

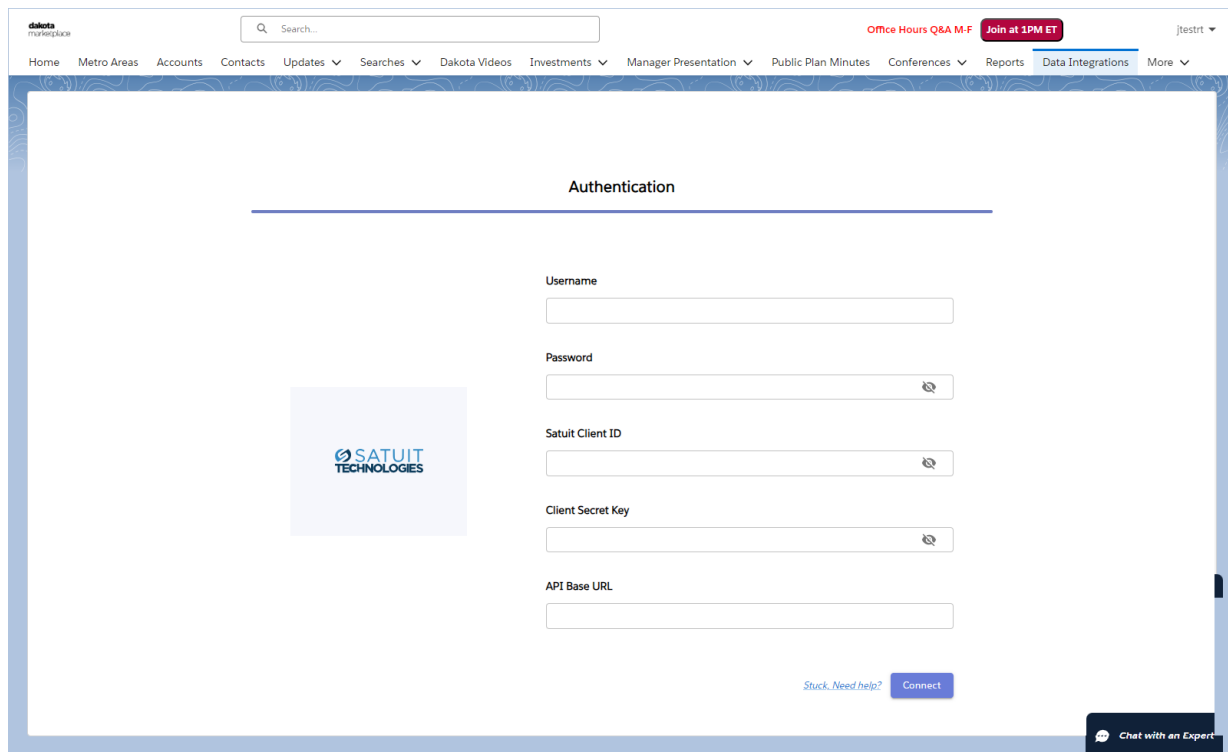
# Satuit Authentication Documentation

## Introduction:

The **Data Integrations** application is an embedded application in the Salesforce Marketplace. It allows the user to link Dakota data with multiple CRMs. The users can select the CRM and link data with the respective CRM. The linked data will be synced with the connected CRM in the form of either a new record or linked with an existing CRM record. The linked data will also be updated (in case of any update).

To connect Satuit CRM with the 'Data Integrations' application, you need to provide a few authentication factors (**Username**, **Password**, **API Base URL**, **Client ID**, **Client Secret Key**). Let's take a look at the following steps that will help you to achieve the authentication:

