

Salesforce Setup Guide

To configure SSO to log in to our application, you will need to add a Connected App inside your Salesforce Setup menu. This is typically performed by someone in IT or InfoSec, typically a System Administrator within your Salesforce organization. For details on the permissions, click [here](#).

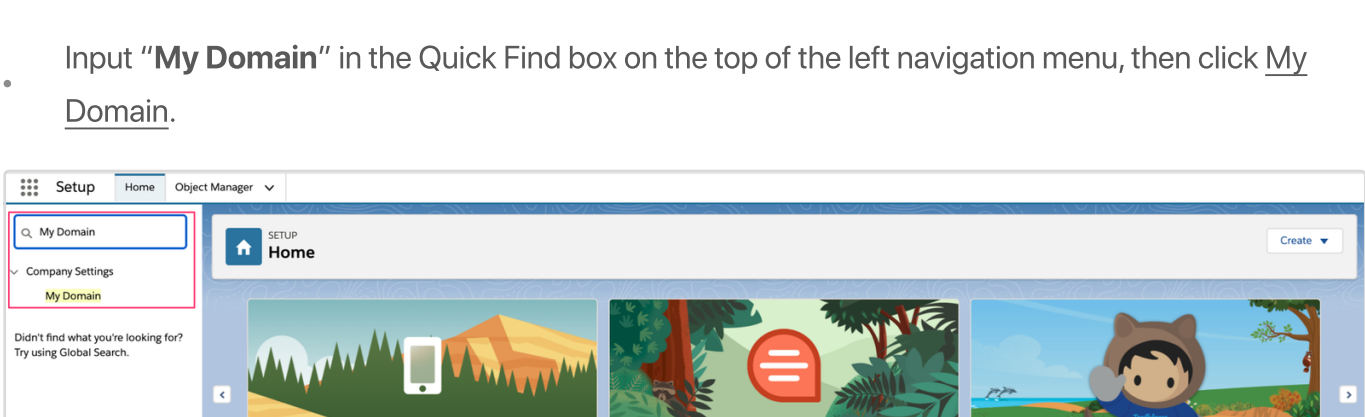
Follow the steps below to add a Connected App with information we've generated for your account, and when finished be sure to return the Metadata file to us, so your team can begin signing in with SSO. Once you've added the Connected App in your Salesforce organization, you will need to return to us the Metadata file that you will download later, so that we can finalize configuration on our end.

If you run into any trouble, contact us [here](#) and we'll get back to you as soon as we can:

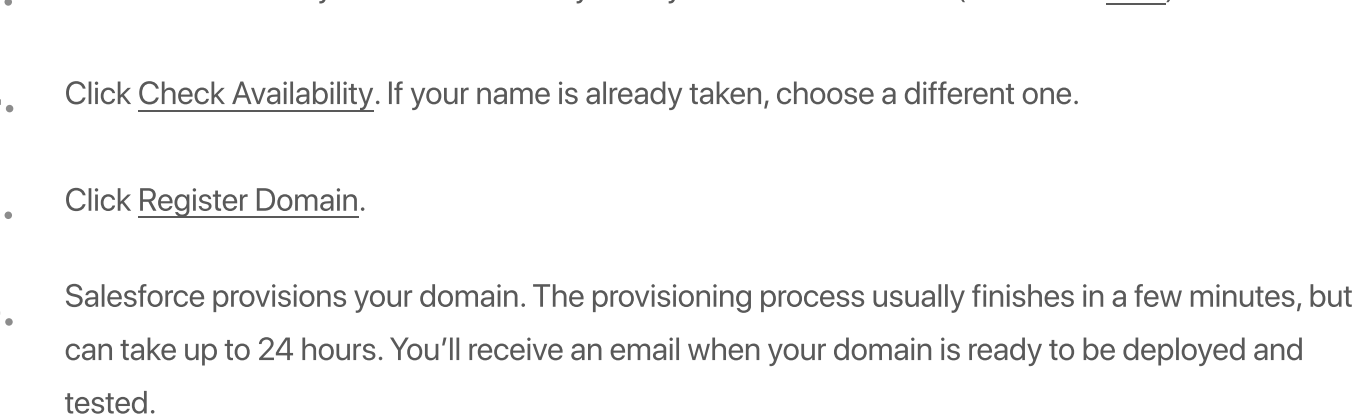
Step 1: Enable Salesforce as a SAML IDP

❶ If your Salesforce organization is already set up as an Identity Provider, skip to [Step 2](#).

