

DocFynd <> Dropbox - Integration

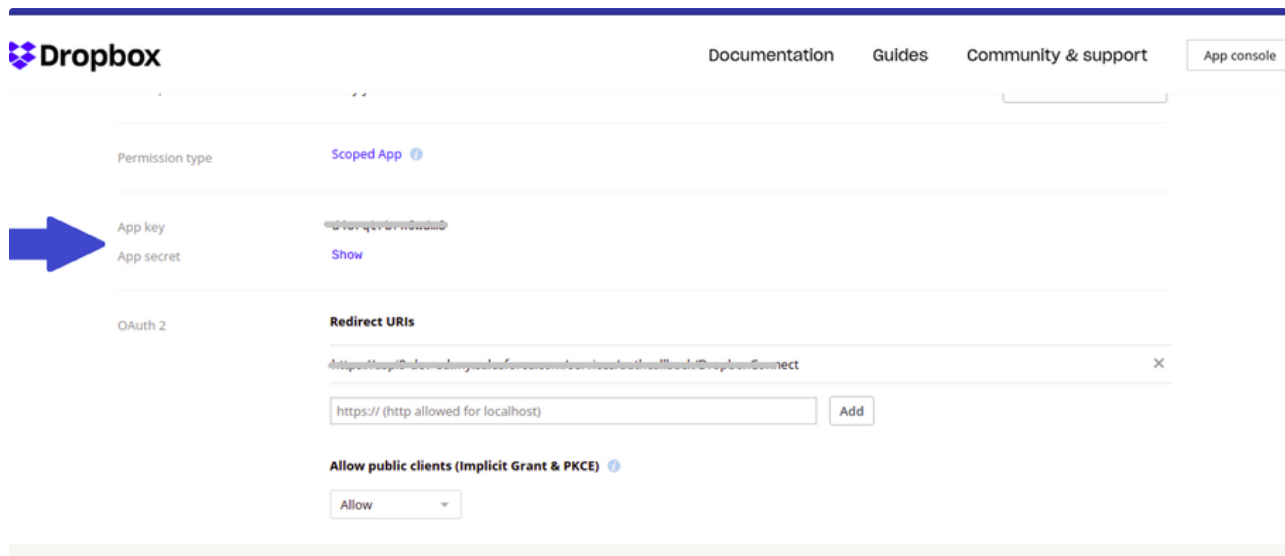
How to integrate DocFynd with Dropbox?

This article explains the steps to integrate DocFynd with Dropbox. This enables accessing/uploading documents to Dropbox from DocFynd.

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

Create an app in Dropbox

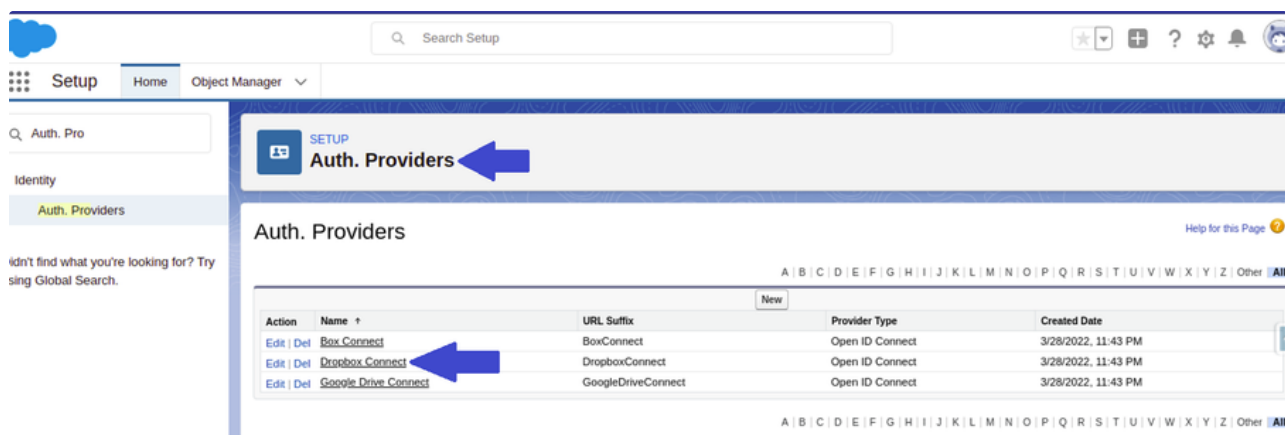
1. Create an app in the Dropbox developer console. (for e.g. "DocFynd Integration")
2. Copy and save the "App Key" and "App Secret".



