



## Metadata Accelerator Installation Guide

1. Install App from AppExchange. An installation key is required to complete the installation process. Please use the key provided below:

**CentricMeta@nNArShjDKboSS**

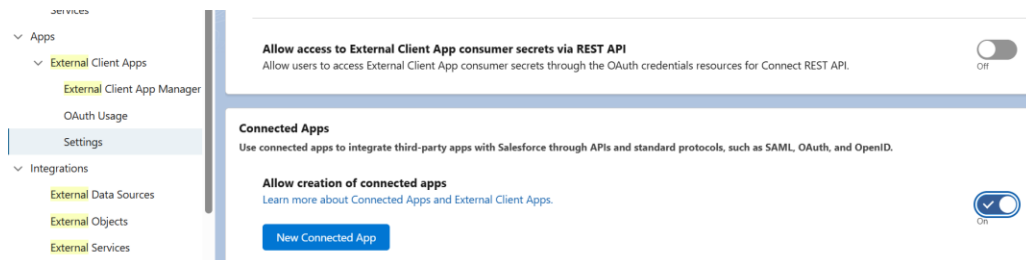
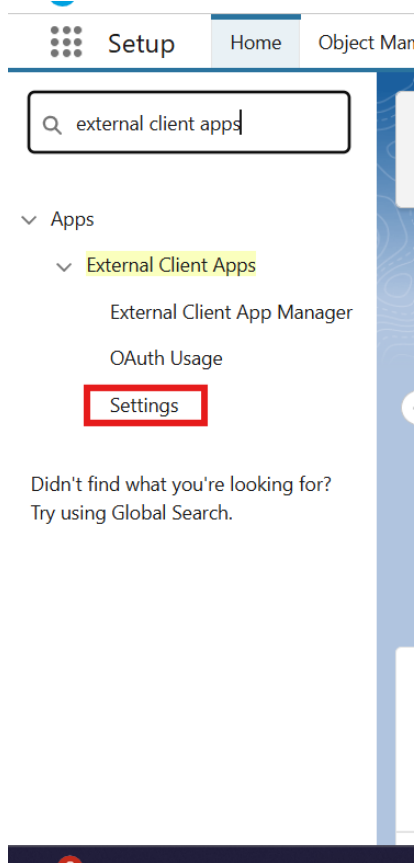
2. Create a Connected App for Client Credential Flow.

There are two options for creating Connected App from two different navigations:

**Note:** *Option 1 is applicable to all environments — Production, Sandbox, and Scratch Orgs. Option 2, however, is not supported in Scratch Orgs but is valid for Production and Sandbox environments.*

### **Option 1: Create through 'New Connected App' button**

Quick Search → External Client Apps → go to 'Settings' underneath → Enable Connected App Creation → click on 'New Connected App' button



It will redirect you to the next screen where you can fill in details as shown in further steps.



 **App Manager**

**New Connected App**

**Basic Information**

Connected App Name

Centric Meta Explorer

API Name

Centric\_Meta\_Explorer

Contact Email

@centricconsulting

Contact Phone

Logo Image URL 

Upload logo image or Choose one of our sample logos

Icon URL 

Choose one of our sample logos

Info URL

Description 

 **API (Enable OAuth Settings)**

- a. Check 'Enable OAuth Settings'



API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Access Analytics REST API resources (wave\_api)
- Access Connect REST API resources (chatter\_api)
- Access Einstein GPT services (einstein\_gpt\_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)
- Access Visualforce applications (visualforce)

Add

Remove

Selected OAuth Scopes

- Manage user data via APIs (api)

Require Proof Key for Code Exchange (PKCE) ☐

Extension for Supported Authorization Flows

Require Secret for Web Server Flow ☐

Require Secret for Refresh Token Flow ☐

Enable Client Credentials Flow ☒

Enable Authorization Code and Credentials Flow ☐

Provide necessary details like name, email address, callback URL

- Email doesn't require a corresponding user to exist in Salesforce; it could be any relevant person's email. However, we suggest you enter your Salesforce administrator email address.
- This flow doesn't use callback URL. However, we suggest you enter below value  
**Production:** <https://login.salesforce.com/oauth2/callback>

**Sandbox:** <https://test.salesforce.com/oauth2/callback>

b. Select the scope below:

i. Manage user data via APIs (api)

c. Check 'Enable Client Credentials Flow' → dialog box opens → click 'OK'  
And then click 'Save'.

d. Click on 'Manage' button



Connected App Name  
**Centric Meta Explorer**

[Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#) [Migrate to External Client App](#)



|                    |                                  |
|--------------------|----------------------------------|
| Version            | 1.0                              |
| API Name           | Centric_Meta_Explorer            |
| Created Date       | 15/07/2025, 11:23 pm             |
| By                 | [REDACTED]                       |
| Contact Email      | [REDACTED]@centricconsulting.com |
| Contact Phone      |                                  |
| Last Modified Date | 15/07/2025, 11:23 pm             |
| By                 | [REDACTED]                       |
| Description        |                                  |
| Info URL           |                                  |

