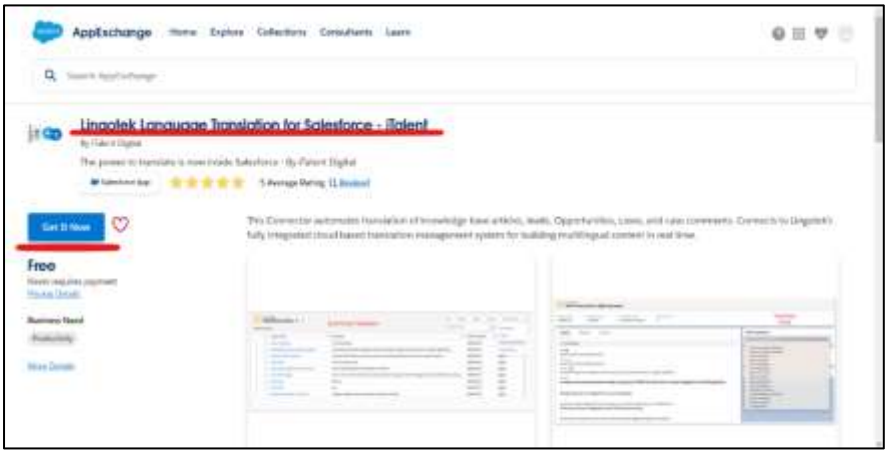
Salesforce Connector Setup

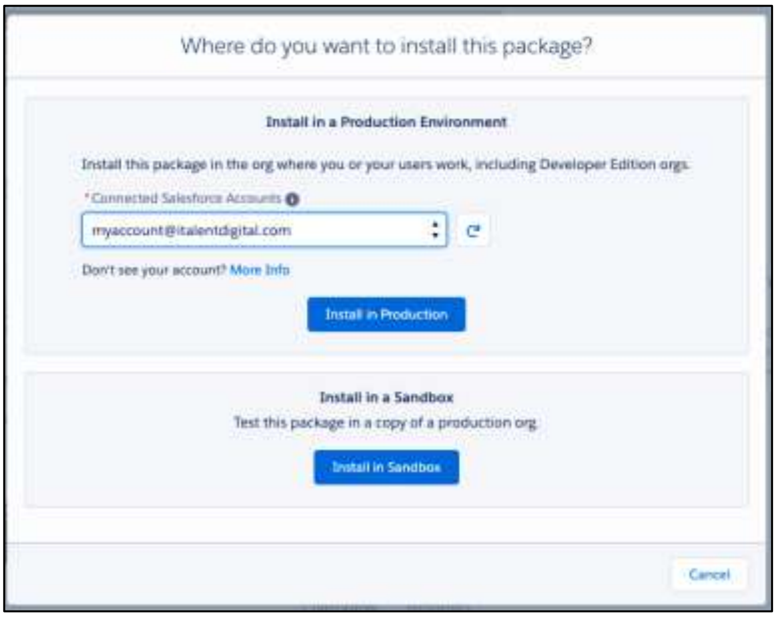
NOTE: The below configurations are specific to Salesforce Classic Environment only.

Install Lingotek inside Salesforce Package

1) Login to App Exchange with your salesforce credentials and search for the “appLingotek Language translation for salesforce-iTalent”.
2) Click on Get it Now button to download App



3) The link will take you to the following page, select appropriate environment where you want to install this app.



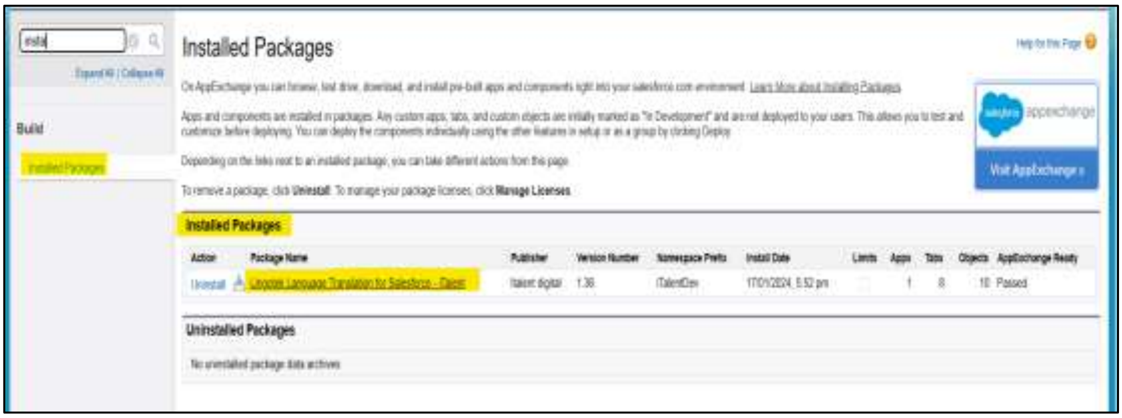
4) Click on the confirm and install button by selecting terms and condition checkbox.
5) After login you will be taken to the Package installation page,

a) Select "**Install for Admins Only**"
b) Click **"Install"**
c) When we want to upgrade the same package to the latest version we need to click on "**Upgrade**".

d) A popup will appear asking for approval for third party access, click on “yes I grant access” and continue.

e) If needed, check your email for confirmation that the installation is completed.

f) **Verify the Installation** by reviewing the installed packages. Click on Setup then Onthe left, under Build select Installed Package.



Configure Knowledge Settings

You can use existing user, or you can create new user for Knowledge Article translation.

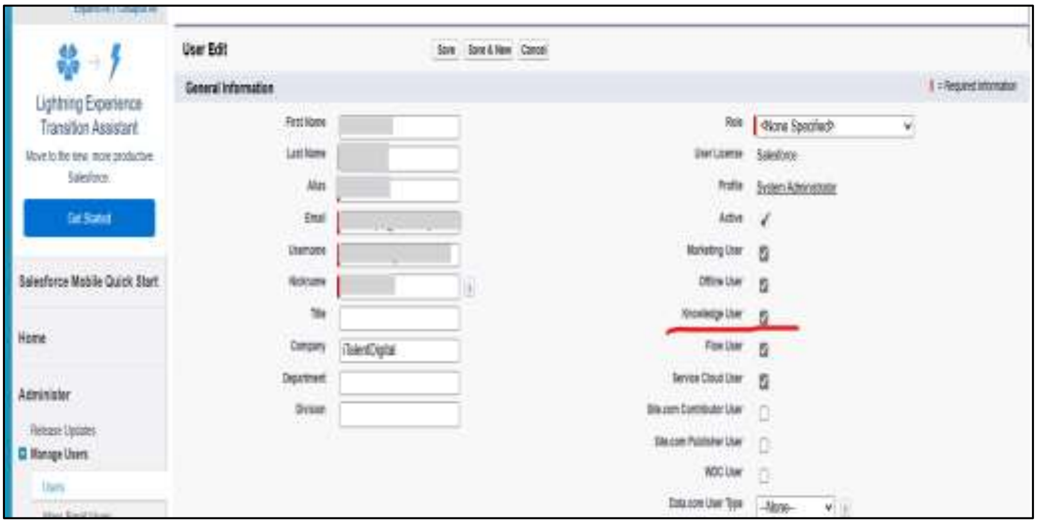
1) Add/Edit a User

1) From the main menu, select **Setup**.
2) On the left under **Administrate**, select **Manage Users > Users**.
3) In the main window, click **New User**.

4) Complete the required fields (red) and any other desired fields.

Scroll down to ensure all required fields are complete.

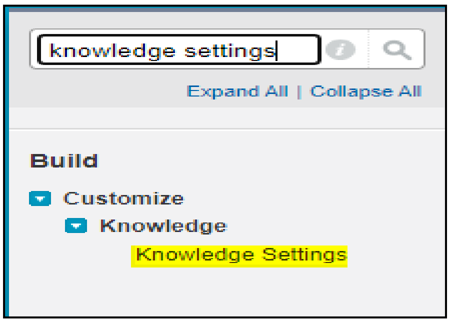
5) Enable the checkbox for **Knowledge User.**
6) When you are ready, scroll down and click Save.

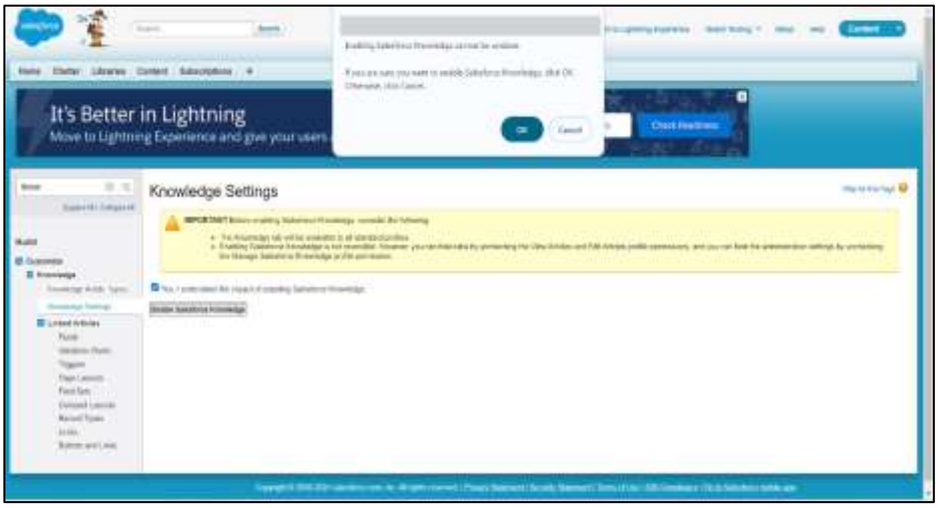


Enabling Salesforce Knowledge

In left sidebar of page, select **Customize** which will expand into a dropdown menu, and then select **Knowledge** from this menu. Another dropdown menu will appear, select **Knowledge Settings** from this menu and Enable Salesforce Knowledge.

Setup > Build > Customize > Knowledge > Knowledge settings.

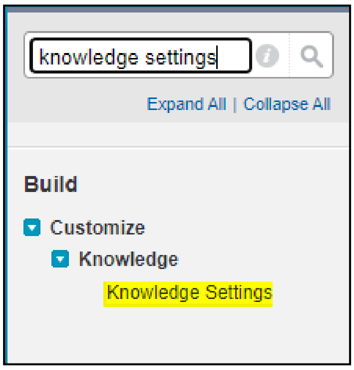


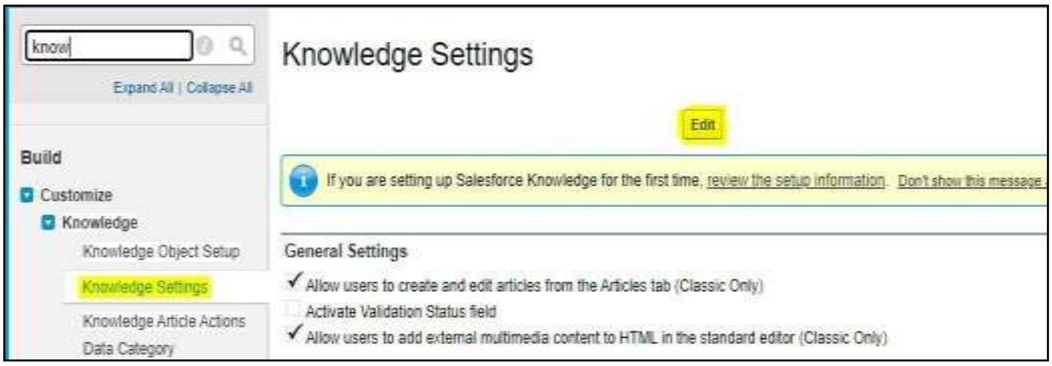


A pop up appears giving an alert click on ok:

Enabling Multiple Languages for Knowledge

1) Setup > Build > Customize > Knowledge > Knowledge settings.
2) Click **Edit,** go to the field Language settings, and select the radio button for **Multiple Languages** and select the **Default Assignee (Knowledge User)**.





Note: The Default Assignee should be the user we created (Lingotek User)

Enable Lightning Knowledge

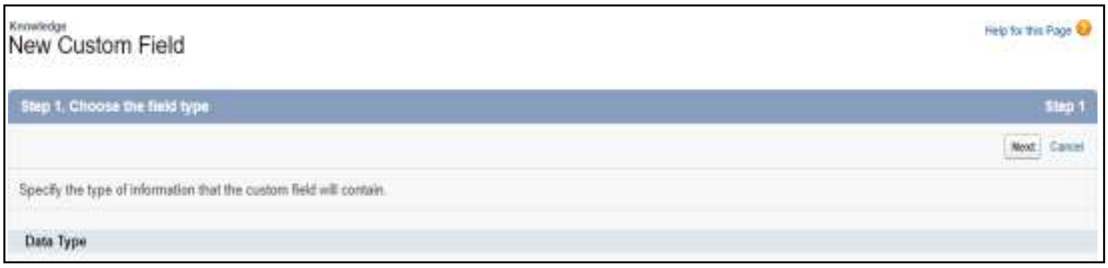
1) Setup > Build > Customize > Knowledge > Knowledge settings.
2) Click Edit and enable checkbox for **Enable Lightning Knowledge.**
3) Click **Save.**

Create Custom Fields for Knowledge

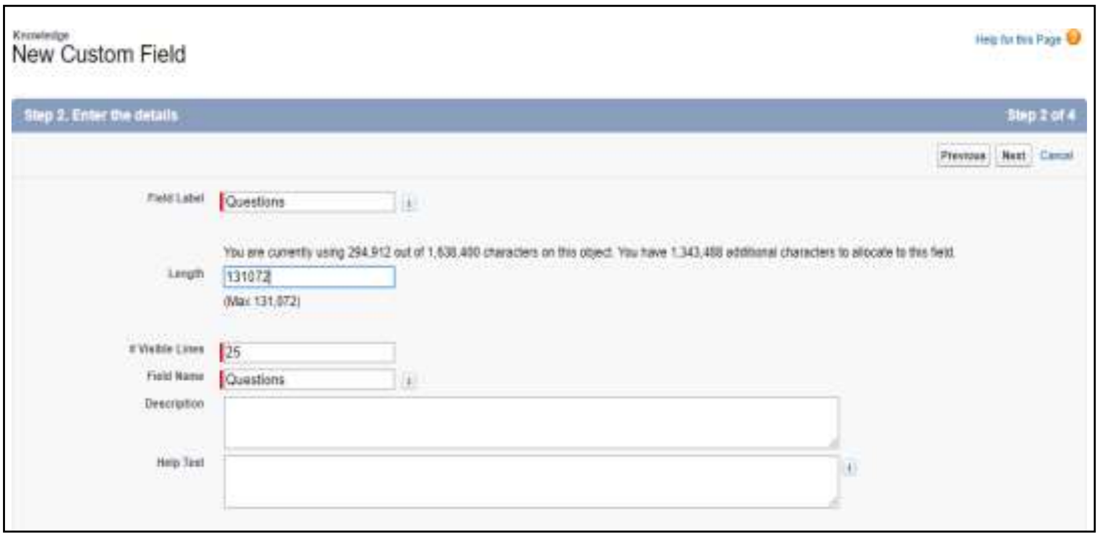
Note: *Optional Part for Creation of Fields in Knowledge Object (Based on requirement it is different for each customer)*

1) Setup > Build > Customize > Knowledge > Knowledge Object Setup.
2) Create a Knowledge Object related Custom Fields (Like Question and Answer),Navigate to the **Knowledge Object Setup** within **Fields** click on new

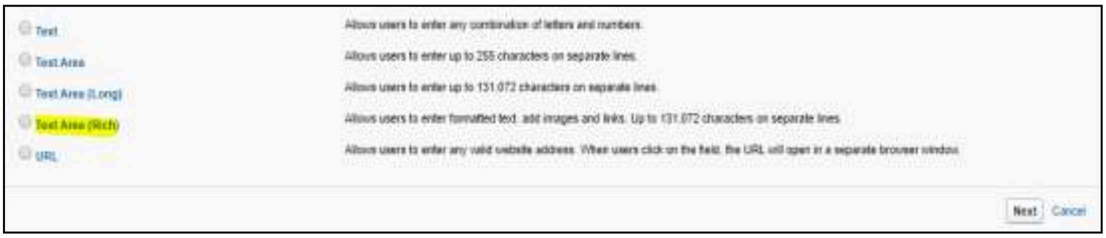
3) Select Data Type for your field and click on Next Button



4) Enter the Name of Field in Field Label and give the length of the field and Click on Next



5) In Next page give the Visible and Read only permissions for this field to other Profiles based on need and click

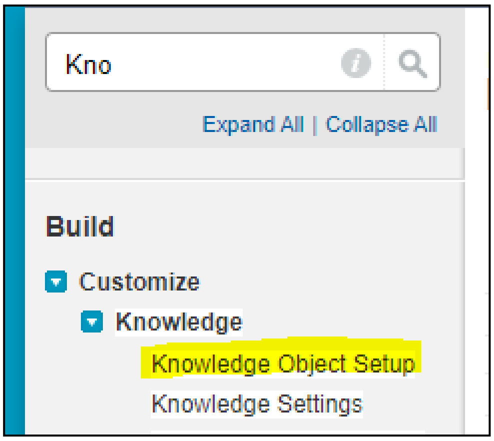


Next

6) Select the page layout and **save** it.

