



KENTAA CONNECT SALESFORCE



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1. INTRODUCTION

This document describes the setup and configuration of the Kentaa interface (Kentaa Connect) with Salesforce. The Salesforce Kentaa integration involves populating data from the Kentaa database into custom objects within Salesforce. To do this, a one-time setup in Salesforce is required.

This setup consists of two parts, with the first part to be performed manually. The first part involves creating a profile in which permissions are assigned, an user and an app. These steps are described in this document. The details of the setup such as the username, password and token must then be shared with Kentaa. The second part of the setup is performed automatically through the Kentaa connection. In these steps, the custom objects and fields are created and an authorization set is created in which the permissions for the custom objects are defined.

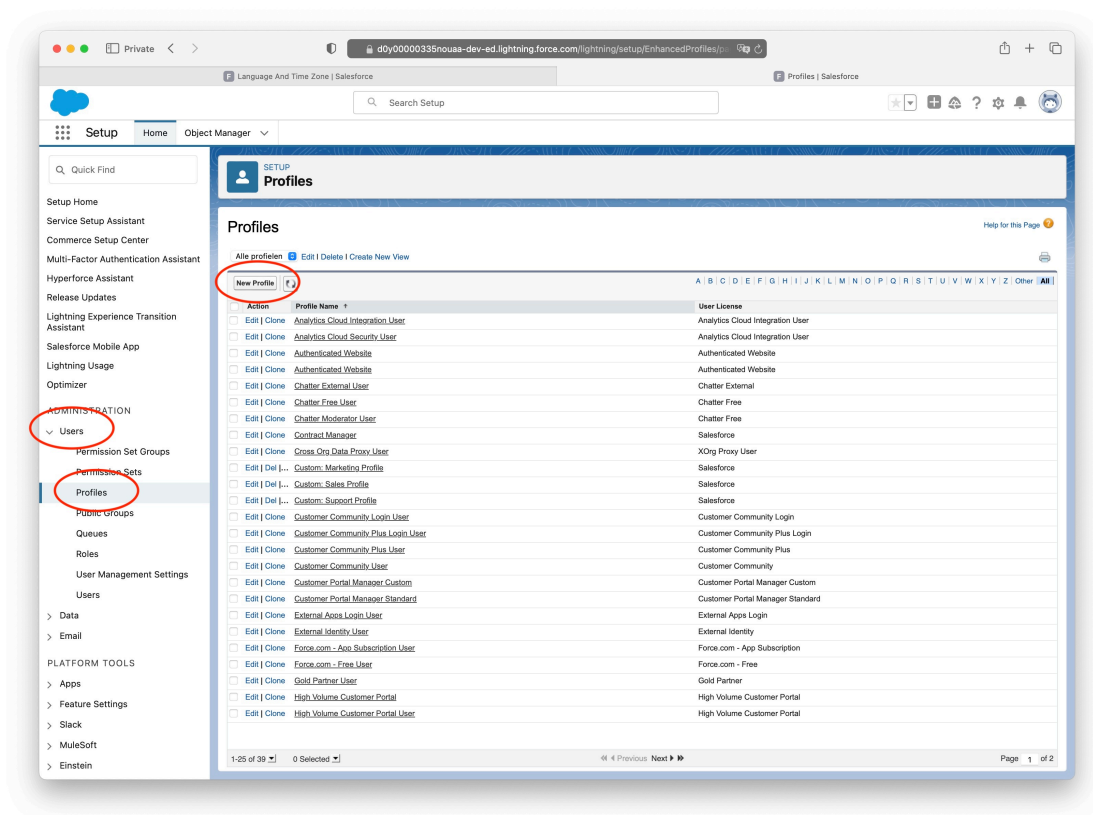


2. CREATE PROFILE

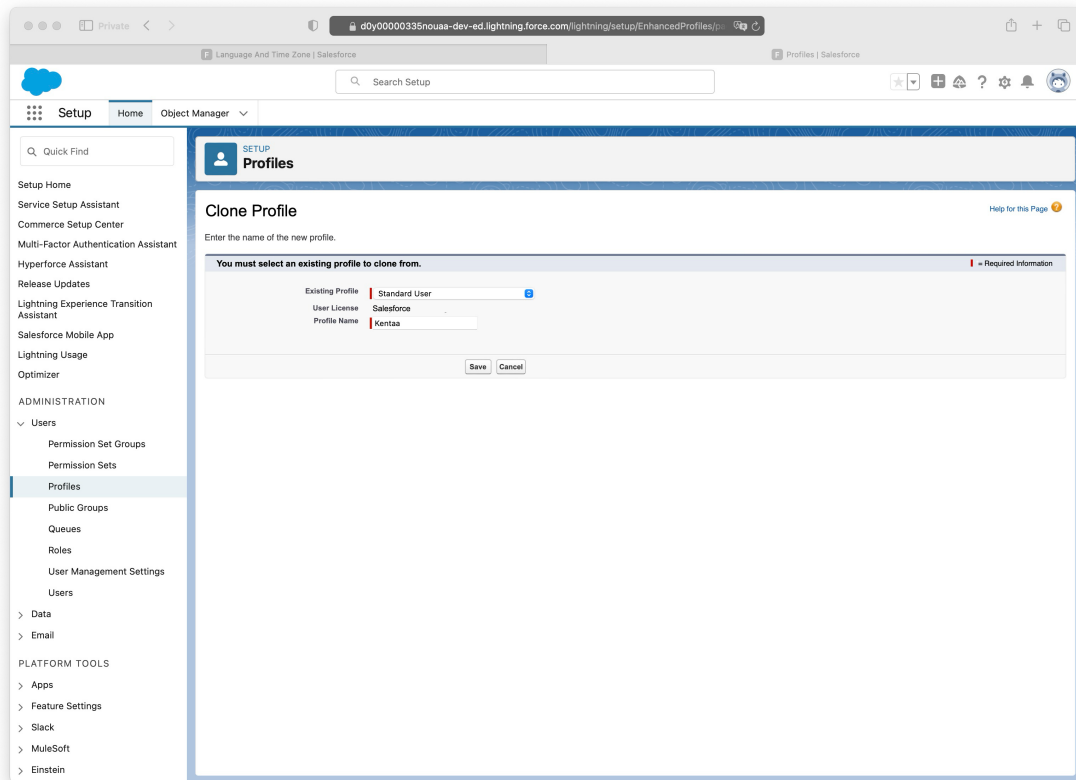
2.1. New profile

Go to Setup (large cog on the top right).

Browse to Administration -> Users -> Profiles. Click on New Profile.



Under existing profile, select 'Default User'.



Under profile name, enter 'Kentaa' and click save.

You will now enter the new profile. Click on Edit to edit the permissions.



2.2. Setting permissions

Below are the permissions that need to be activated for the Kentaa profile. These permissions are only required for the setup of the Kentaa connection and can be revoked after completion of the setup. Please note that when some options are checked, other options are automatically activated (e.g. change all data).

2.3. Administrative Permissions

- Modify All Data
- Assign Permission Sets
- Manage Profiles and Permission Sets
- Customize Application

2.4. General User Permissions

- Manage Content Permissions
- Manage Content Properties

2.5. Password Policies

- User passwords expire in: Never expires

When these options are activated click save and the profile is ready.

2.6. General User Permissions

Effective Feb. 1, 2022, Salesforce is going to require users to enable MFA to log into the user interface.

More information can be found [here](#).

This does not (yet) include the connection (API), but in doing so, it is important to use the following settings in the profile:

- Multi-Factor Authentication in API – leave unchecked
- Multi-Factor Authentication in User Interface – optional checked

