



# Salesforce Connect User Guide

*Installing, configuring and using Salesforce Connect*

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# Chapter 1 Overview

This chapter provides an overview of Salesforce Connect.

## 1.1 Capabilities

This section provides an overview of the capabilities of Salesforce Connect.

### 1.1.1 Expose Salesforce contacts as Sitecore users

Salesforce contacts are exposed as Sitecore users, allowing sites to be personalized for Salesforce contacts.

### 1.1.2 Capture Salesforce contact data in xDB

Contact data from Salesforce is captured in xDB, allowing segments to be built using data from Sitecore and Salesforce.

### 1.1.3 Caching

Salesforce Connect's caching features are designed to limit the number of API calls that are made to Salesforce.

## 1.2 Comparing full and partial Salesforce support

When you install Salesforce Connect you must decide whether you want full or partial Salesforce support.

### 1.2.1 Full support

Full support requires a package be installed on Salesforce. The installation must be performed by an administrator of your Salesforce environment.

Before you install the package Salesforce clearly describes exactly which changes will be made to your Salesforce environment.

### 1.2.2 Partial support

Partial support does not require an extra package be installed on Salesforce. However, without the extensions included in the package, the following Salesforce Connect functionality is unavailable:

- A. Sitecore cannot create new Salesforce contacts
- B. Sitecore cannot authenticate Salesforce contacts

## Chapter 2 Full Salesforce support installation

This chapter describes how to install Salesforce Connect with full Salesforce support.

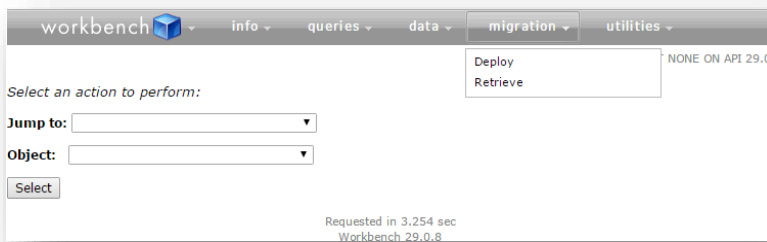
## 2.1 Salesforce configuration

This section describes the configuration that must be performed on Salesforce. An administrator for your Salesforce environment must follow these instructions.

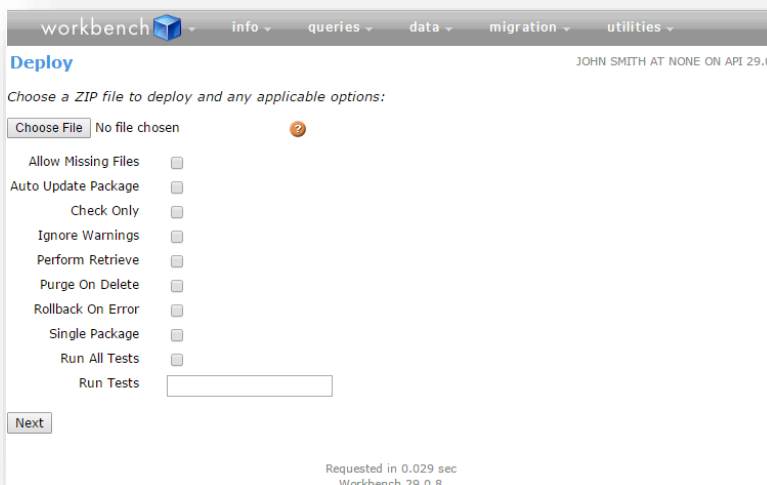
### 2.1.1 Install the Sitecore Salesforce packages

One package adds custom fields to the Salesforce Contact object. The other package adds a custom object type to Salesforce that allows Sitecore roles to be associated with a Salesforce Contact.

1. Log into the Salesforce Workbench (<https://workbench.developerforce.com>)
2. Navigate to migration > deploy

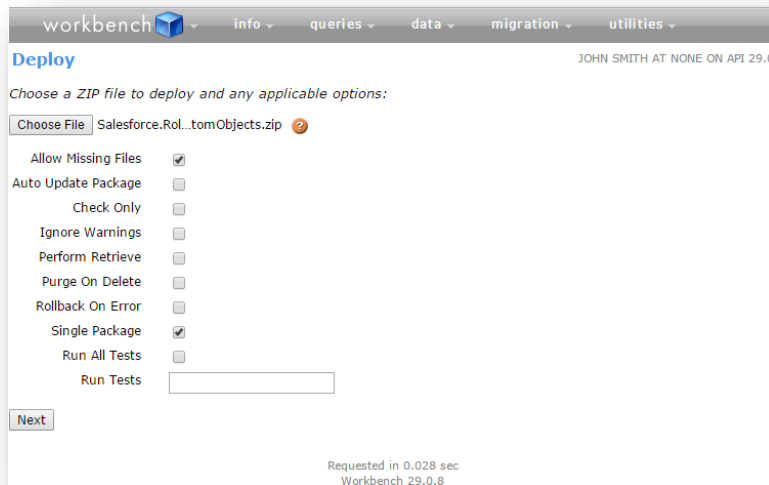


3. Click Choose File and select the file Salesforce.Role.CustomObjects.zip

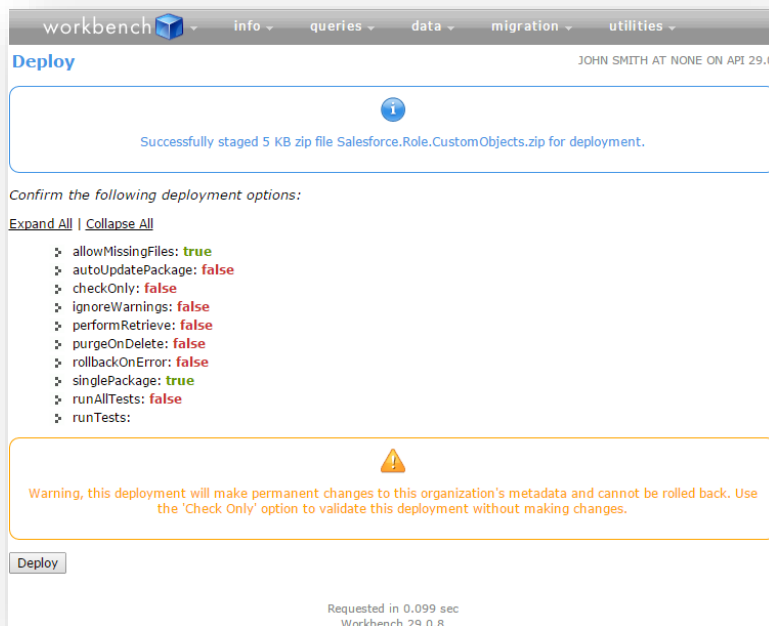


## Salesforce Connect User Guide

4. Select the options "Allow Missing Files" and "Single Package" and click Next



5. Click Deploy



6. The status screen will tell you the package was installed



workbench info queries data migration utilities

### Metadata API Process Status

JOHN SMITH AT NONE ON API 29.0

A Metadata API operation has been performed, which requires asynchronous processing as resources are available. Refresh this page periodically to view the latest status. Results will be available once processing is complete.

**Status**

<b>Id</b>	0Afj0000007jWaoCAM	<b>Done</b>	true
<b>Status</b>	Succeeded	<b>Check Only</b>	false
<b>Rollback On Error</b>	false	<b>Ignore Warnings</b>	false
<b>Number Component Errors</b>	0	<b>Number Test Errors</b>	0
<b>Number Components Deployed</b>	11	<b>Number Tests Completed</b>	0
<b>Number Components Total</b>	11	<b>Number Tests Total</b>	0
<b>Created Date</b>	2015-02-02T20:28:10.000Z	<b>Start Date</b>	2015-02-02T20:28:10.000Z
<b>Last Modified Date</b>	2015-02-02T20:28:13.000Z	<b>Completed Date</b>	2015-02-02T20:28:13.000Z

**Results**

Expand All | Collapse All

- success: true
- componentSuccesses (12)
- runTestResult (3)

Requested in 0.244 sec  
Workbench 29.0.8

- Deploy the file Salesforce.Contact.CustomFields.zip using the previous instructions starting from step 2.

workbench info queries data migration utilities

### Metadata API Process Status

JOHN SMITH AT NONE ON API 29.0

A Metadata API operation has been performed, which requires asynchronous processing as resources are available. Refresh this page periodically to view the latest status. Results will be available once processing is complete.

**Status**

<b>Id</b>	0Afj0000007jWbGCAU	<b>Done</b>	true
<b>Status</b>	Succeeded	<b>Check Only</b>	false
<b>Rollback On Error</b>	false	<b>Ignore Warnings</b>	false
<b>Number Component Errors</b>	0	<b>Number Test Errors</b>	0
<b>Number Components Deployed</b>	7	<b>Number Tests Completed</b>	0
<b>Number Components Total</b>	7	<b>Number Tests Total</b>	0
<b>Created Date</b>	2015-02-02T20:33:18.000Z	<b>Start Date</b>	2015-02-02T20:33:18.000Z
<b>Last Modified Date</b>	2015-02-02T20:33:20.000Z	<b>Completed Date</b>	2015-02-02T20:33:20.000Z

**Results**

Expand All | Collapse All

- success: true
- componentSuccesses (8)
- runTestResult (3)

Requested in 0.472 sec  
Workbench 29.0.8

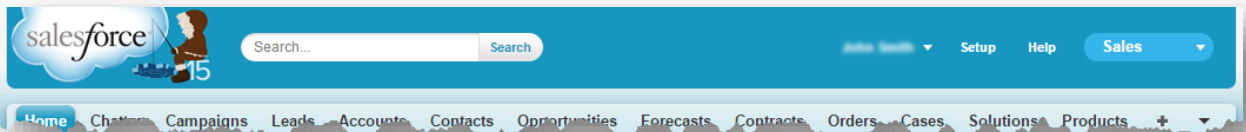
- Log out of the Salesforce Workbench

## 2.1.2 Create a new connected app for Sitecore

This connected app informs Salesforce that Sitecore will be making API calls to Salesforce.

## Salesforce Connect User Guide

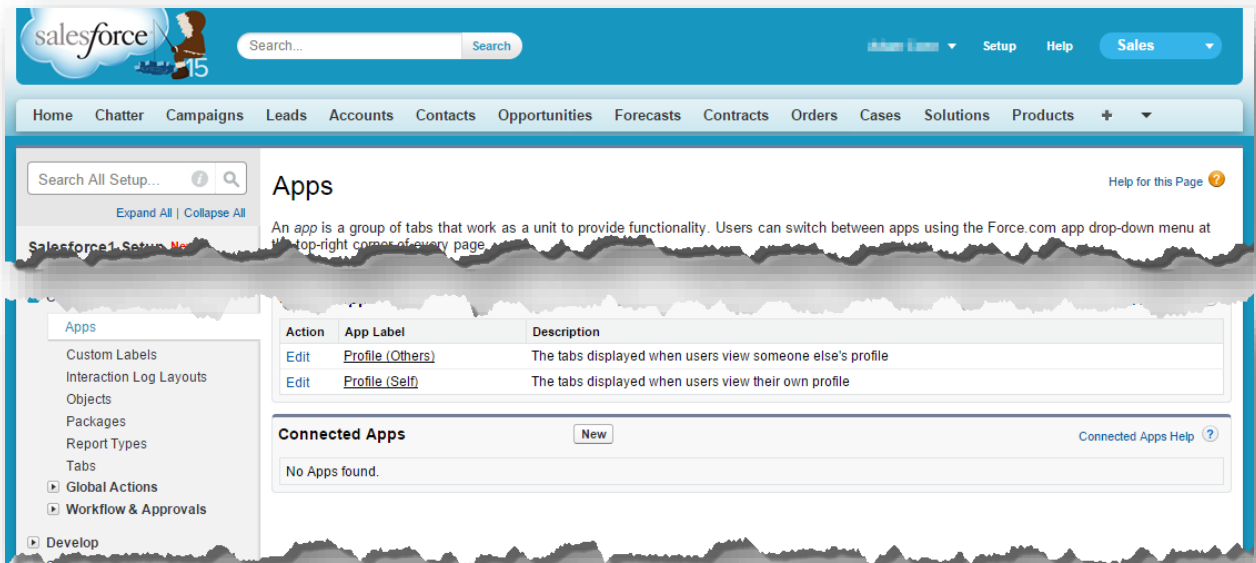
1. Log into Salesforce as an administrator
2. Click Setup