Create Field Set for Knowledge

1) Setup > Build > Customize > Knowledge > Knowledge settings.

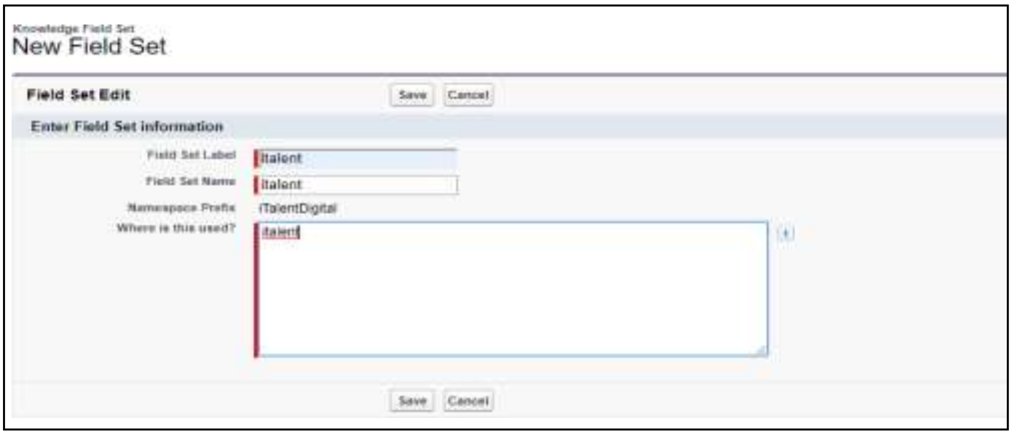


2) Scroll down to the **Field Sets** section and click **New**

3) Provide the Field Set Label – **italent**

4) Provide the Field Set Name – also **italent**

5) For the box that asks *Where is this used?*, you can also say **italent**



6) When you are ready, click **Save**.

7) You will be taken to the italent Field Set page.

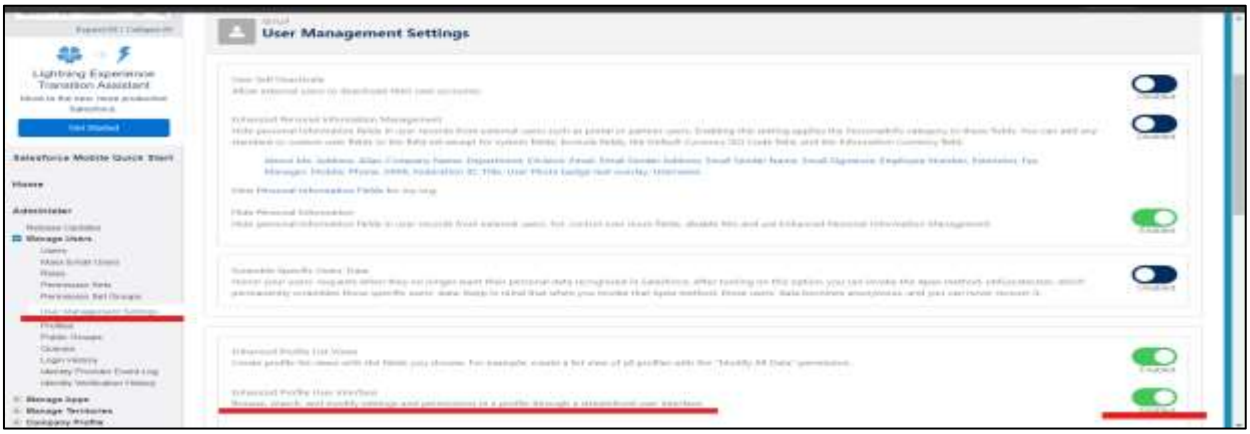
Note: *These are the fields you want to have translated*

8) On this page, you can drag and drop Quick Fields into the Field Set from thetop box to down below.

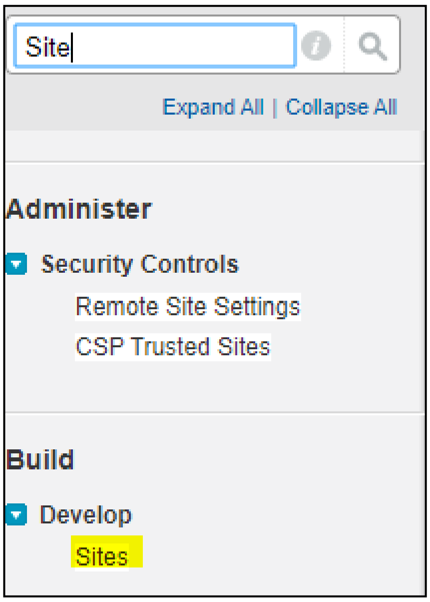
9) Once you have chosen your desired fields, click **Save** in the upper left cornerof the box.
10) You will be directed to the **Field Sets** list for the article type you are workingwith.

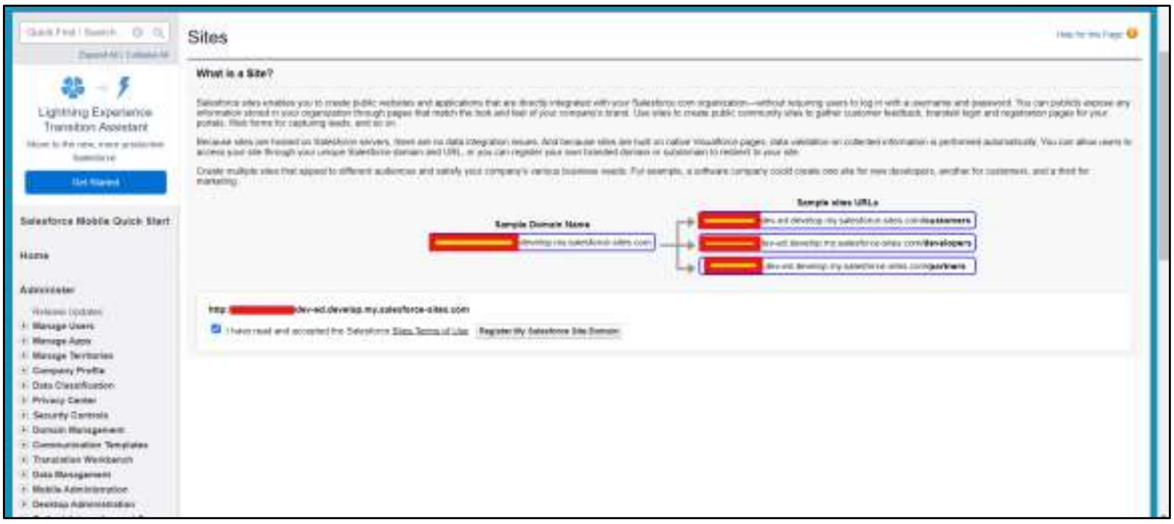
Configure Site Settings

1) Navigate to left sidebar of Setup > Managed Users > User Management Settings andEnable Enhanced Profile User Interface rest all the settings should be default settings.

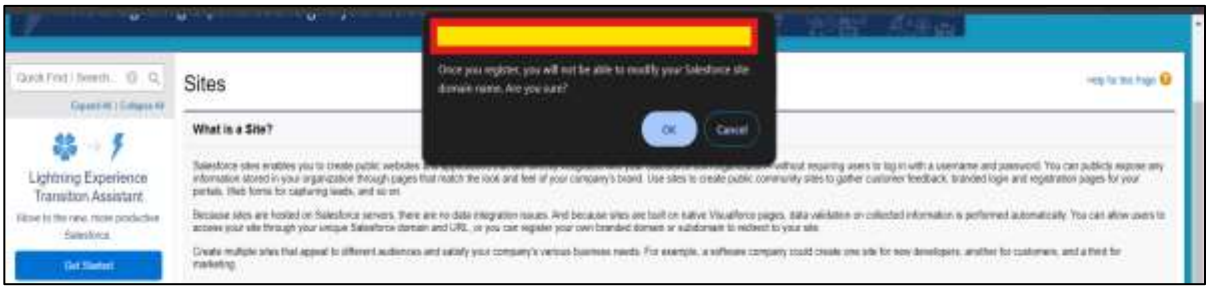


2) From left sidebar of setup > Build > Develop > Site



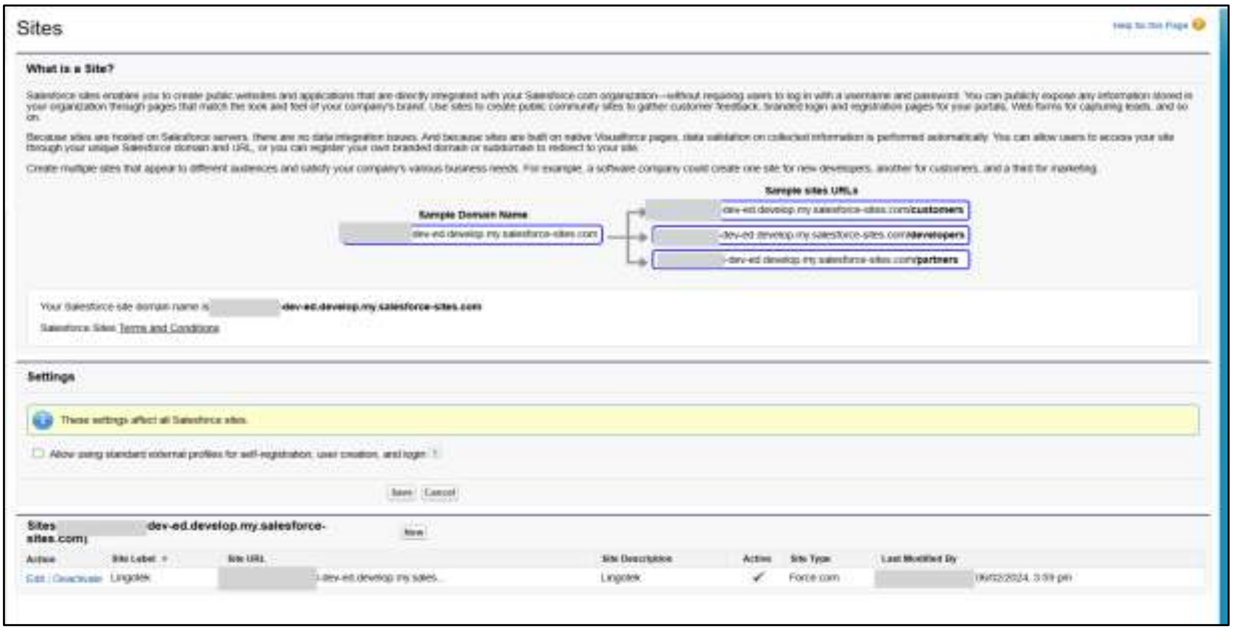


3) You Need to Create domain for your Org (If there is no Domain)

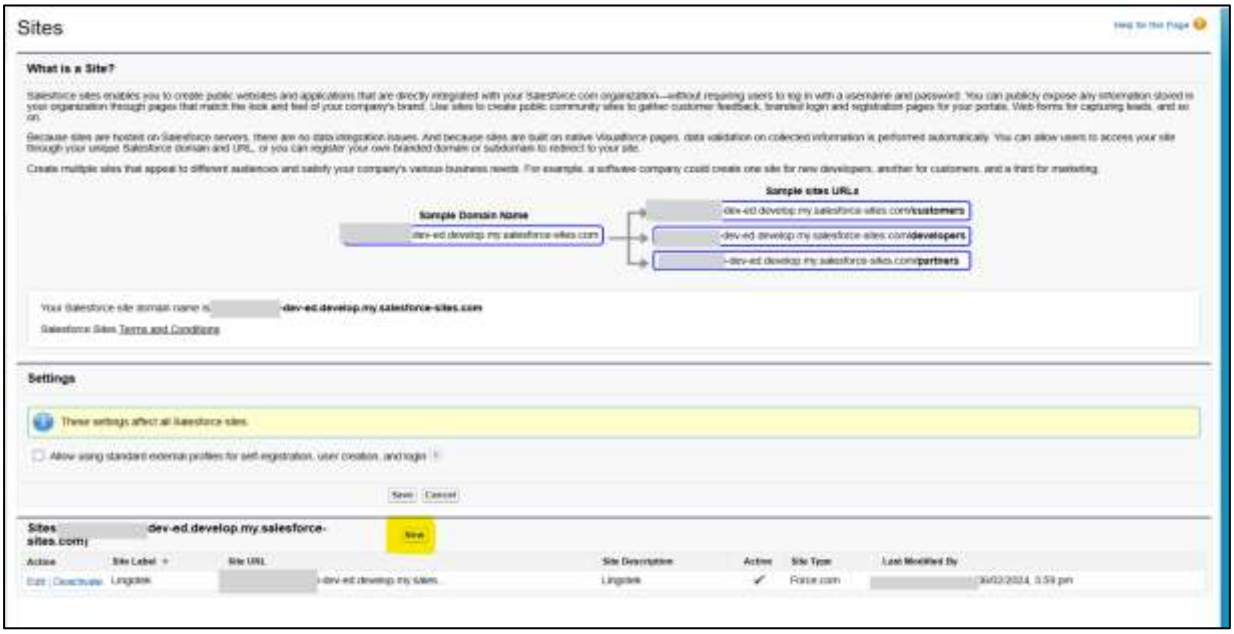


A pop up appears giving an alert saying the site cannot be modified once created click "ok"

4) Once Domain Created now you can be able to create Sites.