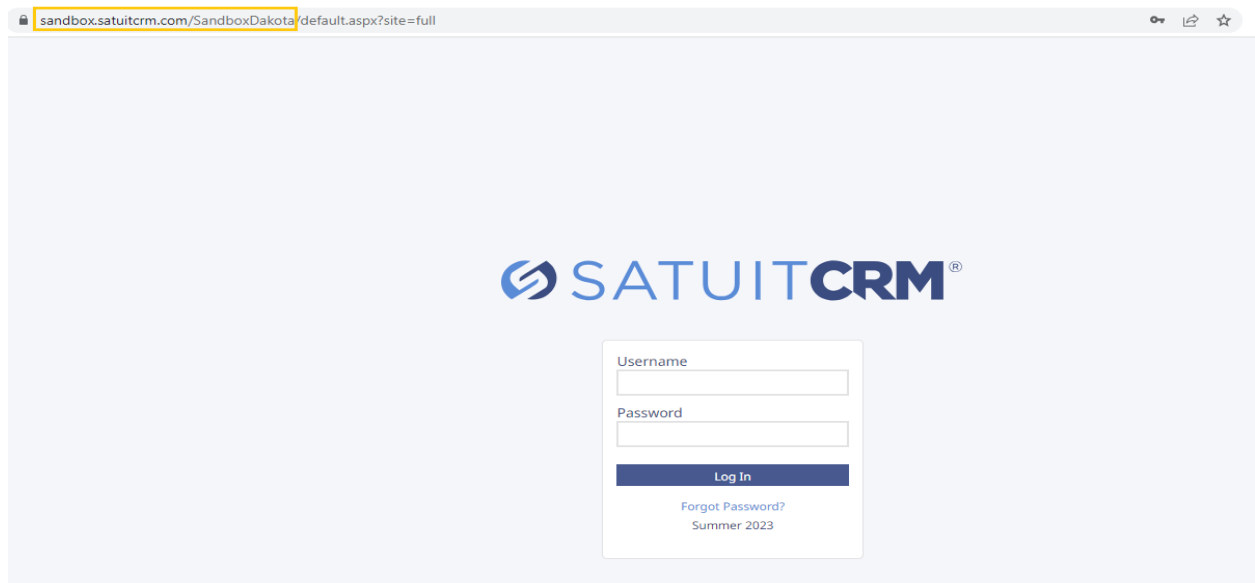
**Step-01:** Enter the **Username** and **Password** of the **Satuit API License user** in the 'Authentication' screen (as shown in the image below).



The screenshot shows the 'Authentication' screen within the Dakota Marketplace. The page has a blue header with the 'dakota marketplace' logo and a search bar. The navigation menu includes links for Home, Metro Areas, Accounts, Contacts, Updates, Searches, Dakota Videos, Investments, Manager Presentation, Public Plan Minutes, Conferences, Reports, Data Integrations (highlighted), and More. The main content area is titled 'Authentication' and contains five input fields: Username, Password, Satuit Client ID, Client Secret Key, and API Base URL. Each field has a corresponding label and a small icon to the right of the input box. A 'Connect' button is located at the bottom right of the form. A 'Stuck. Need help?' link is also present. The Satuit Technologies logo is displayed on the left side of the form. A chat bubble in the bottom right corner says 'Chat with an Expert'.