This opens below screen → Click on 'Edit Policies':

 SETUP

Connected App  
**Centric Meta Explorer**

**Connected App Detail** [Edit Policies](#)



Version 1  
Description

---

**System Info**

|                  |            |                    |                     |
|------------------|------------|--------------------|---------------------|
| Installed By     | [REDACTED] | Installed Date     | 01/05/2025, 1:41 am |
| Last Modified By | [REDACTED] | Last Modified Date | 01/05/2025, 1:41 am |

---

**Basic Information**

|          |  |                  |  |
|----------|--|------------------|--|
| Info URL |  | Start URL        |  |
|          |  | Mobile Start URL |  |

---

**OAuth Policies**

|                          |                                  |                       |                                      |
|--------------------------|----------------------------------|-----------------------|--------------------------------------|
| Permitted Users          | All users may self-authorize     | IP Relaxation         | Enforce IP restrictions              |
| Usage                    | <a href="#">View OAuth Usage</a> | Refresh Token Policy: | Refresh token is valid until revoked |
| Single Logout            | Single Logout disabled           |                       |                                      |
| Application Permissions: | Perform requests at any time     |                       |                                      |

→ Go to 'Client Credentials Flow' section, set 'Run as' - choose admin user with full access to all objects, fields and other components → Click 'Save'



**OAuth Policies**

Permitted Users **Admin approved users are pre-authorized** ▼

Enable Single Logout ☐ ⓘ

**Session Policies**

Timeout Value **--None--** ▼

**Custom Connected App Handler**

Apex Plugin Class  ⓘ

Run As  ⓘ

**User Provisioning Settings**

☐ Enable User Provisioning ⓘ

**Client Credentials Flow**

Run As  ⓘ

**Save Cancel**

- Go back to 'App Manager' and 'View' your just created connected app → Click on 'Manage Consumer Details' button

Connected App Name  
**Centric Meta Explorer**

[Back to List: Custom Apps](#)

**Edit Delete Manage Migrate to External Client App**



|                    |                                  |
|--------------------|----------------------------------|
| Version            | 1.0                              |
| API Name           | Centric_Meta_Explorer            |
| Created Date       | 15/07/2025, 11:23 pm             |
| By:                | [REDACTED]                       |
| Contact Email      | [REDACTED]@centricconsulting.com |
| Contact Phone      |                                  |
| Last Modified Date | 13/08/2025, 12:42 pm             |
| By:                | [REDACTED]                       |
| Description        |                                  |
| Info URL           |                                  |



▼ API (Enable OAuth Settings)

|                                                                                        |                                              |
|----------------------------------------------------------------------------------------|----------------------------------------------|
| Consumer Key and Secret                                                                | <a href="#">Manage Consumer Details</a>      |
| Selected OAuth Scopes                                                                  | Manage user data via APIs (api)              |
| Callback URL                                                                           | https://login.salesforce.com/oauth2/callback |
| Enable for Device Flow                                                                 | <input type="checkbox"/>                     |
| Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows | <input type="checkbox"/>                     |
| Require Secret for Web Server Flow                                                     | <input type="checkbox"/>                     |
| Require Secret for Refresh Token Flow                                                  | <input type="checkbox"/>                     |
| Enable Client Credentials Flow                                                         | <input checked="" type="checkbox"/>          |
| Enable Authorization Code and Credentials Flow                                         | <input type="checkbox"/>                     |
| Enable Token Exchange Flow                                                             | <input type="checkbox"/>                     |
| Enable Refresh Token Rotation                                                          | <input type="checkbox"/>                     |
| Issue JSON Web Token (JWT)-based access tokens for named users                         | <input type="checkbox"/>                     |

Will ask to verify your identity:

Verify Your Identity

You're trying to **access a connected app**. To make sure your Salesforce account is secure, we have to verify your identity.

Enter the verification code we emailed to [REDACTED].com.

Verification Code

[Back](#) [Verify](#)

[Resend Code](#)

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4. Copy Connected App Credentials: Consumer Key and Consumer Secret as needed to configure in later steps below.