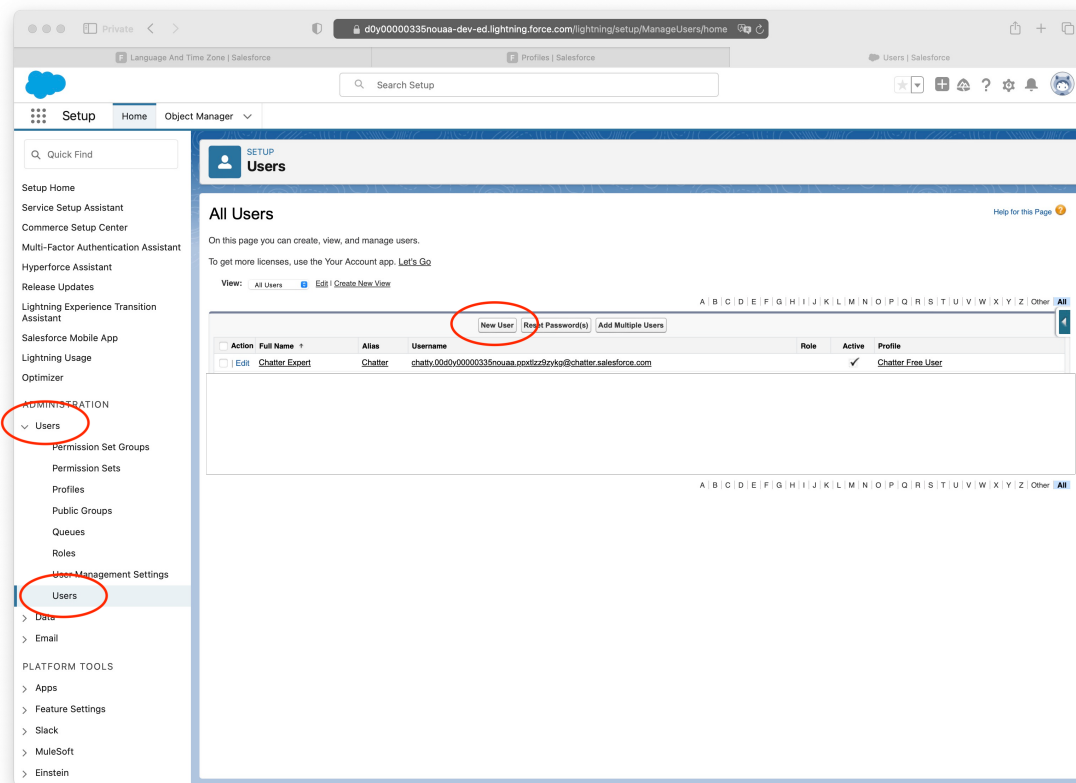


3. CREATE USER

3.1. New user

Go to Setup (large cog in the upper right corner).

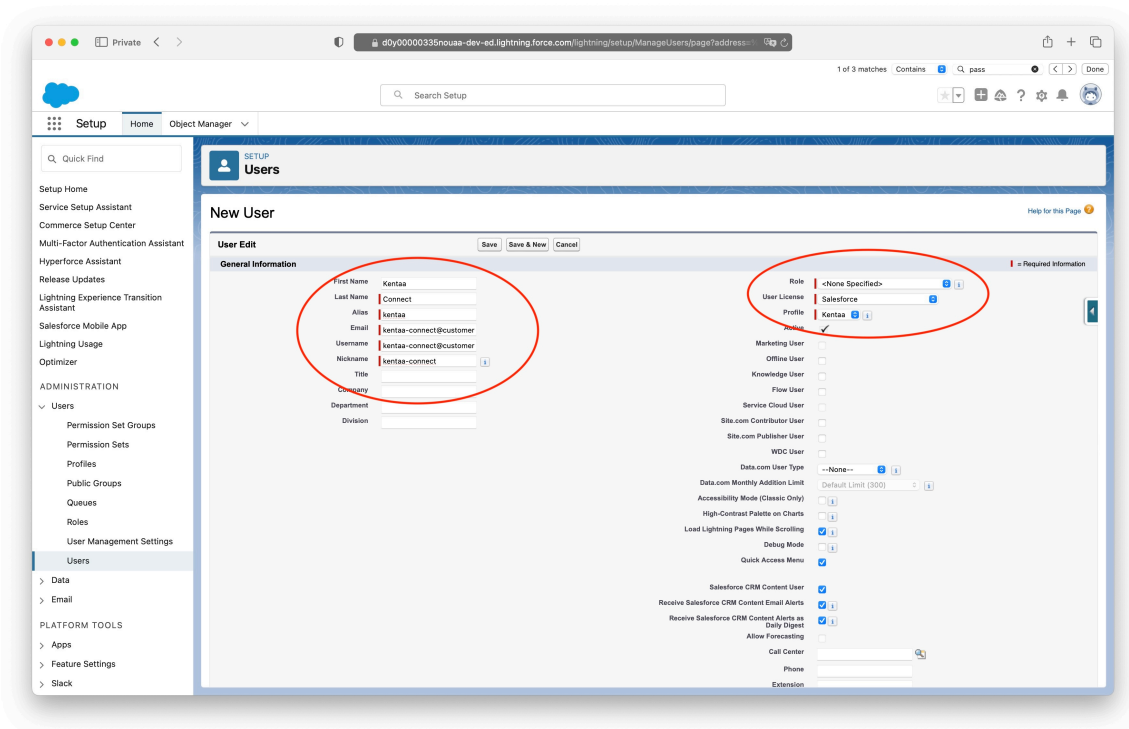
Browse to Administration -> Users -> Users. Click on New User.



