



DocFynd <> Box - Integration

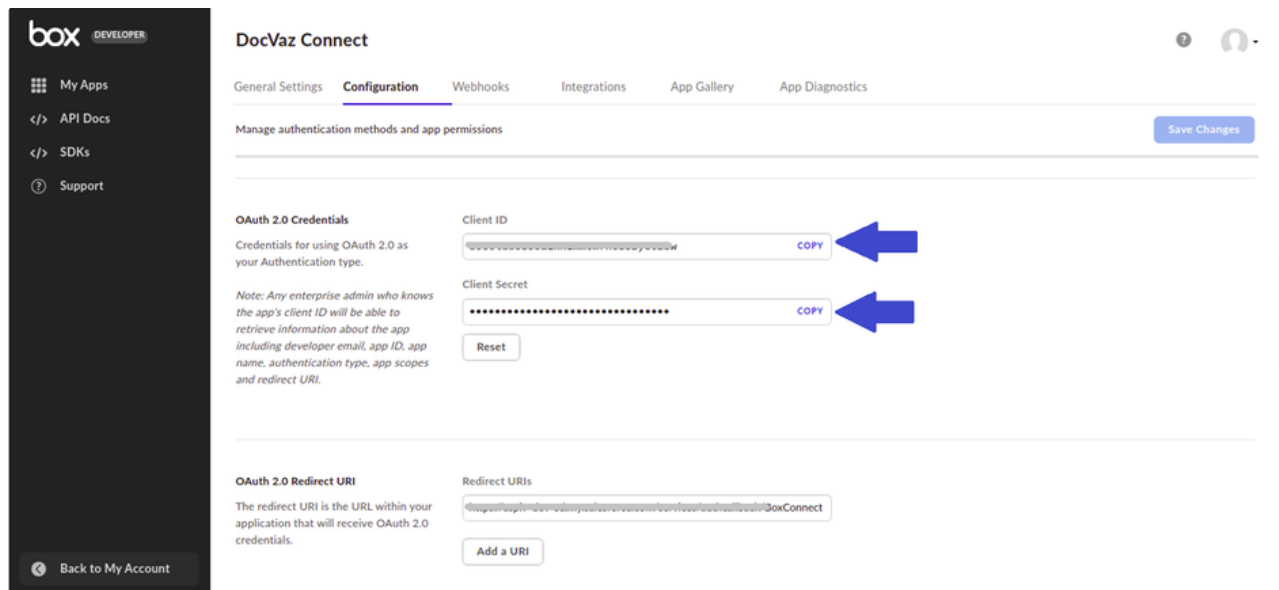
How to integrate DocFynd with Box?

This article explains the steps to integrate DocFynd with Box. This enables uploading documents to Box from DocFynd.

 This article assumes that the reader is a Salesforce Admin and also can access Box instances.

Create an app in Box

1. Create an app in Box developer console (for e.g. "DocFynd Connect")
2. Copy and save the "Client ID" and "Client Secret".



box DEVELOPER

My Apps
API Docs
SDKs
Support

DocVaz Connect

General Settings **Configuration** Webhooks Integrations App Gallery App Diagnostics

Manage authentication methods and app permissions [Save Changes](#)

OAuth 2.0 Credentials

Credentials for using OAuth 2.0 as your Authentication type.

Note: Any enterprise admin who knows the app's client ID will be able to retrieve information about the app including developer email, app ID, app name, authentication type, app scopes and redirect URI.

Client ID [COPY](#)

Client Secret [COPY](#)

[Reset](#)

OAuth 2.0 Redirect URI

The redirect URI is the URL within your application that will receive OAuth 2.0 credentials.

Redirect URIs

[Add a URI](#)

Connect Box with Salesforce

1. Go to Setup and search "Auth. Provider".
2. Click "Edit" against the item named "Box Connect".

Setup Home Object Manager

Q Named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid se named credentials.

View: All Create New View

A B C D E F G H

Action	Label ↑	URL
Edit Del	Box Folders	https://api.box.com
Edit Del	Box Upload	https://upload.box.com
Edit Del	Dropbox File Metadata	https://api.dropboxapi.com/2/sharing/get_file_metadata
Edit Del	Dropbox Folders	https://api.dropboxapi.com/2/sharing/list_folders
Edit Del	Dropbox Upload	https://content.dropboxapi.com/2/files/upload
Edit Del	Google Drive Folders	https://www.googleapis.com/drive/v3/files
Edit Del	Google Drive Upload	https://www.googleapis.com/upload/drive/v3/files

New Named Credential

2. Ensure the field "Start Authentication Flow on Save" is ticked and click "Save".

Setup Home Object Manager

Named

Security

Named Credentials

n't find what you're looking for? Try ng Global Search.