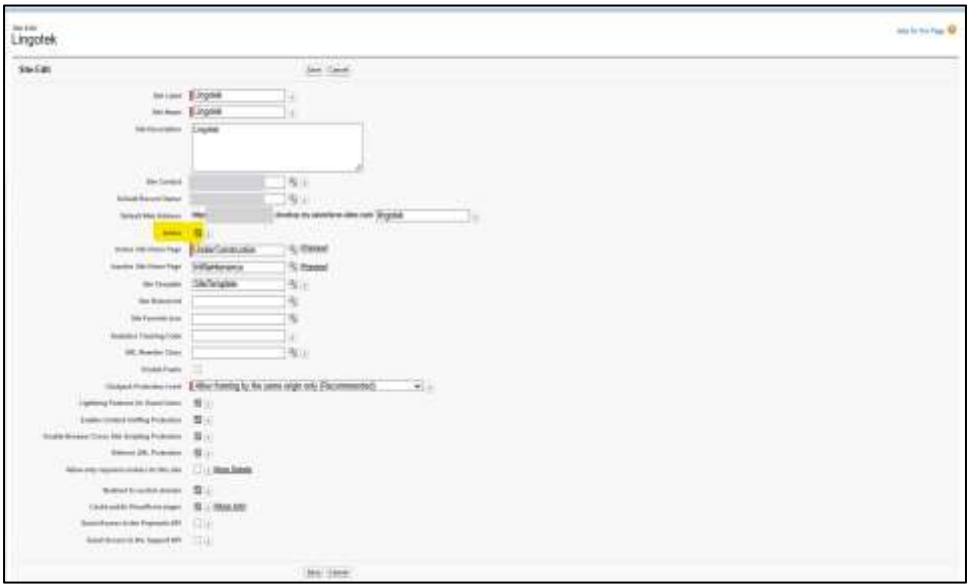


5) On the Sites Homepage, click **New** at the top of the Sites field,



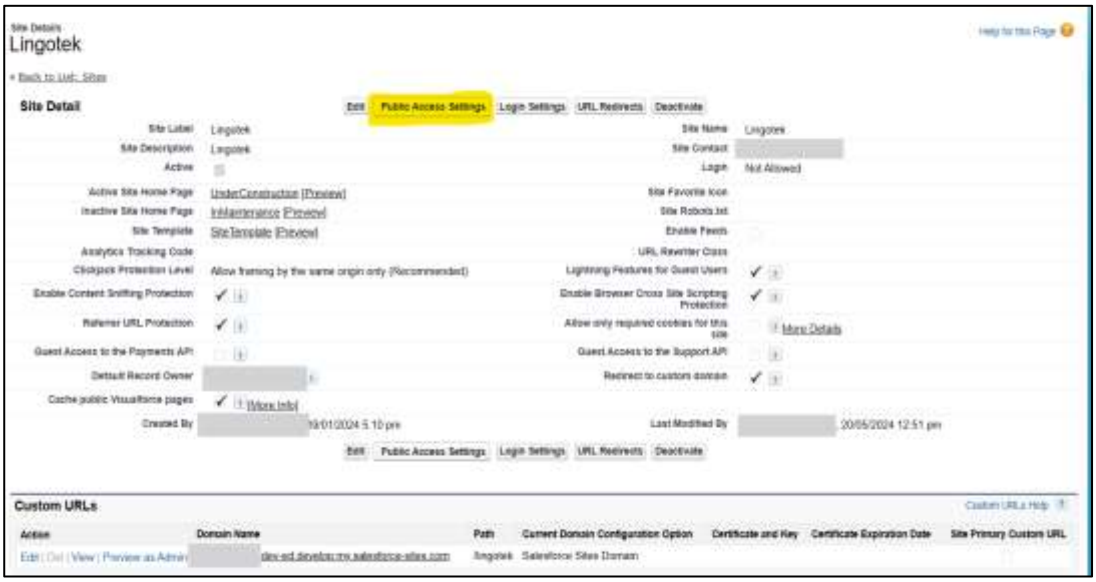
7) Specify the Site Label (call it **Lingotek** once again)
8) The Default Web Address will also be **lingotek**
9) The Active Site Homepage does not matter so you may put **Under Construction**

10) Make sure that the site is checked as **Active**.

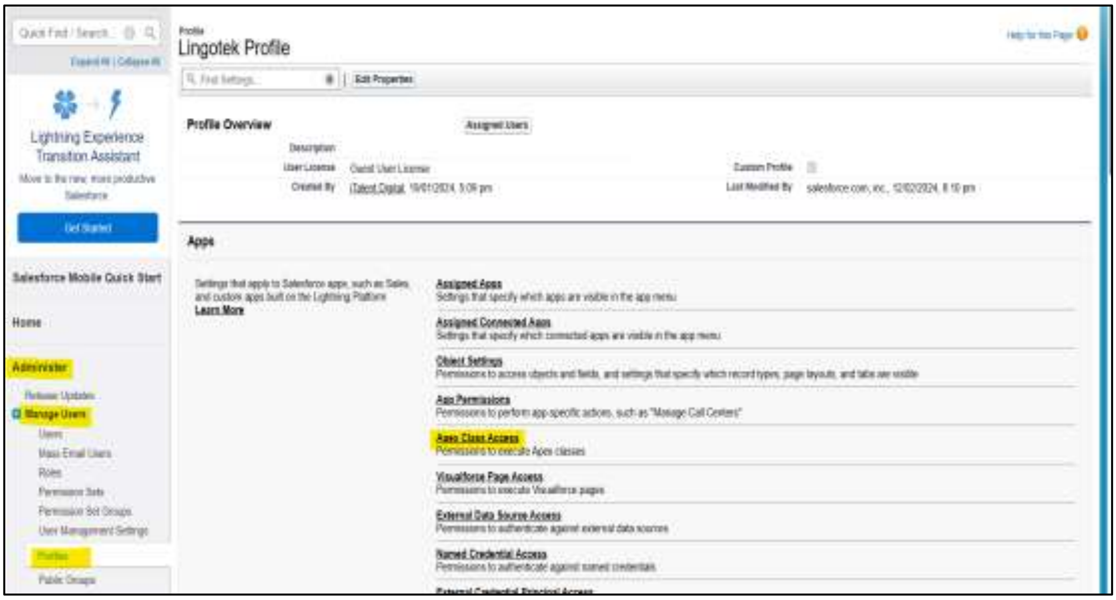


11) Then click **Save**. You will be taken to the Lingotek Site homepage.

12) Click **Public Access Settings** at the top of the page, and you will be taken to theLingotek Profile page.

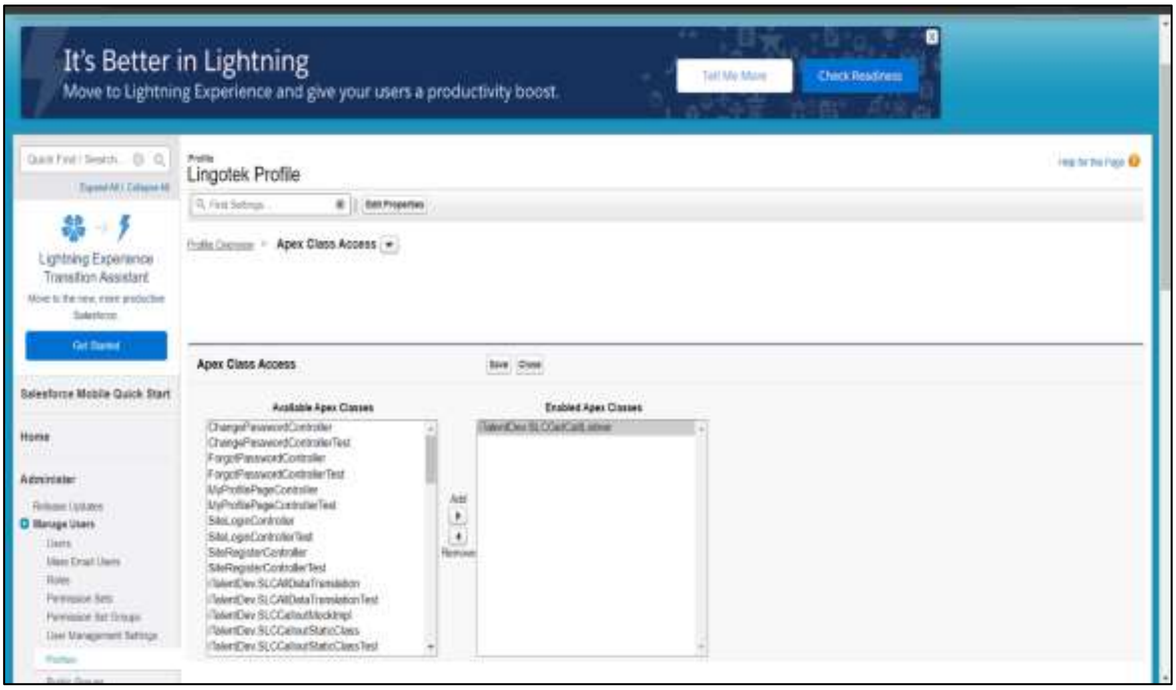


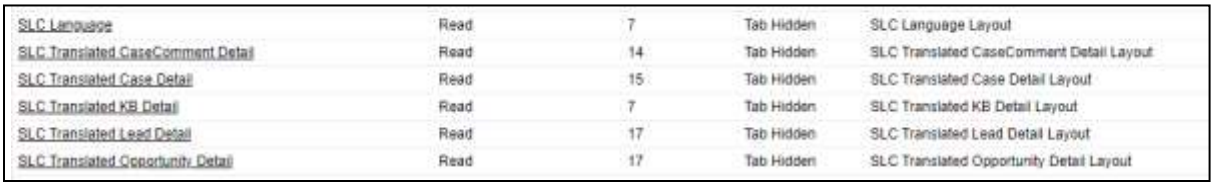
13) Under the Apps field, select **Apex Class Access**



14) On the next page, click **Edit** at the top of the page.

15) Select the **iTalentDev.SLCGetCallListner** Apex Class and click **Add**. Then, click **Save**.



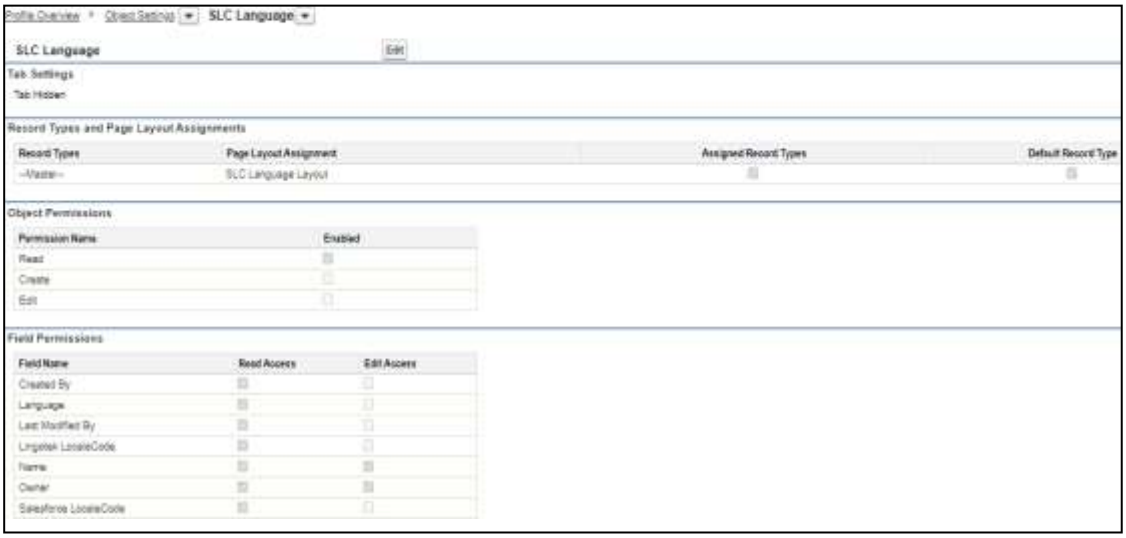


SLC Language	Read	7	Tab Hidden	SLC Language Layout
SLC Translated CaseComment Detail	Read	14	Tab Hidden	SLC Translated CaseComment Detail Layout
SLC Translated Case Detail	Read	15	Tab Hidden	SLC Translated Case Detail Layout
SLC Translated KB Detail	Read	7	Tab Hidden	SLC Translated KB Detail Layout
SLC Translated Lead Detail	Read	17	Tab Hidden	SLC Translated Lead Detail Layout
SLC Translated Opportunity Detail	Read	17	Tab Hidden	SLC Translated Opportunity Detail Layout

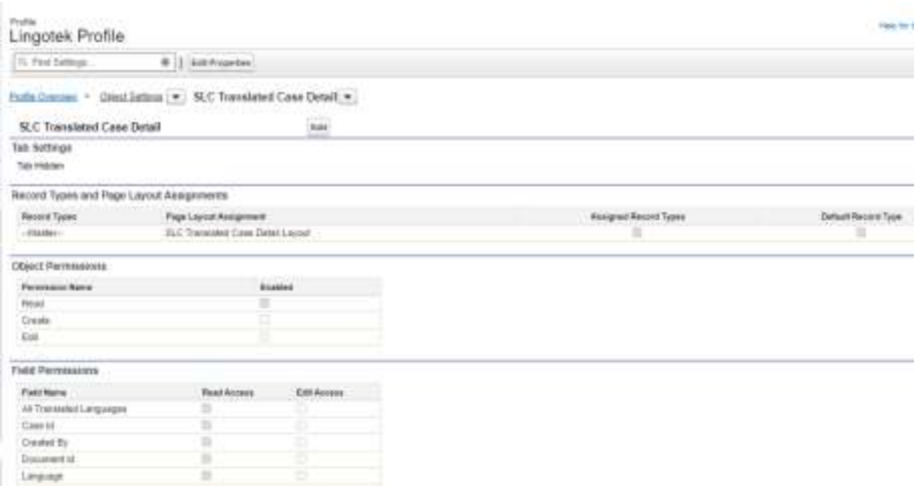
16) Select Object Settings from drop down, you will get list of all objects. Scroll down youwill get installed package related all custom objects.

17) From dropdown select **"SLC Translated KB Detail"** within **"Object Settings"**, click onedit and enable the **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**

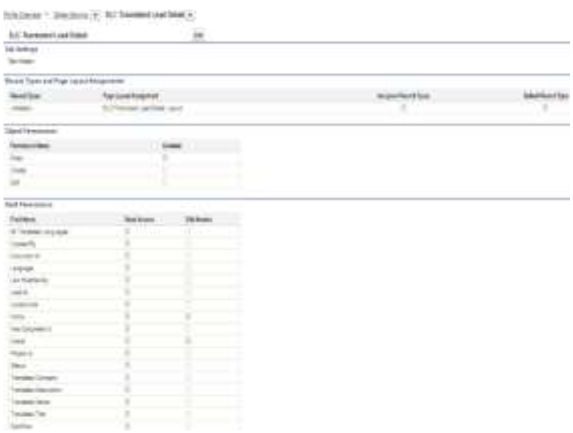
18) From dropdown select **"SLC Language",** click on edit and enable the **Read** Access for **Object Permissions** and **Field Permissions** as shown below and click **save**



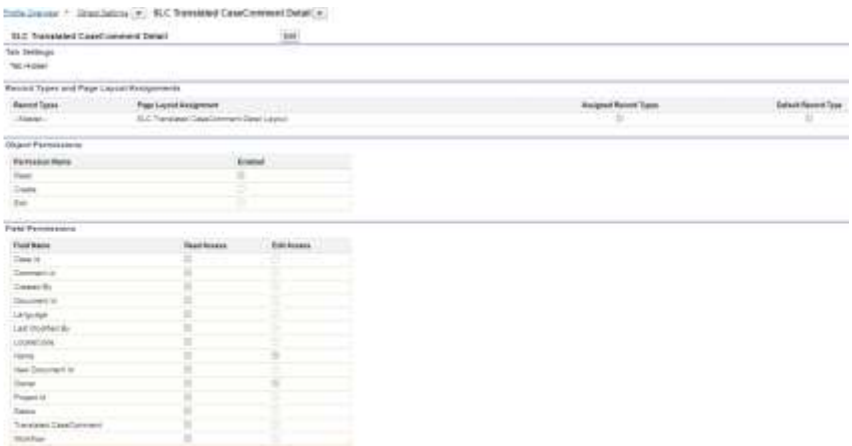
19) Now select **"SLC Translated Case Detail"** within **"Object Settings"**, click on Edit andEnable **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**