Enter a name for the Kentaa connection and choose an email address that is not already in use within Salesforce.

Under 'User License', select 'Salesforce'. Select the profile we just created, 'Kentaa'.

Make sure the setting at the bottom "Generate new password and notify user immediately" is enabled and click save.



The user has now been created.

3.2. Set Password

Check the new user's mailbox to set the user's password.

Choose a secure password that can also be shared with Kentaa. Enter a security question/answer and click change password.

You are now logged into Salesforce.



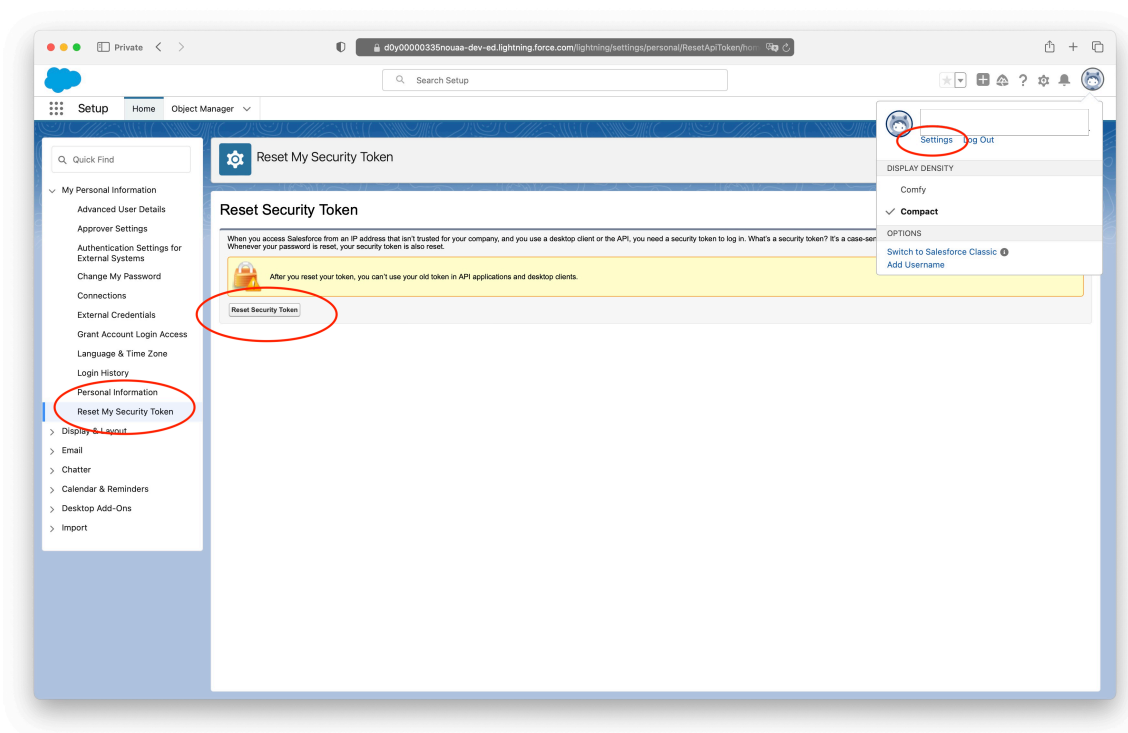
3.3. Security token generation

In addition to an email address and password, the Kentaa connection also requires a security token from the user. This must first be generated.

Click Astro (the Salesforce Mascot in the upper right corner) and click Settings.

Go to My personal information -> Reset my security token.

Click "Reset security token" and you will receive an email containing the new security token.

