

Configure Perspectium properties for Salesforce

Fluorine

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

- Perspectium Mesh URL
- Perspectium Mesh username
- Perspectium 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 Perspectium Package for Salesforce](#).

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

Procedure

To configure your Perspectium 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 **Perspectium Replicator** app.

2


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

3

Type your Perspectium 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 > 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. 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 Perspectium Replicator Configuration Properties form, click **Save All (including Secure Settings)**.



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Search Salesforce

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👤

Perspectium Repli...

Home

Dynamic Shares

Bulk Shares

Queues

Perspectium Jobs

Properties

More

Perspectium Replicator Configuration Properties

Save Standard Settings

Save All (including Secure Settings)

Test Trigger Builder

Test MBS Connection

Perspectium Wiki

Perspectium MBS Configuration Properties

IMPORTANT: The MBS URL must be configured as a Remote Site.

For security purposes, your MBS Password, Encryption Key and Decryption Key are saved securely and will not be displayed here even after saving.

MBS Url	https://us-west-2-dev.perspectium.net/
MBS User	admin
MBS 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 must also be created. The Client Key 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.

For security purposes, your Client Secret, Password and Security Token are saved securely and will not be displayed here even after saving.

[Go to Connected Apps](#)

OAuth Endpoint	https://login.salesforce.com/services/oauth2/
Consumer Key	3MVC9KwVzVHm8XmE2L5HrE869Rk
Consumer Secret*	
User	tim.nguyen@mycompar
Password*	
Security Token*	
Bypass User Names	

Next steps

[Create a custom case field](#)

Similar topics

- [Configure Perspectium Replicator as a Salesforce connected app](#)
- [SalesInsight for ServiceNow incidents and Salesforce cases](#)
- [Install the Perspectium Package for Salesforce](#)
- [Configure Salesforce remote site settings](#)
- [Configure Perspectium properties for Salesforce](#)

Contact Perspectium Support



US: 1 888 620 8880

UK: 44 208 068 5953

support@perspectium.com