

# Configure Perspective properties for Salesforce

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To configure the Perspective properties in Salesforce, you will need the following information on hand:

- Perspective Mesh URL
- Perspective Mesh username
- Perspective Mesh password
- Salesforce Consumer Key
- Salesforce Consumer Secret
- Salesforce Security Token

**NOTE:** To access your Salesforce **Security Token**, you will need to reset your token by clicking your avatar in the top right-hand corner of the screen and navigating to **Settings > My Personal Information > Reset My Security Token** and then clicking the **Reset Security Token** button. Your new Security Token will be emailed to the account registered to your Salesforce profile.

## Prerequisites


**!** First, you will need to [install the Perspective Package for Salesforce](#).

**!** You will also need to [configure your Salesforce remote site settings](#) and [configure Perspective Replicator as a Salesforce connected app](#).

## Procedure

To configure your Perspective properties in Salesforce, follow these steps:

1

Log into your Salesforce organization and click the  icon in the upper left-hand corner of the screen. Then, click the **Perspective Replicator** app.

2


In the upper right-hand corner of the screen, click **More > Properties**.

3

Type your Perspective Mesh URL, username, and password in the appropriate fields. Then, type an encryption and decryption key of 24+ characters to enable AES-128 encryption. Alternatively, type an encryption and decryption key of 32+ characters to enable AES-256 encryption.

4

Scroll down to the Dynamic Share Trigger Builder Properties section. Type your Consumer Key, Consumer Secret, Username, Password, and Security Token.

**NOTE:** To access your Consumer Key and Consumer Secret, click  **> Setup**. Then, navigate to **Apps > App Manager > Perspective 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. To access your Security Token, you will need to reset your token by clicking your avatar in the top right-hand corner of the screen and navigating to **Settings > My Personal Information > Reset My Security Token** and then clicking the **Reset Security Token** button. Your new Security Token will be emailed to the account registered to your Salesforce profile.

**NOTE:** The username you enter must have API privileges to create Apex triggers.

5

At the top or bottom of the Perspective Replicator Configuration Properties form, click **Save**.

Perspectium Replicator Configuration Properties

**Perspectium Mesh Configuration Properties**

IMPORTANT: The Mesh URL must be configured as a Remote Site

Mesh Url

Mesh User

Mesh Password

Encryption Key

Decryption Key

**Dynamic Share Trigger Builder Properties**

In non-production organizations, Perspectium Replicator will generate an Apex Trigger on an Object configured for a Dynamic Share. In order to do this, Remote Sites must be defined for <https://na85.salesforce.com> and <https://login.salesforce.com>. A Connected App configuration with OAuth Settings Enabled and Client Secret from this Connected App configuration should be entered below. To globally bypass dynamic shares for Data Loader/Integration users, provide the usernames (email) in the Bypass User Names field.

[Go to Connected Apps](#)

OAuth Endpoint

Consumer Key

Consumer Secret

User

Password

Security Token

Bypass User Names

**Logging**

Logging Level

Time to Keep Error Logs

Time to Keep Non-Error Logs

**Outbound Messages**

Choose the default status to assign to outbound messages that were not sent successfully due to connection errors, incorrect queue configurations, etc. Selecting Ready will automatically resend outbound messages. Selecting Error will not resend outbound messages.

Default Outbound Message Status

## Next steps

[Create a custom case field](#)

## 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](#)

## Contact Perspectium Support



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