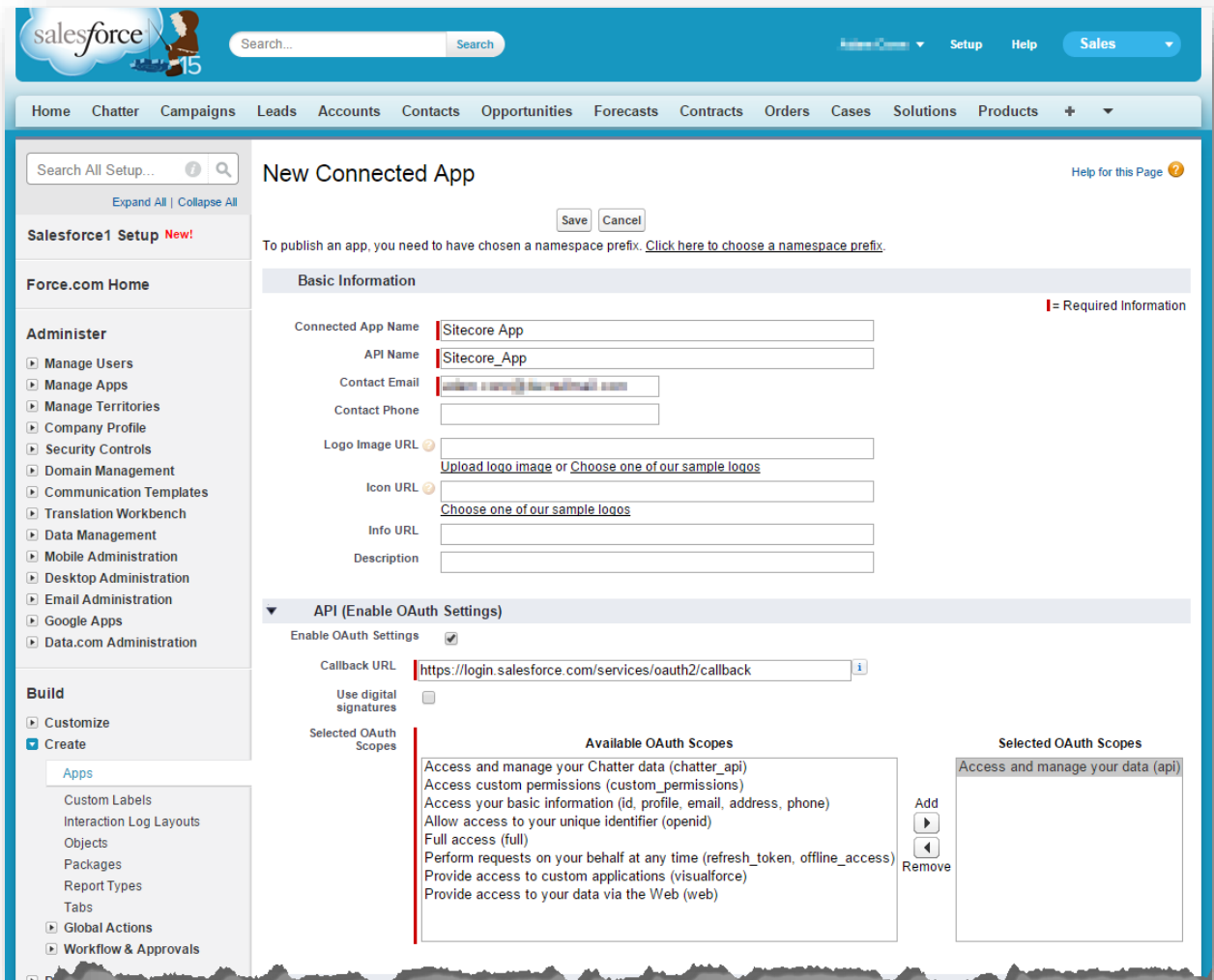
3. Navigate to Create > Apps in the left-hand menu in the "Build" section



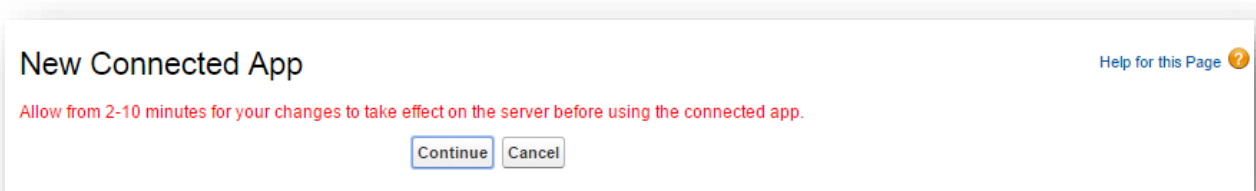
4. Click "New" in the "Connected Apps" section



5. Enter values for the following fields and click Save
  - a. Connected App Name
  - b. API Name
  - c. Contact Email
  - d. Enable OAuth Settings: checked
  - e. Callback URL: <https://login.salesforce.com/services/oauth2/callback>
  - f. Selected OAuth Scopes: Access and manage your data (api)



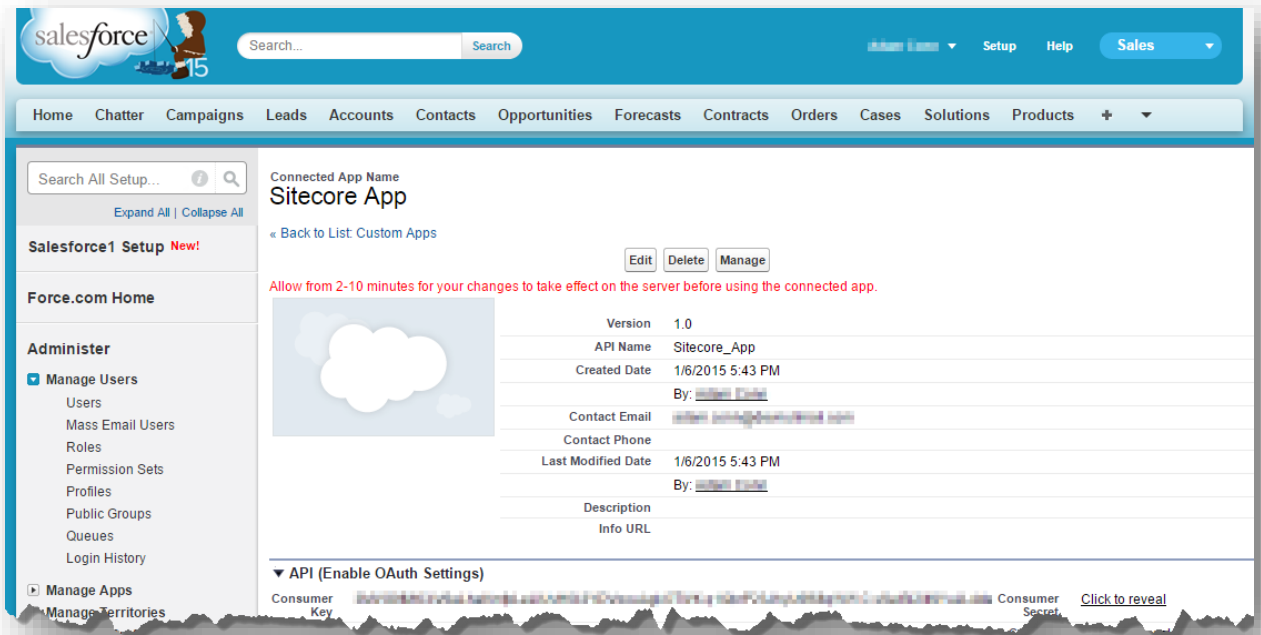
6. A confirmation screen will indicate that the new connected app was created. Click Continue.



### 2.1.3 Create a new permission set

This permission set encapsulates the security settings that are required in order for Sitecore to be able to interact with Salesforce.

1. Navigate to Manage Users > Permission Sets



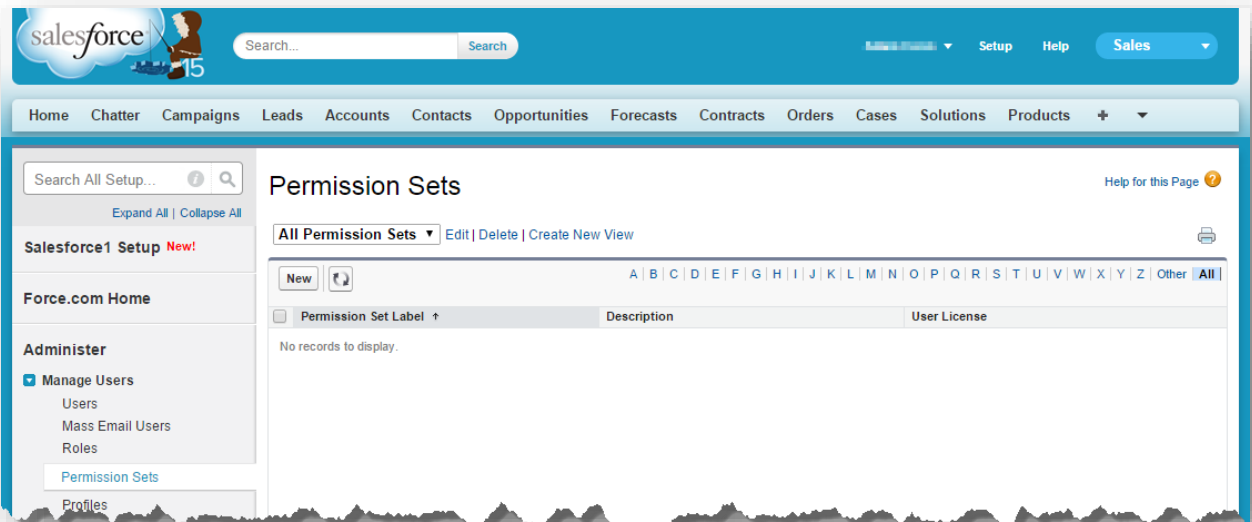
The screenshot displays the Salesforce Connect User Guide interface. The top navigation bar includes the Salesforce logo, a search bar, and links for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, and Products. The left sidebar contains links for Salesforce1 Setup, Force.com Home, and Administer (Manage Users, Manage Apps, Manage Territories). The main content area shows the configuration for the Sitecore App, including a warning message, a cloud icon, and a table of metadata.

Field	Value
Version	1.0
API Name	Sitecore_App
Created Date	1/6/2015 5:43 PM
By	<a href="#">Admin User</a>
Contact Email	<a href="#">admin@sitecore.com</a>
Contact Phone	
Last Modified Date	1/6/2015 5:43 PM
By	<a href="#">Admin User</a>
Description	
Info URL	

Below the table, there is a section for API settings (Enable OAuth Settings) with fields for Consumer Key and Consumer Secret, and a link to reveal the Consumer Secret.

## Salesforce Connect User Guide

### 2. Click New



3. Enter values for the following fields and click Save
  - a. Label: Sitecore App
  - b. API Name: Sitecore\_App

Permission Set  
**Create**

Help for this Page ?

Save Cancel

**Enter permission set information** ! = Required Information

Label

API Name  i

Description

**Select the type of users who will use this permission set**

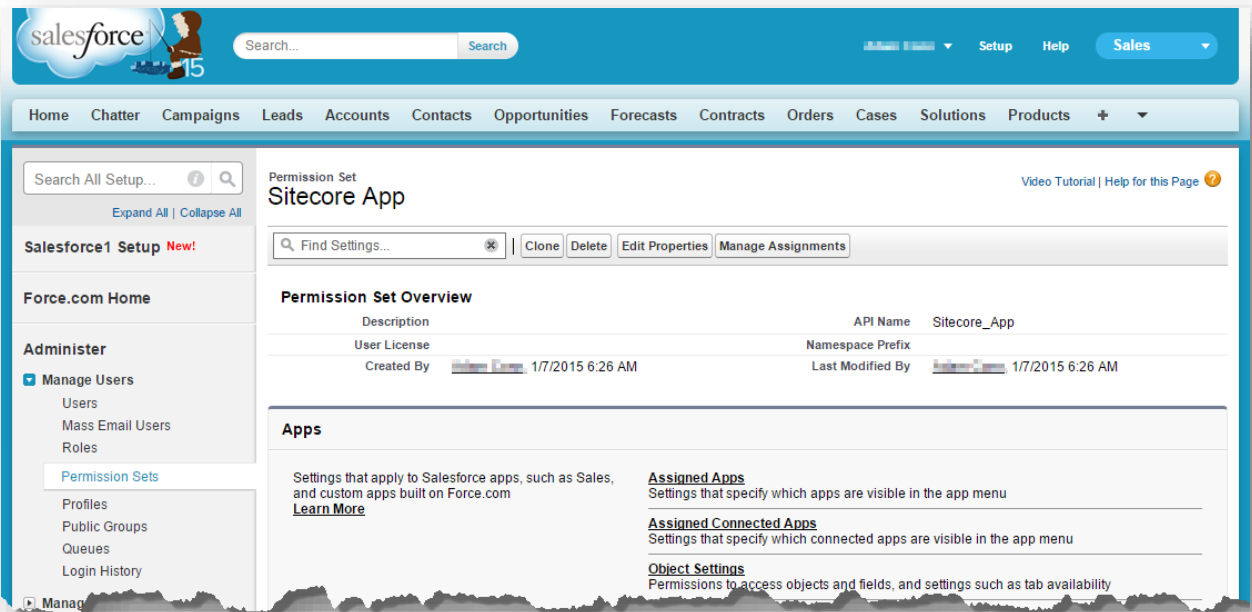
Who will use this permission set? If you plan to assign this permission set to multiple users with different licenses, choose '--None--'. If only users with one type of license will use this permission set, choose the same license that's associated with them.