SETUP
Named Credentials

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Box Connect

Scope:

Administration Authentication Status: Pending

Start Authentication Flow on Save: ☒

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☒

Outbound Network Connection:

Save Cancel

3. This will re-direct to the authorization page of Box.

4. Click "Grant access to Box" to connect your Salesforce org with Box.

5. After granting the access, you will be re-directed back to Salesforce (Named Credentials setting).

6. Now, the "Administration Authentication Status" should have changed from "Pending" to "Authenticated".

Named Credentials

Identity Type: **Per User**

Authentication Protocol: **OAuth 2.0**

Authentication Provider: **Box Connect**

Scope: **Authenticated** (indicated by a blue arrow)

Administration Authentication Status: **Authenticated**

Start Authentication Flow on Save: ☒

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☒

Outbound Network Connection:

Save **Cancel**

✓ With this, authentication with Box is successful for **Box Folders**.

Box Upload Authentication

1. In Salesforce setup, search “Named Credentials” and click “Edit” under the item named “Box Upload”.

Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid se named credentials.

View: **All** [Create New View](#)

A | B | C | D | E | F | G | H

Action	Label ↑	URL
Edit Del	Box Folders	https://api.box.com
Edit Del	Box Upload (indicated by a blue arrow)	https://upload.box.com
Edit Del	Dropbox File Metadata	https://api.dropboxapi.com/2/sharing/get_file_metadata
Edit Del	Dropbox Folders	https://api.dropboxapi.com/2/sharing/list_folders
Edit Del	Dropbox Upload	https://content.dropboxapi.com/2/files/upload
Edit Del	Google Drive Folders	https://www.googleapis.com/drive/v3/files
Edit Del	Google Drive Upload	https://www.googleapis.com/upload/drive/v3/files

2. Ensure the field “Start Authentication Flow on Save” is ticked and click “Save”.

Setup Home Object Manager

Named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Box Connect

Scope:

Administration Authentication Status: Pending

Start Authentication Flow on Save: ☒

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☒

Outbound Network Connection:

Save Cancel

3. This will re-direct to the authorization page of Box. Click “Grant access to Box” to connect your Salesforce org with Box.

4. After granting the access, you will be re-directed back to Salesforce (*Named Credentials* setting).

5. Now, the “Administration Authentication Status” should have changed from “Pending” to “Authenticated”.

Setup Home Object Manager

Named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

SETUP
Named Credentials

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Box Connect

Scope:

Administration Authentication Status: Authenticated

Start Authentication Flow on Save: ☒

Callout Options

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☒

Allow Merge Fields in HTTP Body: ☒

Outbound Network Connection:

Save Cancel

✓ With this, authentication with Box is successful for **Box Upload**.

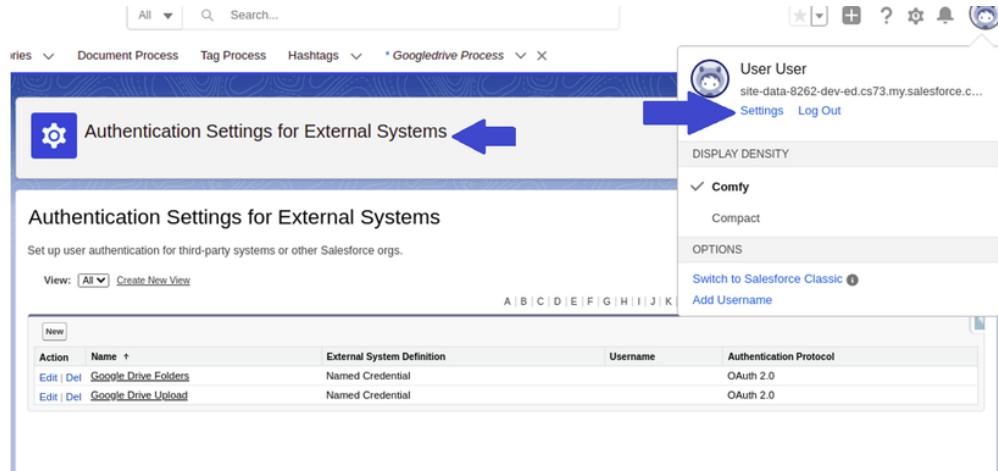
User Authentication settings

Next couple of steps is to authenticate the Salesforce user(s) to access Box. This needs to be done for the options named for “Box Folders” and “Box Upload”.