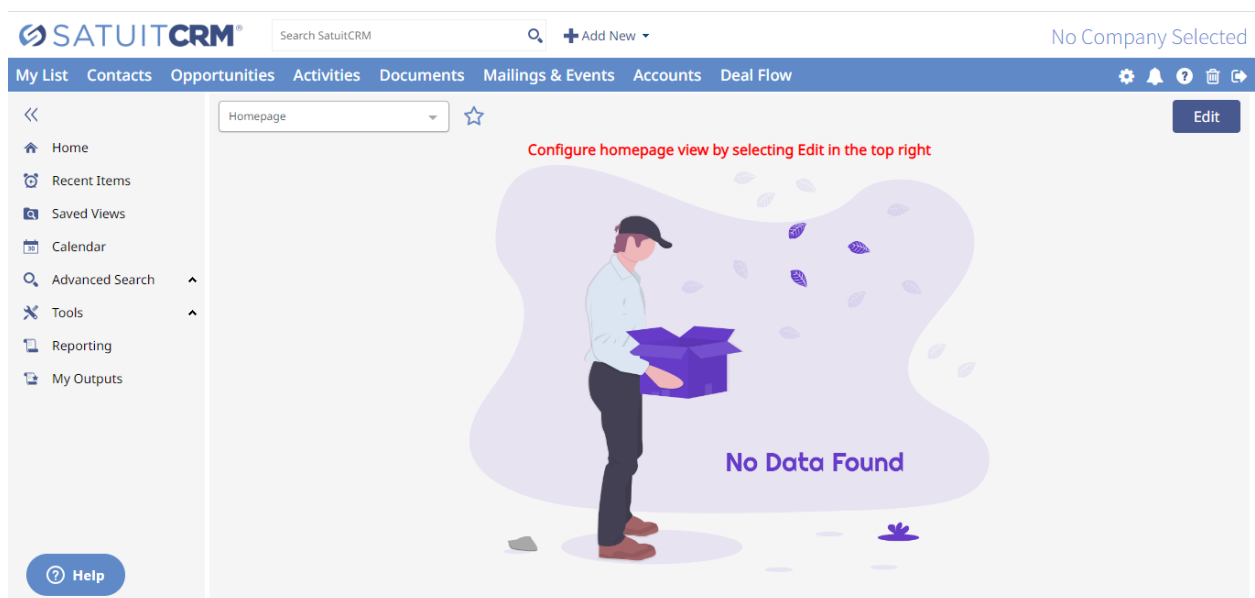
**Step-02:** Enter the **API Base URL** in the 'Authentication' screen

(by extracting it from the login page URL of the Satuit CRM, as shown below).