User License  i

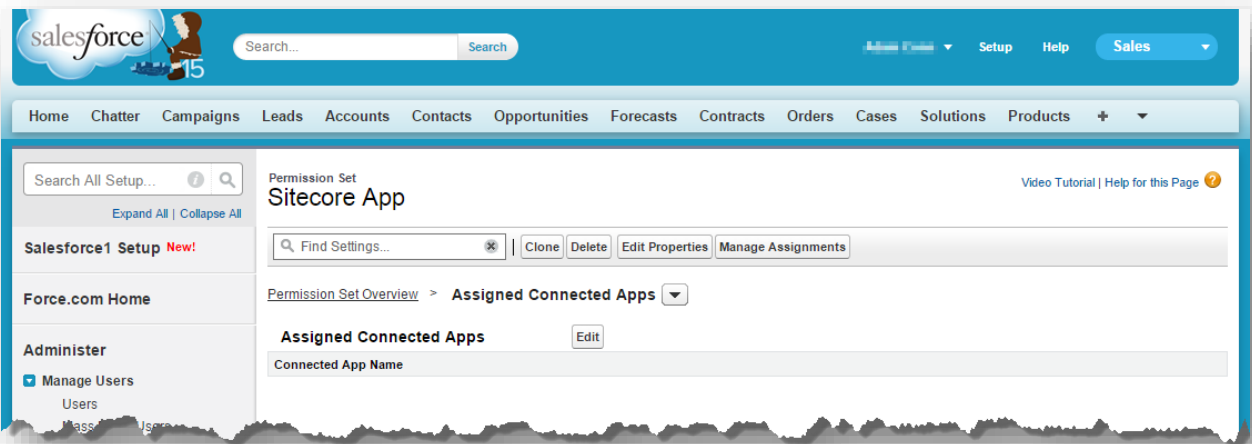
Save Cancel

## Salesforce Connect User Guide

- Click "Assigned Connected Apps" in the "Apps" section

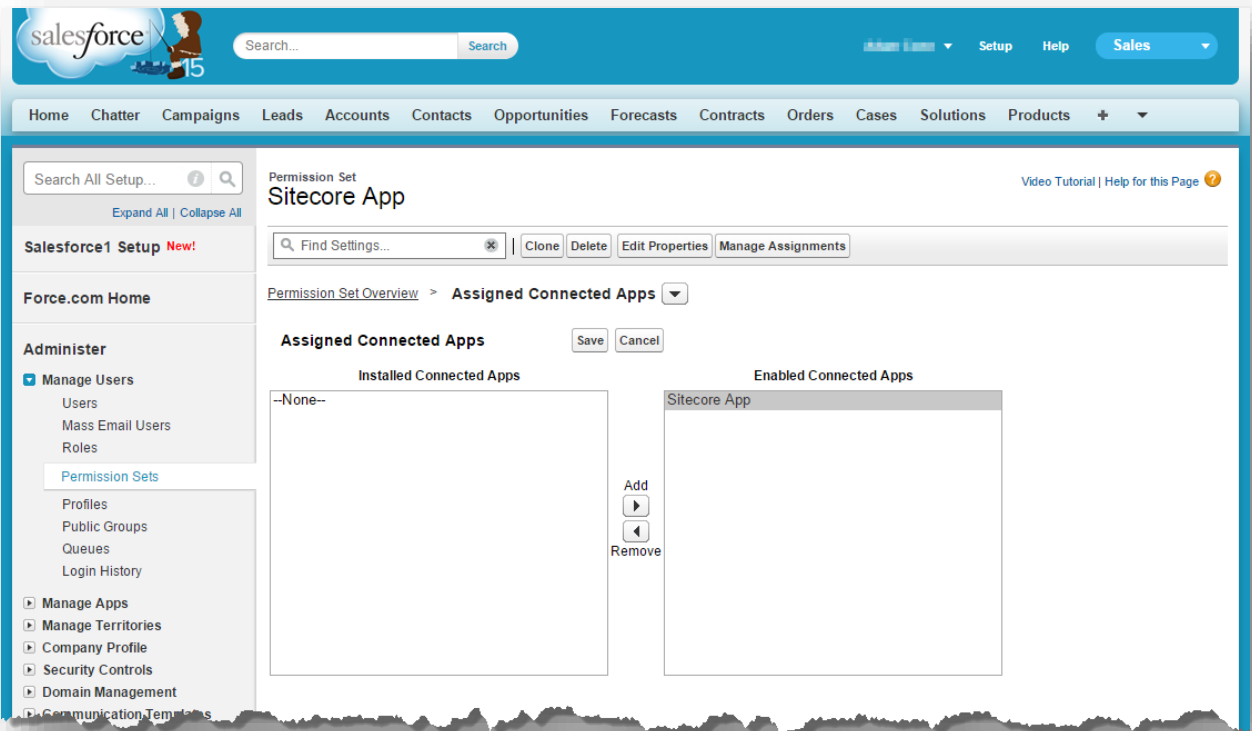


- Click "Edit"

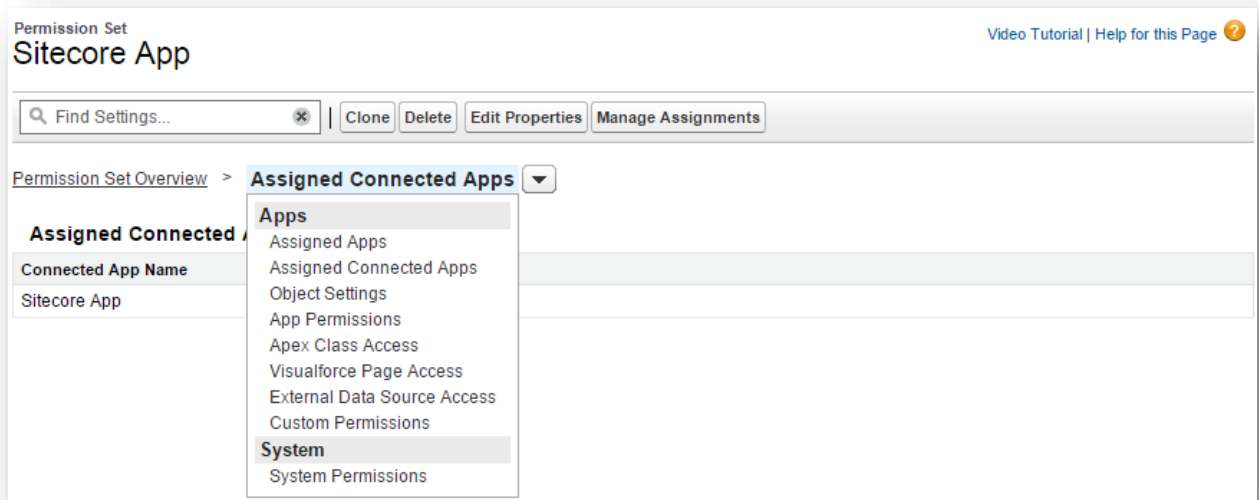


## Salesforce Connect User Guide

6. Add the connected app you created in the previous section and click Save



7. Navigate to Assigned Connected Apps > Object Settings





8. Click "Contacts" in the "Object Settings" section

Permission Set Video Tutorial | Help for this Page ?

## Sitecore App

Find Settings... Clone Delete Edit Properties Manage Assignments

[Permission Set Overview](#) > **Object Settings** ▼

### Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
<a href="#">Accounts</a>	No Access	38	--
<a href="#">Assets</a>	No Access	18	--
<a href="#">Campaign Members</a>	--	29	--
<a href="#">Campaigns</a>	No Access	37	--
<a href="#">Cases</a>	No Access	33	--
<a href="#">Coaching</a>	No Access	5	--
<a href="#">Contacts</a>	No Access	37	--
<a href="#">Content</a>	--	--	--
<a href="#">Contracts</a>	No Access	23	--
<a href="#">D&amp;B Companies</a>	No Access	--	--
<a href="#">Dashboards</a>	--	--	--

9. Click "Edit"

Permission Set Video Tutorial | Help for this Page ?

## Sitecore App

Find Settings... Clone Delete Edit Properties Manage Assignments

[Permission Set Overview](#) > [Object Settings](#) ▼ **Contacts** ▼

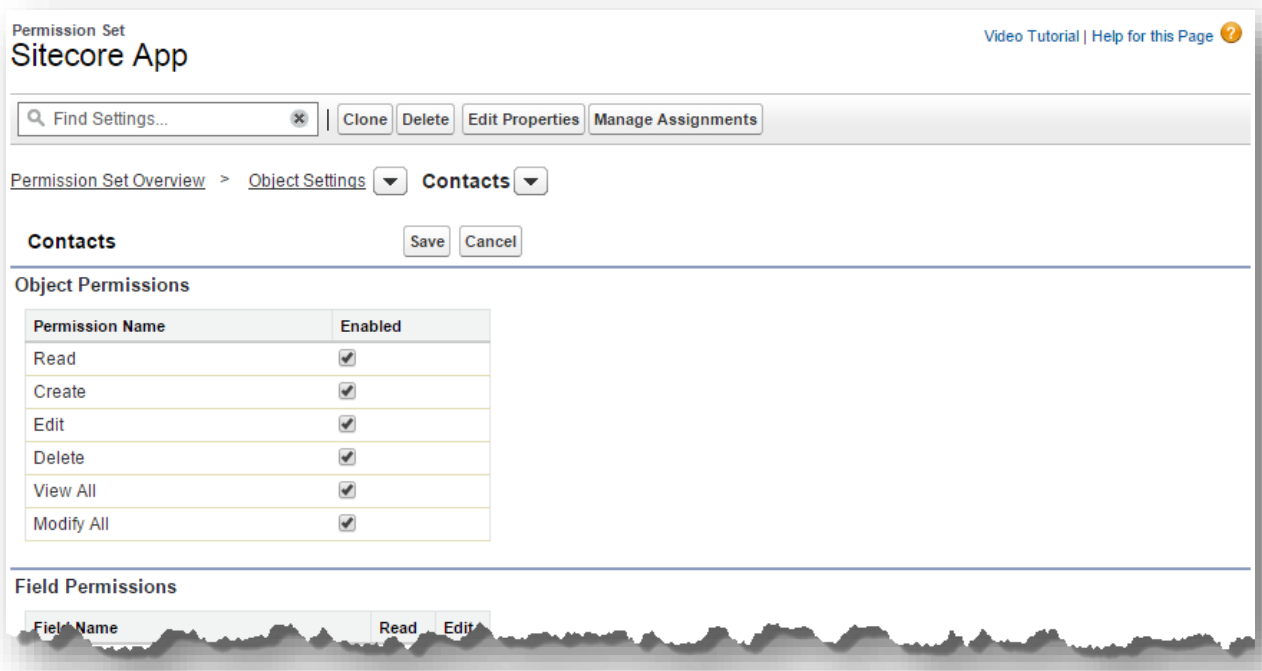
### Contacts Edit

#### Object Permissions

Permission Name	Enabled
...	...

## Salesforce Connect User Guide

10. Check all of the boxes in the "Object Permissions" and "Field Permissions" sections and click Save (note: ignore any box that is disabled)



Permission Set **Sitecore App** [Video Tutorial](#) | [Help for this Page](#) ?

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > **Object Settings** | **Contacts**

**Contacts** | Save | Cancel

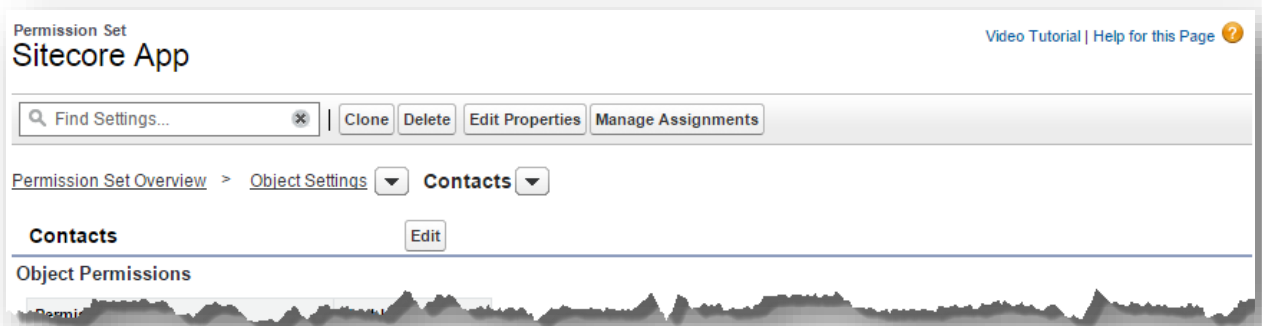
**Object Permissions**

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

**Field Permissions**

Field Name	Read	Edit
------------	------	------

11. Click "Object Settings"



Permission Set **Sitecore App** [Video Tutorial](#) | [Help for this Page](#) ?

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > **Object Settings** | **Contacts**

**Contacts** | Edit | Delete

**Object Permissions**

Permission Name	Enabled
-----------------	---------

12. The Object Settings screen indicates that permissions have been assigned to Contacts objects.

Permission Set **Sitecore App** [Video Tutorial](#) | [Help for this Page](#) ?

