

# 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.

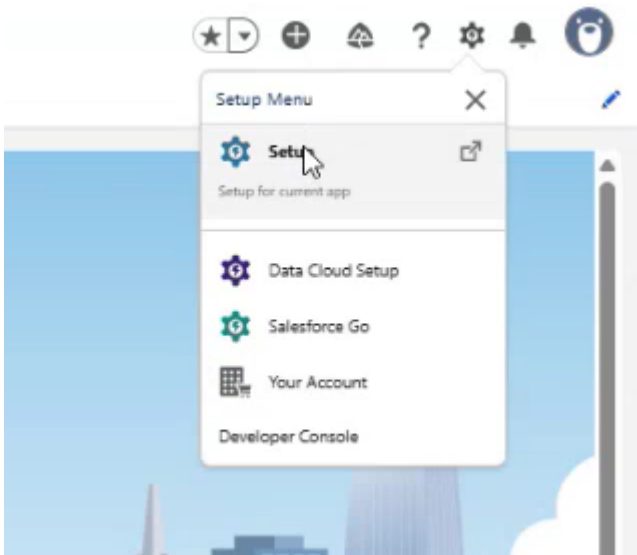
- **Salesforce Classic:** Given the example URL <https://na9.salesforce.com/home/home.jsp>, the Salesforce Instance URL is extracted as <https://na9.salesforce.com>.
- **Salesforce Lightning:** The instance URL is available under your user name in the **View Profile** tab. Use the correct instance URL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

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

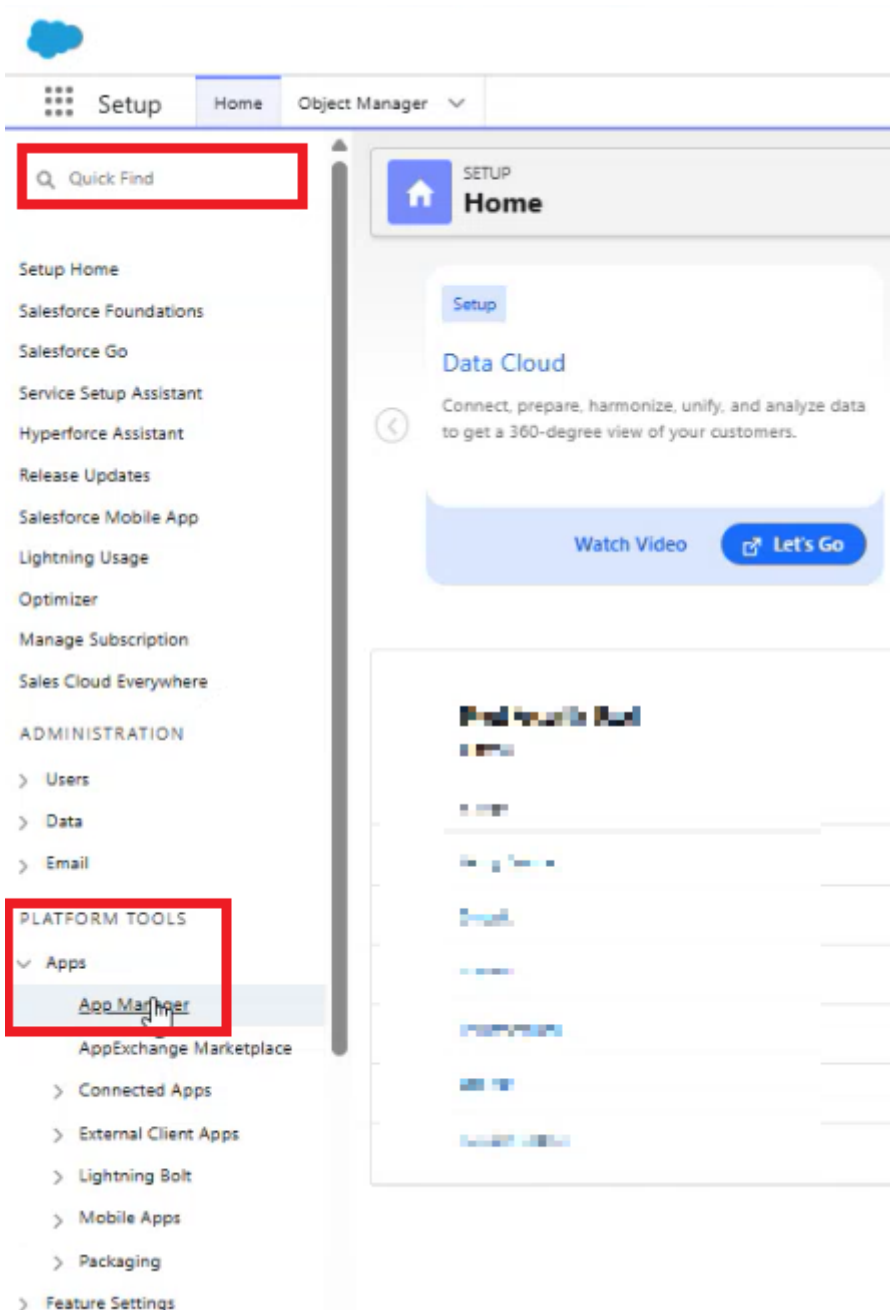
## Step 3: Client Key and Client Secret for Authentication

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

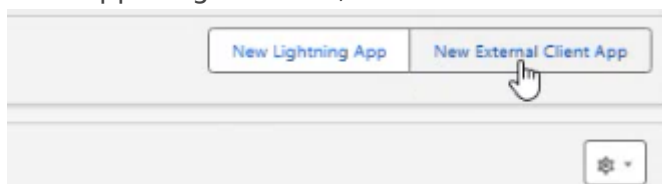
- Log in to **Salesforce** with the user credentials you want to collect data with.
- Click **Setup** in the top right menu bar.



- 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.

Basic Information

* External Client App Name <input type="text"/>	* API Name <input type="text"/>
* Contact Email <input type="text"/>	* Distribution State Local
Contact Phone <input type="text"/>	Info URL <input type="text"/>
Logo image URL <input type="text"/>	Icon URL <input type="text"/>
<a href="#">Choose one of our sample logos.</a>	<a href="#">Choose one of our sample logos.</a>
Description <input type="text"/>	

- 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.

API (Enable OAuth Settings)

Enable OAuth

App Settings

* Callback URL <input type="text"/>	
* OAuth Scopes	Selected OAuth Scopes
Available OAuth Scopes Access the identity URL service (id, profile, email, address, phone) Manage user data via APIs (api) Manage user data via Web browsers (web) Full access (full) Access Connect REST API resources (chatter_api) Access Visualforce applications (visualforce) Perform requests at any time (refresh_token, offline_access)	<input type="text"/>
<input type="checkbox"/> Introspect all Tokens <input type="checkbox"/> Configure ID token	


- 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.

Security

Require secret for Web Server Flow  
 Require secret for Refresh Token Flow  
 Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows  
 Enable Refresh Token Rotation  
 Issue JSON Web Token (JWT)-based access tokens for named users

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

### App Settings

[Consumer Key and Secret](#) 

\* Callback URL



## Verify Your Identity

You're trying to **access an external client app**. To make sure your account is secure, we have to verify your identity.

Use the authenticator app on your mobile device to generate a verification code.

Username: 

Verification Code



Back

Verify

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.

**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 does not 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](mailto:support@cytechint.com) for prompt assistance and guidance.*

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