AQUILA - Salesforce Integration

Overview

The Salesforce integration enables you to monitor your Salesforce instance. Salesforce is a customer relationship management (CRM) platform that supports businesses in managing marketing, sales, commerce, service, and IT teams from a unified platform accessible from anywhere.

Data Streams Logs

- Salesforce Apex Logs
- Salesforce Login Logs
- Salesforce Logout Logs
- Salesforce SetupAudit Logs

Configuration

To configure the Salesforce integration, you need the following information:

- **Create New User Account for the Integration**
- **Salesforce instance URL**
- **Client key and client secret for authentication**
- **Username**
- **Password**
- **Token URL**
- **API version**

Step 1: Create New User Account

- Go to **Home** page of **Salesforce** and click **Setup** in the top right menu bar.
- In the left side you will see a **Quick Find** search textbox, type **Users**.
- Click **Users** and it will redirect you to the **Users setup** page.
- Click **New User** button and fill up the form:
  - First Name
  - Last Name
  - Email
  - Set **User License** to "**Salesforce**"
  - Choose an appropriate **Profile** (see below)
    - **Profile and Permission Set Configuration**
      - **Create a custom profile** or clone an existing minimal profile:
        - Clone the **"Standard User"** profile and name it something like **"Log Extraction Service"** or whatever you prefer.

        - Remove unnecessary permissions, keeping only:
            - **API Enabled**
            - **View Setup and Configuration**
            - **Specific object permissions for logs you need to extract**
        - **Essential permissions** for log extraction:
            - **API Enabled** - Required for programmatic access
            - **View All Data** - If you need comprehensive log access
            - **Read** access to specific objects containing log data
    - Scroll down to the bottom and **check** the box that says **Generate new password and notify user immediately.**
    - Click **Save**.
- Open the account and set a new password.

Please take note of the **Email Address, Username** and **Password** associated with this account, as they will be required during the API and integration setup process.

Step 2: Salesforce instance URL

This is the URL of your Salesforce Organization.

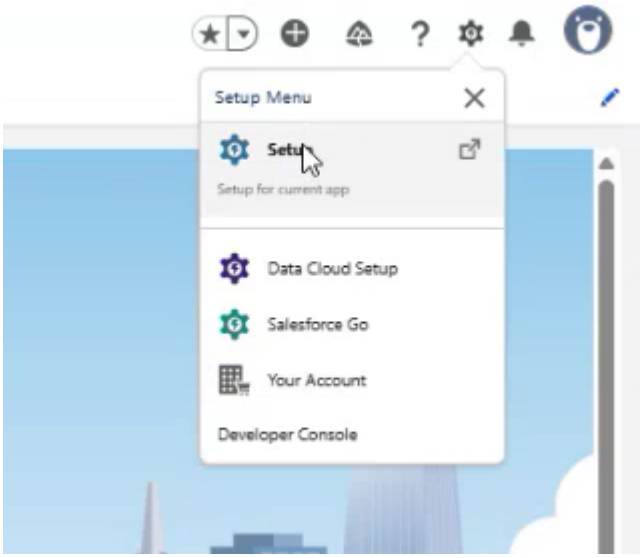
- **Salesforce Classic:** Given the example URL https://na9.salesforce.com/home/home.jsp, the Salesforce Instance URL is extracted as https://na9.salesforce.com.
- **Salesforce Lightning:** The instance URL is available under your user name in the **View Profile** tab. Use the correct instance URL in case of Salesforce Lightning because it uses *.lightning.force.com but the instance URL is *.salesforce.com.

> Ensure the **Instance URL** is noted, as it will be used in both API creation and integration steps.