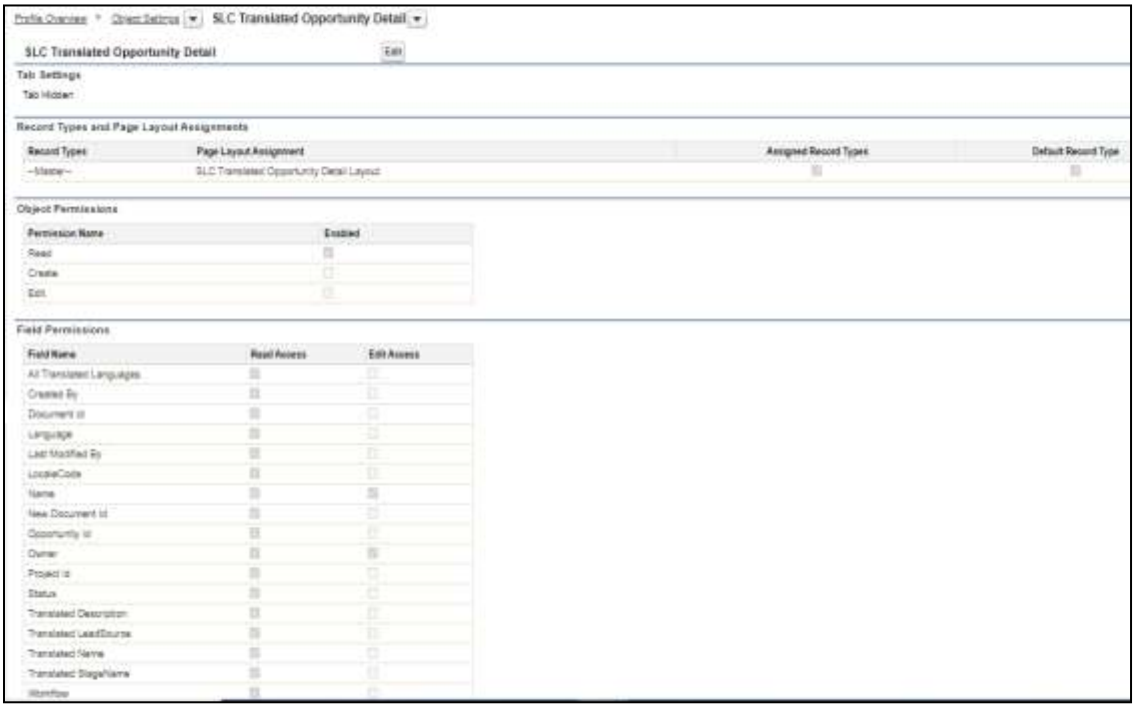
20) Now from dropdown select **"SLC Translated Lead Detail"** with in **"Object Settings"**,click on edit and enable the **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**



21) From dropdown select **"SLC Translated Case Comment Detail"** within **"Object Settings"**, click on edit and enable the **Read** access for **Object Permissions** and **FieldPermissions** as shown below and click **save**

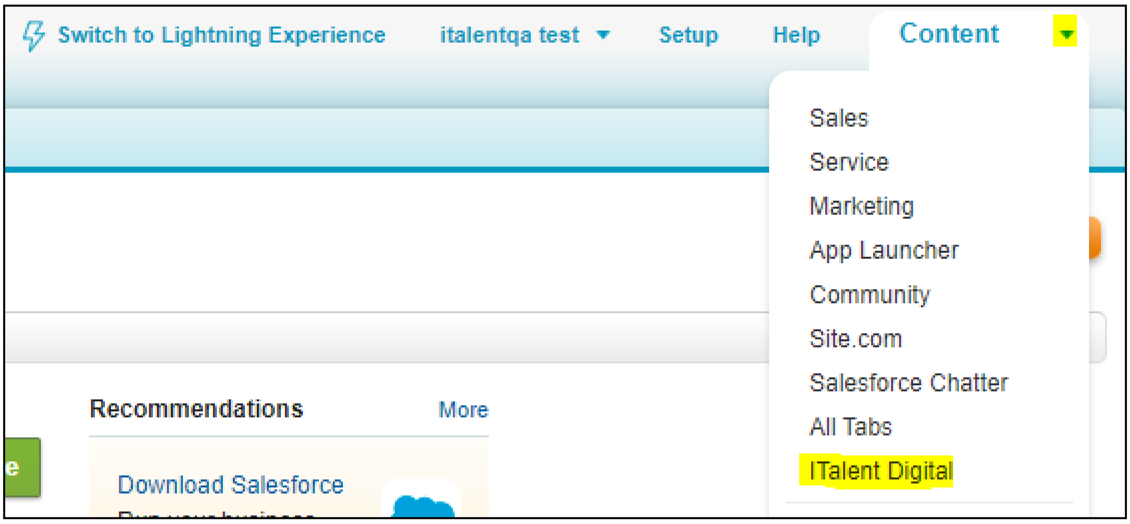


22) From dropdown select **"SLC Translated Opportunity Detail",** click on edit and enablethe **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**

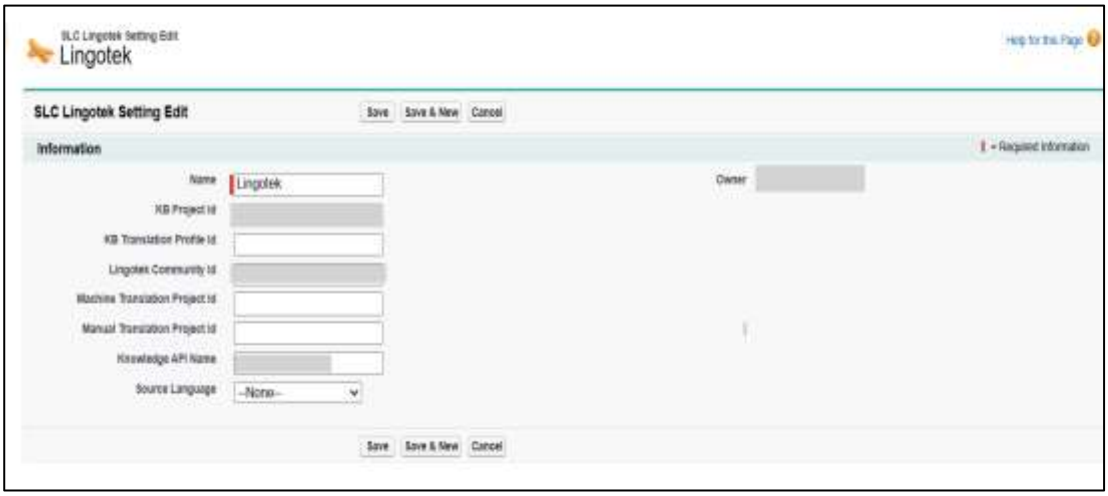


Configure SLC Lingotek Setting Object

1) Open **iTalent Digital** App from left top corner drop down and Click on **SLC Lingotek Setting** Tab



2) Then select **SLC Lingotek setting** on the options bar.
3) Click on New

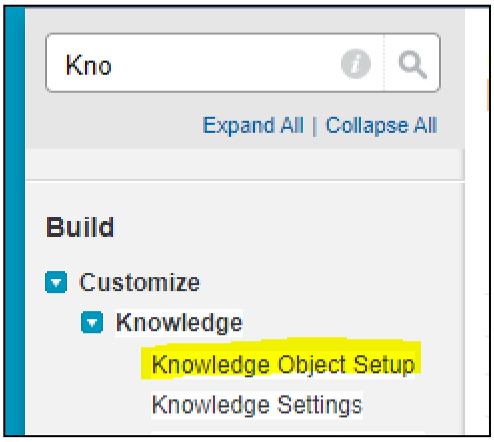


4) Create New record with name like Lingotek.

5) Now at **KB Project Id** give project id of Lingotek TMS which you are going to usefor Knowledge Articles Translation [(Refer Point 2 in Lingotek Setup Document to get Project Id)]

6) Now at **KB Translation Profile Id** give Translation profile ID of Lingotek TMS which you have created and are going to use forKnowledge Articles Translation [(Refer Point 2 in Lingotek Setup Document to get Translation Profile Id)]

   7) To get **Knowledge API Name,** on the left side panel, select **Customize** which will expand into a dropdown menu, and then select **Knowledge** (underneath *Requests*)from this menu. Another dropdown menu will appear, and then select **Knowledge Object Setup** from this menu.



   8) Copy the API Name,

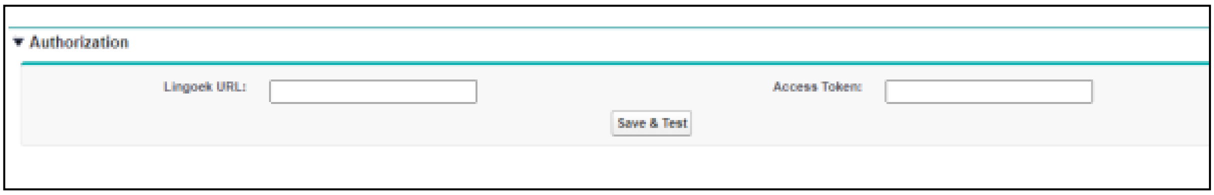
9) Add **Machine Translation Project Id,** it is a project id with workflow Machine Translation which will use for Case**,** Lead And Opportunity Translation [(Refer Point 2 in Lingotek Setup Document to get Project Id)]

10) Add **Manual Translation Project Id,** It is a project id with workflow Manual Translation which will use for Case, Lead And Opportunity Translation [(Refer Point 2 in Lingotek Setup Document to get Project Id)]

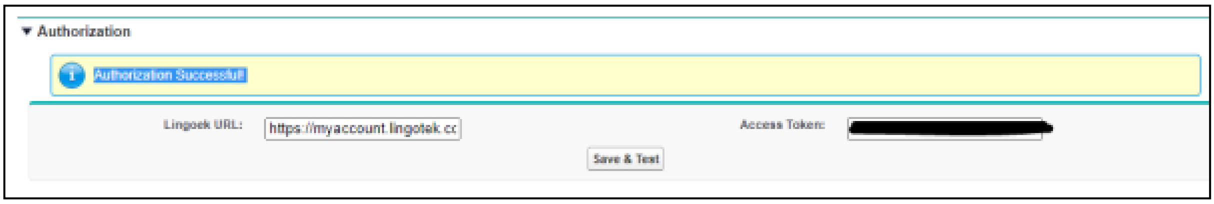
11) Click **Save**

12) Once You save it. Please Provide values in InputText. (i.e Lingotek URL and Lingotek Access Token).Click on Save & Test.

Note: To get the Lingotek Access Token (Refer Point 1 in Lingotek Setup Document)



13) Once your authorization completed you will see message like Authorization



Successful.

Configure Email Service

Next, you will need to set up an internal Email Service within Salesforce. This is needed for the translation plugin to work:

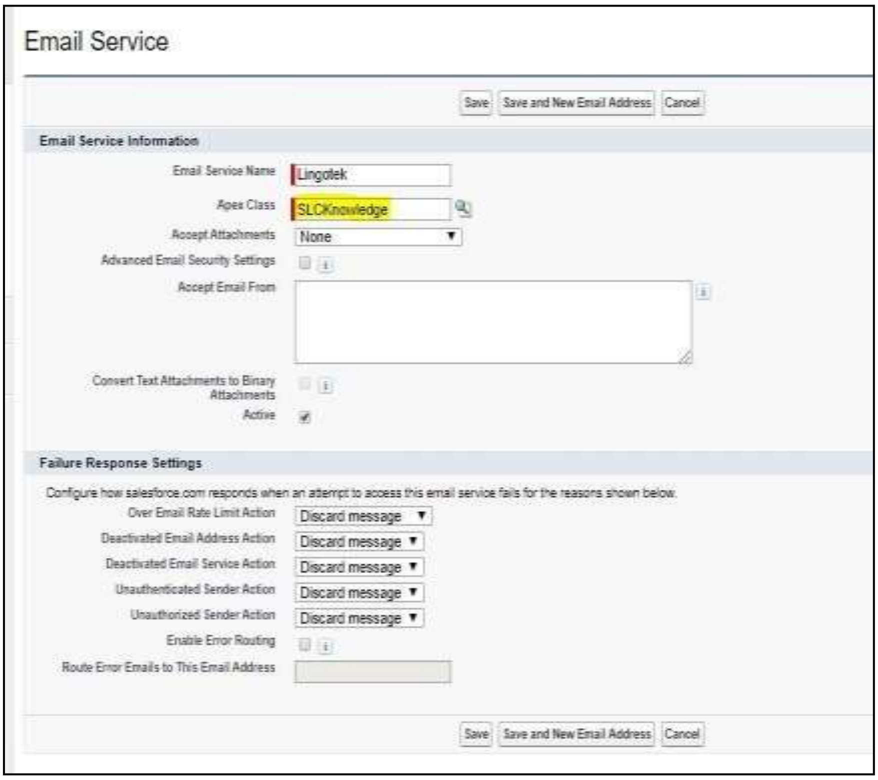
1) **Setup → Build →Develop → Emailservices**
2) Click on **"New Email Service"**

3) Now you will see a screen where you can configure your **Email Service Information**. The information on this page will allow Lingotek and Salesforce to communicate with one another. Complete the fields as shown.

   a. Under **Email Services Name**, enter "Lingotek"
   b. Under **Apex Alert**, search for and select "SLCKnowledge

      Click the search icon, type " SLCKnowledge " and Click Go. From the search results, click to select SLCKnowledge.

   c. At the end of the list, check **Active**.



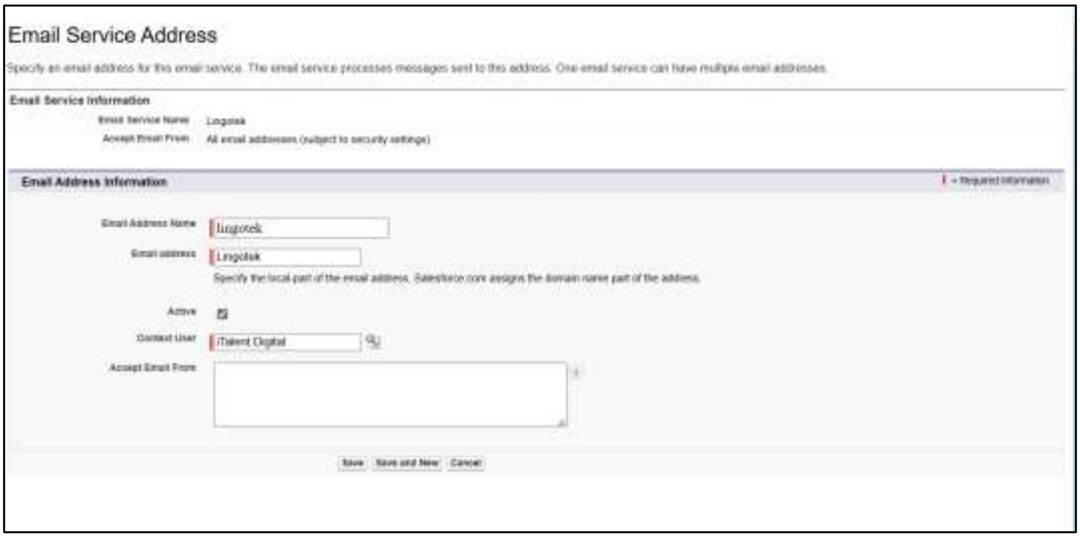
4) Under **Failure Response Settings**, complete the following fields.

   a. Next to **Over Email Rate Limit Action**, scroll to select "Requeue message."
   b. At the end of the list, check **Enable Error Routing**.
   c. Under **Route Error Emails to This Email Address**, enter support email of your domain.
   d. Click **Save and New Email Address**.

5) This should open to the **Email Address Information** page.

   On the Email Address Information page, be sure to add a Context User.

The Context User is a placeholder profile that allows Lingotek to communicate with



Salesforce. Complete the fields as shown:

a. In the **Email Address** field, type "lingotek."

   Note *- Salesforce will use this text ("lingotek") to generate a system email address.*

   This email address helps Lingotek communicate - behind the scenes - with Salesforce.

b. Check **Active**.

By default, Salesforce adds you as the **Context User**. To designate someone asthe **Context User**, click the search icon and select the new user. Select the context user as Lingotek User (which you have created).