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

[Permission Set Overview](#) > **Object Settings** ▼

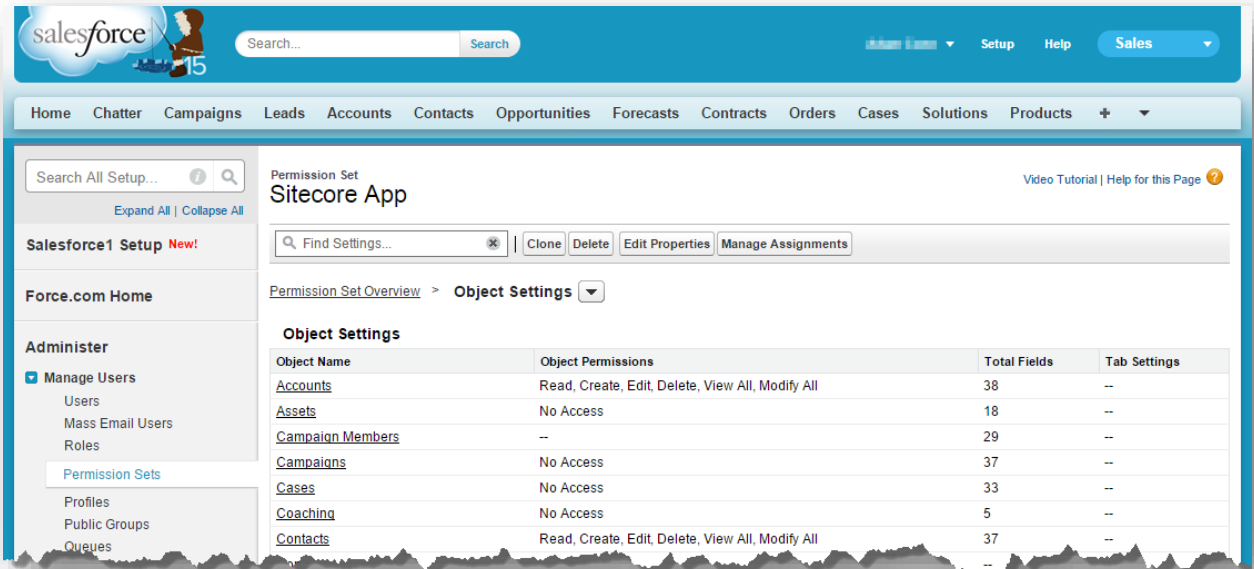
**Object Settings**

Object Name	Object Permissions	Total Fields	Tab Settings
<a href="#">Accounts</a>	No Access	38	--
<a href="#">Assets</a>	No Access	18	--
<a href="#">Campaign Members</a>	--	29	--
<a href="#">Campaigns</a>	No Access	37	--
<a href="#">Cases</a>	No Access	33	--
<a href="#">Coaching</a>	No Access	5	--
<a href="#">Contacts</a>	Read, Create, Edit, Delete, View All, Modify All	37	--
<a href="#">Content</a>	--	--	--
<a href="#">Contracts</a>	No Access	23	--
<a href="#">D&amp;B Companies</a>	No Access	--	--
<a href="#">Dashboards</a>	--	--	--

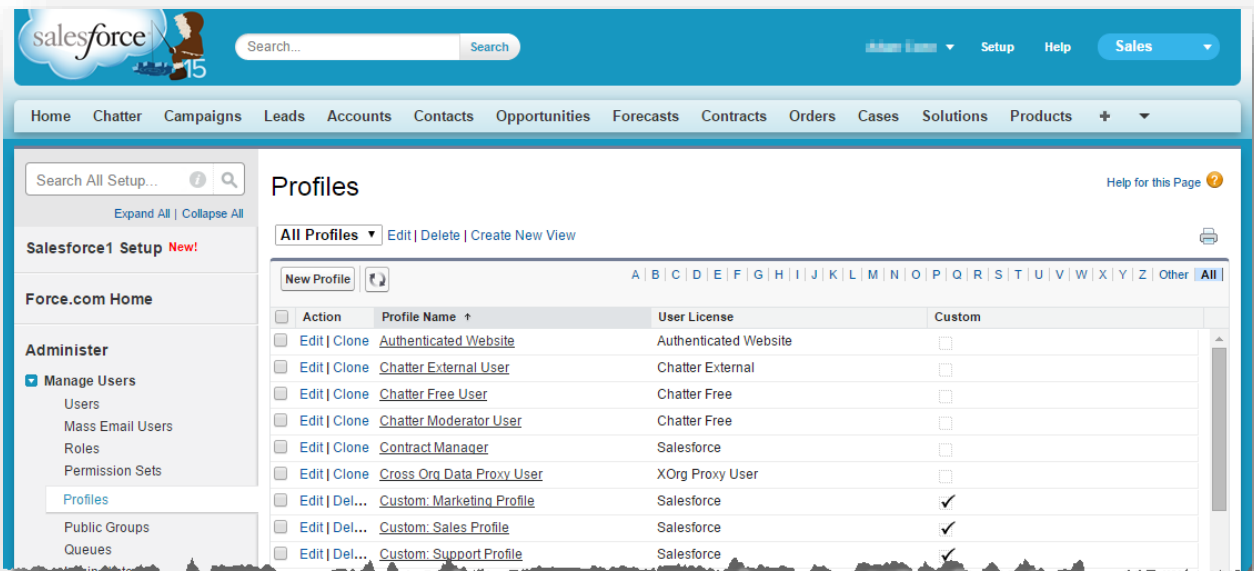
## 2.1.4 Create a new profile

This profile represents a new type of Salesforce user that Sitecore uses to interact with Salesforce.

1. Navigate to Manage Users > Profiles



2. Click New Profile



3. Enter values for the following fields and click Save
  - a. Existing Profile: Standard User
  - b. Profile Name: Sitecore Connect User

## Clone Profile

[Help for this Page](#)

Enter the name of the new profile.

You must select an existing profile to clone from.

! = Required Information

Existing Profile Standard User ▼  
 User License Salesforce  
 Profile Name Sitecore Connect User

Save Cancel

### 4. Click Edit

Profile

[Help for this Page](#)

## Sitecore Connect User

[« Back to List: Connected Apps](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
 [Enabled Apex Class Access \[0\]](#) | 
 [Enabled Visualforce Page Access \[0\]](#) | 
 [Enabled External Data Source Access \[0\]](#) | 
 [Enabled Service Presence Status Access \[0\]](#) | 
 [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit Clone Delete View Users

Name	Sitecore Connect User		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created	April 17, 2018 10:18 AM	Modified	April 17, 2018 10:18 AM

## Salesforce Connect User Guide

5. Set the following permissions and click Save
  - a. Administrative Permissions
    - i. Manage Users
    - ii. View Setup and Configuration
  - b. Standard Objects Permissions
    - i. Contacts: Read, Edit, Delete, View All, Modify All
  - c. Custom Object Permissions
    - i. Sitecore Roles: Read, Create, Edit, Delete, View All, Modify All
    - ii. Sitecore Role Associations: Read, Create, Edit, Delete, View All, Modify All

Profile Edit  
Sitecore Connect User

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Cancel]

Name: Sitecore Connect User  
User License: Salesforce  
Custom Profile: ☒  
Description:   
Sitecore Roles: Tab Hidden

### Administrative Permissions

Access Chatter For SharePoint	Manage Knowledge Article Import/Export
Enable Read Only Fields	Manage Unlisted Groups
Invite Customers To Chatter	Manage Users
IP Restrict Requests	Moderate Chatter
Manage Auth. Providers	Modify All Data
Manage Roles	
Manage System Configurations	
Manage Internal Users	View Reports in Public Folders
Manage IP Addresses	View Setup and Configuration

### General User Permissions

Activate Cont...	Use System Field

### Standard Object Permissions

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goal Collaborators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Macros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Sitecore Roles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sitecore Role Associations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Desktop Integration Clients

## 6. Navigate to Field-Level Security > Contact > View

Profile
Sitecore Connect User
[Help for this Page](#)

[« Back to List: Profiles](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
[Enabled Apex Class Access \[0\]](#) | 
[Enabled Visualforce Page Access \[0\]](#) | 
[Enabled External Data Source Access \[0\]](#) | 
[Enabled Service Presence Status Access \[0\]](#) | 
[Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#)
[Clone](#)
[Delete](#)
[View Users](#)

Name	Sitecore Connect User		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			

[\[ View Assignment \]](#)
[\[ View Assignment \]](#)

Field-Level Security

Standard Field-Level Security

Account	<a href="#">[ View ]</a>	Idea	<a href="#">[ View ]</a>
Asset	<a href="#">[ View ]</a>	Lead	<a href="#">[ View ]</a>
Campaign	<a href="#">[ View ]</a>	Macro	<a href="#">[ View ]</a>
Campaign Member	<a href="#">[ View ]</a>	Opportunity	<a href="#">[ View ]</a>
Case	<a href="#">[ View ]</a>	Opportunity Product	<a href="#">[ View ]</a>
Coaching	<a href="#">[ View ]</a>	Order	<a href="#">[ View ]</a>
Contact	<a href="#">[ View ]</a>	Order Product	<a href="#">[ View ]</a>
Contract	<a href="#">[ View ]</a>	Performance Cycle	<a href="#">[ View ]</a>
Event	<a href="#">[ View ]</a>	Price Book	<a href="#">[ View ]</a>
Feedback	<a href="#">[ View ]</a>	Price Book Entry	<a href="#">[ View ]</a>
Feedback Question	<a href="#">[ View ]</a>	Product	<a href="#">[ View ]</a>
Feedback Question Set	<a href="#">[ View ]</a>	Social Persona	<a href="#">[ View ]</a>
Feedback Request	<a href="#">[ View ]</a>	Solution	<a href="#">[ View ]</a>
Goal	<a href="#">[ View ]</a>	Task	<a href="#">[ View ]</a>
Goal Collaborator	<a href="#">[ View ]</a>	User	<a href="#">[ View ]</a>
Goal Link	<a href="#">[ View ]</a>		

Custom Field-Level Security

Sitecore Role	<a href="#">[ View ]</a>	Sitecore Role Association	<a href="#">[ View ]</a>
---------------	--------------------------	---------------------------	--------------------------

## Salesforce Connect User Guide

### 7. Click Edit

Contact Field-Level Security for profile **Sitecore Connect User** [Help for this Page ?](#)

[Edit](#) [Back to Profile](#)

Field Name	Field Type	Visible	Read-Only
Account Name	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assistant	Text	<input type="checkbox"/>	<input type="checkbox"/>

### 8. Ensure the "Visible" box is checked for the following fields and click Save:

- Is Approved
- Last Activity
- Last Login
- Last Password Changed
- Password
- Password Answer
- Password Question

Contact Field-Level Security for profile **Sitecore Connect User** [Help for this Page ?](#)

[Save](#) [Cancel](#)

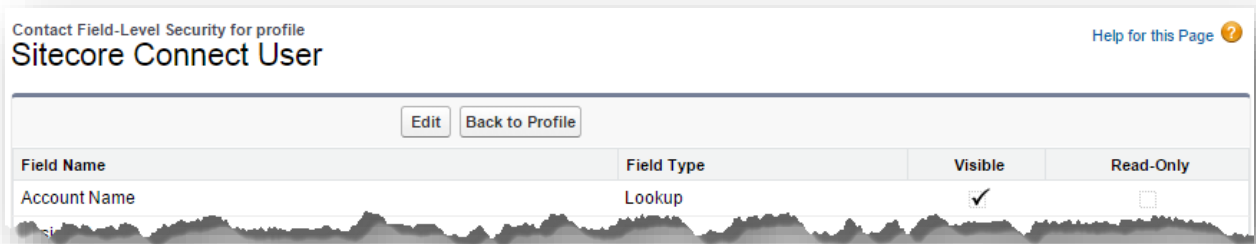
Field Name	Field Type	Visible	Read-Only
Account Name	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assistant	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is Approved	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Languages	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Activity	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password Answer	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password Question	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports To	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Title	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Cancel](#)



## Salesforce Connect User Guide

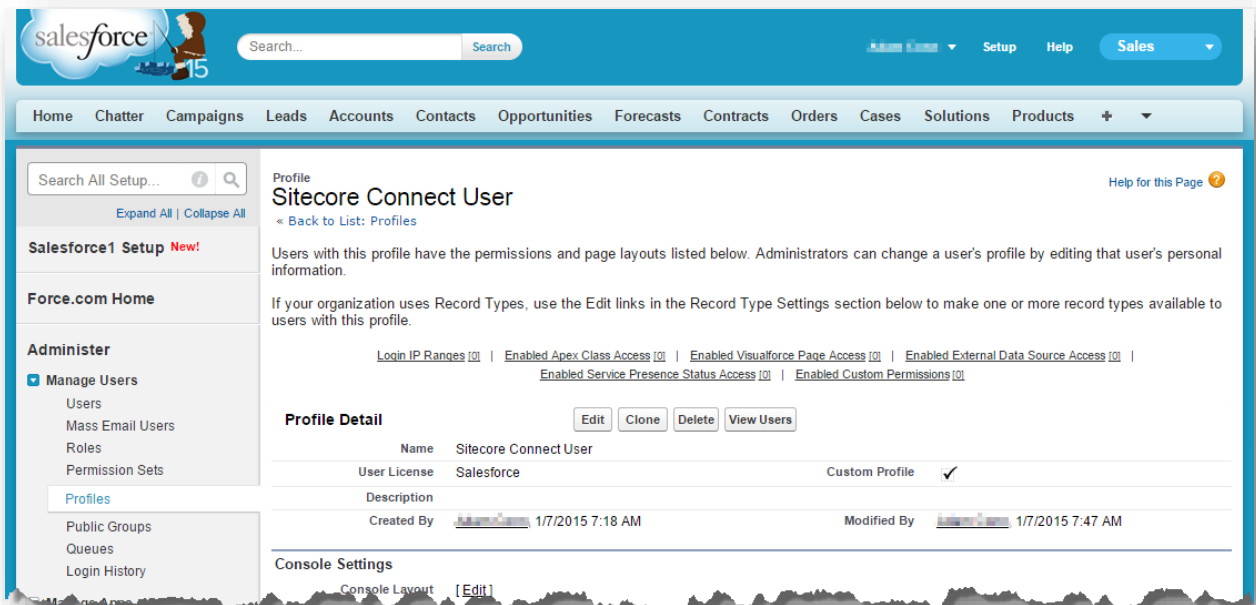
### 9. Click Back to Profile



## 2.1.5 Create a new user

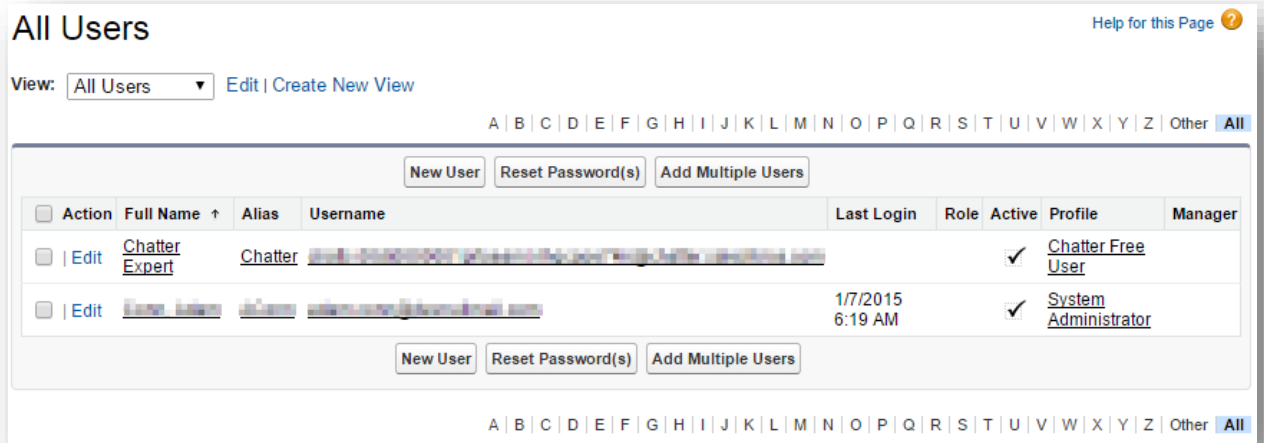
This is the Salesforce user account that Sitecore will use to communicate with Salesforce.