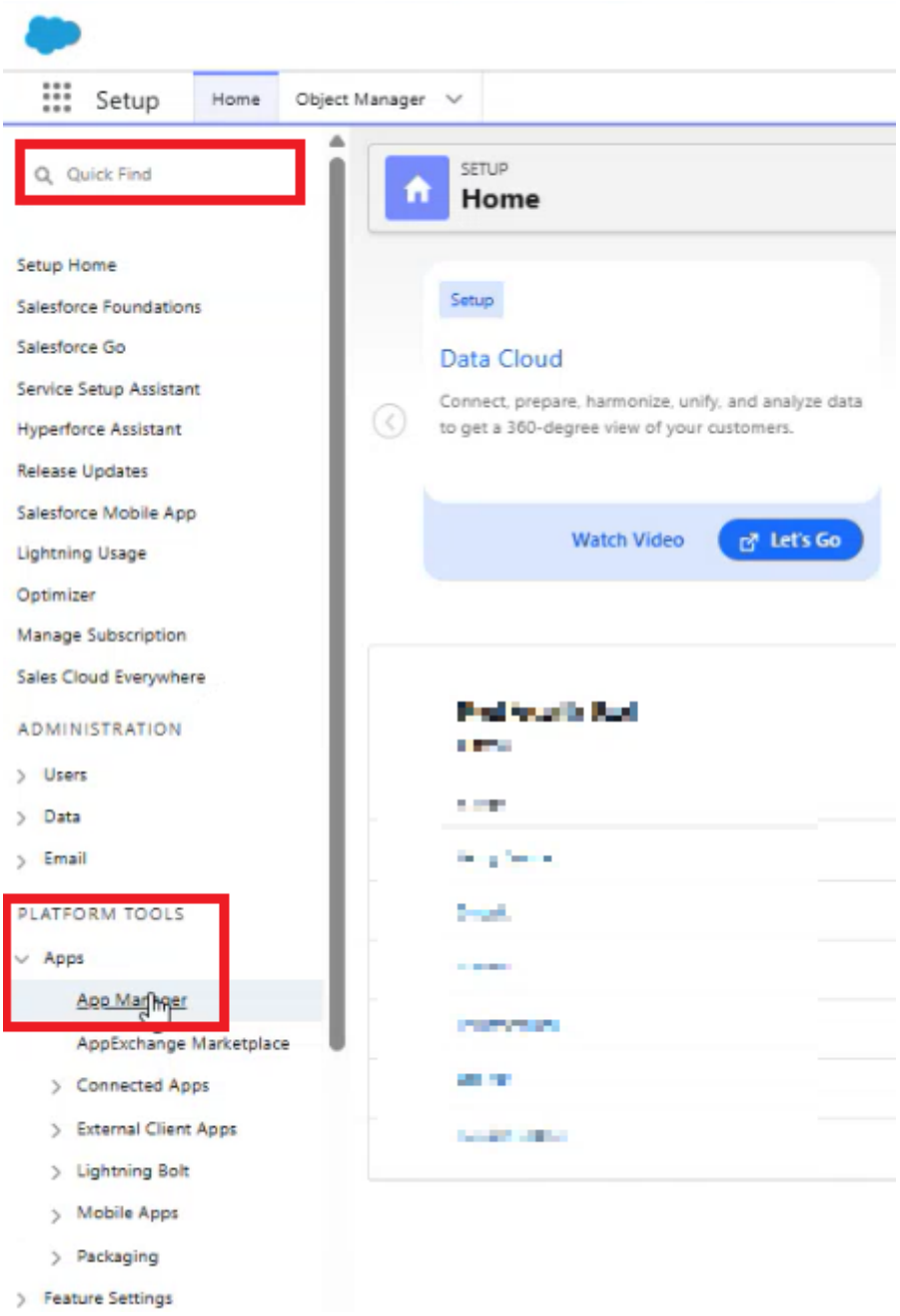
Step 3: Client Key and Client Secret for Authentication

To use this integration, you need to create a new Salesforce Application using OAuth. Follow these steps to create a connected application in Salesforce:

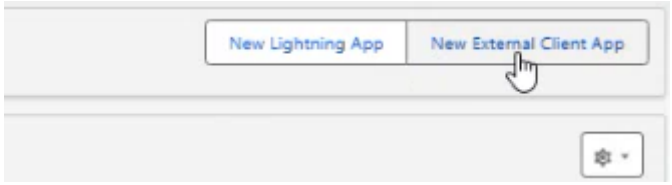
- Log in to **Salesforce** with the user credentials you want to collect data with.
- Click **Setup** in the top right menu bar.