Note: *We shouldn't specify anything in **"Accept Email From".***

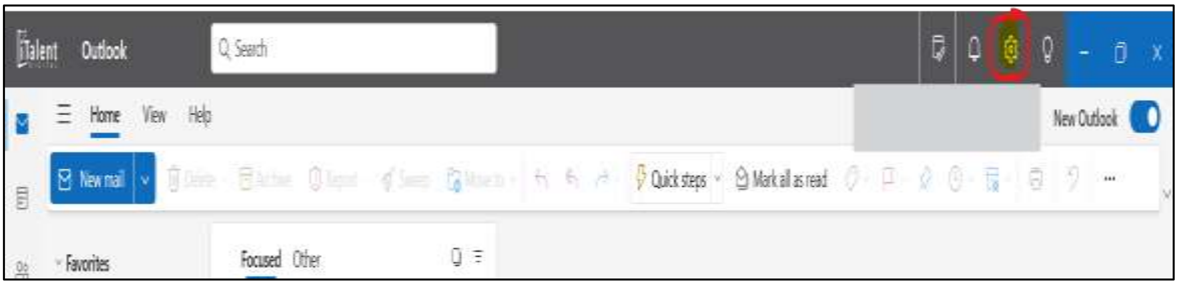
c. Click **Save.**

6) Copy the Email address, this will be used for redirecting purpose.

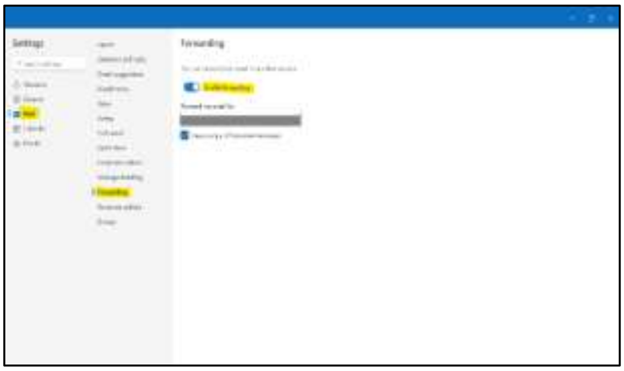
Add Forwarding Email Address to your yourdomain.com email alias in outlook.

a. Login to the outlook using your italentdigital.com email.

b. Click on settings.



c. Click on “Mail” and go to Forwarding tab click on “enable forwarding” and paste the email address that is copied in the previous step, ***you must make sure the “Keep a copy of forwarded message” checkbox is always ticked***.

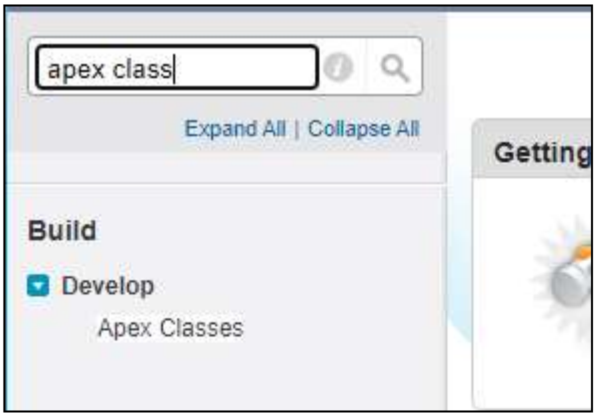


d. Click **Save.**

OR

Add Forwarding Mail to Your Gmail

1) Create apex class from Setup > Build > Develop > Apex Class



2) Click New and add apex class mentioned below (At * add your Gmail ID) and save it.

```
/*

This file is generated and isn't the actual source code for this

managed global class.

This read-only file shows the class's global constructors,
```

```
To enable code to compile, all methods return null.

*/

global class SLCKnowledgeMail implements Messaging.InboundEmailHandler {

  global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail ema
il,

  Messaging.InboundEnvelope envelope) {



  Messaging.SingleEmailMessage semail = new Messaging.SingleEmailMessage();

  String[] sendingTo = new String[]{'*'};

  semail.setToAddresses(sendingTo);

  semail.setSubject('Verification!');

  semail.setPlainTextBody(email.subject);

  Messaging.sendEmail(new Messaging.SingleEmailMessage[] {semail});
```

3) Now go to Setup > Build >Develop > Email Services
4) Click Edit **Lingotek (** Your Email Service Name).Make sure it is **Active**.
5) Add mentioned above apex class **SLCKnowledgeMail** to your Email Service and save it.
6) On your computer, open **Gmail** using the account you want to **forward** messages from.
7) In the top right, click **Settings**.
8) Click the **Forwarding** and POP/IMAP tab.
9) In the "**Forwarding**" section, click Add a **forwarding** address.
10) Enter the email address you want to **forward** messages to.
11) Click Next Proceed and then click on **resend email**.
12) You will get verification code in your Gmail
13) Add verification code to verify your Forwarding Mail
14) Once Verification done.

15) Make sure to select/enable **radio button** for your just now added forwarding mail and click on **save changes** for Gmail Setting. it means now your forwarding mail is added to your Gmail.

16) Now Go back to Salesforce Email Service and change the apex class to **SLCKnowledge**

17) Save it.

Specifying Callback URL

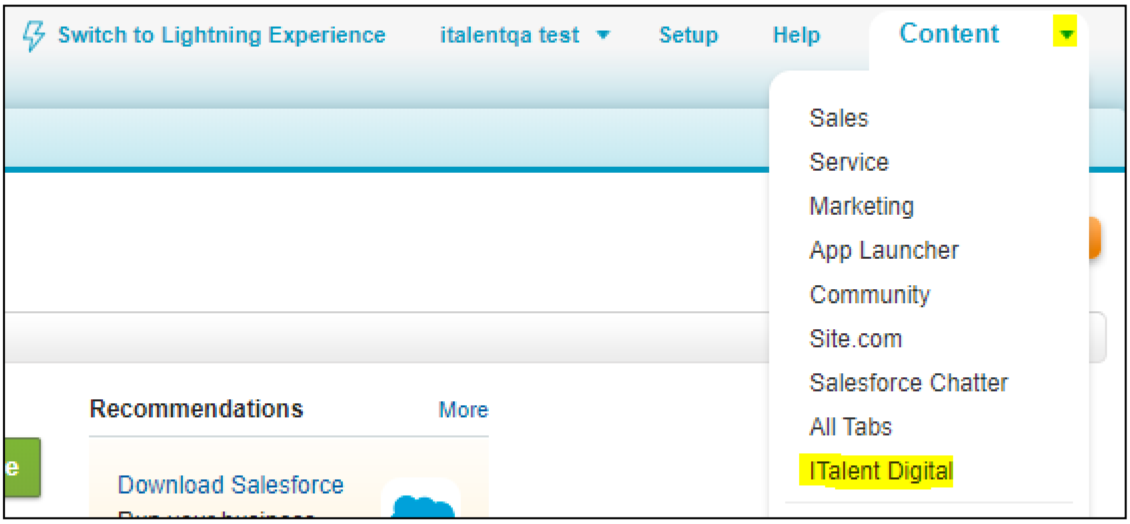
- Add the Callback URL in your Lingotek Project (Refer Point 3 in Lingotek Setup Document)

Specifying Filter for project in Lingotek

- Add Filter for your lingotek project (Refer Point 4 in Lingotek Setup Document)

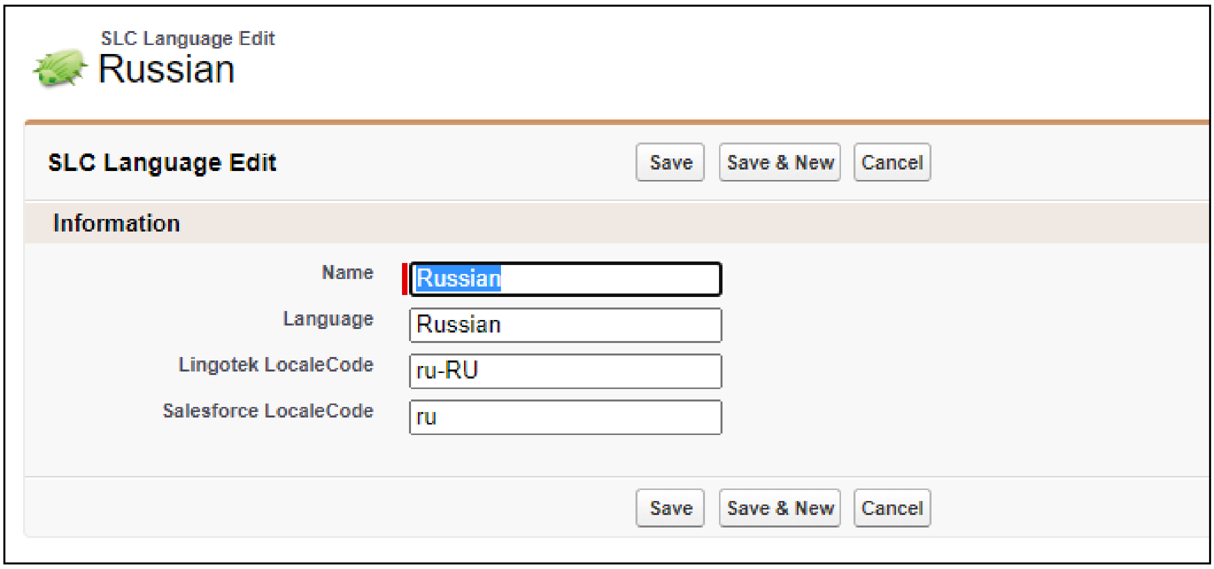
Configure Language Settings

1) Open **iTalent Digital** App from left top corner drop down and Click on **SLCLanguage** Tab



2) Then select **SLC Language** on the options bar.

3) Click on New
4) Add Languages for which you want to perform translation for Articles, Lead,Caseand Opportunity



5) Give the Name and Language same.
6) At Lingoek LocaleCode give Language Code which supporting in Lingotek for thatparticular language

Refer link: https://support.lingotek.com/hc/en-us/articles/115003439192-Supported-Languages-Locales

Note: *For Example Language Dutch Language code in lingotek is **ru-RU***

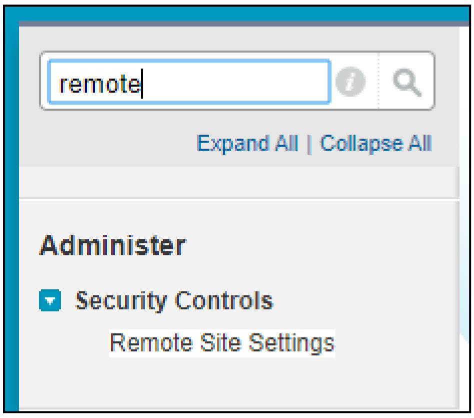
7) At Salesforce LocaleCode give language code which is supporting in salesforce for that particular Language

Refer link:
https://help.salesforce.com/articleView?id=faq_getstart_what_languages_does.htm&type=5

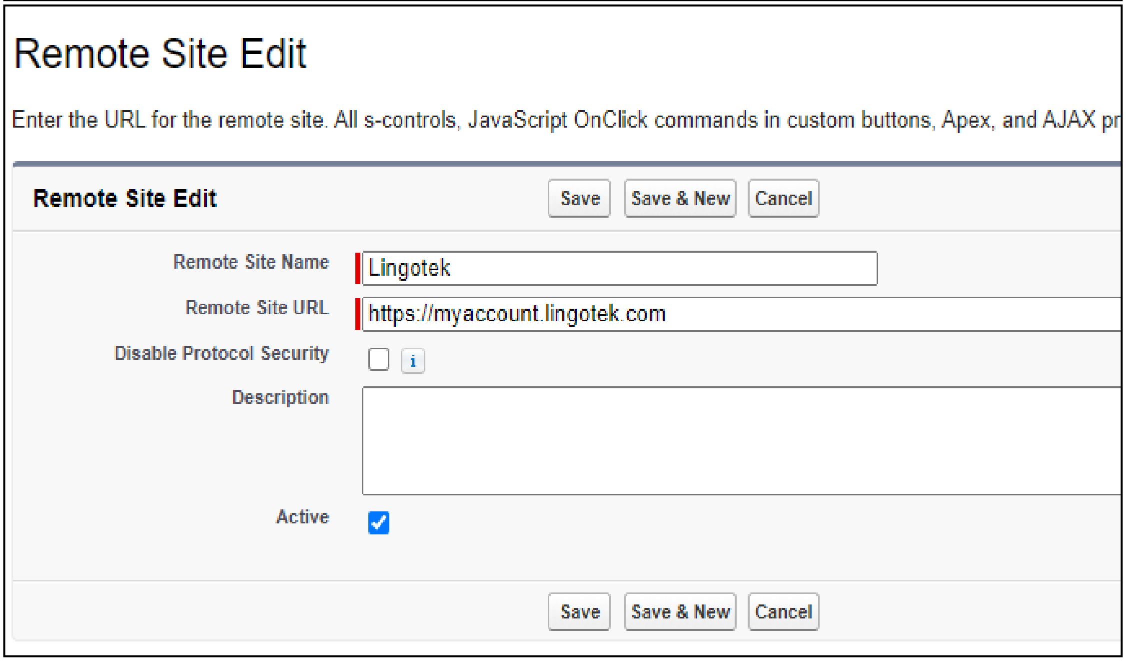
Note: *For Example, Language Dutch Language code in Salesforce is **ru***

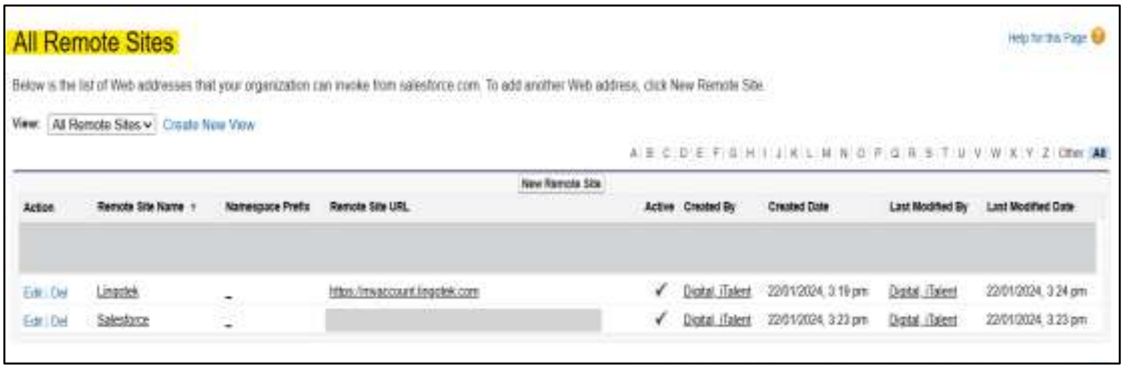
Configure Remote Site Setting

1) Create Remote site Settings



2) Create remote site settings for Lingotek URL and Salesforce URL (Your Salesforce instance URL)





Named Credential Setup

Following are the steps to connect to an external system using "Named Credential":

1) Create Connected App
2) Create Authorization Provider
3) Define Named Credential
4) Use Apex to connect in 5 lines of code.