### 1. Navigate to Manage Users > Users



## Salesforce Connect User Guide

### 2. Click New User



**All Users** [Help for this Page](#)

View: All Users [Edit](#) | [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**

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

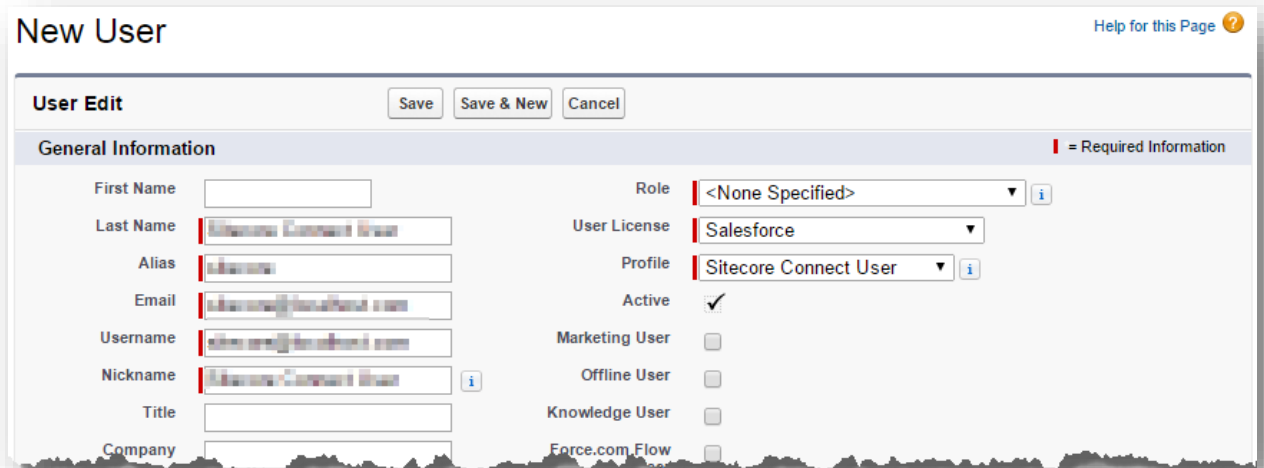
<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">Chatter Expert</a>	<a href="#">Chatter</a>	<a href="#">[redacted]</a>			✓	<a href="#">Chatter Free User</a>	
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">System Administrator</a>	<a href="#">System</a>	<a href="#">[redacted]</a>	1/7/2015 6:19 AM		✓	<a href="#">System Administrator</a>	

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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**

### 3. Enter values for the following fields and click Save

- Last Name: [any value]
- Alias: [any value]
- Email: [any value]
- Username: [any value]
- Nickname: [any value]
- Role: <None Specified>
- User License: Salesforce
- Profile: Sitecore Connect User



**New User** [Help for this Page](#)

**User Edit** [Save](#) [Save & New](#) [Cancel](#)

**General Information** ! = Required Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Role

User License

Profile

Active ☒

Marketing User ☐

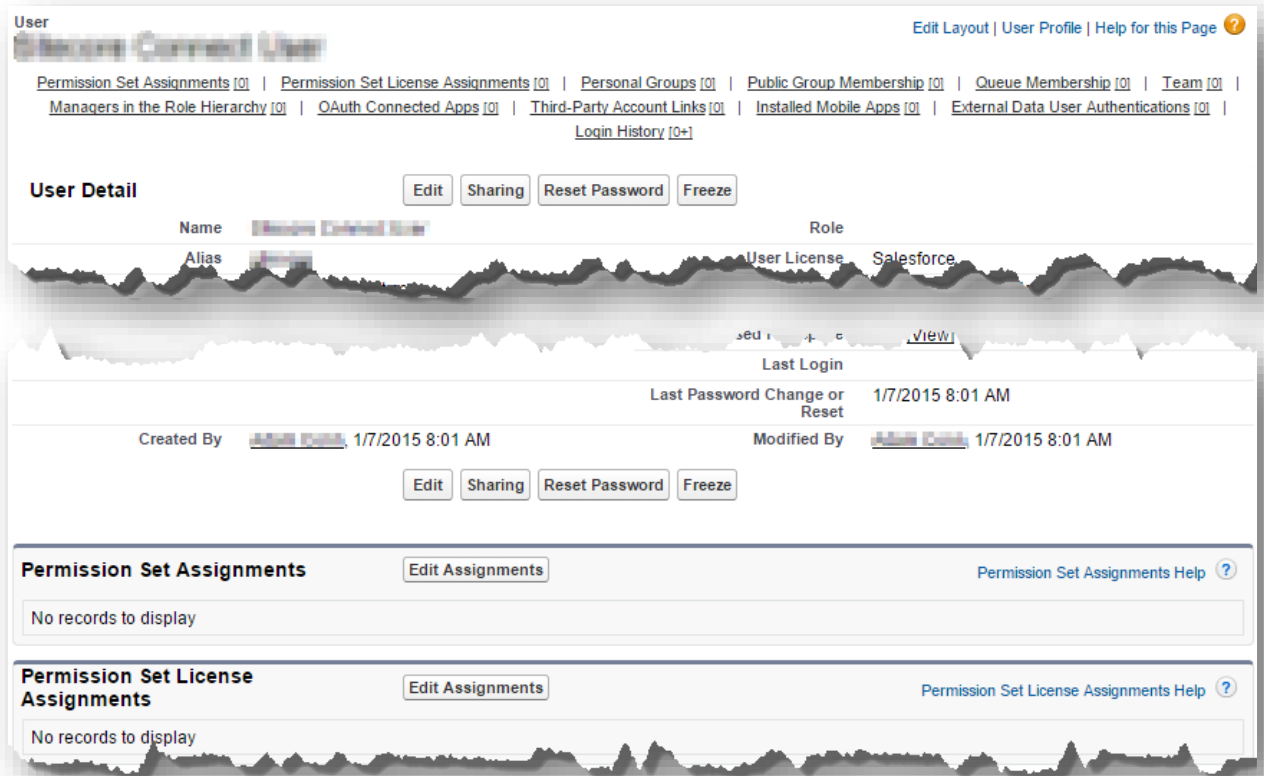
Offline User ☐

Knowledge User ☐

Force.com Flow ☐

## Salesforce Connect User Guide

4. In the Permission Set Assignments section click Edit Assignments



User Edit Layout | User Profile | Help for this Page ?

[Permission Set Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Connected Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [External Data User Authentications \[0\]](#) | [Login History \[0+\]](#)

**User Detail** Edit Sharing Reset Password Freeze

Name Alias Role User License Salesforce view

Last Login Last Password Change or Reset 1/7/2015 8:01 AM

Created By 1/7/2015 8:01 AM Modified By 1/7/2015 8:01 AM Edit Sharing Reset Password Freeze

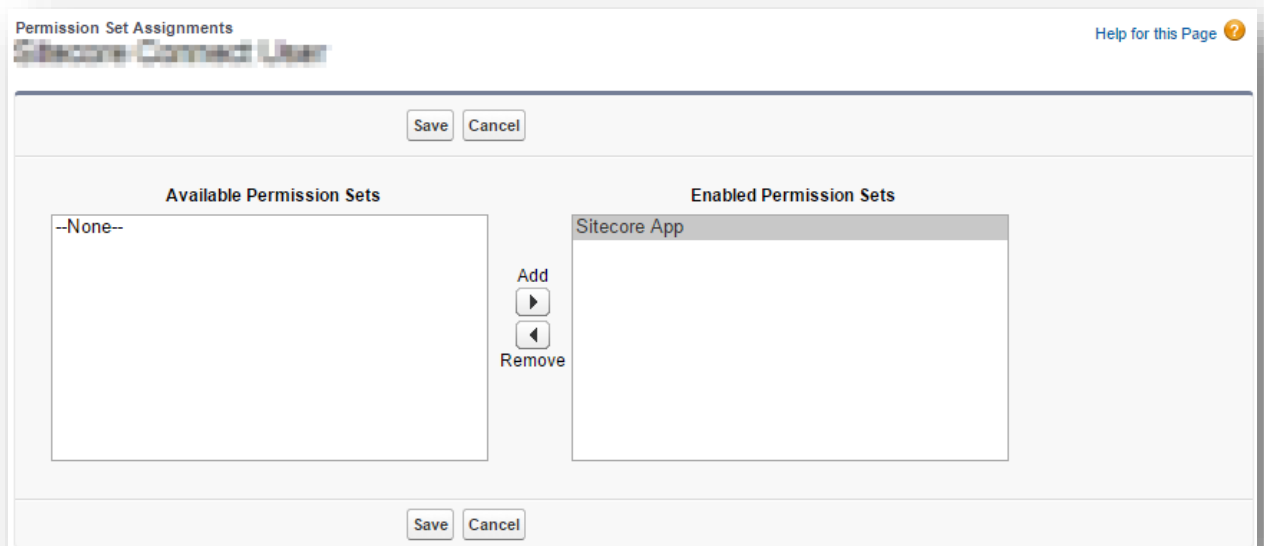
**Permission Set Assignments** Edit Assignments Permission Set Assignments Help ?

No records to display

**Permission Set License Assignments** Edit Assignments Permission Set License Assignments Help ?

No records to display

5. Add the "Sitecore App" permission set and click Save



Permission Set Assignments Help for this Page ?

Save Cancel

**Available Permission Sets** --None--

**Enabled Permission Sets** Sitecore App

Add Remove

Save Cancel

## 2.2 Sitecore configuration

This section describes the configuration that must be performed on Sitecore. An administrator for your Sitecore environment must follow these instructions.

### 2.2.1 Install the Sitecore package

Install the Sitecore installation package for Salesforce Connect.

### 2.2.2 Modify domains.config

Add the highlighted configuration:

```
<?xml version="1.0" encoding="utf-8"?>
<domains xmlns:sc="Sitecore">
  <domain name="sitecore" ensureAnonymousUser="false" />
  <domain name="extranet" />
  <domain name="default" isDefault="true" />
  <domain name="salesforce" AccountNameValidation="."+" ensureAnonymousUser="false"
  defaultProfileItemID="{4F2D283A-1035-498F-8E66-B02EC5B816E0}" />
  <sc:templates>
    <domain type="Sitecore.Security.Domains.Domain, Sitecore.Kernel">
      <ensureAnonymousUser>true</ensureAnonymousUser>
      <locallyManaged>false</locallyManaged>
    </domain>
  </sc:templates>
</domains>
```

### 2.2.3 Modify web.config

Make the following changes to configuration > Sitecore:

```
<switchingProviders>
  <membership>
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
  />
  <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
  </membership>
  <roleManager>
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
ignoredUserDomains="" allowedUserDomains="" />
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
  </roleManager>
  <profile>
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
ignoredDomains="" />
  </profile>
</switchingProviders>
```

## Salesforce Connect User Guide

Make the following changes to configuration > system.web:

```
<membership defaultProvider="sitecore" hashAlgorithmType="SHA1">
  <providers>
    <clear />
    <add name="sitecore" type="Sitecore.Security.SitecoreMembershipProvider,
Sitecore.Kernel" realProviderName="switcher" providerWildcard="%"
raiseEvents="true" />
    <add name="sql" type="System.Web.Security.SqlMembershipProvider"
connectionStringName="core" applicationName="sitecore"
minRequiredPasswordLength="1" minRequiredNonalphanumericCharacters="0"
requiresQuestionAndAnswer="false" requiresUniqueEmail="false"
maxInvalidPasswordAttempts="256" />
    <add name="switcher" type="Sitecore.Security.SwitchingMembershipProvider,
Sitecore.Kernel" applicationName="sitecore"
mappings="switchingProviders/membership" />
    <add name="salesforce"
type="Sitecore.Salesforce.Security.SalesforceMembershipProvider,
Sitecore.Salesforce" applicationName="sitecore" readOnly="false"
enablePasswordReset="true" minRequiredPasswordLength="1"
passwordStrengthRegularExpression=".*" minRequiredNonalphanumericCharacters="0"
maxInvalidPasswordAttempts="5" passwordAttemptWindow="0"
requiresQuestionAndAnswer="false" requiresUniqueEmail="true" />
  </providers>
</membership>
<roleManager defaultProvider="sitecore" enabled="true">
  <providers>
    <clear />
    <add name="sitecore" type="Sitecore.Security.SitecoreRoleProvider,
Sitecore.Kernel" realProviderName="switcher" raiseEvents="true" />
    <add name="sql" type="System.Web.Security.SqlRoleProvider"
connectionStringName="core" applicationName="sitecore" />
    <add name="switcher" type="Sitecore.Security.SwitchingRoleProvider,
Sitecore.Kernel" applicationName="sitecore"
mappings="switchingProviders/roleManager" />
    <add name="salesforce"
type="Sitecore.Salesforce.Security.SalesforceRoleProvider, Sitecore.Salesforce"
readOnly="false" applicationName="sitecore" />
  </providers>
</roleManager>
<profile defaultProvider="switcher" enabled="true"
inherits="Sitecore.Security.UserProfile, Sitecore.Kernel">
  <providers>
    <clear />
    <add name="salesforce"
type="Sitecore.Salesforce.Profile.SalesforceProfileProvider, Sitecore.Salesforce"
readOnly="false" />
    <add name="sql" type="System.Web.Profile.SqlProfileProvider"
connectionStringName="core" applicationName="sitecore" />
    <add name="switcher" type="Sitecore.Security.SwitchingProfileProvider,
Sitecore.Kernel" applicationName="sitecore" mappings="switchingProviders/profile"
/>
  </providers>
  <properties>
    <clear />
    <add type="System.String" name="SC_UserData" />
    <add type="System.String" name="FirstName"
customProviderData="salesforce|FirstName" />
    <add type="System.String" name="LastName"
customProviderData="salesforce|LastName" />
    <add type="System.String" name="JobTitle"
customProviderData="salesforce|Title" />
    <add type="System.DateTime" name="Birthdate"
customProviderData="salesforce|Birthdate" />
  </properties>
</profile>
</system.web>
```

```
<add type="System.String" name="Phone"
customProviderData="salesforce|Phone" />
</properties>
</profile>
```

## 2.2.4 Modify Sitecore.Salesforce.config

Make the following changes.