The screenshot shows the Dropbox Developer Console for a new app named "DocFynd Integration". A blue arrow points to the "App key" field, which contains a long alphanumeric string. Below it, the "App secret" field is visible with a "Show" button. The "Permission type" is set to "Scoped App". Under "OAuth 2", the "Redirect URIs" section shows a single URI: "https://localhost:3000/docfynd-integration". The "Allow public clients (Implicit Grant & PKCE)" option is set to "Allow".

Connect Dropbox with Salesforce

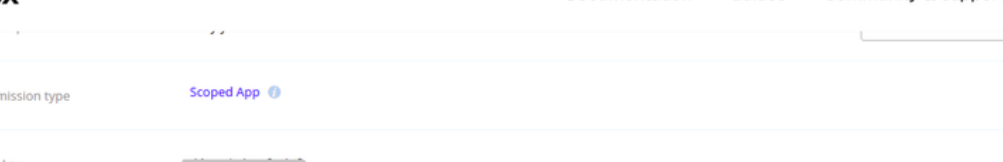
1. From your Salesforce org, go to *Setup* and search "Auth. Providers".
2. Click "Edit" against the item named "Dropbox Connect".



The screenshot shows the Salesforce Setup page. A blue arrow points to the "Auth. Providers" link in the left sidebar. Another blue arrow points to the "Dropbox Connect" entry in the table below. The table lists three providers: Box Connect, Dropbox Connect, and Google Drive Connect. The "Dropbox Connect" entry is highlighted.

Action	Name	URL Suffix	Provider Type	Created Date
Edit Del	Box Connect	BoxConnect	Open ID Connect	3/28/2022, 11:43 PM
Edit Del	Dropbox Connect	DropboxConnect	Open ID Connect	3/28/2022, 11:43 PM
Edit Del	Google Drive Connect	GoogleDriveConnect	Open ID Connect	3/28/2022, 11:43 PM

3. Enter the "Consumer Key" with the value of "App Key" as saved earlier from the Dropbox app.
4. Enter the "Consumer Value" with the value of "App Secret" as saved earlier from the Dropbox app and click "Save".

[illegible]

The screenshot shows the 'OAuth 2' tab selected in the Dropbox developer console. The 'Redirect URIs' section contains one entry: 'https:// (http allowed for localhost)' with an 'Add' button. The 'Allow public clients (Implicit Grant & PKCE)' section is set to 'Allow'.

In the next steps, we will authenticate “Dropbox Folders”, *Dropbox File Metadata* and “Dropbox Upload”.

Dropbox Folders Authentication

1. In Salesforce setup, search “*Named Credentials*” and click “*Edit*” under the item named “*Dropbox Folders*”.

Setup Home Object Manager

Q Named

Security

Named Credentials

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

Named Credentials

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

View: All Create New View

A B C D E F

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

2. Ensure the field "Start Authentication Flow on Save" is ticked and click "Save".
3. You will be redirected to the Dropbox authorization page.
4. Click "Grant access to Dropbox" to connect your Salesforce org with Dropbox.
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".

Setup Named Credentials

Edit

Label: Dropbox Folders

Name: DropboxFolders

URL: https://api.dropboxapi.com/2/sharing/list_folders

Authentication

Certificate

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Dropbox Connect

Scope: sharing.read files.metadata.read files.metadata.write files.content.read files.content.write

Administration Authentication Status: **Authenticated**

The authentication provider didn't provide a refresh token. If the access token expires, your org won't be able to access this named credential.