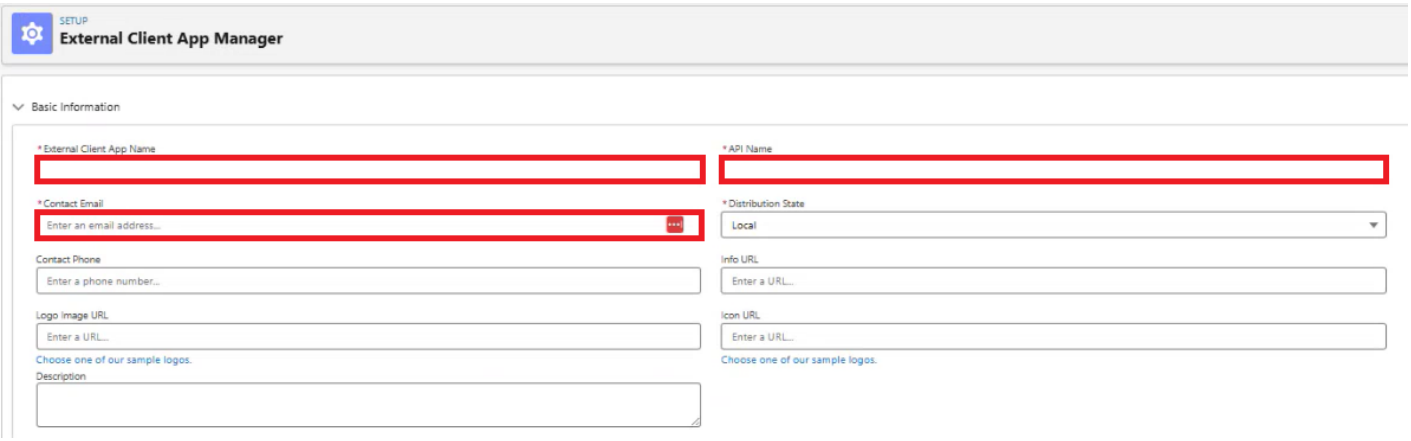
- In the **Quick Find textbox**, search for **App Manager** or you can scroll down to **PLATFORM TOOLS** and select **App Manager.**



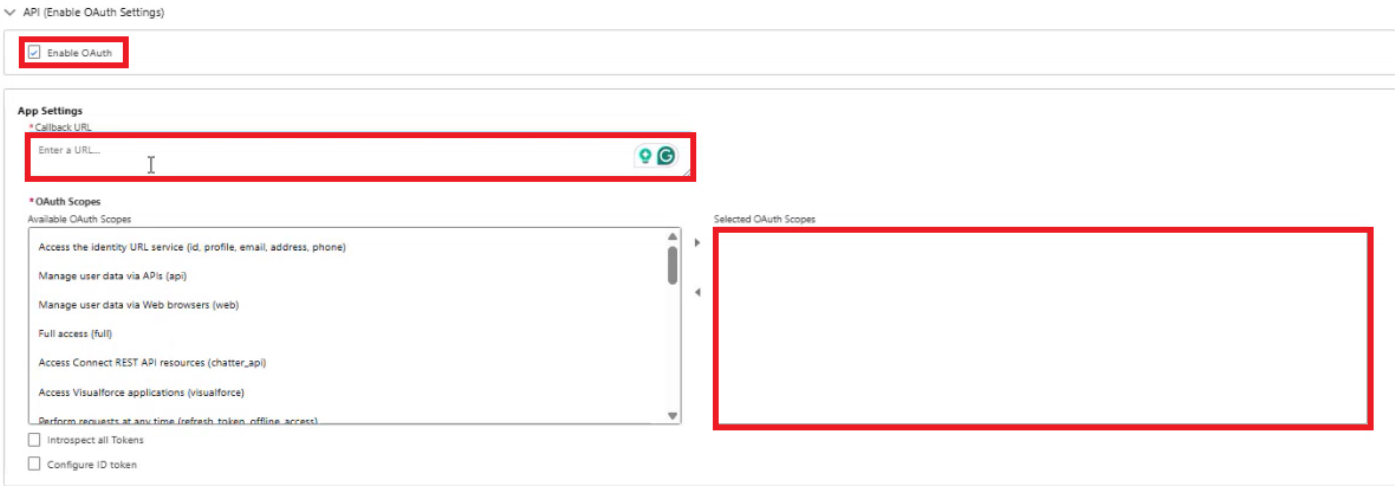
- In the upper right corner, choose the **New External Client App.**