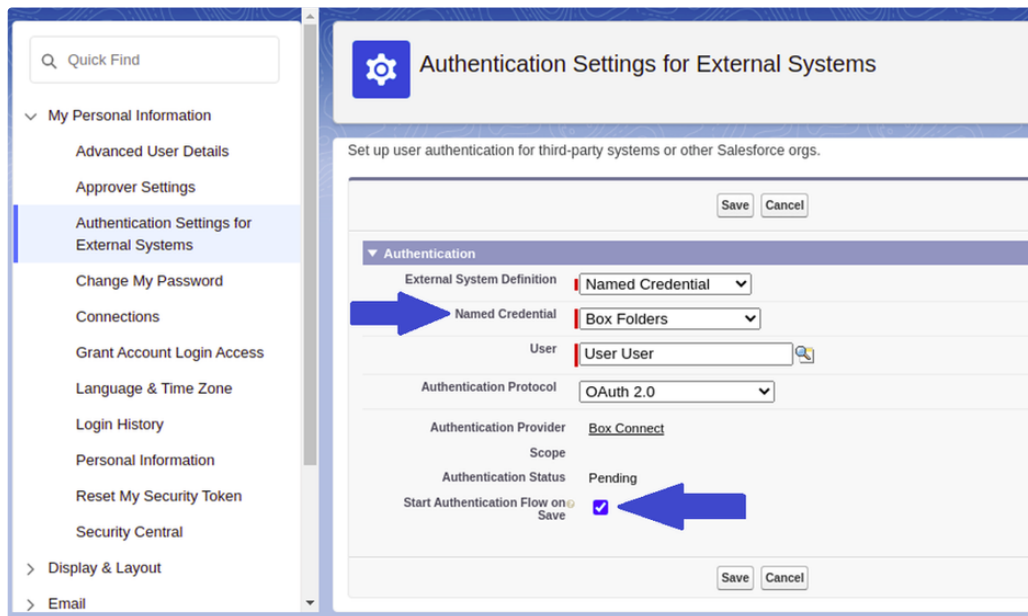
These steps ensure Box allows only authenticated access to its folders when files are uploaded from DocFynd.

Authentication settings for Box Folders

1. From User Settings in Salesforce, search “Authentication Settings for External Systems”. Click “New”.



2. Change the field value of “Named Credential” to “Box Folders” from the drop-down.
3. In the “User” field, select all users who require the functionality of accessing Box.
4. Tick the checkbox “Start Authentication Flow on Save”. Leave the rest of the values as same.



5. Click “Save”.
6. You will be re-directed to the authorization page of Box.
7. Click “Grant access to Box” to connect your Salesforce org with Box.
8. After granting access, you will be re-directed to Salesforce > Authentication Settings for External Systems setting.
9. Now, the “Authentication Status” should be changed to “Authenticated”.

Quick Find

- My Personal Information
 - Advanced User Details
 - Approver Settings
 - Authentication Settings for External Systems
 - Change My Password
 - Connections
 - Grant Account Login Access
 - Language & Time Zone
 - Login History
 - Personal Information
 - Reset My Security Token
 - Security Central
- Display & Layout
- Email

Authentication Settings for External Systems

Set up user authentication for third-party systems or other Salesforce orgs.

Save Cancel

Authentication

External System Definition: Named Credential

Named Credential: Box Folders

User: User User

Authentication Protocol: OAuth 2.0

Authentication Provider: Box Connect

Scope:

Authentication Status: **Authenticated**

Start Authentication Flow on Save: ☒

Save Cancel

✓ User(s) successfully authenticated with Box for **"Box Folders"**.

Authentication settings for Box Upload

- Next step is to set up the authentication per user for **"Box Upload"**.
- Under *"Authentication Settings for External Systems"* setting, select *"Box Upload"* option.

Quick Find

- My Personal Information
 - Advanced User Details
 - Approver Settings
 - Authentication Settings for External Systems
 - Change My Password
 - Connections
 - Grant Account Login Access
 - Language & Time Zone
 - Login History
 - Personal Information
 - Reset My Security Token
 - Security Central
- Display & Layout
- Email

Authentication Settings for External Systems

Set up user authentication for third-party systems or other Salesforce orgs.

Save Cancel

Authentication

External System Definition: Named Credential

Named Credential: **Box Upload**

User:

Authentication Protocol:

Authentication Provider:

Scope:

Authentication Status: Pending

Start Authentication Flow on Save: ☐

- Next, select the user(s) to authenticate for Box Upload option. Ensure that you select all users who require the functionality of uploading and accessing documents from Box.
- Click *"Save"*. You will be re-directed to the authorization page of Box.
- Click *"Grant access to Box"* to connect your Salesforce org with Box.
- After granting access, you will be re-directed to Salesforce > *Authentication Settings for External Systems* setting.
- Now, the *"Authentication Status"* should be changed to *"Authenticated"*.

✔ User(s) successfully authenticated with Box for "**Box Upload**".

✔ This completes the setup of Box integration with DocFynd.