1. Uncomment the following section: configuration > Sitecore > salesforce > clients > client

```
<clients>
  <client provider="salesforce"
type="Sitecore.Salesforce.Client.SalesforceClient, Sitecore.Salesforce.Client"
singleInstance="true">
    <param desc="authenticator"
type="Sitecore.Salesforce.Client.Security.PasswordAuthenticator,
Sitecore.Salesforce.Client">
      <consumerKey></consumerKey>
      <consumerSecret></consumerSecret>
      <userName></userName>
      <password></password>
      <securityToken></securityToken>
    </param>
  </client>
</clients>
```

2. Enter the consumer key and consumer secret values for the connected app you configured in Salesforce. Those values can be located by:
  - a. Log into Salesforce as an administrator
  - b. Navigate to Build > Create > Apps > Connected Apps > Sitecore App
3. Enter the security token value for the Sitecore user you created in Salesforce. That value can be located by:
  - c. Log into Salesforce as the Sitecore user
  - d. Navigate to My Settings > Personal > Reset My Security Token

## 2.3 Upgrading from partial to full Salesforce support

This section describes how to upgrade an environment that is configured for partial Salesforce support to full Salesforce support.

This section assumes the environment was configured as described in Chapter 3.

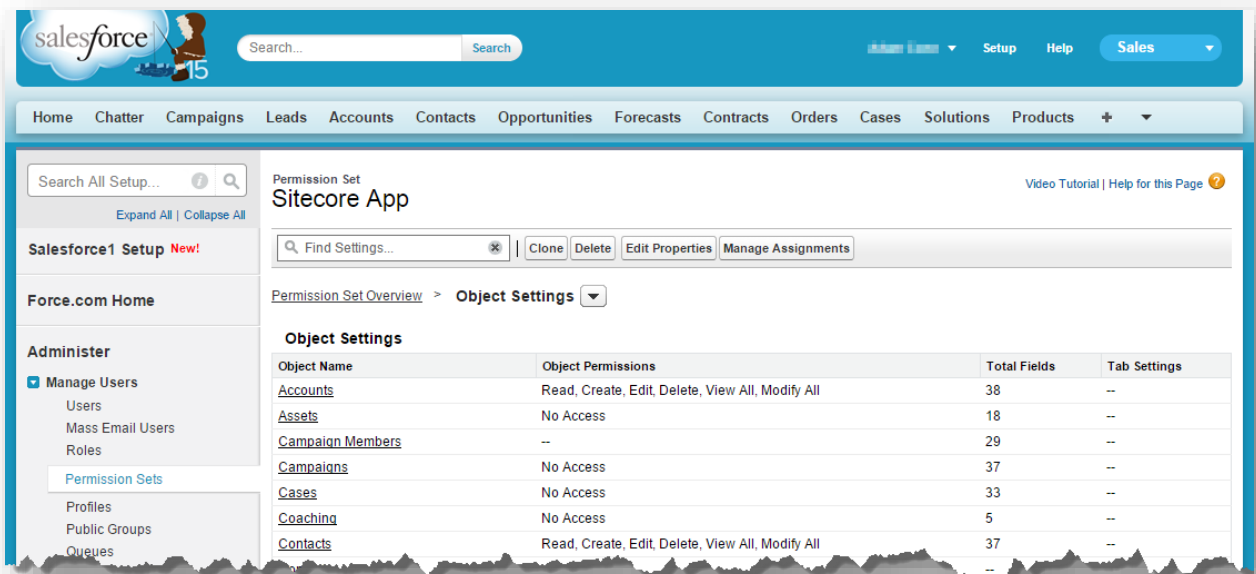
### 2.3.1 Install the Sitecore Salesforce packages

Follow the steps in section 2.1.1.

### 2.3.2 Update Salesforce profile

This profile represents a new type of Salesforce user that Sitecore uses to interact with Salesforce.

1. Navigate to Manage Users > Profiles

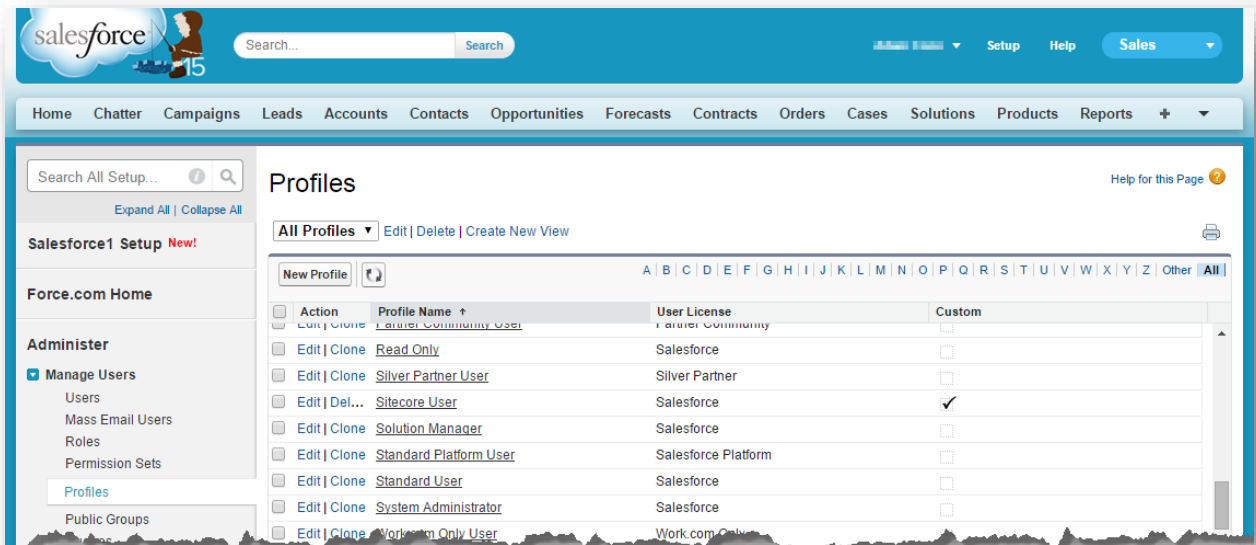


The screenshot shows the Salesforce Admin console interface. The left sidebar contains the 'Administer' menu with 'Manage Users' selected. The main content area displays the 'Sitecore App' permission set configuration. The 'Object Settings' tab is active, showing a table of object permissions.

Object Name	Object Permissions	Total Fields	Tab Settings
<a href="#">Accounts</a>	Read, Create, Edit, Delete, View All, Modify All	38	--
<a href="#">Assets</a>	No Access	18	--
<a href="#">Campaign Members</a>	--	29	--
<a href="#">Campaigns</a>	No Access	37	--
<a href="#">Cases</a>	No Access	33	--
<a href="#">Coaching</a>	No Access	5	--
<a href="#">Contacts</a>	Read, Create, Edit, Delete, View All, Modify All	37	--

## Salesforce Connect User Guide

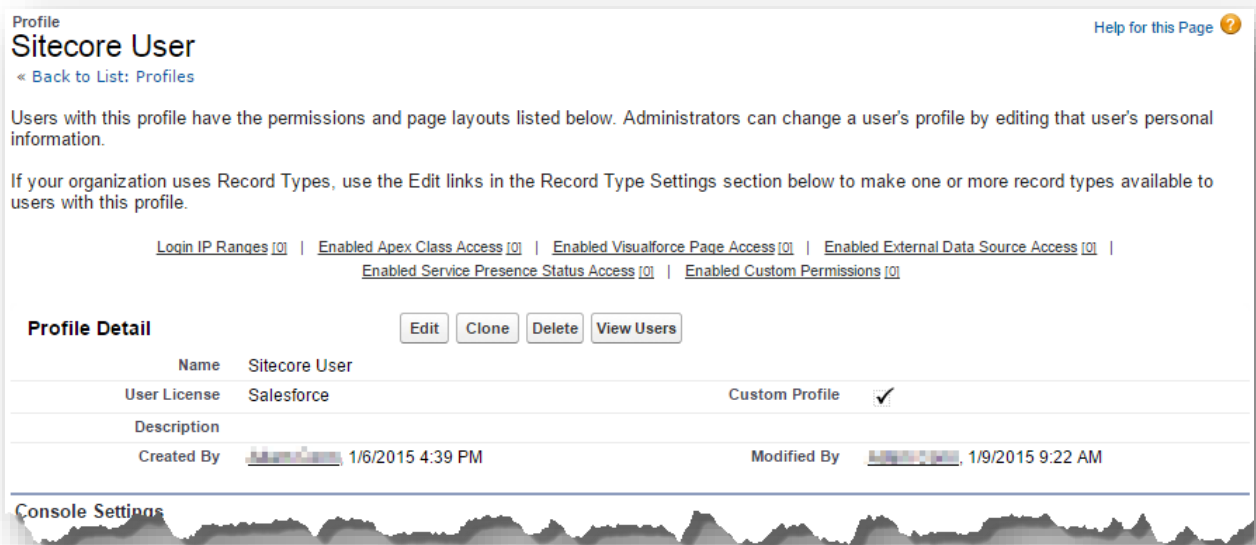
### 2. Click Sitecore User



The screenshot shows the Salesforce 'Profiles' page. The left sidebar contains navigation links: Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, and a search bar. Below these are links for 'Salesforce1 Setup', 'Force.com Home', and 'Administer' (Manage Users, Users, Mass Email Users, Roles, Permission Sets, Profiles, Public Groups). The main content area is titled 'Profiles' and includes a search bar, 'Expand All | Collapse All', and a 'Salesforce1 Setup New!' button. A table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Sitecore User' profile is highlighted.

Action	Profile Name	User License	Custom
<a href="#">Edit   Clone</a>	<a href="#">Sales Community User</a>	Sales Community	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Read Only</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<a href="#">Edit   Del...</a>	<a href="#">Sitecore User</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Work.com Only User</a>	Work.com Only	<input type="checkbox"/>

### 3. Click Edit



The screenshot shows the 'Profile: Sitecore User' page. It includes a 'Back to List: Profiles' link and a description of the profile. Below the description are links for 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile's name, user license, and custom profile status. The 'Console Settings' section is partially visible at the bottom.

