

Configure Perspectium Replicator as a Salesforce connected app

Fluorine+

A connected app integrates an application using Salesforce APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide single sign-on, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow administrators to set security policies and have explicit control over who may use the corresponding applications.

Perspectium Replicator is a connected app when used in non-production organizations because it uses Salesforce APIs to generate Dynamic Share Apex Triggers. The Salesforce APIs is an OAuth protected service that defines the OAuth scopes and callback URL for the Perspectium Replicator connected app. The connected app configuration provides an OAuth Consumer Key and a Consumer Secret used for authorization.


Prerequisites

- ⚠ First, you will need to [install the Perspectium Package for Salesforce](#).
- ⚠ You will also need to [configure your Salesforce remote site settings](#).

Procedure

To configure Perspectium Replicator as a Salesforce connected app, follow these steps:

1

Log into your Salesforce organization and click the  icon in the top right-hand corner of the screen. Then, click **Setup**.

2

In the Quick Find window on the left side of the screen, type and then click **App Manager** (under **Apps**).

3

In the upper right-hand corner of the Lightning Experience App Manager form, click **New Connected App**.

4

Type **Perspectium Replicator** as the Connected App Name, which will automatically populate **Perspectium_Replicator** as the API Name. Then, type the email address you use to log into this Salesforce instance next to Contact Email.

5

Check the **Enable OAuth Settings** box under the API Enable OAuth Settings section. Then, if using a non-sandbox Salesforce instance, enter <https://login.salesforce.com/services/oauth2/token> as the Callback URL. Otherwise, if using a sandbox Salesforce instance, enter <https://test.salesforce.com/services/oauth2/token> as the Callback URL.

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Under Available OAuth Scopes, select **Access and manage your data (api)**. Then, click the  icon to add it to the Selected OAuth Scopes list.

The screenshot shows the Salesforce App Manager setup page. The left sidebar has a search bar with 'app manager' and a list of apps with 'App Manager' selected. The main form is titled 'App Manager' and contains the following fields and sections:

- Connected App Name:** Perspectium Replicator
- API Name:** Perspectium_Replicator
- Contact Email:** tim.nguyen@mycompany.net
- Contact Phone:** (empty)
- Logo Image URL:** (empty) with a link to 'Upload logo image or Choose one of our sample logos'
- Icon URL:** (empty) with a link to 'Choose one of our sample logos'
- Info URL:** (empty)
- Description:** (empty)
- API (Enable OAuth Settings):**
 - Enable OAuth Settings:** ☒ (Annotated: 'Check to enable OAuth')
 - Enable for Device Flow:** ☐
 - Callback URL:** https://login.salesforce.com/services/oauth2/token (Annotated: 'Enter the callback URL')
 - Use digital signatures:** ☐
- Selected OAuth Scopes:** (empty)
- Available OAuth Scopes:**
 - Access and manage your Chatter data (chatter_api)
 - Access and manage your Eclair data (eclair_api)
 - Access and manage your Wave data (wave_api)
 - Access custom permissions (custom_permissions)
 - Access your basic information (id, profile, email, address, phone)
 - Allow access to your unique identifier (openid)
 - Full access (full)
 - Perform requests on your behalf at any time (refresh_token, offline_access)
 - Provide access to custom applications (visualforce)
 - Provide access to your data via the Web (web)
- Selected OAuth Scopes:** Access and manage your data (api) (Annotated: 'Access and manage your data (api)')

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Scroll to the bottom of the form and click **Save**. You will be redirected to a screen indicating that your connected app may take 2-10 minutes to take effect. Click **Continue**.

NOTE: You will then be redirected to a page that contains your **Consumer Key** and **Consumer Secret**. You will need to keep this information on hand to configure your dynamic share trigger builder properties. To access your Consumer Key and Consumer Secret at any point, log into your Salesforce instance and click  > **Setup**. Then, navigate to **Apps > App Manager > Perspectium Replicator > View**. Your **Consumer Key** will be listed under the **API (Enable OAuth Settings)** section. Within this same section, click **Click to reveal** next to **Consumer Secret** to view your Consumer Secret.

Next steps

[Configure Perspectium properties for Salesforce](#)

[Access your Consumer Key and Consumer Secret](#)

Similar topics

- [Install the Perspectium Package for Salesforce](#)
- [Configure Salesforce remote site settings](#)
- [Configure Perspectium Replicator as a Salesforce connected app](#)
- [Configure Perspectium properties for Salesforce](#)
- [Create a custom case field](#)

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