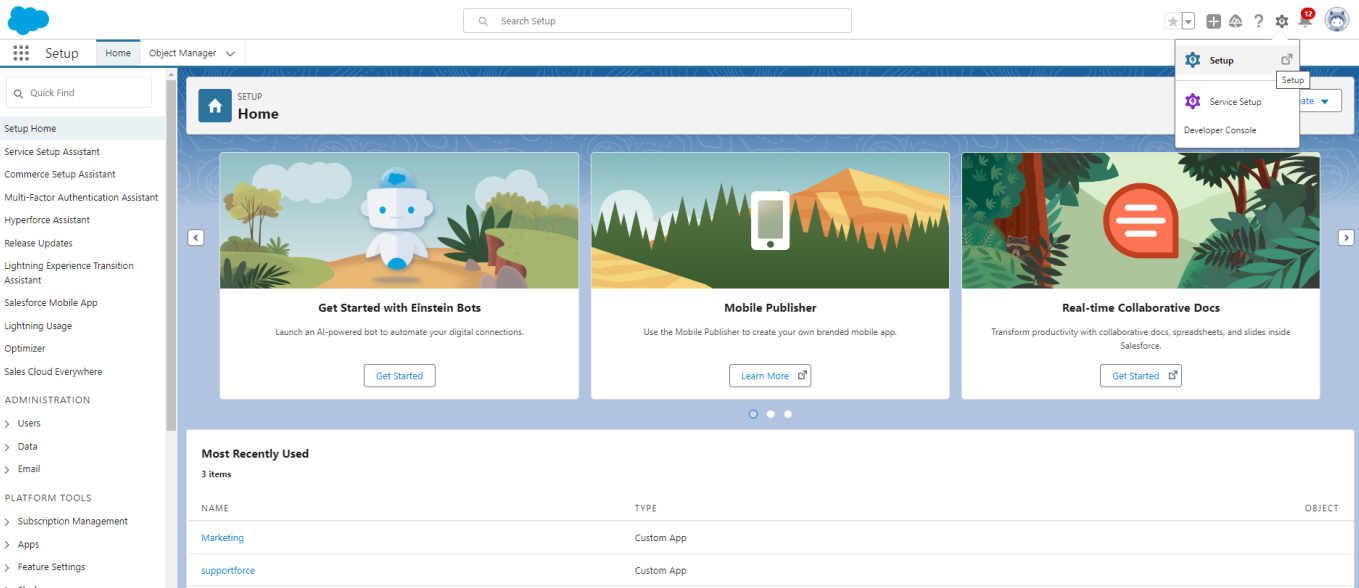


Salesforce Skill

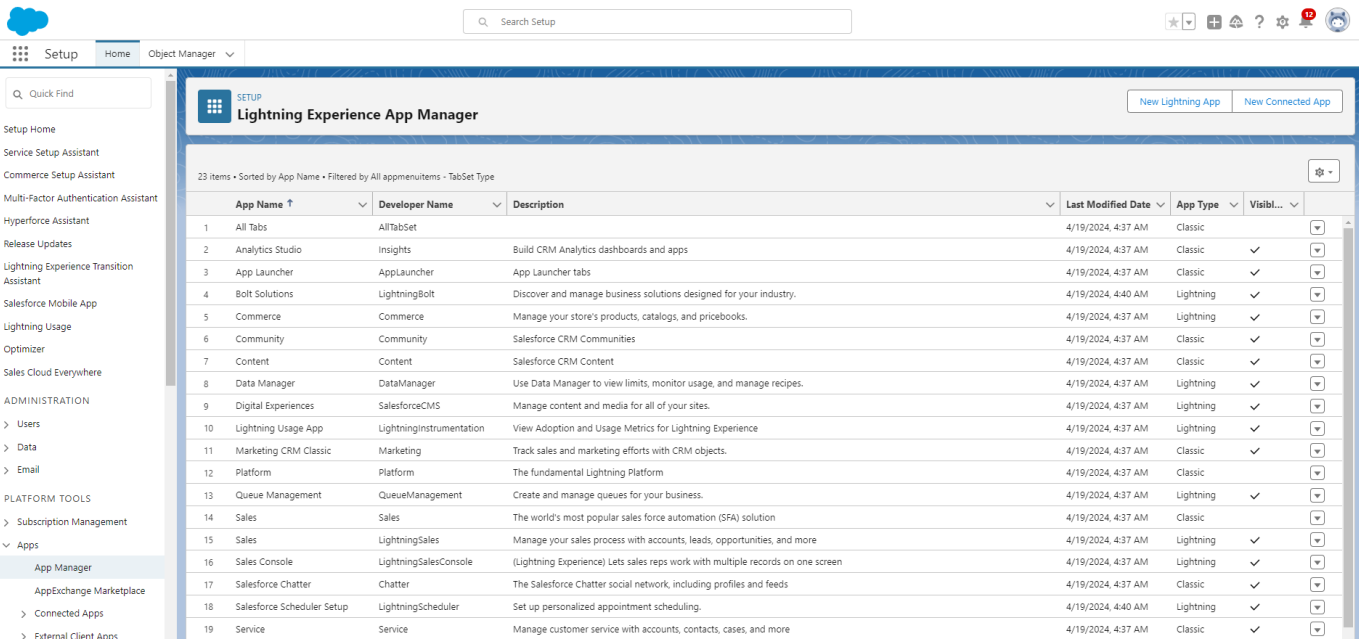
This skill allows the authenticated user to perform simple tasks on his/her Salesforce account directly from the VertexGraph chat prompt.