**Profile Detail**

Name	User License	Custom Profile
Sitecore User	Salesforce	<input checked="" type="checkbox"/>

**Console Settings**



## Salesforce Connect User Guide

4. Set the following permissions and click Save
  - a. Custom Object Permissions
    - i. Sitecore Roles: Read, Create, Edit, Delete, View All, Modify All
    - ii. Sitecore Role Associations: Read, Create, Edit, Delete, View All, Modify All

Profile Edit  
Sitecore Connect User [Help for this Page](#)

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Sitecore Connect User  
User License: Salesforce  
Description: Sitecore Roles  
Custom Profile: ☒

**Administrative Permissions**

<input type="checkbox"/> Access Chatter For SharePoint	<input type="checkbox"/> Manage Knowledge Article Import/Export
<input type="checkbox"/> Exclude Only Fields	<input type="checkbox"/> Manage Unlisted Groups
<input checked="" type="checkbox"/> Invite Customers To Chatter	<input checked="" type="checkbox"/> Manage Users
<input type="checkbox"/> IP Restrict Requests	<input type="checkbox"/> Moderate Chatter
<input type="checkbox"/> Manage Auth. Providers	<input type="checkbox"/> Modify All Data
<input type="checkbox"/> Manage Roles	<input type="checkbox"/> New Help Link
<input type="checkbox"/> Manage Configurations	<input type="checkbox"/> View Reports in Public Folders
<input checked="" type="checkbox"/> Manage Internal Users	<input checked="" type="checkbox"/> View Setup and Configuration
<input checked="" type="checkbox"/> Manage IP Addresses	

**General User Permissions**

☐ Activate Console ☐ Custom Field Layouts ☐ Dashboards

**Standard Object Permissions**

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goal Collaborators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Macros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Custom Object Permissions**

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Sitecore Roles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sitecore Role Associations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Desktop Integration Clients**

## 5. Navigate to Field-Level Security > Contact > View

Profile
[Help for this Page](#)

# Sitecore Connect User

[« Back to List: Profiles](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
[Enabled Apex Class Access \[0\]](#) | 
[Enabled Visualforce Page Access \[0\]](#) | 
[Enabled External Data Source Access \[0\]](#) | 
[Enabled Service Presence Status Access \[0\]](#) | 
[Enabled Custom Permissions \[0\]](#)

**Profile Detail**
[Edit](#)
[Clone](#)
[Delete](#)
[View Users](#)

Name	Sitecore Connect User		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			

[\[ View Assignment \]](#)
[\[ View Assignment \]](#)

## Field-Level Security

### Standard Field-Level Security

Account	<a href="#">[ View ]</a>	Idea	<a href="#">[ View ]</a>
Asset	<a href="#">[ View ]</a>	Lead	<a href="#">[ View ]</a>
Campaign	<a href="#">[ View ]</a>	Macro	<a href="#">[ View ]</a>
Campaign Member	<a href="#">[ View ]</a>	Opportunity	<a href="#">[ View ]</a>
Case	<a href="#">[ View ]</a>	Opportunity Product	<a href="#">[ View ]</a>
Coaching	<a href="#">[ View ]</a>	Order	<a href="#">[ View ]</a>
Contact	<a href="#">[ View ]</a>	Order Product	<a href="#">[ View ]</a>
Contract	<a href="#">[ View ]</a>	Performance Cycle	<a href="#">[ View ]</a>
Event	<a href="#">[ View ]</a>	Price Book	<a href="#">[ View ]</a>
Feedback	<a href="#">[ View ]</a>	Price Book Entry	<a href="#">[ View ]</a>
Feedback Question	<a href="#">[ View ]</a>	Product	<a href="#">[ View ]</a>
Feedback Question Set	<a href="#">[ View ]</a>	Social Persona	<a href="#">[ View ]</a>
Feedback Request	<a href="#">[ View ]</a>	Solution	<a href="#">[ View ]</a>
Goal	<a href="#">[ View ]</a>	Task	<a href="#">[ View ]</a>
Goal Collaborator	<a href="#">[ View ]</a>	User	<a href="#">[ View ]</a>
Goal Link	<a href="#">[ View ]</a>		

### Custom Field-Level Security

Sitecore Role	<a href="#">[ View ]</a>	Sitecore Role Association	<a href="#">[ View ]</a>
---------------	--------------------------	---------------------------	--------------------------

## Salesforce Connect User Guide

### 6. Click Edit

Contact Field-Level Security for profile **Sitecore Connect User** [Help for this Page ?](#)

[Edit](#) [Back to Profile](#)

Field Name	Field Type	Visible	Read-Only
Account Name	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assistant	Text	<input type="checkbox"/>	<input type="checkbox"/>

### 7. Ensure the "Visible" box is checked for the following fields and click Save:

- Is Approved
- Last Activity
- Last Login
- Last Password Changed
- Password
- Password Answer
- Password Question

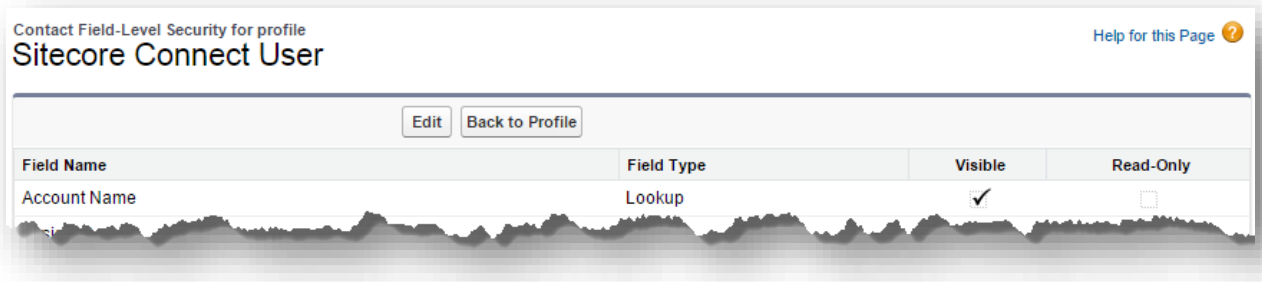
Contact Field-Level Security for profile **Sitecore Connect User** [Help for this Page ?](#)

[Save](#) [Cancel](#)

Field Name	Field Type	Visible	Read-Only
Account Name	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assistant	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is Approved	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Languages	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Activity	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password Answer	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Password Question	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone	Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports To	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Title	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Cancel](#)

## 8. Click Back to Profile



### 2.3.3 Modify web.config

Make the following changes to configuration > Sitecore:

```
<switchingProviders>
  <membership>
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
  />
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
  </membership>
  <roleManager>
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
ignoredUserDomains="" allowedUserDomains="" />
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
  </roleManager>
  <profile>
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
ignoredDomains="" />
  </profile>
</switchingProviders>
```

Make the following changes to configuration > system.web > roleManager:

```
<roleManager defaultProvider="sitecore" enabled="true">
  <providers>
    <clear />
    <add name="sitecore" type="Sitecore.Security.SitecoreRoleProvider,
Sitecore.Kernel" realProviderName="switcher" raiseEvents="true" />
    <add name="sql" type="System.Web.Security.SqlRoleProvider"
connectionStringName="core" applicationName="sitecore" />
    <add name="switcher" type="Sitecore.Security.SwitchingRoleProvider,
Sitecore.Kernel" applicationName="sitecore"
mappings="switchingProviders/roleManager" />
    <add name="salesforce"
type="Sitecore.Salesforce.Security.SalesforceRoleProvider, Sitecore.Salesforce"
readOnly="false" applicationName="sitecore" />
  </providers>
</roleManager>
```

### 2.3.4 Modify Sitecore.Salesforce.config

Make the following changes to configuration > sitecore> salesforce > configurations > fieldMapping:

```
<fieldMapping type="Sitecore.Salesforce.Configuration.SalesforceFieldMapping,
Sitecore.Salesforce">
  <id>Id</id>
  <login>Email</login>
  <email>Email</email>
  <description>Description</description>
  <password>SC_Password__c</password>
  <passwordAnswer>SC_PasswordAnswer__c</passwordAnswer>
  <passwordQuestion>SC_PasswordQuestion__c</passwordQuestion>
  <isApproved>SC_IsApproved__c</isApproved>
  <isLockedOut></isLockedOut>
  <createdDate>CreatedDate</createdDate>
  <lastLoginDate>SC_LastLogin__c</lastLoginDate>
  <lastActivityDate>SC_LastActivity__c</lastActivityDate>
  <lastPasswordChangedDate>SC_LastPasswordChanged__c</lastPasswordChangedDate>
</fieldMapping>
```

## Chapter 3 Partial Salesforce support installation

This chapter describes how to install Salesforce Connect with partial Salesforce support.

## 3.1 Salesforce configuration

This section describes the configuration that must be performed on Salesforce. An administrator for your Salesforce environment must follow these instructions.

### 3.1.1 Create a new connected app for Sitecore

Follow the steps in section 2.1.2.

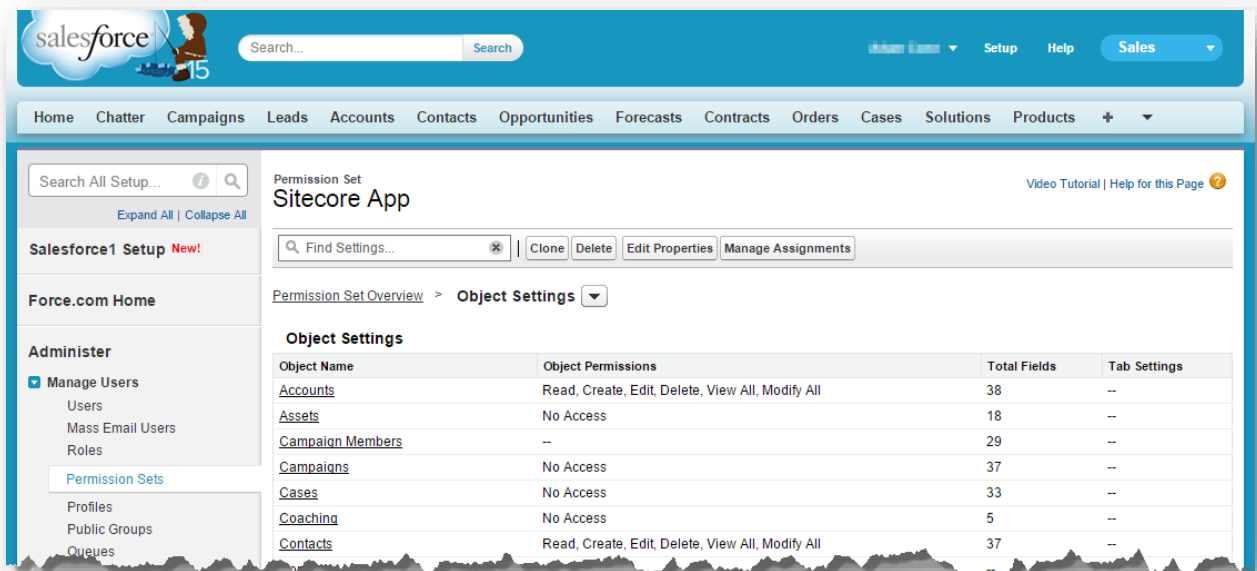
### 3.1.2 Create a new permission set

Follow the steps in section 2.1.3.

### 3.1.3 Create a new profile

This profile represents a new type of Salesforce user that Sitecore uses to interact with Salesforce.

1. Navigate to Manage Users > Profiles

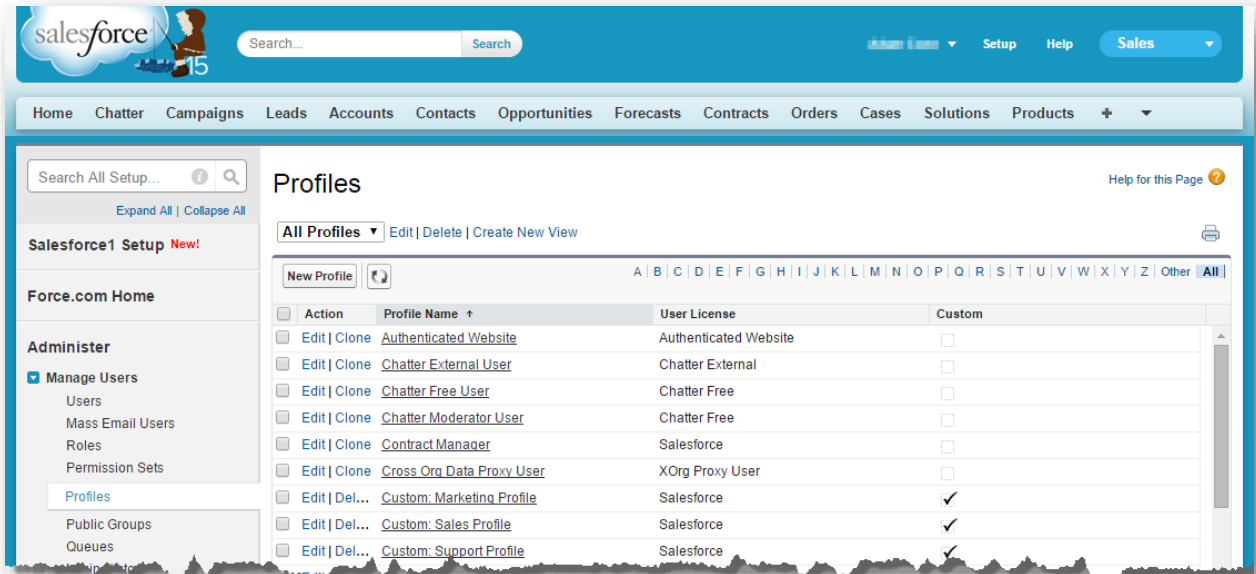


The screenshot shows the Salesforce 'Permission Set: Sitecore App' configuration page. The left sidebar contains navigation links for 'Salesforce1 Setup', 'Force.com Home', and 'Administer'. The 'Administer' section is expanded, showing 'Manage Users' (Users, Mass Email Users, Roles) and 'Permission Sets'. The main content area shows the 'Permission Set Overview' and 'Object Settings' tabs. The 'Object Settings' tab is active, displaying a table of permissions for various objects.

Object Name	Object Permissions	Total Fields	Tab Settings
<a href="#">Accounts</a>	Read, Create, Edit, Delete, View All, Modify All	38	--
<a href="#">Assets</a>	No Access	18	--
<a href="#">Campaign Members</a>	--	29	--
<a href="#">Campaigns</a>	No Access	37	--
<a href="#">Cases</a>	No Access	33	--
<a href="#">Coaching</a>	No Access	5	--
<a href="#">Contacts</a>	Read, Create, Edit, Delete, View All, Modify All	37	--
		--	

## Salesforce Connect User Guide

### 2. Click New Profile



3. Enter values for the following fields and click Save
  - a. Existing Profile: Standard User
  - b. Profile Name: Sitecore Connect User

### Clone Profile Help for this Page ?

Enter the name of the new profile.

**You must select an existing profile to clone from.** ! = Required Information

Existing Profile	<span style="border: 1px solid #ccc; padding: 2px;">Standard User ▼</span>
User License	Salesforce
Profile Name	<span style="border: 1px solid #ccc; padding: 2px;">Sitecore Connect User</span>



## Salesforce Connect User Guide

### 4. Click Edit

Profile [Help for this Page](#) ?

