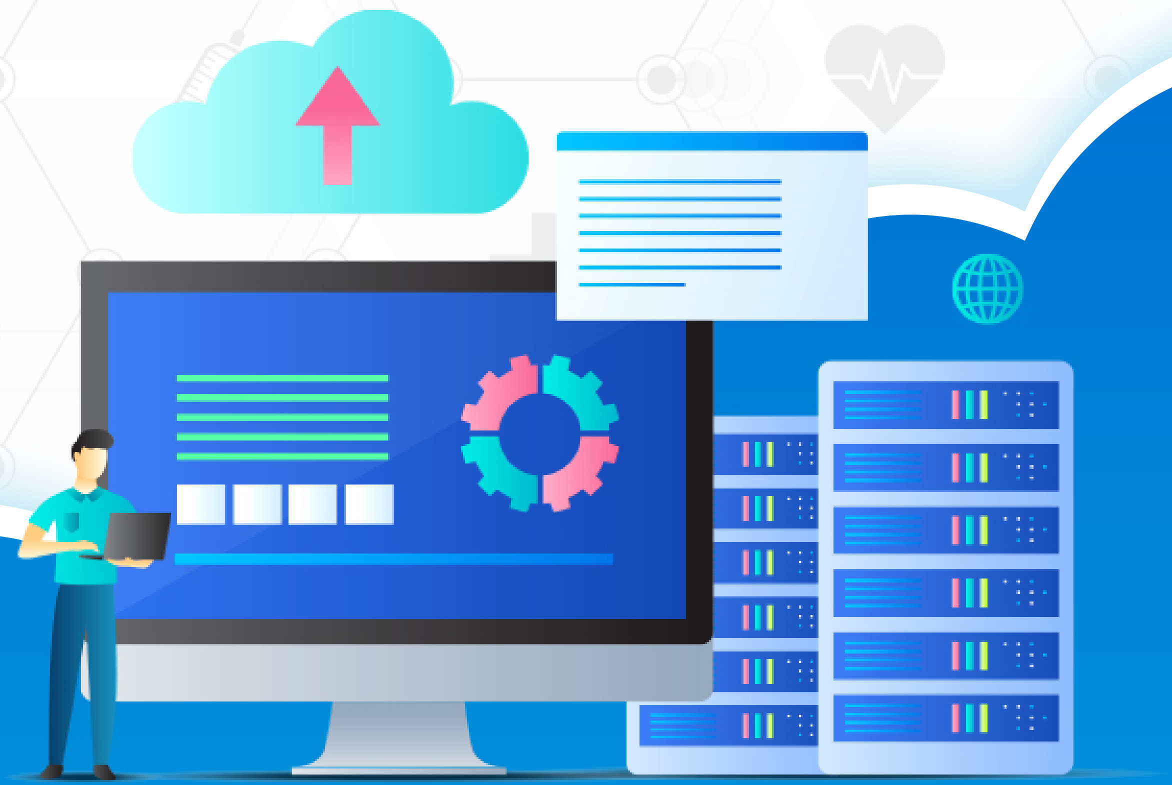
Aress Software & Education Technologies (P) Ltd.