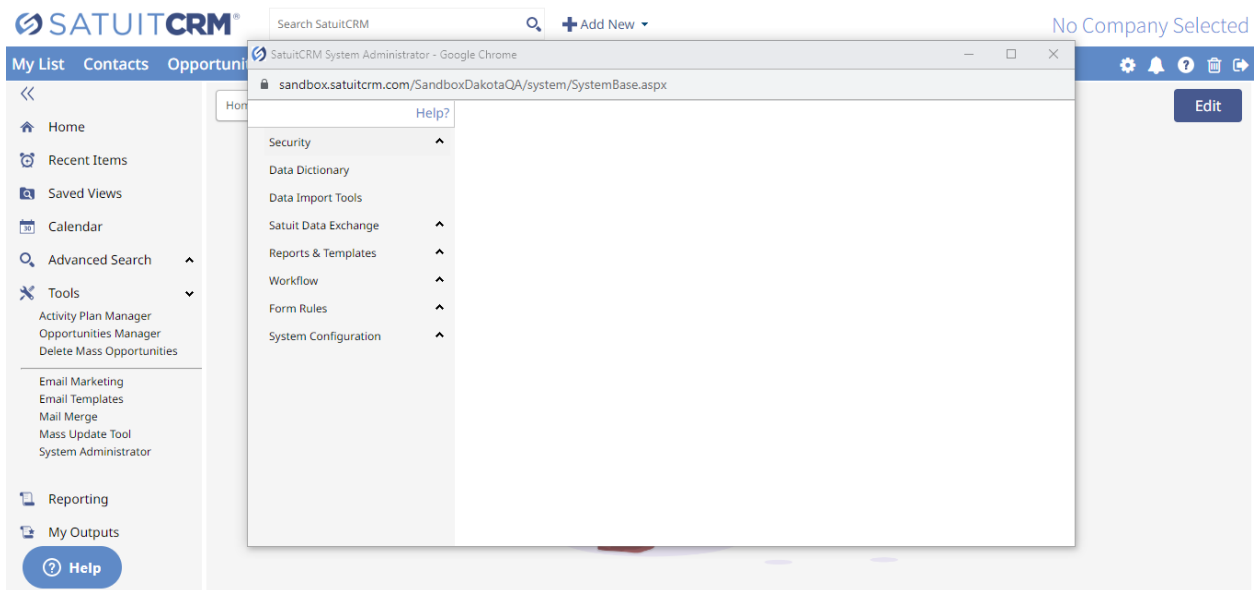


**Step-03:** Follow the following steps to get Satuit Client ID and Client Secret Key (if you don't have them already)

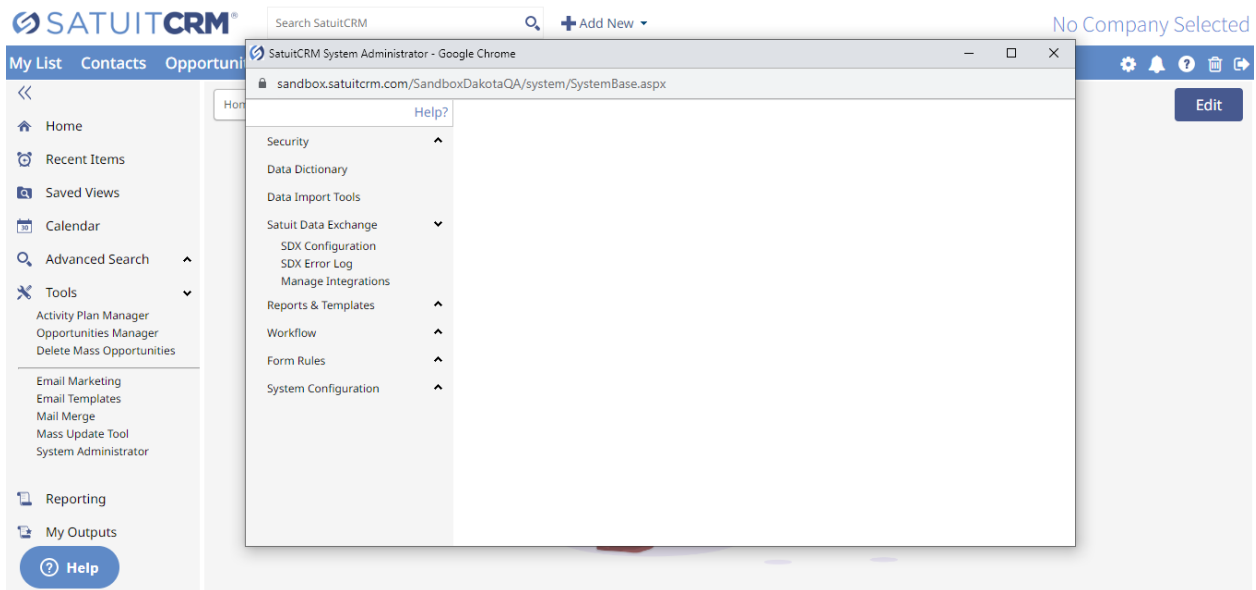
- Login to the Satuit CRM  
(After login, the user will be redirected to the Home page)



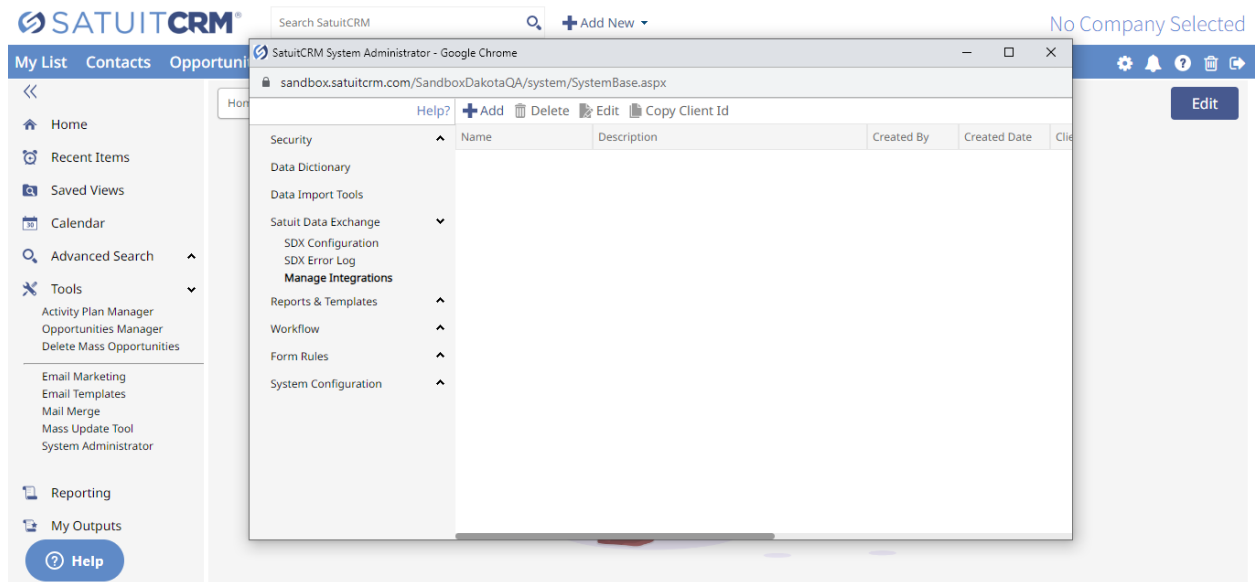
- Click **Tools > System Administrator**  
(which will open a new popup on the screen)