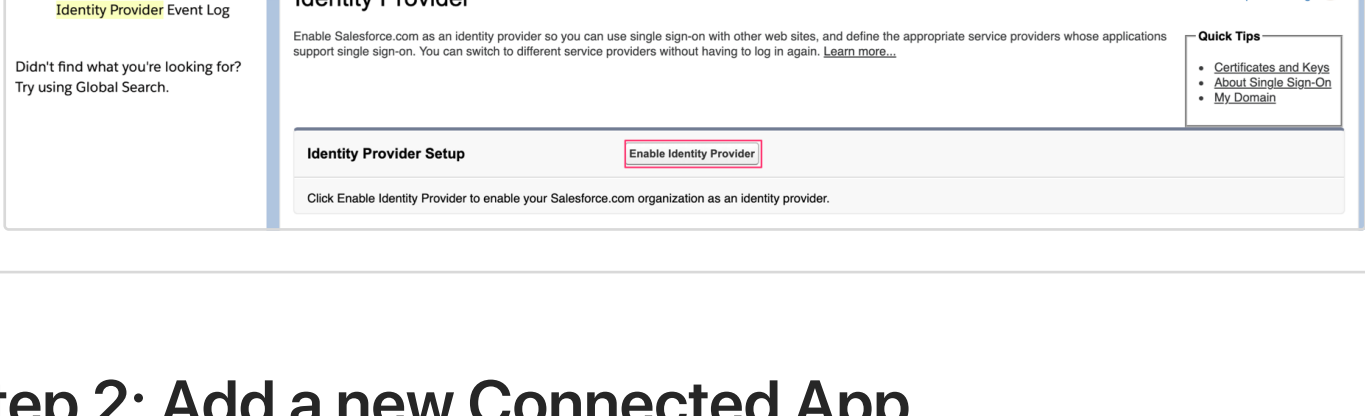
1. From the Salesforce Homepage, click the [gear icon](#) on the top right, then click [Setup](#) from the dropdown menu.