ORG Health Tracker

Customization Guide



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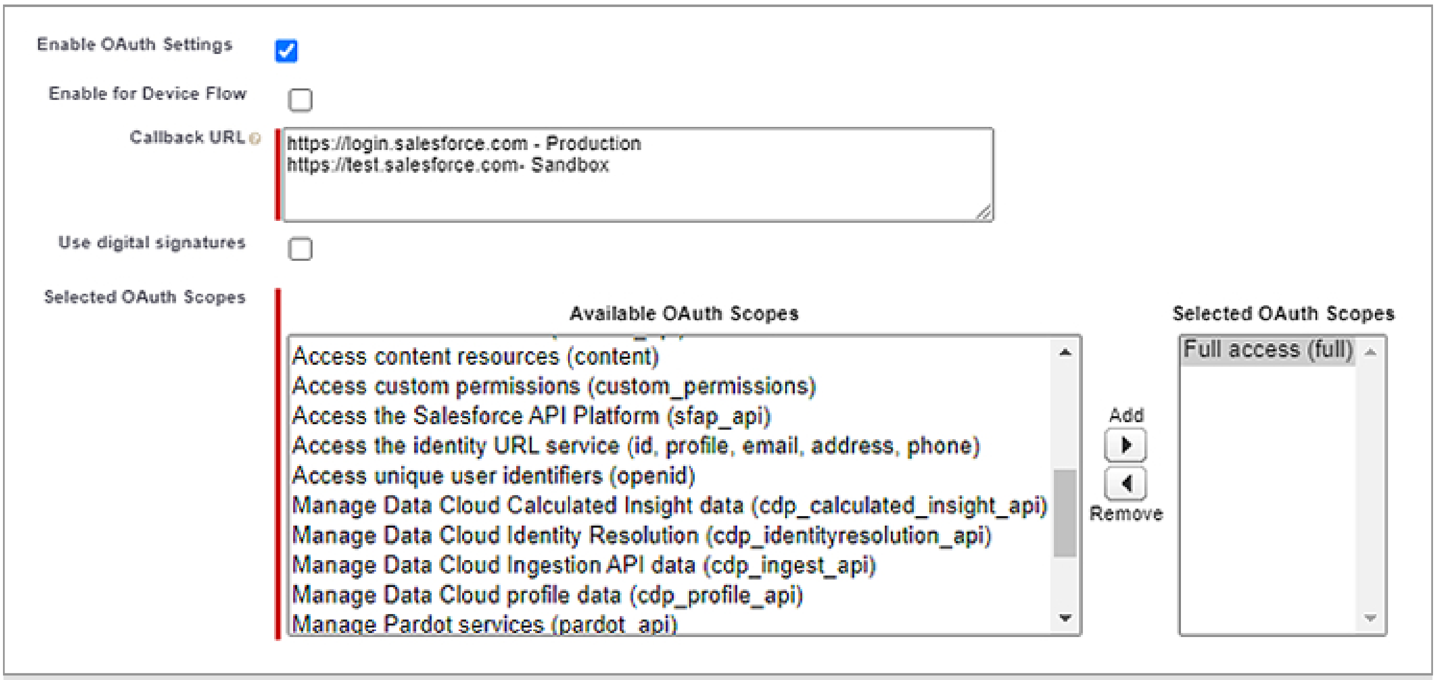
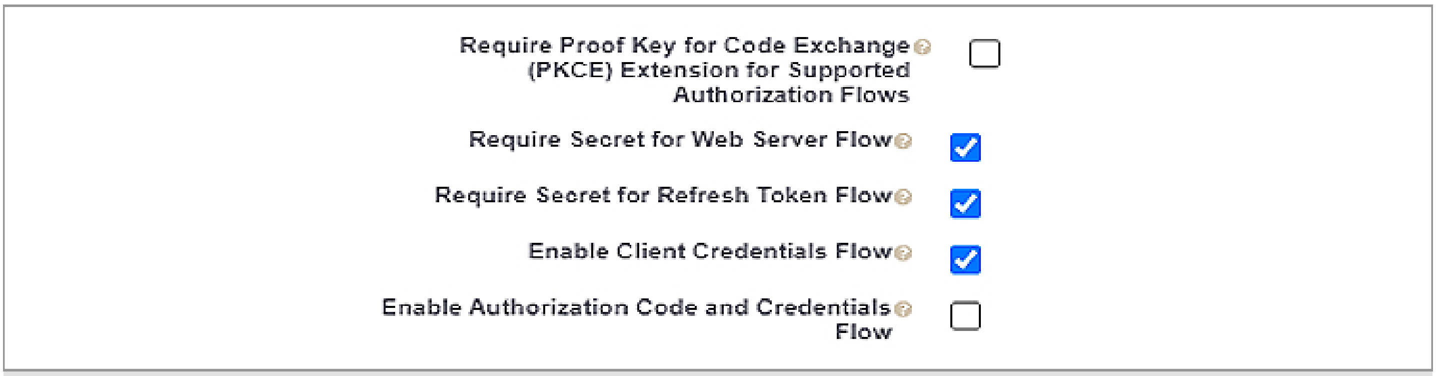
Step 1: Create Connected APP

- Set up > Quick find box > App Manager > New Connected App >
- Fill in the basic information for your connected app, including the connected app name, API name, and contact email.
- Check the **Enable OAuth Settings** checkbox. (Enable OAuth Settings)
- In the **Callback URL** add the URLs according to your instances
  - For Production: https://login.salesforce.com
  - For Sandbox: https://test.salesforce.com
- Select OAuth Scope: full access (full)



- Enable the following check boxes:
  - Require Secret for Web Server Flow
  - Require Secret for Refresh Token Flow
  - Enable Client Credentials Flow



- Save the connected app.
- After saving the connected app.
- Click on **Manage Consumer details**.
- Copy the **Consumer Key** and **Secret Key** and keep them for future use.

Step 2: Create Auth. Provider record

- In Quick Find search for **Auth. Provider**.
- Click on new.
- Select Provider Type to Salesforce.
- Provide the Name as required e.g. Org Health Check.
- Add Consumer Key and Consumer Secret as copied in the previous.
- Add Authorize Endpoint URL according to instance
  - For Production: https://login.salesforce.com/services/oauth2/authorize
  - For Sandbox: https://test.salesforce.com/services/oauth2/authorize
- Add Token Endpoint URL according to instance
  - For Production: https://login.salesforce.com/services/oauth2/token
  - For Sandbox: https://test.salesforce.com/services/oauth2/token
- Add Default Scope: refresh token full.
- Check to Include Consumer Secret in SOAP API Responses checkbox.
- Save the Auth provider record.
- Copy the callback URL from the Auth providers section.

Step 3: Reconfigure the connected apps

- Navigate to **App Manager**.
- Edit the connected app which we have created in Step 1.
- Replace the **Callback URL** for the connected app with the callback URL of the Auth provider that we got in step 2.
- Save the connected app.

Step 4: Configure Client credentials flow

- Navigate to **App Manager**.
- Manage the created connected app in step 1.
- Click on **Edit Policies**.
- Select a Run as user (System admin) for **Client Credentials Flow**.

- Save the Connected App.

Let's Get Started

If you would like to join us and become our client,
then we would be delighted to have you.

We believe that we have all the credentials to do this project with you. Our price is set at a level corresponding to the high-quality work needed for this type of project. We give you the assurance of our willingness to be an offshore partner who is committed to your success.

Thank you

for your interest in Aress Software.

Strategic Partners