API Permissions Setup

1. Go to <https://login.salesforce.com>
2. Login with your Salesforce developer account credentials.
3. Go to **Gear Icon > Setup**.



4. Under **Platform Tools**, navigate to **Apps > App Manager**. Select **New Connected App**.



5. Fill out the form with all required information marked in red. Under the **API (Enable OAuth Settings)** section, choose exactly the following setup option in the image below with the scopes (*api, offline_access, refresh_token*). Then add the following links into the **Callback URL** list:

<https://api.vertexgraph.com/adminapi/assets/oauthcode>

<http://localhost/salesforce/auth> (only apply to local setup, public url is different)

<http://localhost/salesforce/token> (only apply to local setup, public url is different)

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL
<http://localhost/salesforce/auth>
<http://localhost/salesforce/token>

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access unique user identifiers (openid)
- Full access (full)
- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)
- Manage Pardot services (pardot_api)
- Manage user data via Web browsers (web)
- Perform ANSI SQL queries on Data Cloud data (cdp_query_api)
- Perform segmentation on Data Cloud data (cdp_segment_api)

Selected OAuth Scopes

- Manage user data via APIs (api)
- Perform requests at any time (refresh_token, offline_access)

Require Proof Key for Code Exchange (PKCE) ☐

Require Secret for Web Server Flow ☐

Require Secret for Refresh Token Flow ☒

Enable Client Credentials Flow ☐

Enable Authorization Code and Credentials Flow ☐

Enable Token Exchange Flow ☐

Enable Refresh Token Rotation ☐

Issue JSON Web Token (JWT)-based access tokens ☐

Introspect All Tokens ☐

Configure ID Tokens ☐

Enable Asset Tokens ☐

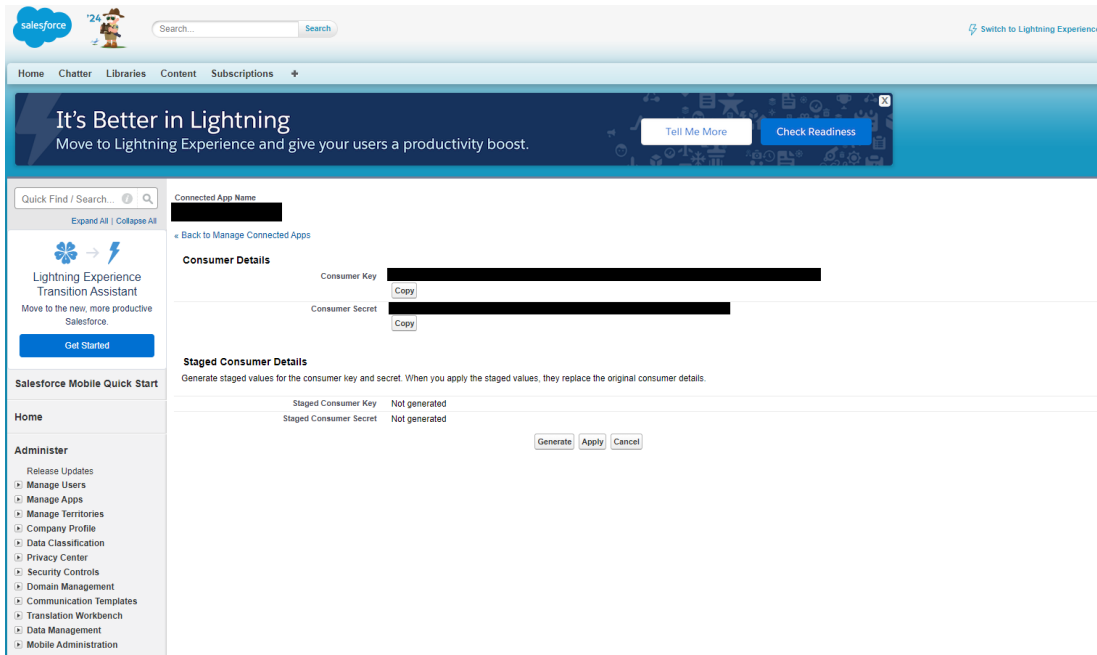
Enable Single Logout ☐

6. After filling out the information, click **Save** to create the connected app. Then navigate to **Apps > App Manager** and scroll down the list to identify your newly created app. Click on the arrow icon at the end then click **View**.

23 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
3 App Launcher	AppLauncher	App Launcher tabs	4/19/2024, 4:37 AM	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	4/19/2024, 4:40 AM	Lightning	✓
5 Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	4/19/2024, 4:37 AM	Lightning	✓
6 Community	Community	Salesforce CRM Communities	4/19/2024, 4:37 AM	Classic	✓
7 Content	Content	Salesforce CRM Content	4/19/2024, 4:37 AM	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	4/19/2024, 4:37 AM	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	4/19/2024, 4:37 AM	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	4/19/2024, 4:37 AM	Lightning	✓