2. Input **"My Domain"** in the Quick Find box on the top of the left navigation menu, then click [My Domain](#).

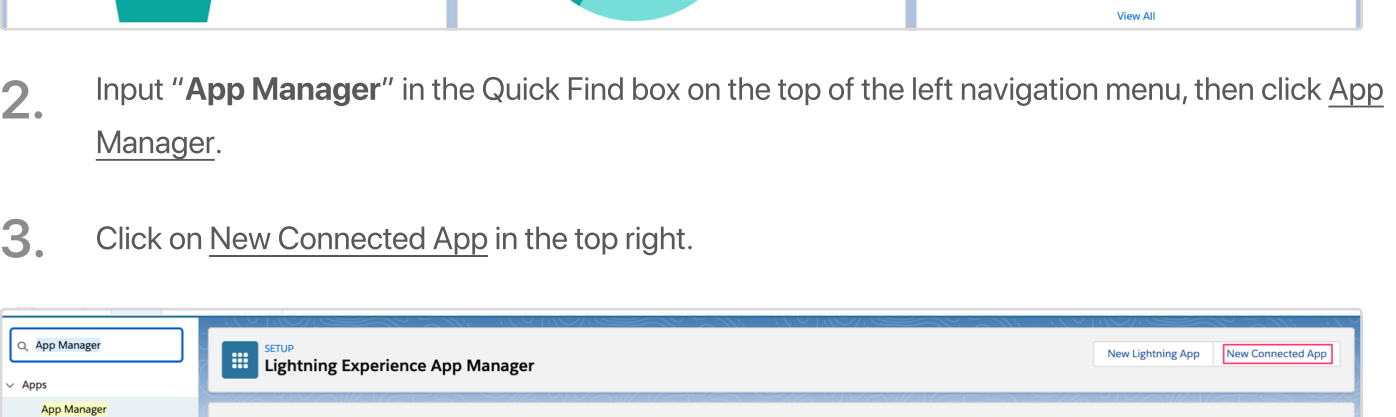


3. Add the name that you want to use for your My Domain subdomain (read more [here](#)).
4. Click [Check Availability](#). If your name is already taken, choose a different one.
5. Click [Register Domain](#).
6. Salesforce provisions your domain. The provisioning process usually finishes in a few minutes, but can take up to 24 hours. You'll receive an email when your domain is ready to be deployed and tested.
7. To enable Salesforce as a SAML Identity Provider, click the [gear icon](#) on the top right, then click [Setup](#) from the dropdown menu.
8. Input **"Identity Provider"** in the Quick Find box on the top of the left navigation menu, then click [Identity Provider](#).
9. Click [Enable Identity Provider](#).



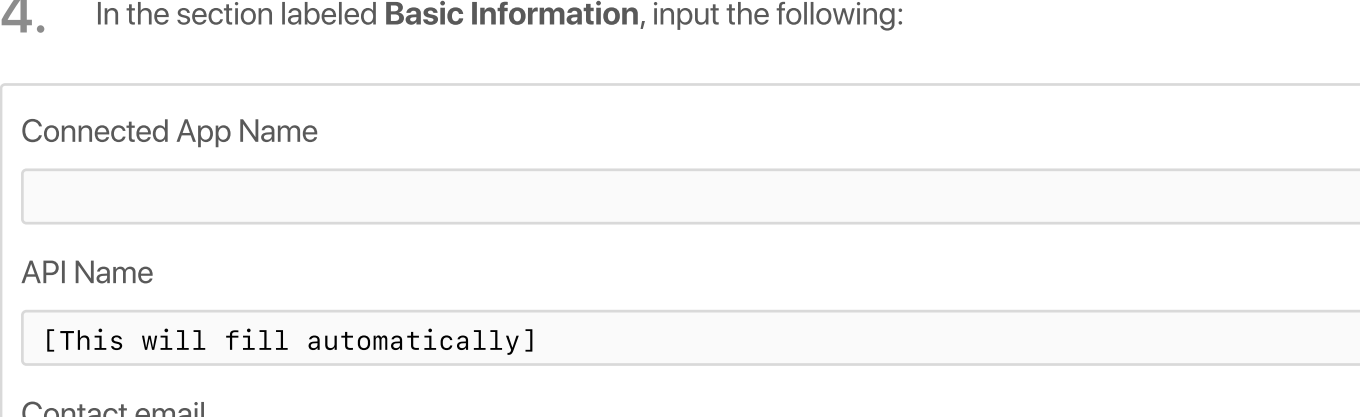
Step 2: Add a new Connected App

1. From the Salesforce Homepage, click the [gear icon](#) on the top right, then click [Setup](#) from the dropdown menu.



2. Input **"App Manager"** in the Quick Find box on the top of the left navigation menu, then click [App Manager](#).

3. Click on [New Connected App](#) in the top right.



4. In the section labeled **Basic Information**, input the following:

Connected App Name

API Name

Contact email

Logo Image URL

Description

5. In the section labeled **Web App Settings**, check the [box](#) directly to the right of **Enable SAML**. Then, input the following information in the relevant fields:

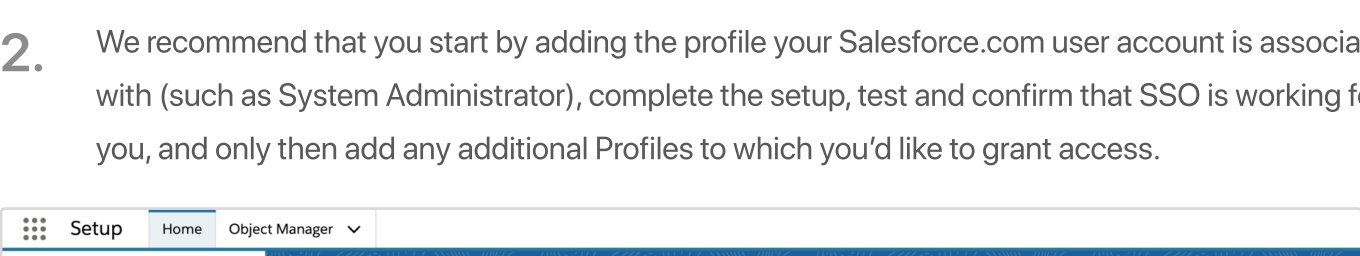
Entity ID

ACS URL

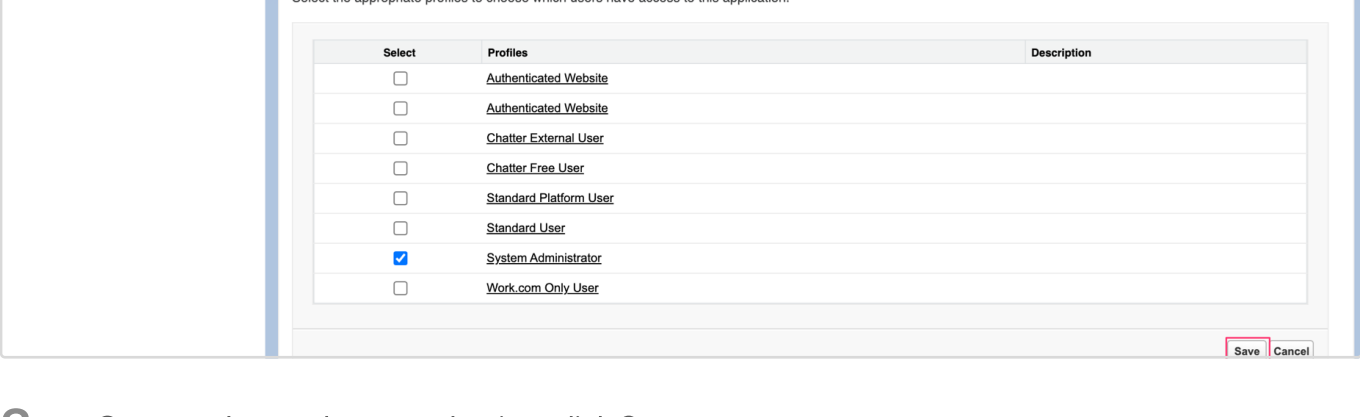
6. You can leave all other fields as-is.
7. Click [Save](#) at the bottom of the page.

Step 3: Manage profiles

1. From the **App Manager** page of your recently added **Connected App**, find the **Profiles** section and click [Manage Profiles](#).