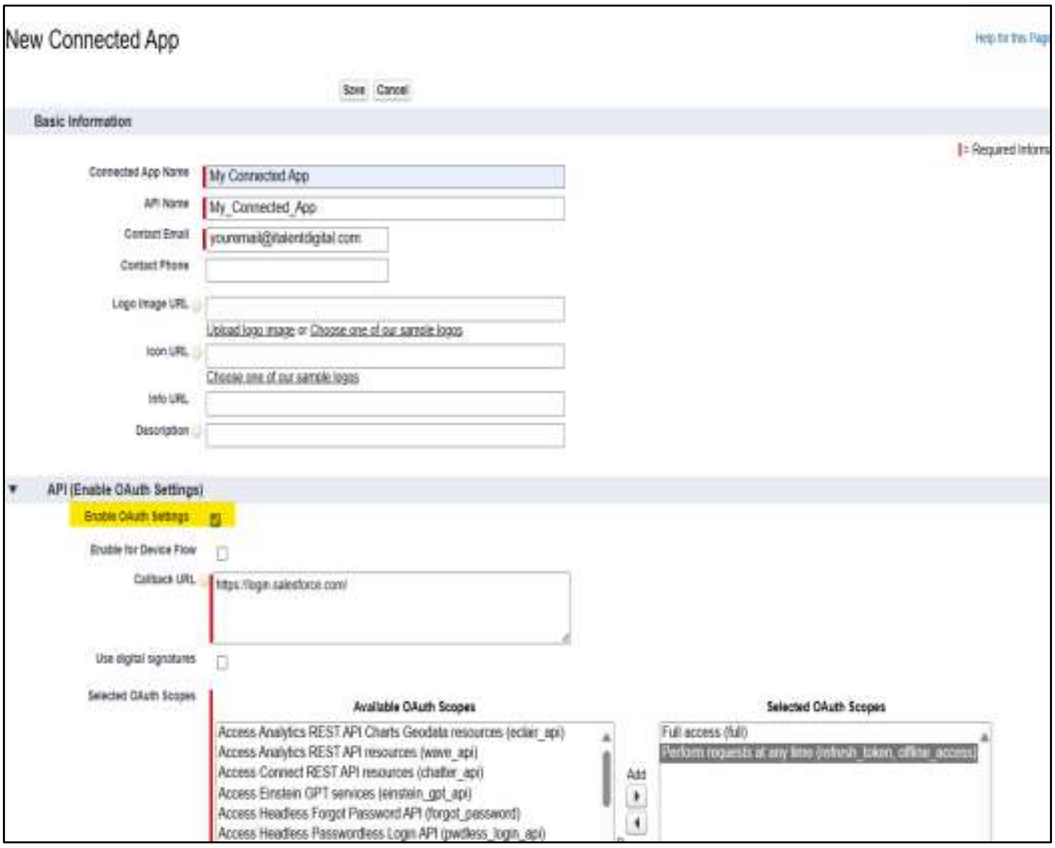
1) Create Connected App:

a) Navigate to "Setup | Build | Create | Apps | Connected Apps" and click on New
b) Provide all necessary information.
c) In "Callback URL" enter the temporary Salesforce URL. We will come back againon this step later to provide Callback URL
d) Check "Enable OAuth Settings" checkbox to use OAuth

e) Select the scope

f) Save

g) “Consumer Key” and “Consumer Secret” will be provided once you save this. Weneed this information on the next step.



2) Create Authorization Provider:

a) Navigate to "Setup | Administer | Security Controls | Auth. Providers | Create New".

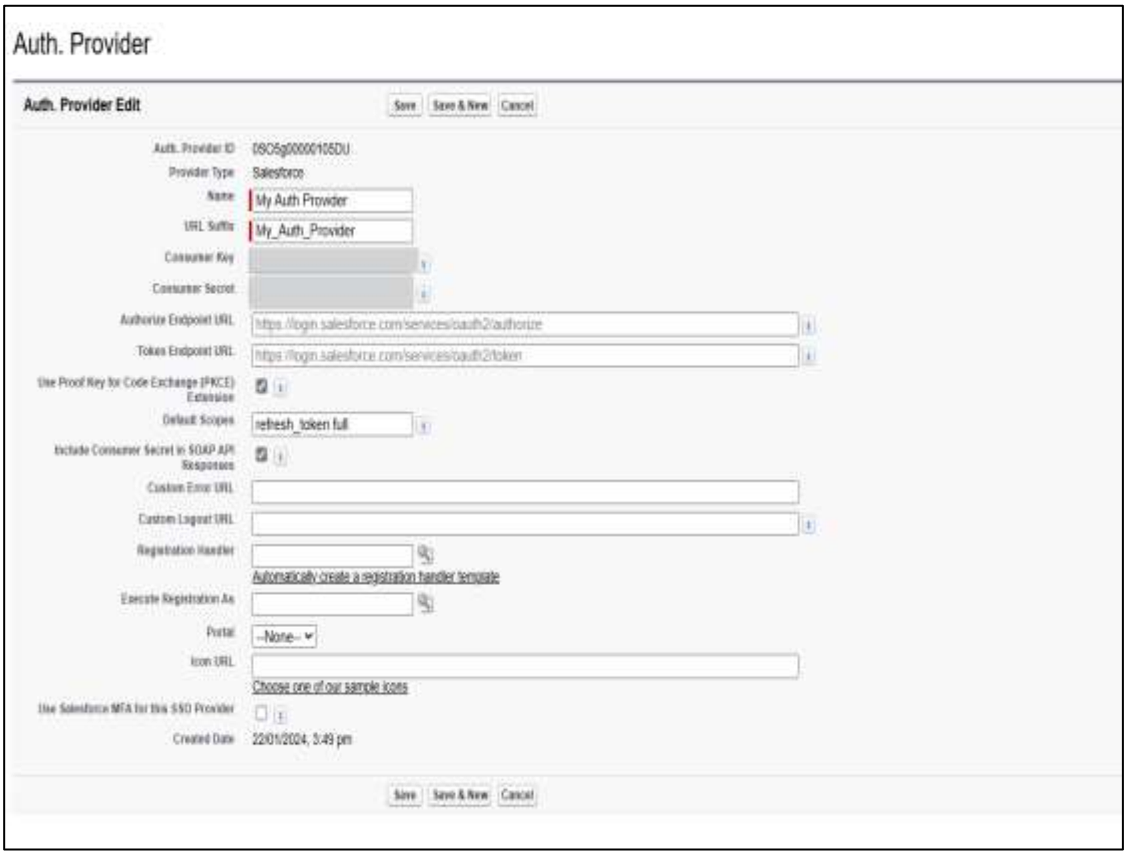
b) Select "Salesforce" as Provider Type

c) Provide "Consumer Key" and "Consumer Secret" from the previous step

d) In "Default Scope" enter the value as "refresh_token full". "refresh_token" and "full" should be separated by space

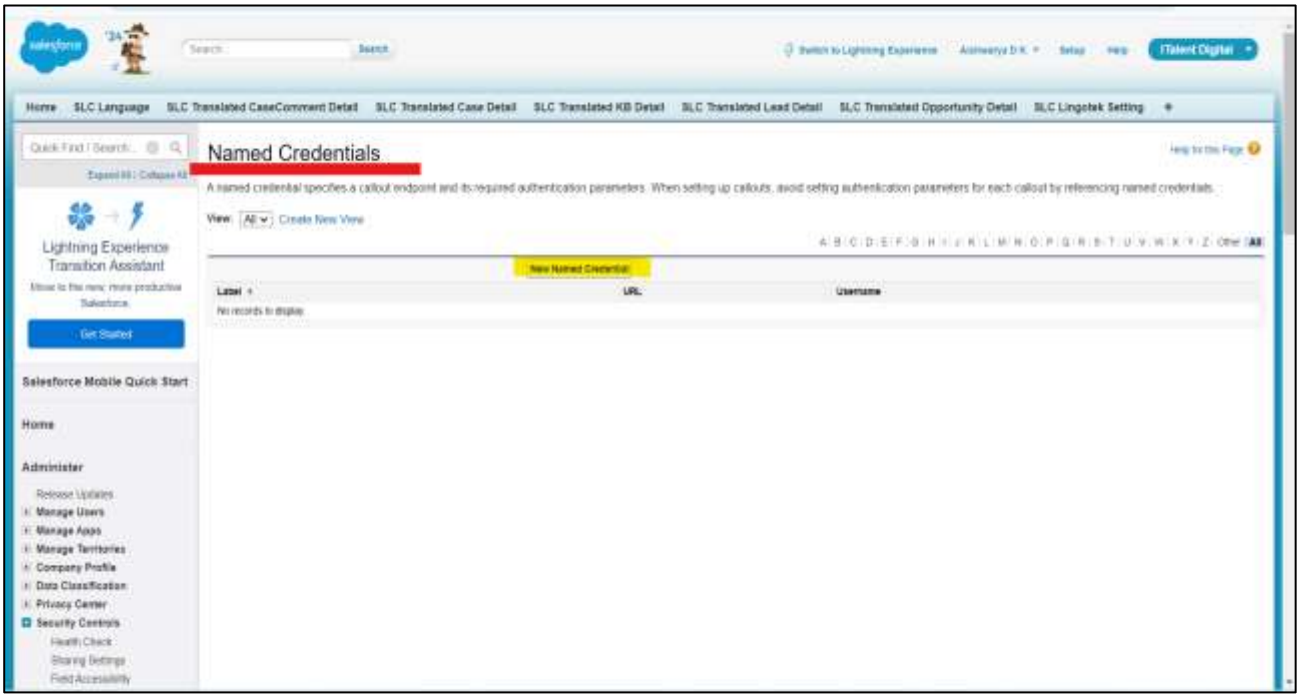
e) Finally, Save

f) Once you save, it will provide you the set of URLs in "Salesforce Configuration" section on the same page. Copy "Callback URL" and edit Connected App we created in the previous step and set this URL as Callback URL.



3) Define Named Credentials:

a) Navigate to “Setup | Administer | Security Controls | Named Credentials | New



Named Credential “.

Provide the name (label) as italent

b) In URL, provide URL of Salesforce instance where we want to Connect.

c) Select “Named Principal” as Identity Type

d) In our example select “Authentication Protocol” as OAuth 2.0

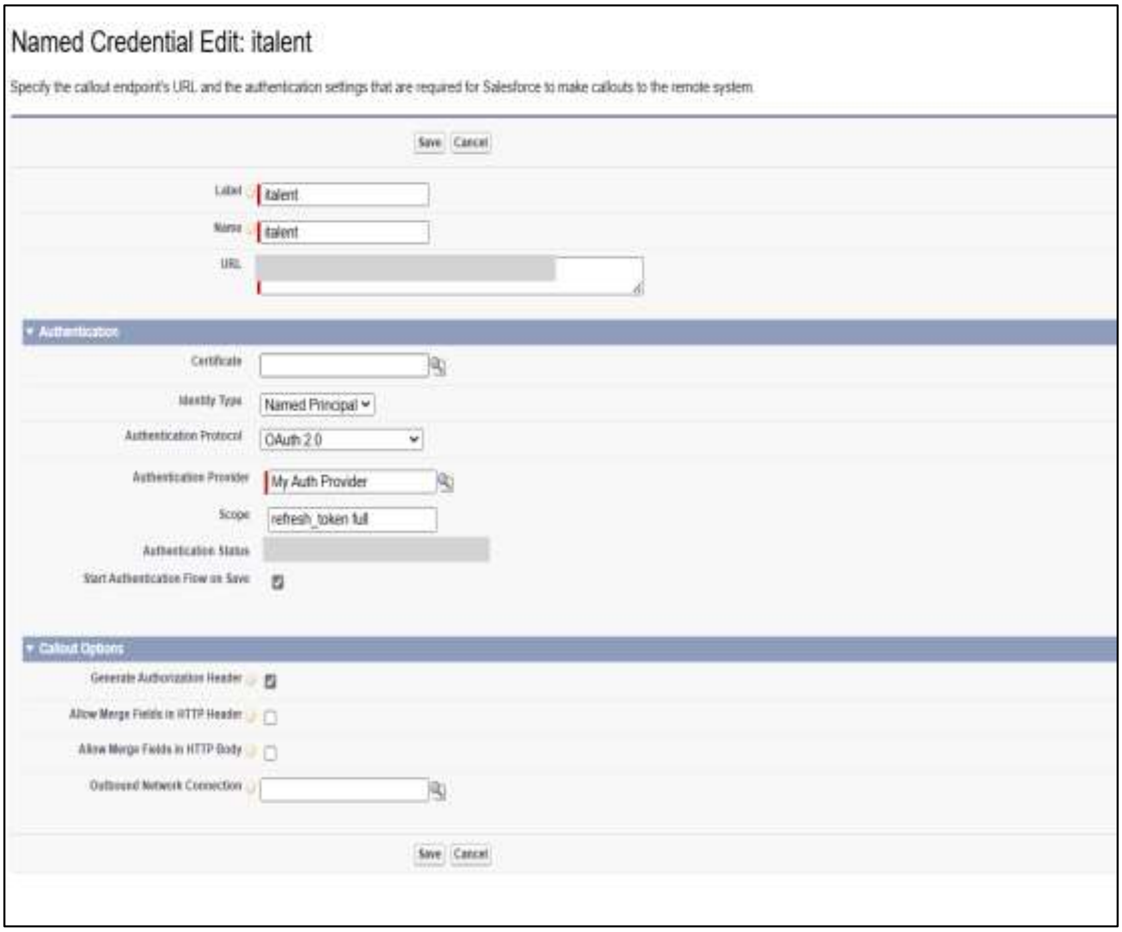
e) Select the “Auth Provider” created in the previous step

f) In scope, enter the value as “refresh_token full”

g) Check “Start Authentication Flow on Save” (this is important)

h) Save

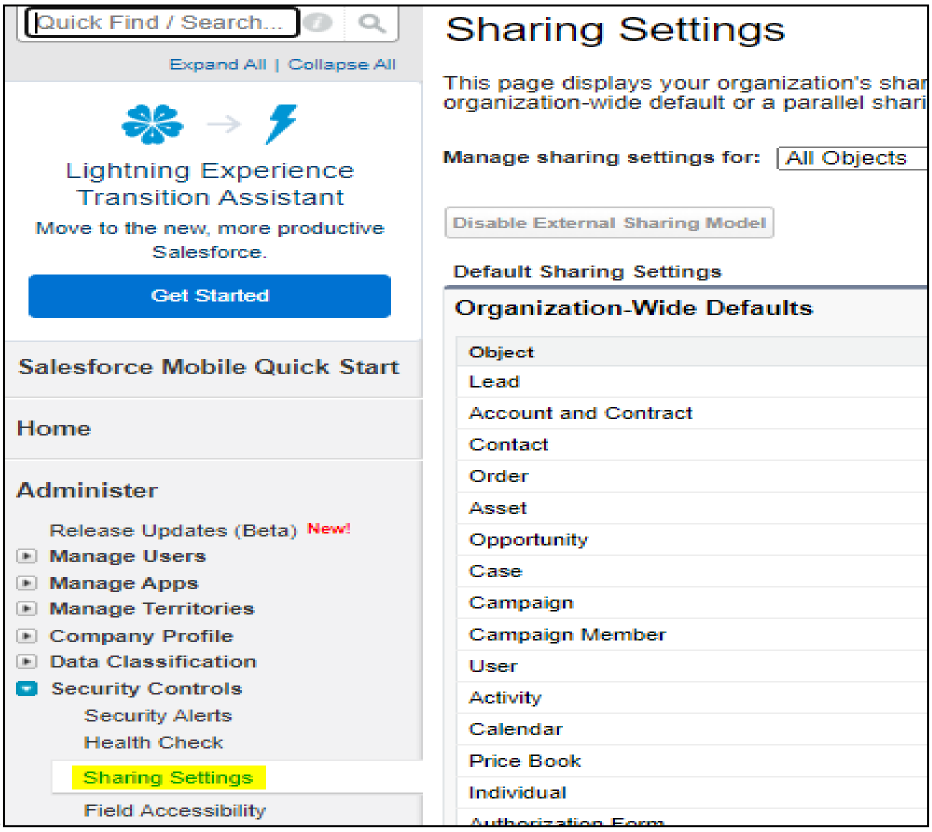
i) After clicking on “Save” a new page will open to authenticate Salesforce Org using OAuth2 connected App. Log in using the credentials of the Salesforce instance that you want to connect to. If authentication is a success, you can see



a message like “Authenticated as “.

Add Sharing Settings

1) Navigate to “Setup | Administer | Security Control | Sharing



Settings

NOTE: Every time we configure sharing settings below for any object and click on save a pop up appears saying an email will be sent upon completion of these configurations click on “OK”

2) Create Sharing Rule for SLC Translated KB Detail

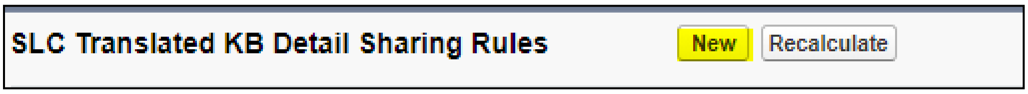
Click New, give label, select Rule Type Guest user access, based on criteria, select field Document Id and share with Lingotek Site Guest User, save it.

