

Post Installation Steps for OmniCoach

Follow the below steps to complete the Setup:

Step 1: Create a Connected App

- Go to Setup
- Search for App manager.
- Click on New Connected App
- Enter a name for Connected App name "OmniCoach Connected App".
- Provide all the details as shown in the snapshot except the Callback URL which needs to be updated after creating the **Authorization Provider**

The screenshot shows the 'Manage Connected Apps' interface in Salesforce. The app name is 'OmniCoach Connected App'. The API Name is 'OmniCoach_Connected_App'. The Contact Email is 'ankana.sadhukhan@coognizant.co'. The Callback URL is 'https://cognizanttechnology.co.uk/od-develop/my.salesforce.com/services/oauth2/OmniCoach'. The 'Available OAuth Scopes' list includes 'Access Analytics REST API Charts Decentral resources (edair_api)', 'Access Analytics REST API resources (wave_api)', 'Access Connect REST API resources (chatter_api)', 'Access Einstein OPT services (einstein_opt_api)', 'Access Headless Forgot Password API (forgot_password)', 'Access Headless Passwordless Login API (pwdless_login_api)', 'Access Headless Registration API (user_registration_api)', 'Access Interaction API resources (interaction_api)', 'Access Lightning applications (lightning)', and 'Access Visualforce applications (visualforce)'. The 'Selected OAuth Scopes' list is empty. The 'Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows' is checked. The 'Require Secret for Web Server Flow' is checked. The 'Require Secret for Refresh Token Flow' is checked. The 'Enable Client Credential Flow' is checked. The 'Enable Authorization Code and Credential Flow' is unchecked. The 'Enable Token Exchange Flow' is unchecked. The 'Enable Refresh Token Rotation' is checked.

Once you save this Connected app, it will provide “Consumer Key” and “Consumer Secret”, we need this information in next step.

Step 2: Create an Authorization Provider

- Go to Setup
- Search for Auth. Providers
- Click on New
- Enter a name for Connected App name "OmniCoach".
- Select “Salesforce” as provider Type.

- We need to provide “Consumer Key” and “Consumer Secret” created in previous step. Also one important setting is “Default Scope“, it should have value as “refresh_token full”. “refresh_token” and “full” should be separated by space.
- Authorize Endpoint URL should be something like “<https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/oauth2/authorize>”.
- Token Endpoint URL should be like “<https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/oauth2/token>”.

Setup

Auth. Providers

Auth. Provider

Auth. Provider Detail

Auth. Provider ID: 0SOQy0000001wzd

Provider Type: Salesforce

Name: OmniCoach

URL Suffix: OmniCoach

Consumer Key: 3MVG9k0zhQhyUgODW08mlaSYLAN4uNVM3RVuLXjdS4gd35Qka9RymiwWWRMEyQCq9_cxkBMCLye2xp90kB

Consumer Secret: [Click to reveal](#)

Authorize Endpoint URL: <https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/oauth2/authorize>

Token Endpoint URL: <https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/oauth2/token>

Use Proof Key for Code Exchange (PKCE) Extension: ☒

Default Scopes: ☒

Include Consumer Secret in SOAP API Responses: ☒

Custom Error URL:

Custom Logout URL:

Registration Handler: [AutogeneratedRegHandler1719240076804](#)

Execute Registration As: [Kaushtuv Saha](#)

Portal:

Icon URL:

Use Salesforce MFA for this SSO Provider: ☐

Salesforce Configuration

Test-Only Initialization URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/test/OmniCoach
Single Sign-On Initialization URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/sso/OmniCoach
Existing User Linking URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/link/OmniCoach
OAuth-Only Initialization URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/oauth/OmniCoach
Callback URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/callback/OmniCoach
Single Logout URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/auth/oidc/logout

Step 3: Set Callback URL in Connected App

Once you save “Auth. Provider” in previous step, it will provide you list of URLs as shown in below image. Copy Callback URL. It should be something similar to <https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/services/authcallback/OmniCoach> and edit Connected App we created in service provider Salesforce instance and set this URL.

Step 4: Create a Named Credential

- Navigate to Classic
- Go to Setup
- Search for Named Credentials.
- Click on New Named Credential
- Enter a name for Connected App name "OmniCoach Credentials".
- Select Identity Type as Named Principal and authentication protocol as OAuth 2.0
- Select authentication protocol as OmniCoach and scope as refresh token full.
- Make sure to check “Start Authentication Flow on Save” and click on Save. After clicking on “Save” new page will open to authenticate Salesforce Org using OAuth2 connected

App. If authentication is success, you can see message like “Authenticated as <Salesforce Username>” as shown in below image.

Named Credential: OmniCoach Credentials

[Help](#)

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

[« Back to Named Credentials](#)

Edit Delete	
Label	OmniCoach Credentials
Name	OmniCoach_Credentials
URL	https://cognizanttechnologysolu-1cd-dev-ed.develop.my.salesforce.com/
▼ Authentication	
Certificate	
Identity Type	Named Principal
Authentication Protocol	OAuth 2.0
Authentication Provider	OmniCoach
Scope	refresh_token full
Authentication Status	Authenticated as kaustuv.saha@cognizant.com.omnicoachtest
▼ Callout Options	
Generate Authorization Header	☒
Allow Merge Fields in HTTP Header	☐
Allow Merge Fields in HTTP Body	☐
Outbound Network Connection	☐

Step 5: Assign Permission Set to User

1. Go to Setup.
2. Search for “**Permission Sets**”
3. Click on “**OmniCoach Permission Set**” from the list of available Permission Sets
4. Click on Manage Assignment.
5. Assign the Permission Set to the Users who want to use the OmniCoach App (Preferably Admins)