Callout Options

Generate Authorization Header: ☒

✓ With this, authentication with Dropbox is successful for **Dropbox Folders**

Dropbox File Metadata Authentication

1. In Salesforce setup, search "Named Credentials" and click "Edit" under the item named "Dropbox File Metadata".

Setup Home Object Manager

Q Named

Security

Named Credentials

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

Named Credentials

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

View: All Create New View

A B C D E F

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

2. Ensure the field "Start Authentication Flow on Save" is ticked and click "Save".
3. This will re-direct to the authorization page of Dropbox. Click "Grant access to Dropbox" to connect your Salesforce org with Dropbox.
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".



✓ With this, authentication with Dropbox is successful for **Dropbox File Metadata**.

Dropbox Upload Authentication

1. In Salesforce setup, search "Named Credentials" and click "Edit" under the item named "Dropbox Upload".

Setup Home Object Manager

Q Named

Security

Named Credentials

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

Named Credentials

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

View: All Create New View

A B C D E F

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".
3. This will re-direct to the authorization page of Dropbox. Click "Grant access to Dropbox" to connect your Salesforce org with Dropbox.
4. Click on "Grant access to Dropbox" to connect your org with Dropbox.
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".

Setup Named Credentials

Edit

Label: Dropbox Upload

Name: DropboxUpload

URL: https://content.dropboxapi.com/2/files/upload

Authentication

Certificate

Identity Type: Per User

Authentication Protocol: OAuth 2.0

Authentication Provider: Dropbox Connect

Scope: files.content.write files.metadata.read files.metadata.write

Administration Authentication Status: **Authenticated**

The authentication provider didn't provide a refresh token. If the access token expires, your org won't be able to access this named credential.

Callout Options

Generate Authorization Header: ☒

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

User Authentication settings

Next step is to authenticate the Salesforce user(s) to access Dropbox. This needs to be done for the options named "Dropbox Folders", "Dropbox File Metadata" and "Dropbox Upload".

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

Authentication settings for Dropbox Folders

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

Authentication Settings for External Systems

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

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K

Action	Name	External System Definition	Username	Authentication Protocol
Edit Del	Google Drive Folders	Named Credential		OAuth 2.0
Edit Del	Google Drive Upload	Named Credential		OAuth 2.0

New

User User
site-data-8262-dev-ed.cs73.m
[Settings](#) [Log Out](#)

DISPLAY DENSITY

✓ Comfy

Compact

OPTIONS

[Switch to Salesforce Classic](#) [Add Username](#)

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

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 Dropbox folders

User User User

Authentication Protocol OAuth 2.0

Authentication Provider Box Connect

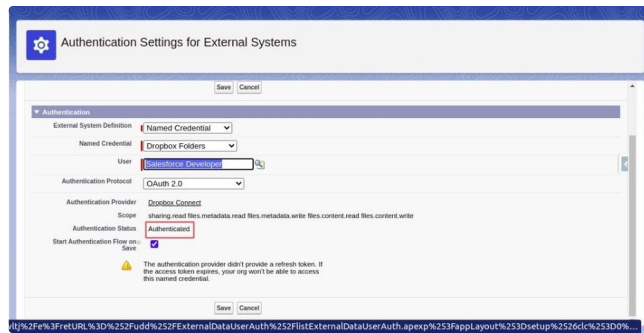
Scope

Authentication Status Pending

Start Authentication Flow on Save ☒

[Save](#) [Cancel](#)

5. Click "Save".
6. You will be re-directed to the authorization page of Dropbox.
7. Click "Grant access to Dropbox" to connect your Salesforce org with Dropbox.
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".