- Provide a name for the connected application. This name will be displayed in the App Manager and on its App Launcher tile.
- Enter the API name. The default is a version of the name without spaces. Only letters, numbers, and underscores are allowed. If the original app name contains any other characters, edit the default name.
- Enter the **email address** of the **new account** you created earlier.



- Under the **API (Enable OAuth Settings)** section, check the box for **Enable OAuth Settings**.
- In the **Callback URL** field, enter the instance URL as specified in **Salesforce instance URL.** Example URL: https://na9.salesforce.com
- Select the following OAuth scopes to apply to the connected app:
  - **Manage user data via APIs (api)**
  - **Perform requests at any time (refresh_token, offline_access)**
  - (Optional) If you encounter any permission issues during data collection, add the **Full access (full)** scope.



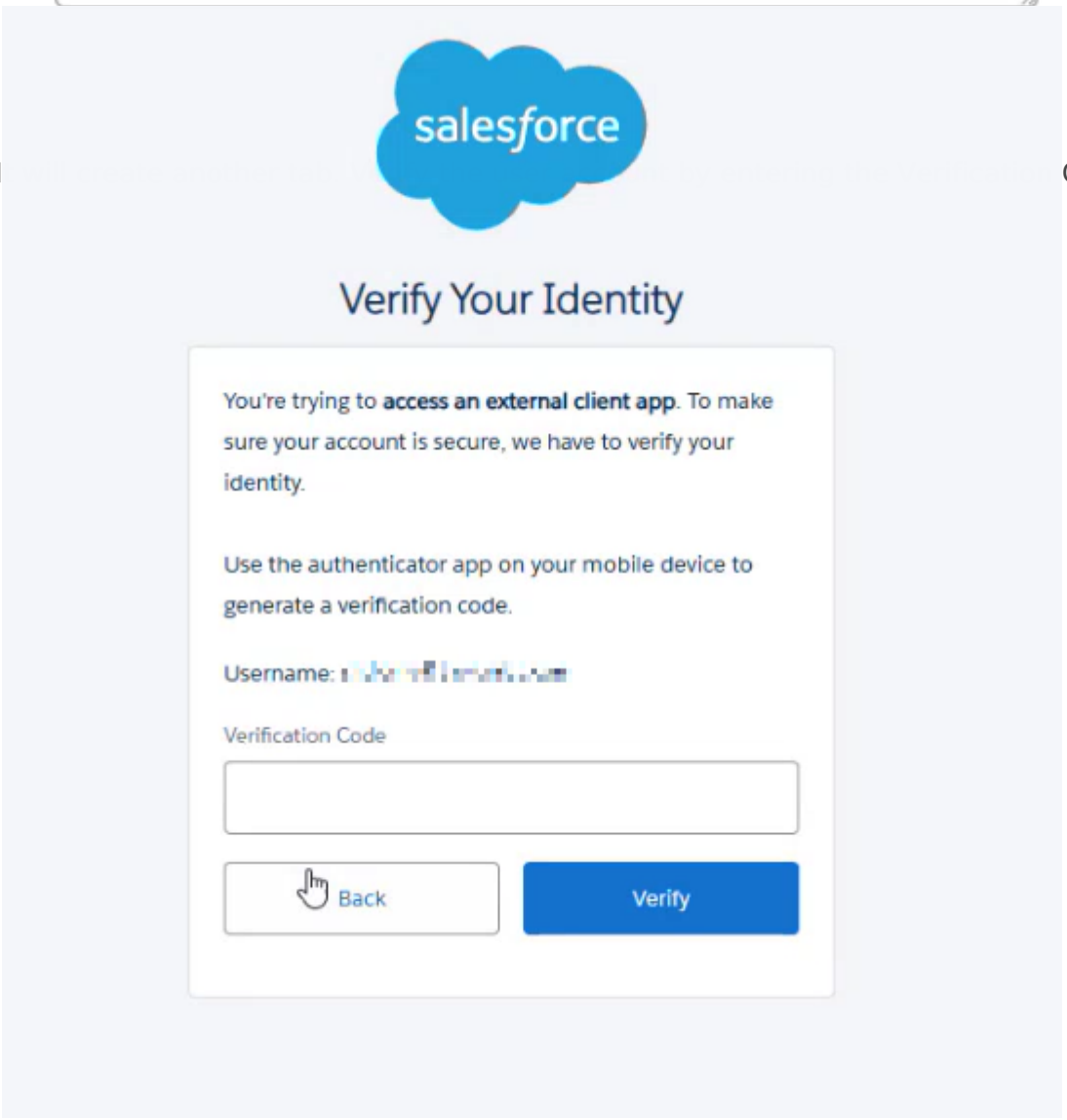
- Select **Require Secret for the Web Server Flow** to require the app's client secret in exchange for an access token.
- Select **Require Secret for Refresh Token Flow** to require the app's client secret in the authorization request of a refresh token and hybrid refresh token flow.