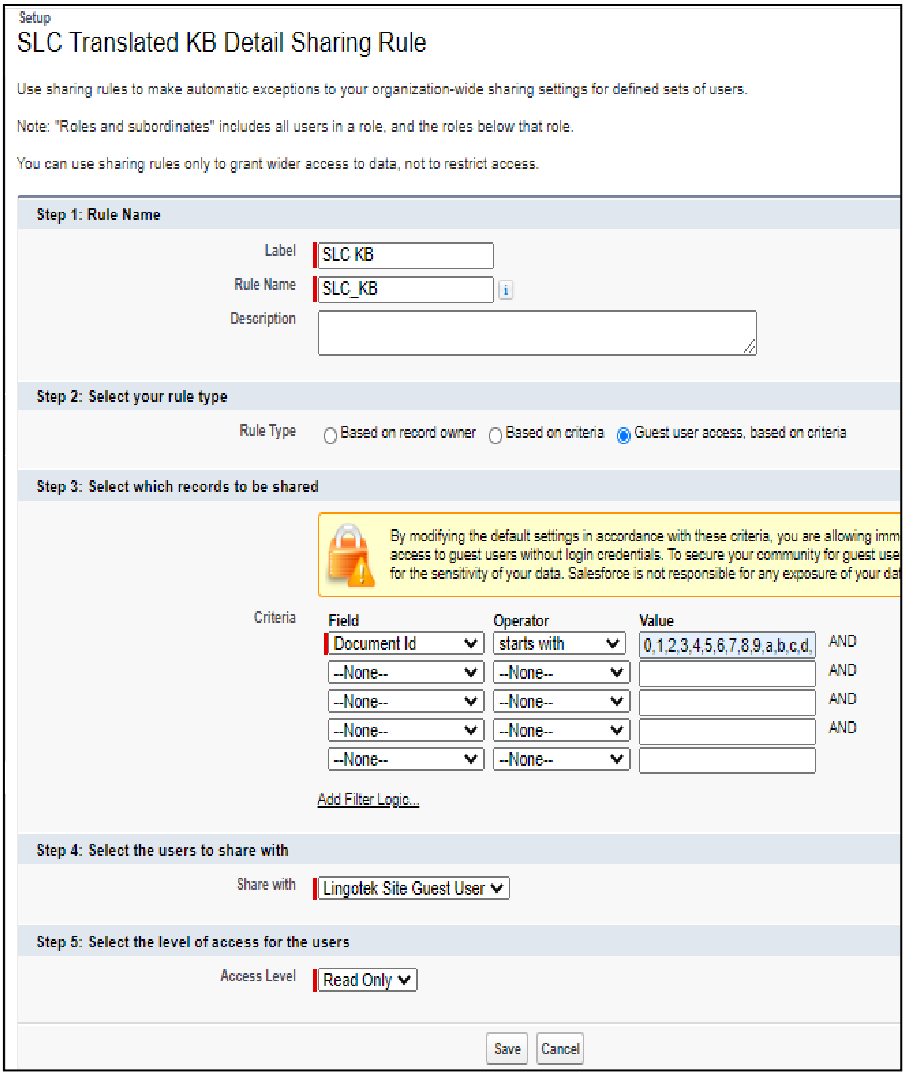
Note:

a) For Field **Document Id** give value **Starts With 0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
b) Select Rule Type > **Guest User access, based on criteria**
c) Select the users to share with > **Lingotek Site Guest User**
d) Select Access Level > **Read Only**

→To get the site guest username

Navigate to Site | Select Site | Public Access Settings |Assigned Users





3) Create Sharing Rules for SLC Translated Case Detail

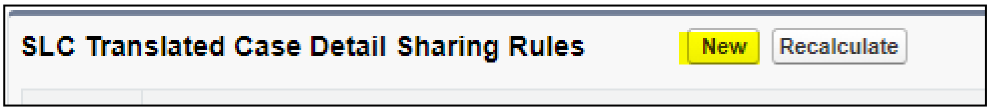
Click New, give label, select Rule Type Guest user access, based oncriteria, select field Document Id and share with Lingotek Site Guest User, save it.

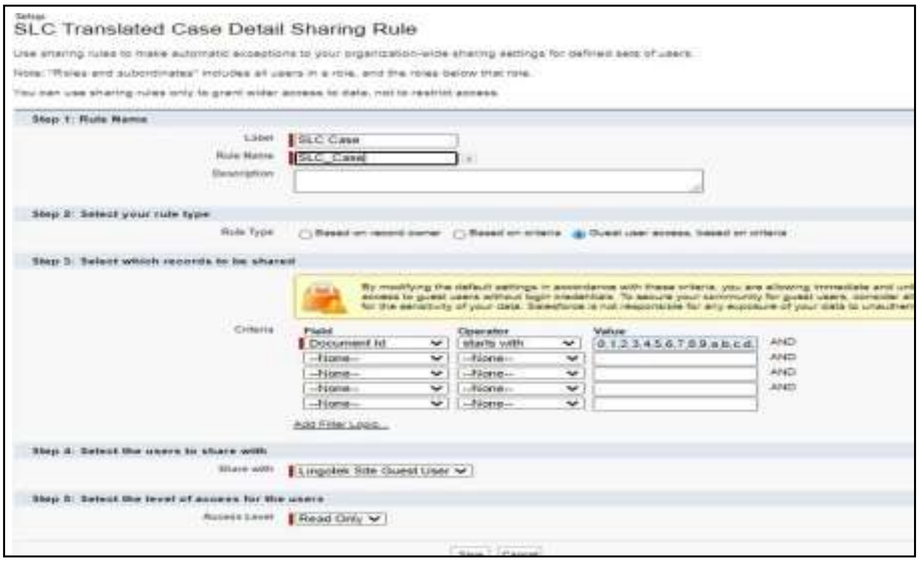
Note:

a) For Field **Document Id** give value **Starts With 0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
b) Select Rule Type > **Guest User access, based on criteria**
c) Select the users to share with > **Lingotek Site Guest User**
d) Select Access Level > **Read Only**

→To get the site guest username

Navigate to Site | Select Site | Public Access Settings |Assigned Users





4) Create Sharing Rule for SLC Translated Lead Detail

Click New, give label, select Rule Type Guest user access, based oncriteria, select field Document Id and share with Lingotek Site Guest User, save it.

Note:

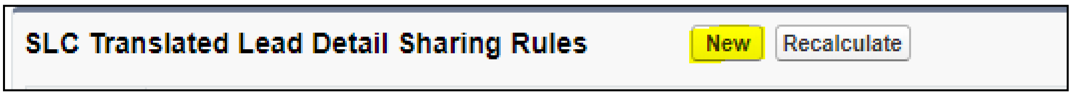
a) For Field **Document Id** give value **Starts With 0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
b) Select Rule Type > **Guest User access, based on criteria**

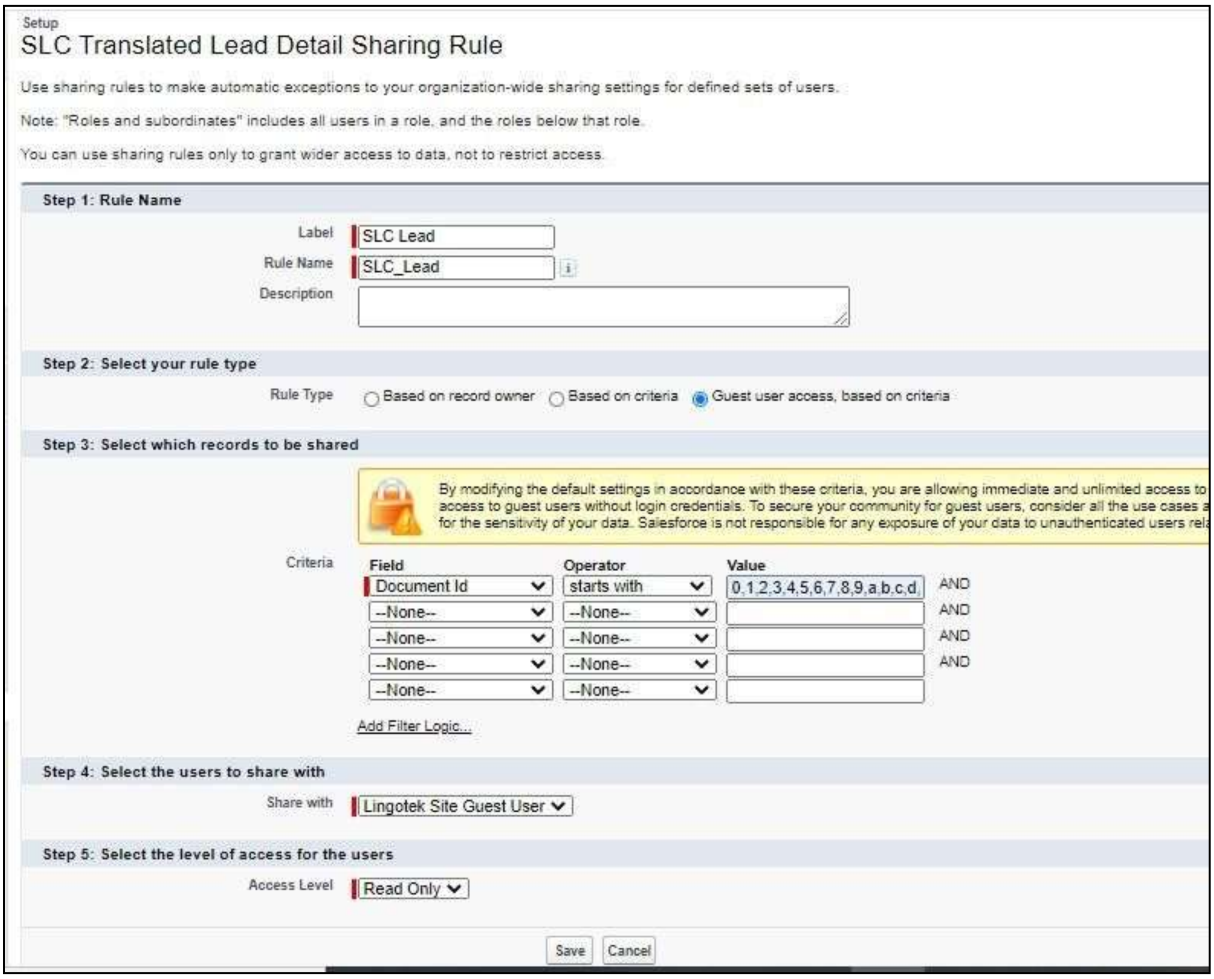
c) Select the users to share with > **Lingotek Site Guest User**

d) Select Access Level > **Read Only**

→To get the site guest username

Navigate to Site | Select Site | Public Access Settings |Assigned Users





5) Create Sharing Rule for SLC Translated Opportunity Detail

Click New, give label, select Rule Type Guest user access, based oncriteria, select field Document Id and share with Lingotek Site Guest User, save it.

Note:

a) For Field **Document Id** give value **Starts With 0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**

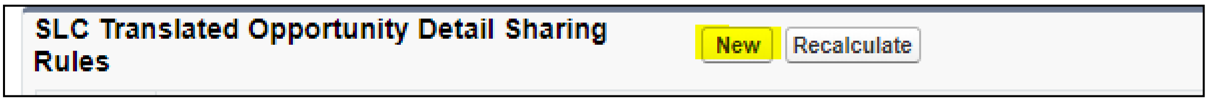
b) Select Rule Type > **Guest User access, based on criteria**

c) Select the users to share with > **Lingotek Site Guest User**

d) Select Access Level > **Read Only**

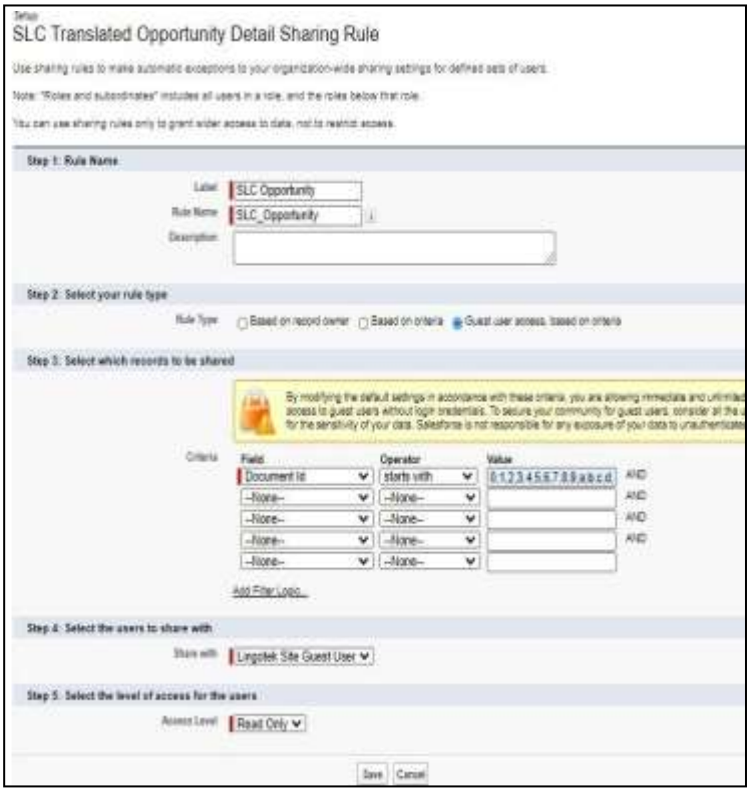
→To get the site guest username

Navigate to Site | Select Site | Public Access Settings |Assigned Users



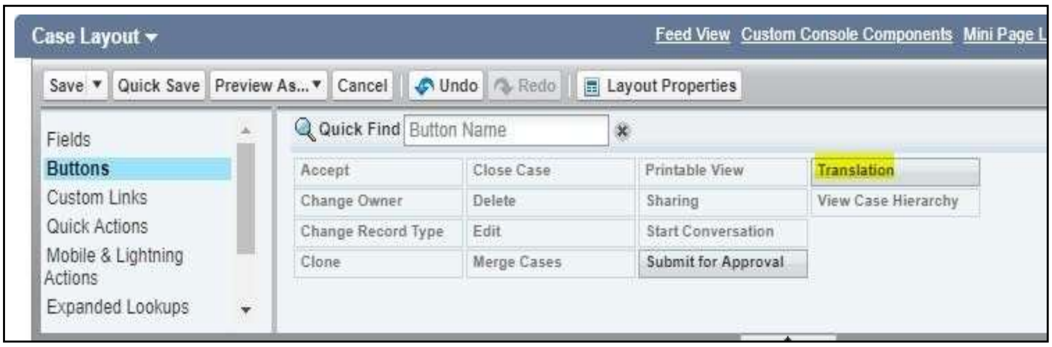
Add Translation Button and Translation Field for Case, Lead and Opportunity

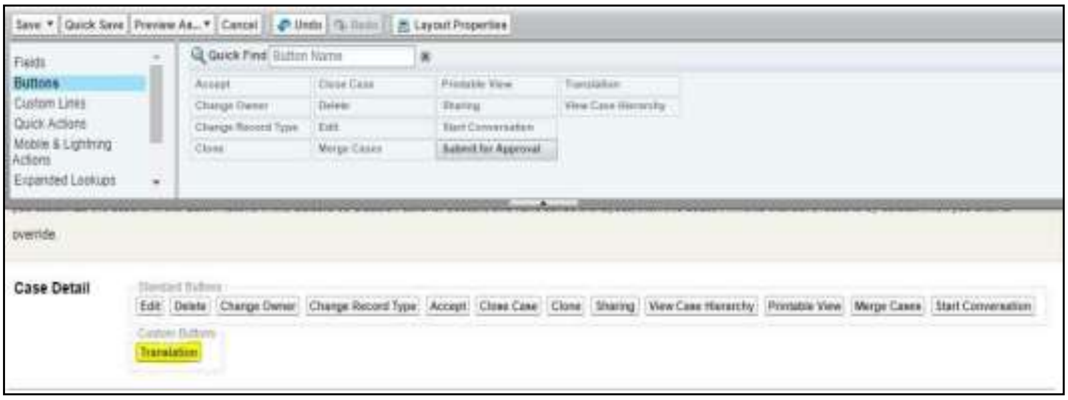
1. Add **Translation Button** and **Translation Field** for **Case**