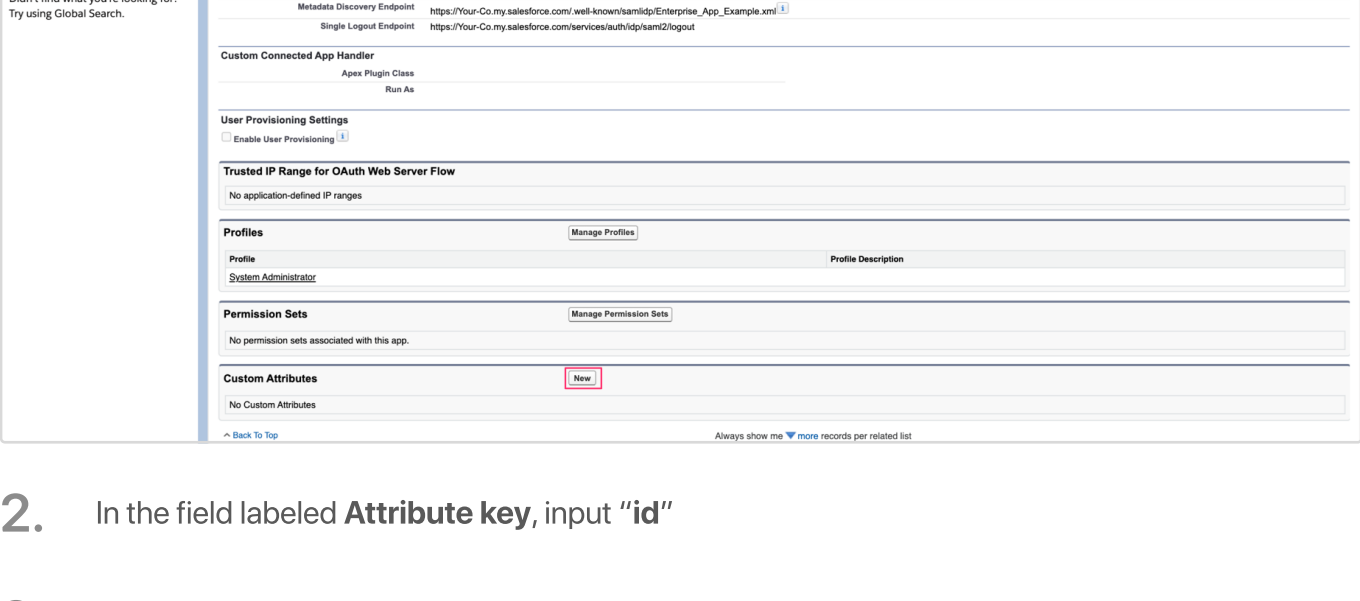
2. We recommend that you start by adding the profile your Salesforce.com user account is associated with (such as System Administrator), complete the setup, test and confirm that SSO is working for you, and only then add any additional Profiles to which you'd like to grant access.



3. Once you've made your selection, click [Save](#).

Step 4: Add custom attributes

1. From the **App Manager** page of your recently added **Connected App**, find the **Custom Attributes** section and click [New](#).



2. In the field labeled **Attribute key**, input **"id"**
3. In the field labeled **Attribute value**, input **"\$User.Id"**
4. When complete, it should look like this:

Create Service Provider SAML Attribute

Attribute key: id

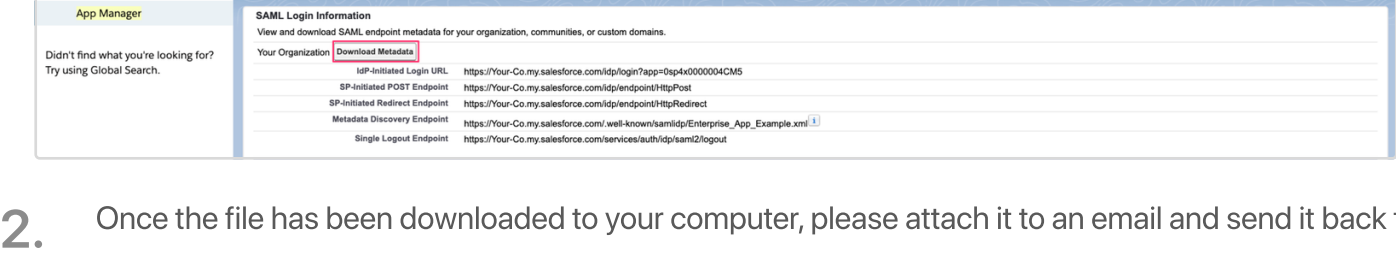
Attribute value: \$User.Id

Save Cancel

5. Click [Save](#).

Step 5: Download SAML Metadata

1. Under the **SAML Login Information** section, click [Download Metadata](#) and save the file to your computer.



2. Once the file has been downloaded to your computer, please attach it to an email and send it back to us so we can complete the setup process.