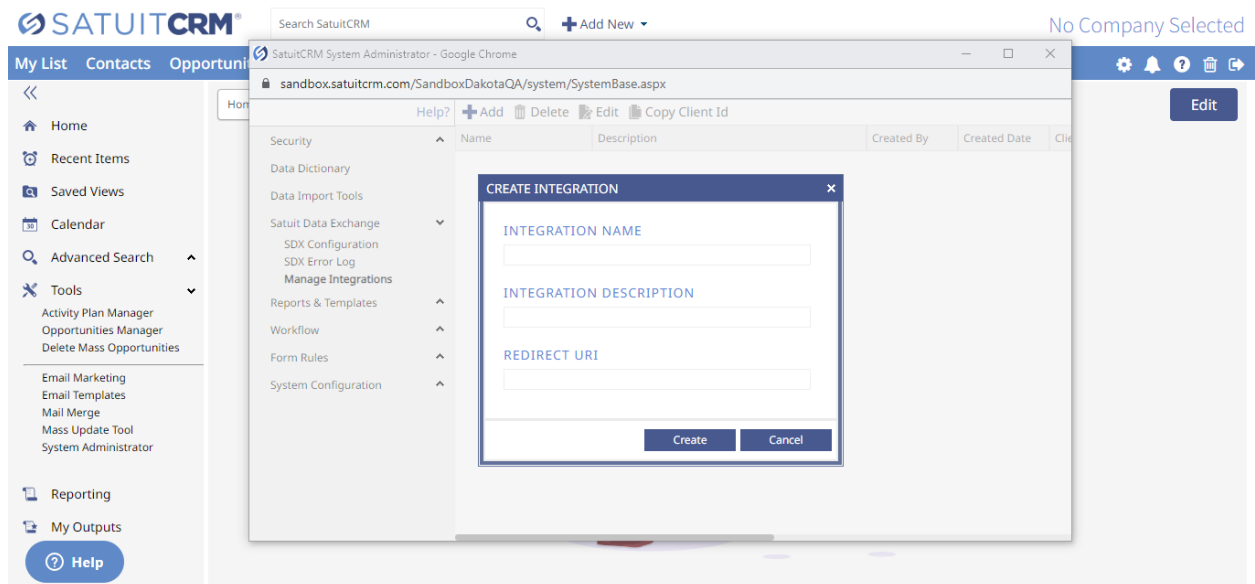
- Click **Satuit Data Exchange > Manage Integrations**



- Click the **Add** button in the 'Manage Integrations' section (which will open the 'Create Integration' popup)



- Fill in the fields of the popup and click the **Create** button (which will open the 'Integration Details' popup)



- Copy the Client ID and Client Secret Key from the 'Integration Details' popup (which will be used in the Authentication screen)

*(Note: In case of any other assistance, please contact Satuit Client Success Representative)*

Once the required values are provided, you are ready to connect your Satuit CRM with the 'Data Integrations' application.