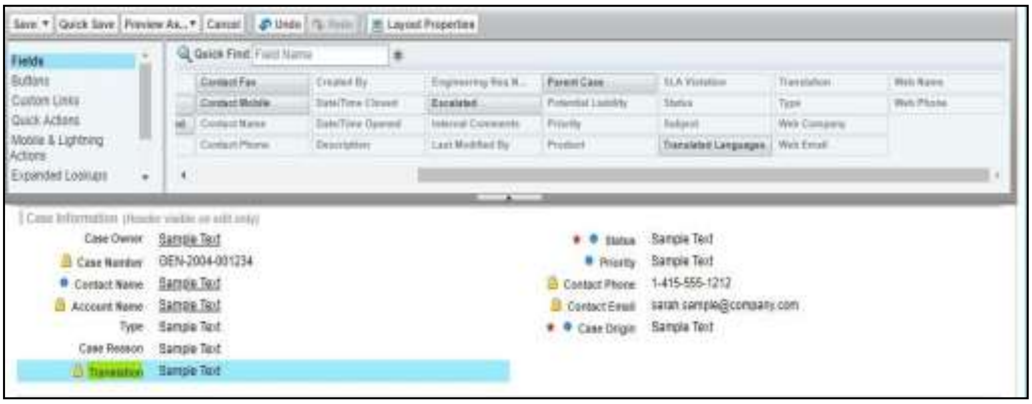
Navigate to Setup | Build | Customize |Cases | Page Layouts

- Edit **Case Layout**. From **Buttons** select **Translation** button and drag and drop within **Case Detail** Custom Buttons



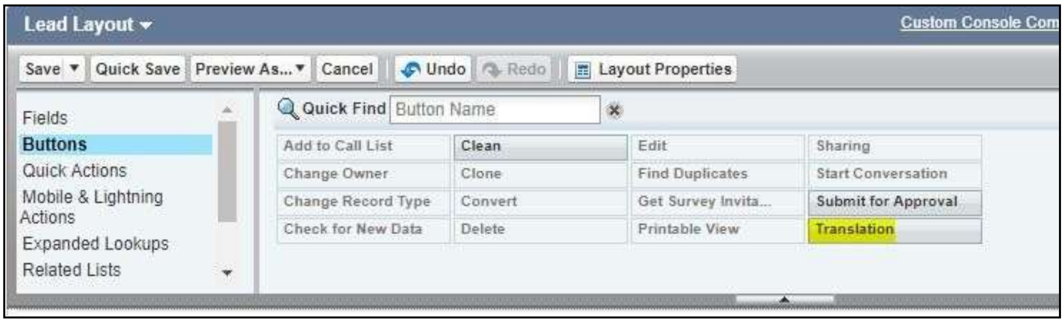


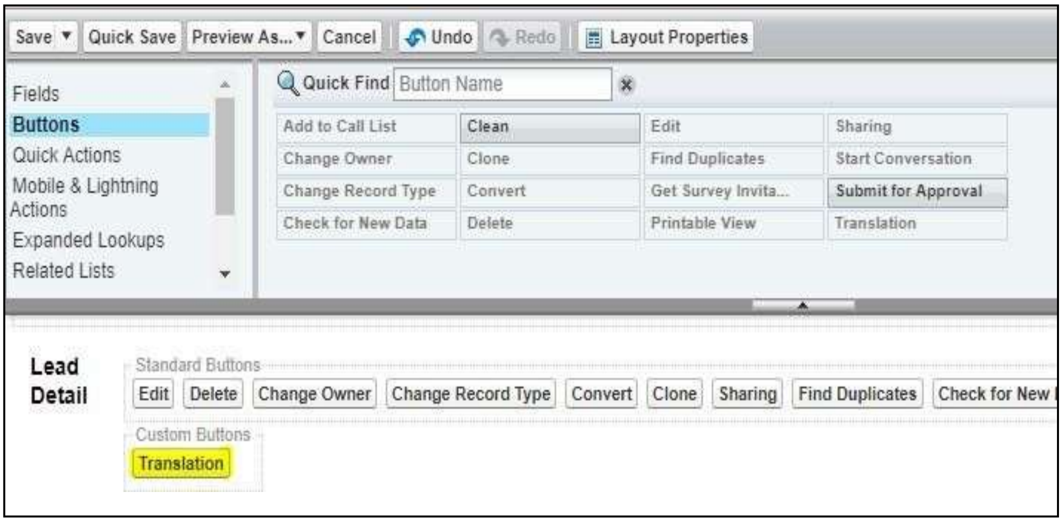
- Now from **Fields,** select **Translation** field and drag and drop it within Case Information



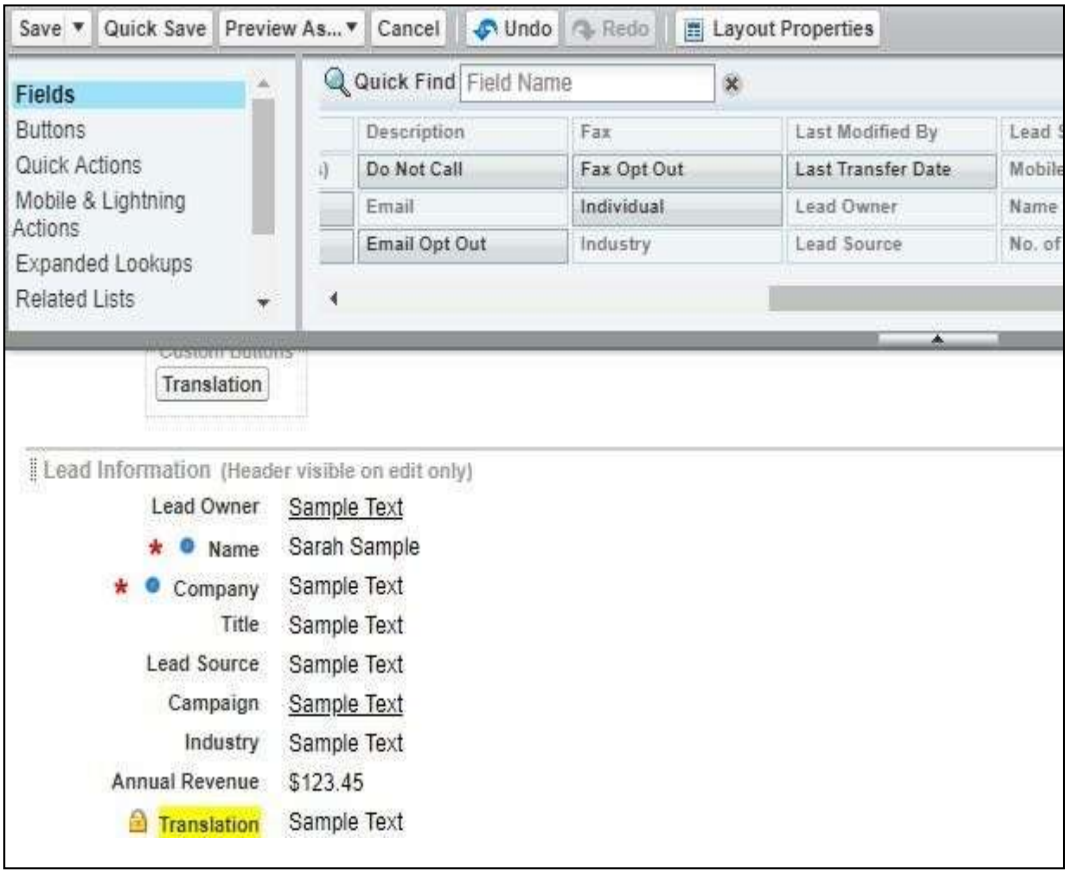
2. Add **Translation Button** and **Translation Field** for **Lead**
   - Navigate to Setup | Build | Customize |Leads | Page Layouts

   - Edit **Lead Layout**. From **Buttons** select **Translation** button and drag and drop within **Lead Detail** Custom Buttons





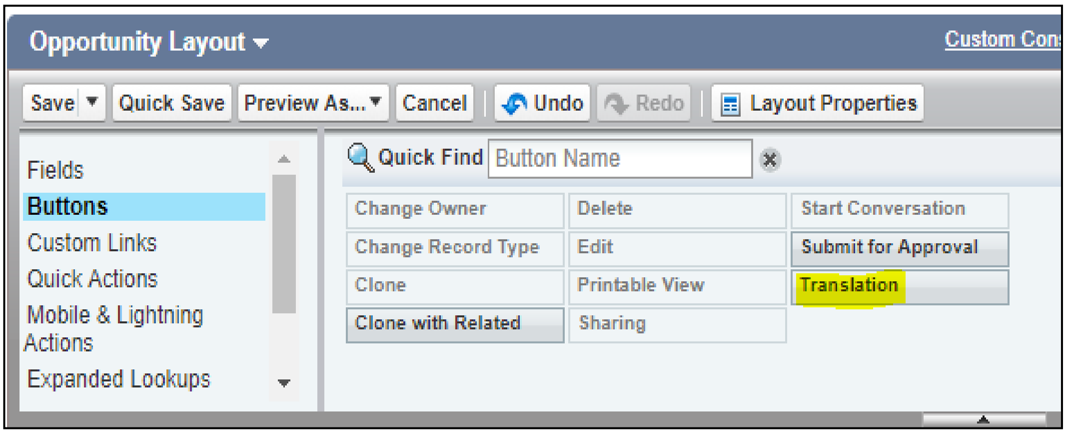
- Now from **Fields,** select **Translation** field and drag and drop it within Lead Information

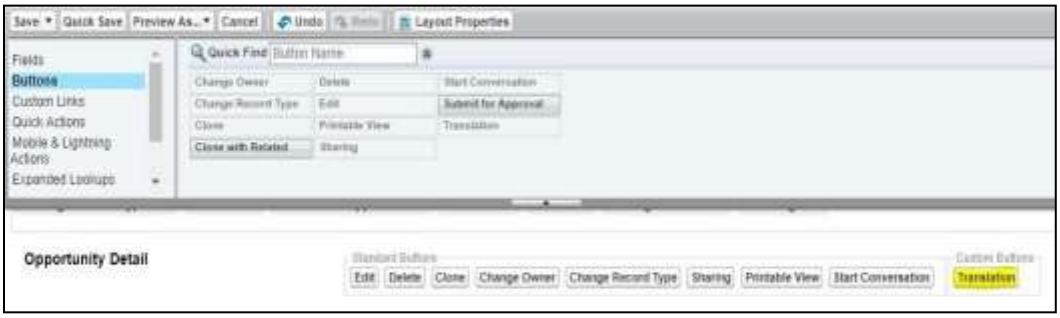


3. Add **Translation Button** and **Translation Field** for **Opportunity**

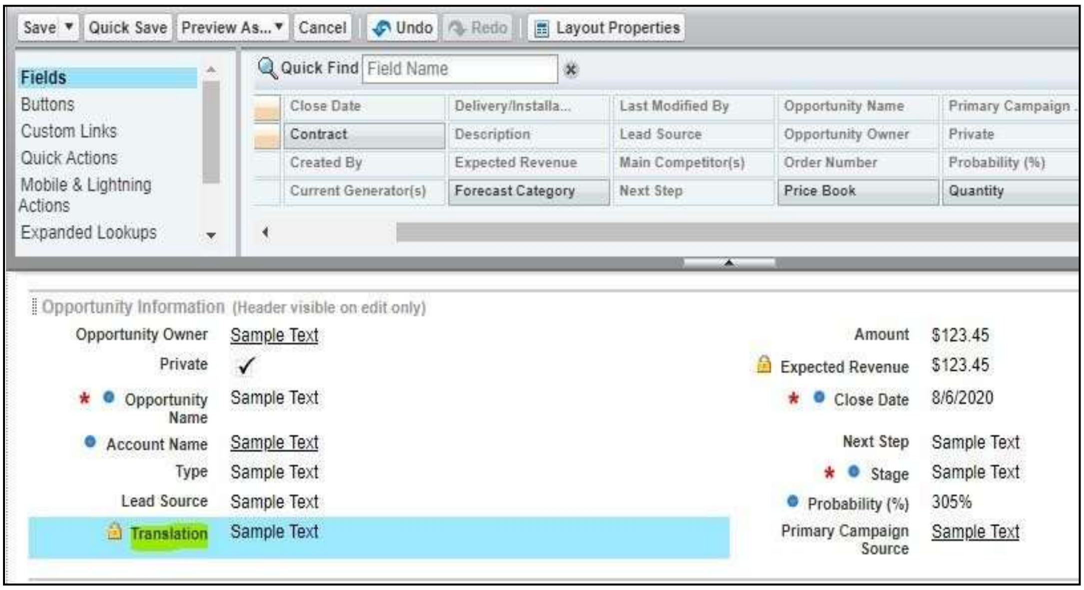
- Navigate to Setup | Build | Customize |Opportunities | Page Layouts

- Edit **Opportunity Layout**. From **Buttons** select **Translation** button and drag and drop within **Opportunity Detail** Custom Buttons





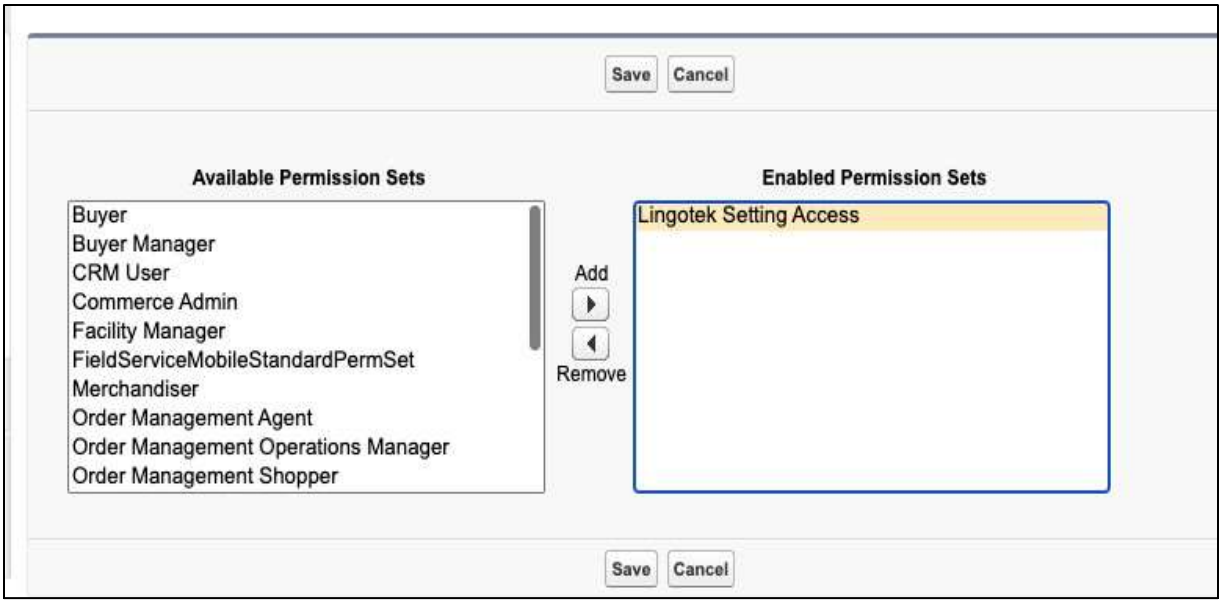
- Now from **Fields,** select **Translation** field and drag and drop it within Opportunity Information



User access for SLC Language and SLC Setting Object

Note: This permission set is useful when the package is only installed for salesforce administrators, and you want to give users access to the SLC Language and SLC Lingotek Setting Object.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets and click **Add Lingotek Setting Access**. To remove a permission set assignment, select it under Enabled Permission Sets and click **Remove**.


Save
Cancel
Available Permission Sets
Buyer
Buyer Manager
CRM User
Commerce Admin
Facility Manager
FieldServiceMobileStandardPermSet
Merchandiser
Order Management Agent
Order Management Operations Manager
Order Management Shopper
Add
Remove
Enabled Permission Sets
Lingotek Setting Access
Save
Cancel

5. Click **Save**.