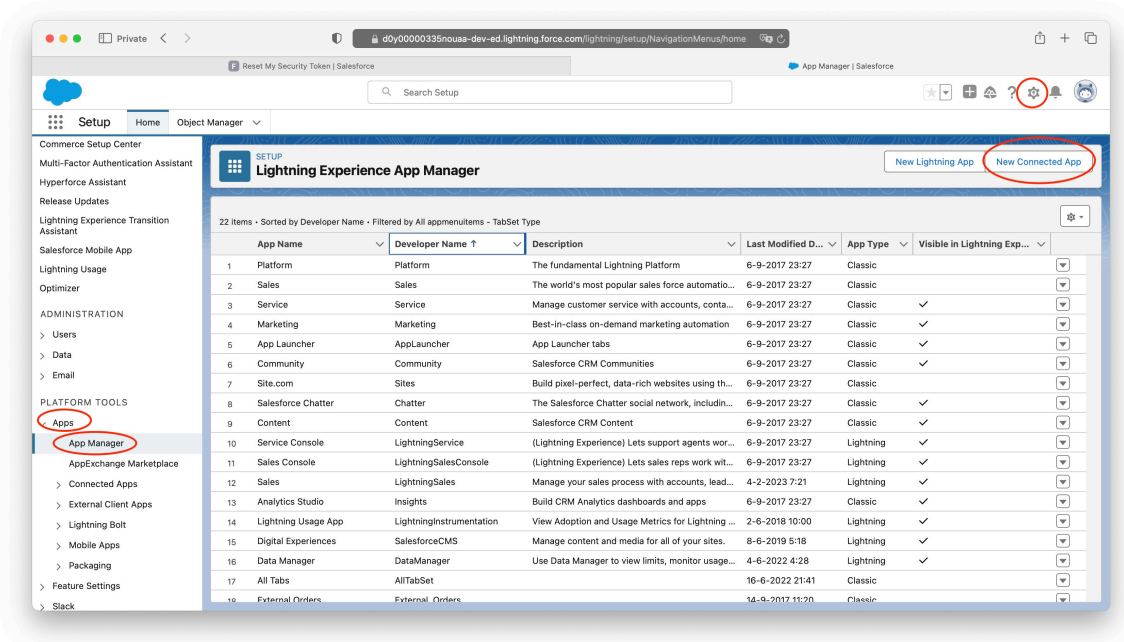


4. CREATE APP

The communication between the Kentaa connection and Salesforce will be through an App. For this a connected App must be configured in Salesforce.

Go to Setup (large cog in the upper right corner).

Browse to Platform Tools -> Apps -> App Management. Click on New Connected App.



Enter the required basic information and use 'Kentaa' as the app name.

Please provide a valid email address for the contact person.

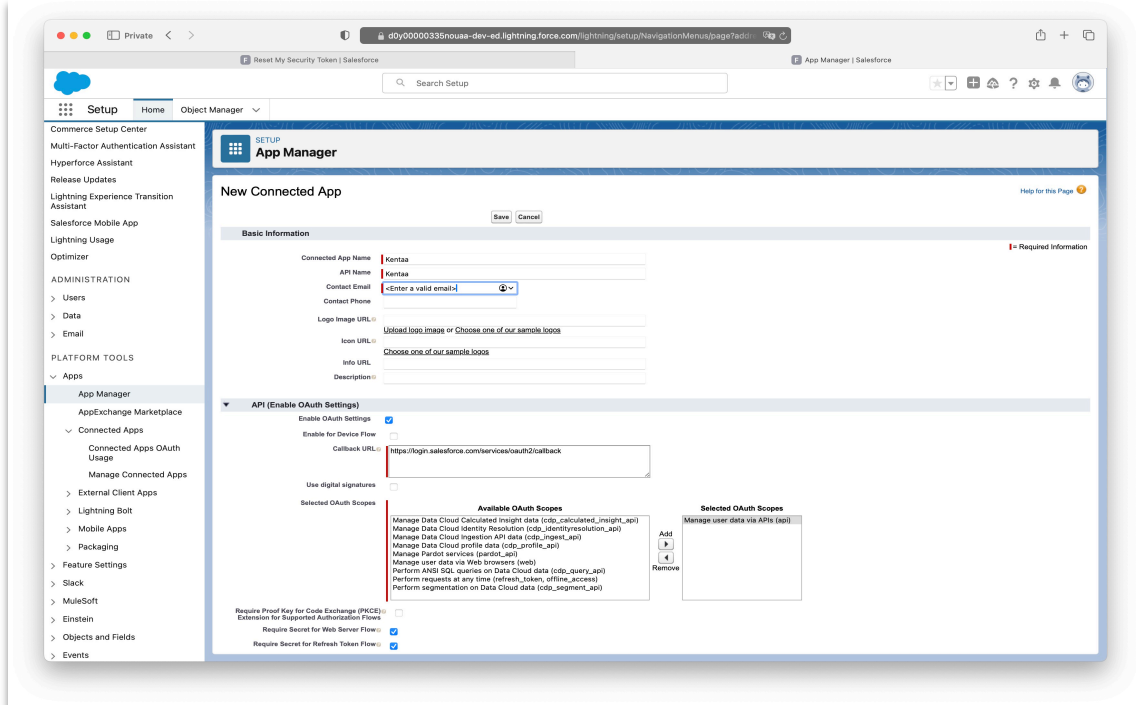
Under the heading API (Enable OAuth Settings) check the 'Enable OAuth Settings' setting.