11 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	4/19/2024, 4:37 AM	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	4/19/2024, 4:37 AM	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	4/19/2024, 4:37 AM	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	4/19/2024, 4:37 AM	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	4/19/2024, 4:37 AM	Lightning	✓
16 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	4/19/2024, 4:37 AM	Lightning	✓
17 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	4/19/2024, 4:37 AM	Classic	✓
18 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	4/19/2024, 4:40 AM	Lightning	✓
19 Service	Service	Manage customer service with accounts, contacts, cases, and more	4/19/2024, 4:37 AM	Classic	✓
20 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	4/19/2024, 4:37 AM	Lightning	✓
21 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	4/19/2024, 4:37 AM	Classic	✓
22 Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	4/19/2024, 4:37 AM	Lightning	✓
23 Web client 1	Web_client_1		5/3/2024, 11:49 AM	Connected	✓

7. Next to **Consumer Key and Seret**, click on **Manage Consumer Details**. It might require you to verify yourself with a verification code. After completing it, following screen as in the image below will pop up. Copy down the **Consumer Key (Client ID)** and **Consumer Secret (Client Secret)** for authorization.



(*) Note: There is a special condition for Salesforce skill to work, which is that the API needs to use the users' org/personal domain which can be found in the Salesforce Setup page at **Settings > Company Settings > My Domain** and then use it to update the **SalesforceApiBaseUrl** constant inside the code base (only change the domain/subdomain, the path stays the same).

Test Prompts

Please refer to the root README (<https://github.com/vertexgraphinc/aiskills/blob/main/DotNet/README.md>) for instructions on how to host the custom skill and install it on the VertexGraph.ai website. Once the Salesforce Skill is properly installed, you can try the following example prompts on the AI Assistant:

- Get all the campaigns from Salesforce happening from tomorrow
- Create a campaign named "Test campaign" from today till Monday next week
- Update the campaign named "Test campaign" with the new description "updated description"
- Remove all campaigns happening after today
- Get all contacts with the first name John
- Create a contact for John Doe with email example@example.com and phone number 1234567890
- Update John Doe contact email to update@example.com
- Remove all contacts with first name John