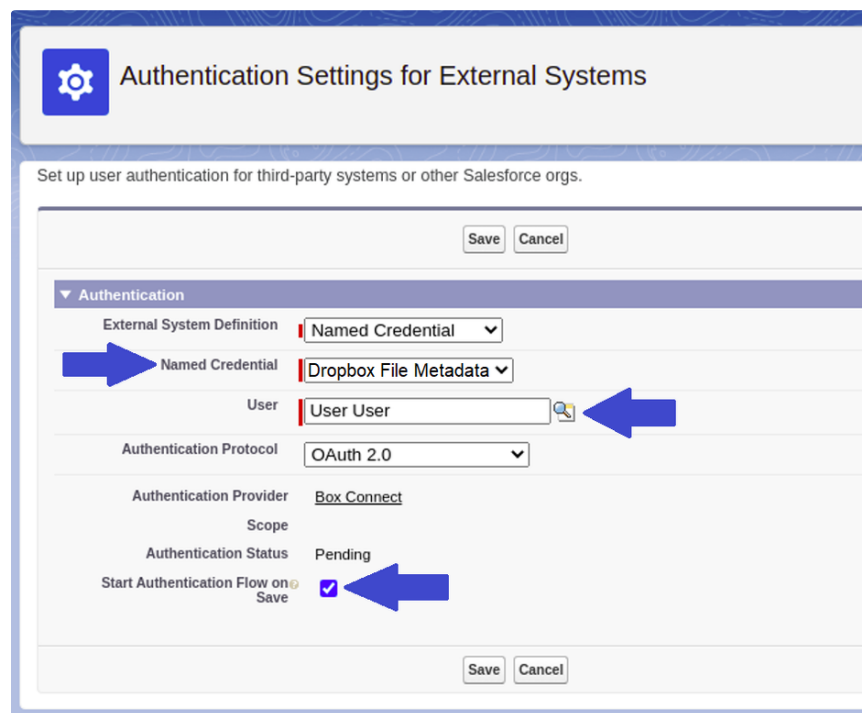


✓ The user(s) are successfully authenticated with Dropbox for “Dropbox Folders”.

Authentication settings for Dropbox File Metadata

Next step is to set up the authentication of users for “Dropbox File Metadata”

1. Under “Authentication Settings for External Systems” setting, select “Dropbox File Metadata” option.



2. Next, select the user(s) to authenticate for Dropbox file metadata (ideally, any user who needs to access/upload files from Dropbox from DocFynd will need this). Ensure that you select all users who require the feature of uploading and accessing documents from Dropbox.
3. Click “Save”. You will be re-directed to the authorization page of Dropbox.
4. Click “Grant access to Dropbox” to connect your Salesforce org with Dropbox.
5. After granting access, you will be re-directed to Salesforce > Authentication Settings for External Systems setting.
6. Now, the “Authentication Status” should be changed to “Authenticated”.

✓ User(s) successfully authenticated with Dropbox for “Dropbox File Metadata”.

Authentication settings for Dropbox Upload

Next step is to set up the authentication of users for “Dropbox Upload”.

1. Under “Authentication Settings for External Systems” setting, select “Dropbox Upload” option.

The screenshot shows the 'Authentication Settings for External Systems' page. The title bar includes a gear icon and the text 'Authentication Settings for External Systems'. Below the title bar, a subtitle reads 'Set up user authentication for third-party systems or other Salesforce orgs.' The main configuration area has a 'Save' and 'Cancel' button at the top right. A section titled 'Authentication' contains the following fields:

- External System Definition:** A dropdown menu set to 'Named Credential'.
- Named Credential:** A dropdown menu set to 'Dropbox Upload'.
- User:** A text field containing 'User User' with a selection icon to its right.
- Authentication Protocol:** A dropdown menu set to 'OAuth 2.0'.
- Authentication Provider:** A text field containing 'Box Connect'.
- Scope:** A text field.
- Authentication Status:** A text field containing 'Pending'.
- Start Authentication Flow on Save:** A checkbox that is checked.

At the bottom of the configuration area, there are 'Save' and 'Cancel' buttons. Blue arrows in the image point to the 'Named Credential' dropdown, the 'User' selection icon, and the 'Start Authentication Flow on Save' checkbox.

2. Next, select the user(s) to authenticate for Dropbox upload. Ensure that you select all users who require the feature of uploading and accessing documents from Dropbox.
3. Click “Save”. You will be re-directed to the authorization page of Dropbox.
4. Click “Grant access to Dropbox” to connect your Salesforce org with Dropbox.
5. After granting access, you will be re-directed to Salesforce > *Authentication Settings for External Systems* setting.
6. Now, the “Authentication Status” should be changed to “Authenticated”.

✔ User(s) successfully authenticated with Dropbox for “Dropbox Upload”.

✔ This completes the setup of Dropbox integration with DocFynd.