For the Callback URL, enter the following: <https://connect.kentaa.nl/oauth/salesforce/callback>

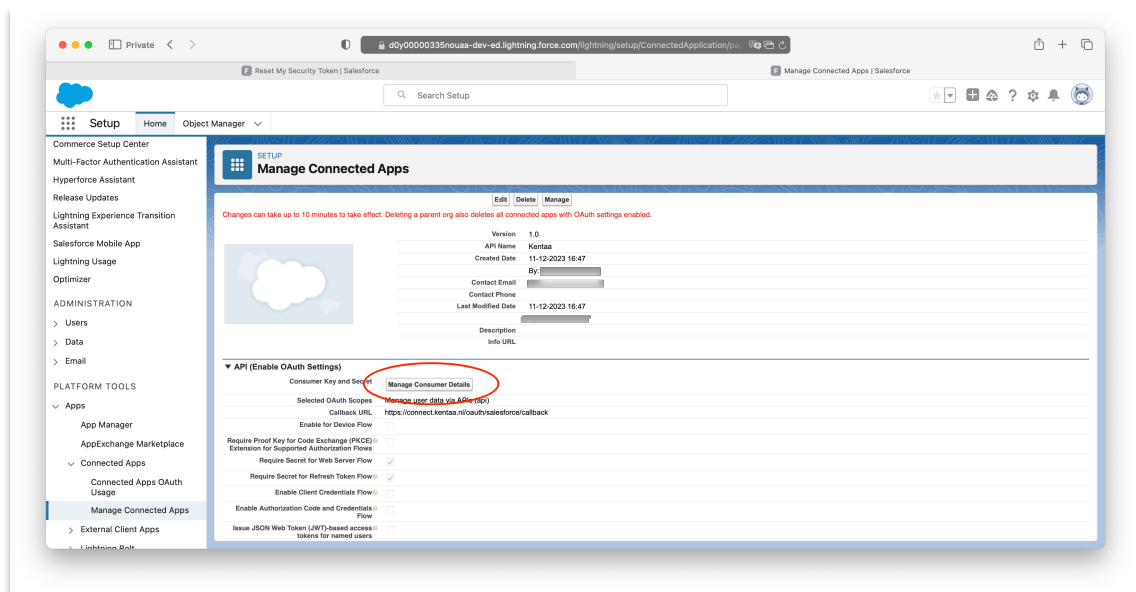
Among the available OAuth ranges, select: Access and manage your data (api).

Click save and then confirm the creation by clicking continue.





The connected App has now been created. In the screen where you are now you will see a 'Consumer Key' and a 'Consumer Secret', we need both of these.



5. CONNECTING KENTAA

If the above steps have been performed successfully then Kentaa can start creating the integration with Salesforce. For this, the following data needs to be shared with Kentaa:

- The user's email address
- The user's password
- The user's security token
- Consumer key of the connected App
- Consumer secret of the connected App

Once Kentaa has created the connection then step 2 of the setup can be performed, Kentaa's automated creation of the custom objects. It will create the following items in Salesforce:

- The custom objects, see document 'Salesforce Kentaa Objects' for a description.
- Permission set 'Kentaa' with permissions for the custom objects and fields so that it can read and write into the objects (this set is associated with the Salesforce user).



6. NEXT

After setup, the selected permissions in section 'Set Permissions' are no longer needed and can be revoked if necessary. It is also possible to change the profile of the user to 'Default User'.

Kentaa will from now on populate and update the custom objects as the data in the Kentaa platform changes.

You can create a tab within Salesforce to view the contents of custom objects. In addition, the Kentaa permission set can be used to give other users rights to view data.

It is further up to you to do something with the custom objects.

7. CONTACT

If you need help to create the connection as described please contact us. Also if there are any changes needed in this document we would like to hear from you.:

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