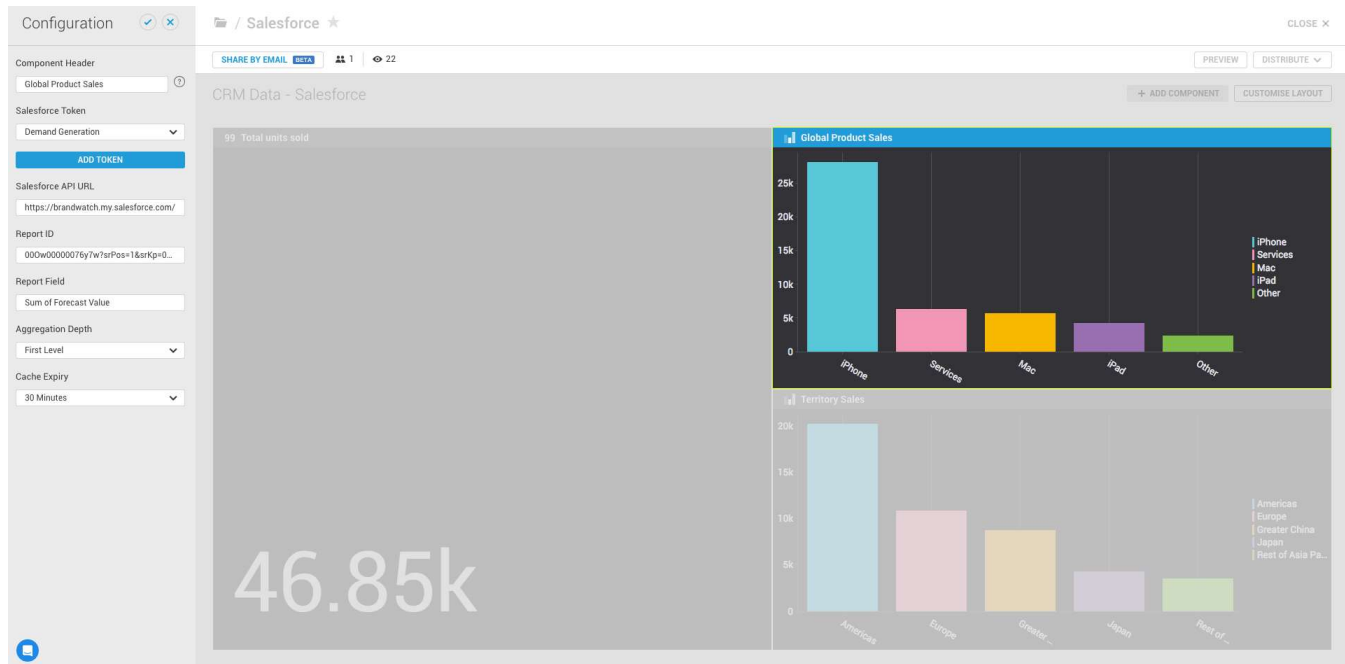


6. Create your Salesforce component inside Vizia

Choose if you would like to visualize the data as a chart, a big number or a table. The set up process for each is similar.

In the Salesforce component configuration screen, you add:



- The url of your report eg. <https://brandwatch.my.salesforce.com>
- The report ID e.g. 000w0000006oq3c (found in the report url in salesforce)
- The report field (copy-and-pasted from the headers of the report in salesforce)
- NOTE: The report must be in a 'summary format' in Salesforce
- The labels for the X & Y axis
- Choose the aggregation depth:
 - Grand Total: the total at the bottom of the report
 - First-Level: the breakdown numbers that sum to the grand total
 - Second-Level: the breakdown numbers that sum to the first level.




7. Salesforce authentication

- Click on the plus button:

Configuration



Component Header



Salesforce Token

▼

ADD TOKEN

Salesforce API URL

Report ID

Report Field

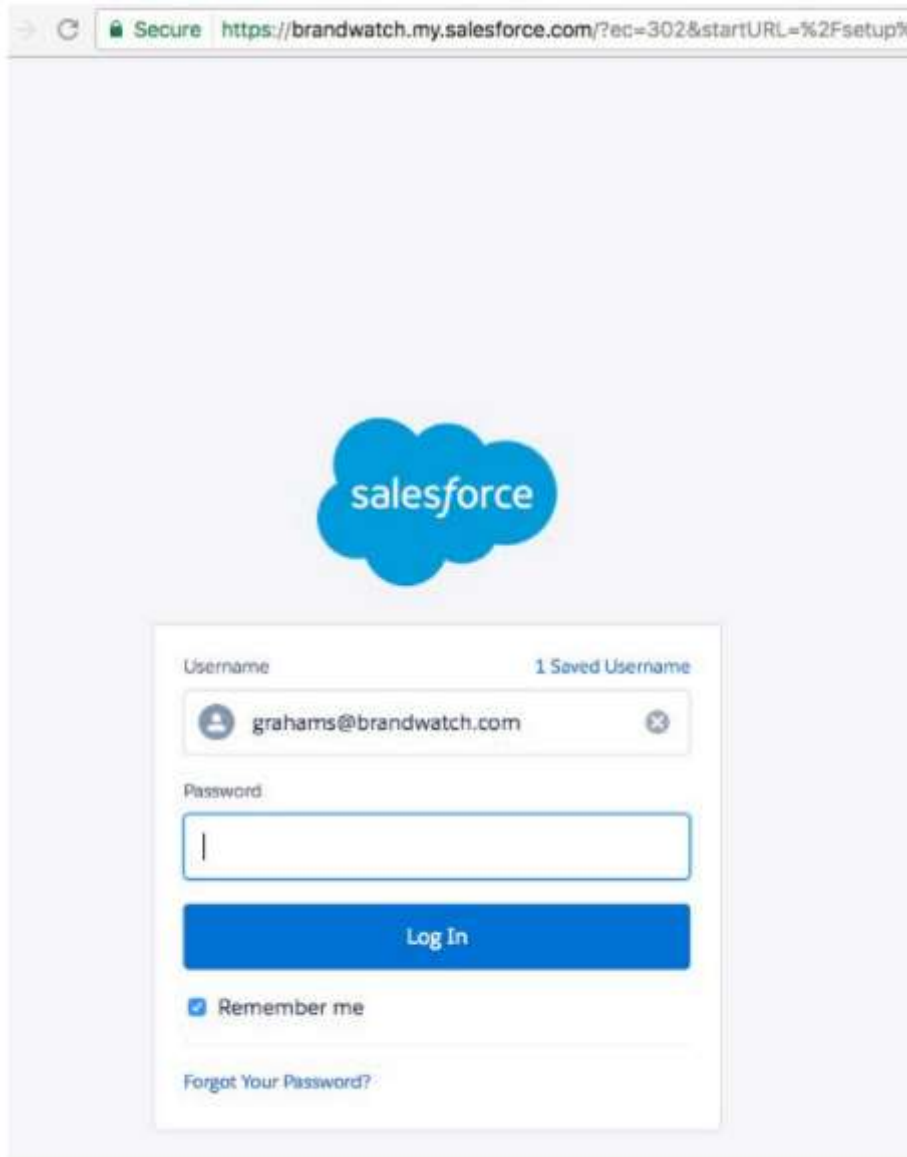
Aggregation Depth

▼

Cache Expiry

▼

- Log in using the credentials of your Salesforce Vizia reports user (see Step 4).

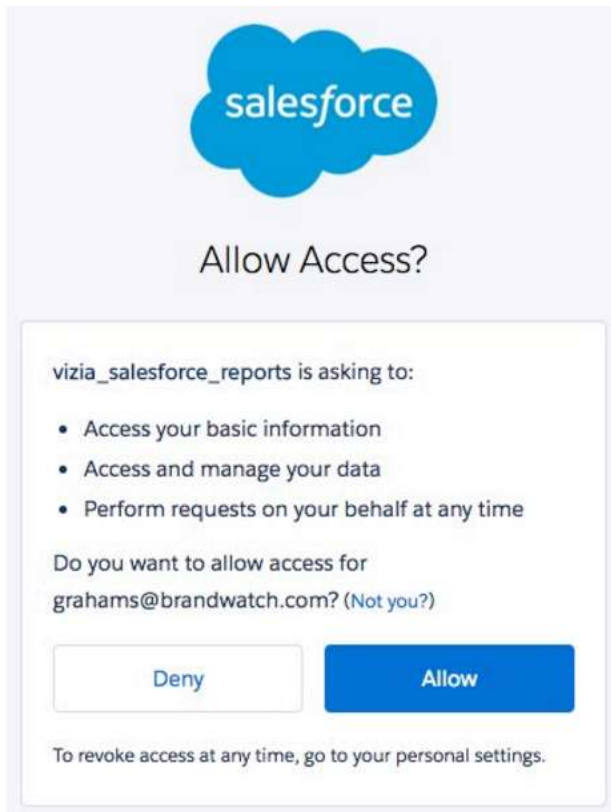


Permissions you are granting to Vizia:

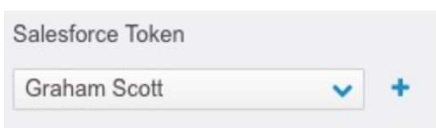
Access your basic information - Vizia needs to get your name from Salesforce in order to name your token in the Vizia Admin token selection dropdown

Access and manage your data - Vizia needs access to read your Salesforce reports. This is the most fine-grained permission with which it can do this

Perform requests on your behalf at any time - Vizia needs to get a refresh token from Salesforce, so that it can repeatedly fetch fresh data from your report. This permission allows this.



- Click 'Allow'.
- The token is named according to your Salesforce account's "Display Name" property (normally your full name).
- When you are returned to Vizia Admin the token will already be pre-selected,



8. Save the Tile and launch your Scene to visualize your report!

Congratulations on bringing your Salesforce data to life across the Vizia platform. If you are interested in visualizing other forms of data inside Vizia, explore the Vizia Framework.

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