## Sitecore Connect User

[« Back to List: Connected Apps](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
 [Enabled Apex Class Access \[0\]](#) | 
 [Enabled Visualforce Page Access \[0\]](#) | 
 [Enabled External Data Source Access \[0\]](#) | 
 [Enabled Service Presence Status Access \[0\]](#) | 
 [Enabled Custom Permissions \[0\]](#)

**Profile Detail**

[Edit](#)
[Clone](#)
[Delete](#)
[View Users](#)

Name	Sitecore Connect User		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			

## Salesforce Connect User Guide

5. Set the following permissions and click Save
  - a. Administrative Permissions
    - i. Manage Users
    - ii. View Setup and Configuration
  - b. Standard Objects Permissions
    - i. Contacts: Read, Edit, Delete, View All, Modify All

Profile Edit  
Sitecore Connect User [Help for this Page](#)

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Sitecore Connect User  
User License: Salesforce Custom Profile: ☒  
Description:   
Sitecore Roles: Tab Hidden

**Administrative Permissions**

<input type="checkbox"/> Access Chatter For SharePoint	<input type="checkbox"/> Manage Knowledge Article Import/Export
<input type="checkbox"/> Edit Read Only Fields	<input type="checkbox"/> Manage Unlisted Groups
<input checked="" type="checkbox"/> Invite Customers To Chatter	<input checked="" type="checkbox"/> Manage Users
<input type="checkbox"/> IP Restrict Requests	<input type="checkbox"/> Moderate Chatter
<input type="checkbox"/> Manage Auth. Providers	<input type="checkbox"/> Modify All Data
<input type="checkbox"/> Manage Billing	<input type="checkbox"/> New Help Link
<input type="checkbox"/> Manage External Configurations	<input type="checkbox"/> View Reports in Public Folders
<input checked="" type="checkbox"/> Manage Internal Users	<input checked="" type="checkbox"/> View Setup and Configuration
<input checked="" type="checkbox"/> Manage IP Addresses	

**General User Permissions**

☐ Activate Content ☐ System Field ☐ Dashboards

**Standard Object Permissions**

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goal Collaborators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goal Links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Macros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 3.1.4 Create a new user

Follow the steps in section 2.1.5.

## 3.2 Sitecore configuration

This section describes the configuration that must be performed on Sitecore. An administrator for your Sitecore environment must follow these instructions.

### 3.2.1 Install the Sitecore package

Follow the steps in section 2.2.1.

### 3.2.2 Modify domains.config

Follow the steps in section 2.2.2.

### 3.2.3 Modify web.config

Make the following changes to configuration > Sitecore:

```
<switchingProviders>
  <membership>
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
  />
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
  </membership>
  <profile>
    <provider providerName="salesforce" storeFullNames="false" wildcard="%"
domains="salesforce" />
    <provider providerName="sql" storeFullNames="true" wildcard="%" domains="*"
ignoredDomains="" />
  </profile>
</switchingProviders>
```

## Salesforce Connect User Guide

Make the following changes to configuration > system.web:

```
<membership defaultProvider="sitecore" hashAlgorithmType="SHA1">
  <providers>
    <clear />
    <add name="sitecore" type="Sitecore.Security.SitecoreMembershipProvider,
Sitecore.Kernel" realProviderName="switcher" providerWildcard="%"
raiseEvents="true" />
    <add name="sql" type="System.Web.Security.SqlMembershipProvider"
connectionStringName="core" applicationName="sitecore"
minRequiredPasswordLength="1" minRequiredNonalphanumericCharacters="0"
requiresQuestionAndAnswer="false" requiresUniqueEmail="false"
maxInvalidPasswordAttempts="256" />
    <add name="switcher" type="Sitecore.Security.SwitchingMembershipProvider,
Sitecore.Kernel" applicationName="sitecore"
mappings="switchingProviders/membership" />
    <add name="salesforce"
type="Sitecore.Salesforce.Security.SalesforceMembershipProvider,
Sitecore.Salesforce" applicationName="sitecore" readOnly="false"
enablePasswordReset="true" minRequiredPasswordLength="1"
passwordStrengthRegularExpression=".*" minRequiredNonalphanumericCharacters="0"
maxInvalidPasswordAttempts="5" passwordAttemptWindow="0"
requiresQuestionAndAnswer="false" requiresUniqueEmail="true" />
  </providers>
</membership>
<profile defaultProvider="switcher" enabled="true"
inherits="Sitecore.Security.UserProfile, Sitecore.Kernel">
  <providers>
    <clear />
    <add name="salesforce"
type="Sitecore.Salesforce.Profile.SalesforceProfileProvider, Sitecore.Salesforce"
readOnly="false" />
    <add name="sql" type="System.Web.Profile.SqlProfileProvider"
connectionStringName="core" applicationName="sitecore" />
    <add name="switcher" type="Sitecore.Security.SwitchingProfileProvider,
Sitecore.Kernel" applicationName="sitecore" mappings="switchingProviders/profile"
/>
  </providers>
  <properties>
    <clear />
    <add type="System.String" name="SC_UserData" />
    <add type="System.String" name="FirstName"
customProviderData="salesforce|FirstName" />
    <add type="System.String" name="LastName"
customProviderData="salesforce|LastName" />
    <add type="System.String" name="JobTitle"
customProviderData="salesforce|Title" />
    <add type="System.DateTime" name="Birthdate"
customProviderData="salesforce|Birthdate" />
    <add type="System.String" name="Phone"
customProviderData="salesforce|Phone" />
  </properties>
</profile>
```

### 3.2.4 Modify Sitecore.Salesforce.config

Make the following changes.

1. Uncomment the following section: configuration > Sitecore > salesforce > clients > client

```
<clients>
  <client provider="salesforce"
type="Sitecore.Salesforce.Client.SalesforceClient, Sitecore.Salesforce.Client"
singleInstance="true">
    <param desc="authenticator"
type="Sitecore.Salesforce.Client.Security.PasswordAuthenticator,
Sitecore.Salesforce.Client">
      <consumerKey></consumerKey>
      <consumerSecret></consumerSecret>
      <userName></userName>
      <password></password>
      <securityToken></securityToken>
    </param>
  </client>
</clients>
```

2. Enter the consumer key and consumer secret values for the connected app you configured in Salesforce. Those values can be located by:
  - a. Log into Salesforce as an administrator
  - b. Navigate to Build > Create > Apps > Connected Apps > Sitecore App
3. Enter the security token value for the Sitecore user you created in Salesforce. That value can be located by:
  - a. Log into Salesforce as the Sitecore user
  - b. Navigate to My Settings > Personal > Reset My Security Token
4. Make the following changes to configuration > sitecore> salesforce > configurations > fieldMapping:

```
<fieldMapping
type="Sitecore.Salesforce.Configuration.SalesforceFieldMapping,
Sitecore.Salesforce">
  <id>Id</id>
  <login>Email</login>
  <email>Email</email>
  <description>Description</description>
  <password></password>
  <passwordAnswer></passwordAnswer>
  <passwordQuestion></passwordQuestion>
  <isApproved></isApproved>
  <isLockedOut></isLockedOut>
  <createdDate>CreatedDate</createdDate>
  <lastLoginDate></lastLoginDate>
  <lastActivityDate></lastActivityDate>
  <lastPasswordChangedDate></lastPasswordChangedDate>
</fieldMapping>
```

## Chapter 4 Using Salesforce Connect

This chapter describes how to use Salesforce Connect.

## 4.1 Mapping Salesforce objects to Sitecore users

Salesforce Connect uses ASP.NET membership components to expose Salesforce entities as Sitecore users.

### 4.1.1 Membership provider

The membership provider is responsible for interacting with Salesforce objects and representing those objects as Sitecore users.

By default Salesforce Connect reads all contacts from Salesforce. This behavior can be changed. For example, an alternate objects may represent what should be exposed as Sitecore users.

The mapping of the Salesforce objects to the Sitecore user model is defined in the Sitecore.Salesforce.config file in the following section:

configuration > sitecore > salesforce > configurations > configuration > api > contactsApi

### 4.1.2 Role provider

The role provider is responsible for determining which roles a Sitecore user is a member of.

By default Salesforce Connect uses the SitecoreRole object in Salesforce to determine which roles a Sitecore user is a member of. This object is populated when Sitecore users are added to roles using the Sitecore User Manager or the Sitecore API.

**Note:**

The SitecoreRole object is a custom object that is added to your Salesforce environment when the Salesforce package is installed. This explains why the role provider is not used with partial Salesforce support mode.

If a different means for associating roles to a user is required the default behavior can be changed. In this case a custom IRolesApi implemented is required. This is configured in the Sitecore.Salesforce.config file in the following section:

configuration > sitecore > salesforce > configurations > configuration > api > rolesApi

### 4.1.3 Profile provider

The profile provider is responsible for populating the Sitecore user's profile.

The mapping of Salesforce properties to the Sitecore user profile is defined in web.config in the following section:

configuration > system.web > profile > properties

By default the following properties are mapped from Salesforce to the Sitecore user profile:

Salesforce contact field	Sitecore user property
FirstName	FirstName
LastName	LastName
Title	JobTitle
BirthDate	Birthdate
Phone	Phone

#### 4.1.4 Caching

In order to minimize the number of Salesforce API calls that are made Salesforce Connect uses caches to store data that is read from Salesforce. The caches are defined in the Sitecore.Salesforce.config file in the following section:

configuration > sitecore > salesforce > configurations > configuration > api



## 4.2 Experience Database integration

This section describes how Salesforce Connect integrates Salesforce data with the Sitecore Experience Database (xDB).

### 4.2.1 Contact Facet

Salesforce Connect stores Salesforce contact data in xDB through a contact facet named "Salesforce Data". This contact facet is defined in the Sitecore.Salesforce.config file.

**Note:**

Salesforce Connect does not include an extension to display Salesforce data in the Sitecore Experience Profile (xProfile). The Salesforce data is in the xDB but that data will not appear in the xProfile.

## Chapter 5 Troubleshooting

This chapter describes how to troubleshoot Salesforce Connect.

## 5.1 Authentication

This section describes common errors that may occur when trying to authenticate a Salesforce contact using Sitecore.

### 5.1.1 Authenticating from Sitecore

Attempting to use Sitecore to authenticate a Salesforce contact results in the following exception:

```
Exception: Sitecore.Salesforce.Client.Exceptions.SalesforceException
Message:
Id = '003j0000006pcVsAAI' AND ^ = 'jEEaie1thG8GTtDezbo6hX8NFmc='

ERROR at Row:1:Column:60
unexpected token: '='
Source: Sitecore.Salesforce.Client
    at Sitecore.Salesforce.Client.SalesforceClient.HttpGet[T](String resource)
    at Sitecore.Salesforce.Api.ContactsApi.CheckHashedFieldEquality(String userId,
String fieldName, String value)
    at Sitecore.Salesforce.Security.SalesforceMembershipProvider.ValidateUser(String
username, String password)
    at Sitecore.Data.DataProviders.NullRetryer.Execute[T](Func`1 action, Action
recover)
    at Sitecore.Security.SitecoreMembershipProvider.ValidateUser(String username,
String password)
    at
System.Web.UI.WebControls.Login.AuthenticateUsingMembershipProvider(AuthenticateEventArgs e)
    at System.Web.UI.WebControls.Login.AttemptLogin()
    at System.Web.UI.WebControls.Login.OnBubbleEvent(Object source, EventArgs e)
    at System.Web.UI.Control.RaiseBubbleEvent(Object source, EventArgs args)
    at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint,
Boolean includeStagesAfterAsyncPoint)
```

The following options are available to fix this exception:

- A. Do not attempt to authenticate Salesforce contacts when partial Salesforce support is configured.
- B. Configure full Salesforce support.

## 5.2 Sitecore user management

This section describes common errors that may occur when trying to manage a Salesforce contact using the Sitecore User Manager.

### 5.2.1 User creation

When using the Sitecore User Manager to create a new user results in the following exception:

```
Exception: System.ArgumentException
Message: An item with the same key has already been added.
Source: mscorlib
    at System.Collections.Generic.Dictionary`2.Insert(TKey key, TValue value, Boolean
add)
    at Sitecore.Salesforce.Security.SalesforceMembershipProvider.CreateUser(String
username, String password, String email, String passwordQuestion, String passwordAnswer,
Boolean isApproved, Object providerUserKey, MembershipCreateStatus& status)
    at Sitecore.Security.SwitchingMembershipProvider.CreateUser(String userName, String
password, String email, String passwordQuestion, String passwordAnswer, Boolean isApproved,
Object providerUserKey, MembershipCreateStatus& status)
    at
Sitecore.Security.SitecoreMembershipProvider.<>c__DisplayClass9.<CreateUser>b__8()
    at Sitecore.Data.DataProviders.NullRetryer.Execute[T](Func`1 action, Action
recover)
    at Sitecore.Security.SitecoreMembershipProvider.CreateUser(String username, String
password, String email, String passwordQuestion, String passwordAnswer, Boolean isApproved,
Object providerUserKey, MembershipCreateStatus& status)
    at System.Web.UI.WebControls.CreateUserWizard.AttemptCreateUser()
    at
System.Web.UI.WebControls.CreateUserWizard.OnNextButtonClick(WizardNavigationEventArgs e)
    at System.Web.UI.WebControls.Wizard.OnBubbleEvent(Object source, EventArgs e)
    at System.Web.UI.Control.RaiseBubbleEvent(Object source, EventArgs args)
    at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint,
Boolean includeStagesAfterAsyncPoint)
```

The following options are available to fix this exception:

- A. Do not attempt to authenticate Salesforce contacts when partial Salesforce support is configured.
- B. Configure full Salesforce support.