- Then scroll up above the **Callback URL** on the **App Settings** you will see the **Consumer I**



- I Code.



- Copy the `Consumer Key` and `Consumer Secret` from the Consumer Details section. These values should be used as the **Client ID** and **Client Secret**, respectively, in the integration.



- Close that tab and go back to the **External Client App Manager**. Click **Save**.

Step 4: Username

Provide the **Username** of the new account that you created earlier.

Step 5: Password

Please provide the **password** you set upon accessing the new account.

> **Note:**
> When using a Salesforce instance with a security token, append the token directly to your password without spaces or special characters. For example, if your password is **Password** and your security token is **12345** enter: **Pasword12345**

Step 6: Token URL

- Use the token URL to obtain authentication tokens for API access.
- For most Salesforce instances, the token URL follows this format: https://login.salesforce.com/services/oauth2/token.
- If you're using a Salesforce sandbox environment, use https://test.salesforce.com/services/oauth2/token instead.
- For custom Salesforce domains, replace **login.salesforce.com** with your custom domain name. For example, if your custom domain is **mycompany.my.salesforce.com**, the token URL becomes **https://mycompany.my.salesforce.com/services/oauth2/token.** This applies to Sandbox environments as well.
- In the Salesforce integration, we internally append **/services/oauth2/token** to the URL. Make sure that the URL you provide in the Salesforce integration is the base URL without the **/services/oauth2/token** part. For example, if your custom domain is **mycompany.my.salesforce.com**, the complete token URL would be **https://mycompany.my.salesforce.com/services/oauth2/token**, but the URL you provide in the Salesforce integration should be **https://mycompany.my.salesforce.com .** In most cases, this is the same as the Salesforce instance URL.

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> **NOTE:** Salesforce Lightning users must use URL with *.salesforce.com domain (similar to the Salesforce instance URL) instead of *.lightning.force.com because the Salesforce API doesnot work with *.lightning.force.com.

Step 7: API Version

To find the API version:

- Go to the search textbox and type **Api Version**. Click the first **Api Version** on the list.

Reference: *https://www.integrate.io/blog/salesforce-rest-api-integration/*

> **Please provide these credentials and send it to CyTech Support:**

- **Salesforce instance URL**
- **Client key and client secret for authentication**
- **Username**
- **Password**
- **Token URL**
- **API version**

If you need further assistance, kindly contact our support at ***support@cytechint.com*** *for prompt assistance and guidance.*

Revision #14
Created 16 July 2025 12:21:38
Updated 7 August 2025 13:19:34 by Jeff Saguing