Connected App Name  
**Centric Meta Explorer**

[← Back to Manage Connected Apps](#)

**Consumer Details**

Consumer Key   
[Copy](#)

Consumer Secret   
[Copy](#)

**Staged Consumer Details**

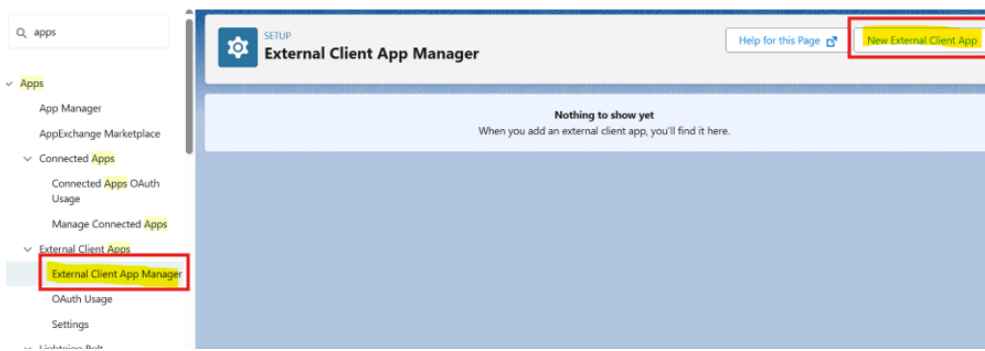
Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

|                        |               |
|------------------------|---------------|
| Staged Consumer Key    | Not generated |
| Staged Consumer Secret | Not generated |

[Generate](#) [Apply](#) [Cancel](#)

## Option 2: Create through 'New External Client App' button

Quick Search → External Client App Manager → click on 'New External Client App' button → Fill in the details as shown in screenshots below and 'Save'





Configure basic settings for the external client app and plugins.

✓ Basic Information

|                                                                               |                                                                                     |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| * External Client App Name<br>Centric Metadata Explorer                       | * API Name<br>Centric_Metadata_Explorer                                             |
| * Contact Email<br>[REDACTED]@centricconsulting.com                           | * Distribution State<br>Local                                                       |
| Contact Phone<br>Enter a phone number...                                      | Info URL<br>Enter a URL...                                                          |
| Icon URL<br>Enter a URL...<br><a href="#">Choose one of our sample logos.</a> | Logo Image URL<br>Enter a URL...<br><a href="#">Choose one of our sample logos.</a> |
| Description<br><div></div>                                                    |                                                                                     |

✓ API (Enable OAuth Settings)

☒ Enable OAuth

**App Settings**

\* Callback URL  

https://login.salesforce.com/oauth2/callback

\* OAuth Scopes

Available OAuth Scopes

Access the identity URL service (id, profile, email, address, phone)

Manage user data via Web browsers (web)

Full access (full)

Access Connect REST API resources (chatter\_api)

Access Visualforce applications (visualforce)

Perform requests at any time (refresh\_token, offline\_access)

Selected OAuth Scopes

Manage user data via APIs (api)



#### Flow Enablement

- ☒ Enable Client Credentials Flow
- ☐ Enable Authorization Code and Credentials Flow
- ☐ Enable Device Flow
- ☐ Enable JWT Bearer Flow
- ☐ Enable Token Exchange Flow

#### Security

- ☐ Require secret for Web Server Flow
- ☐ Require secret for Refresh Token Flow
- ☐ Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- ☐ Enable Refresh Token Rotation
- ☐ Issue JSON Web Token (JWT)-based access tokens for named users

> Web App (Enable SAML Settings)

Now, you navigated to the new page as below → click 'Edit' under the 'Policies' tab

 Manage External Client Apps

**Centric Metadata Explorer**

[Help for this Page](#) [Disable](#) ▼

Contact Email  
[redacted]@centricconsulting.com

App Authorization  
Admin approved users are pre-authorized

Type  
Local

App Status  
**Enabled**

**Policies** Settings Package Defaults

Configure policies to customize the external client app and plugins for this Salesforce organization. [Edit](#)

▼ App Policies

\* Start Page ⓘ  
None ▼

**Select Profiles**

Available Profiles

Analytics Cloud Integration User  
Chatter Free User

Selected Profiles

System Administrator



Update 'Permitted Users' and check 'Enable Client Credentials Flow' → Scroll up to 'Select Profile' section and move 'System Administrator' profile to Selected Profiles column as shown in the below screenshot.

▼ OAuth Policies

---

**Plugin Policies**

\* Permitted Users  
Admin approved users are pre-authorized ▼

OAuth Start URL  
Enter a URL...

**Custom Scopes**  
You don't currently have any OAuth Custom Scopes defined. You can define them [here](#) before assigning to your app.

Apex Plugin Class  
Search classes 🔍

---

**OAuth Flows and External Client App Enhancements**

☒ Enable Client Credentials Flow

\* Run As (Username)  
[redacted]@centricconsulting.com

---

**App Authorization**

**Refresh Token Policy**  
☐ Refresh token is valid until revoked

\* IP Relaxation  
☐ Enforce IP restrictions

▼

\* Start Page ⓘ  
None ▼

**Select Profiles**

Available Profiles

- Analytics Cloud Integration User
- Chatter Free User
- Analytics Cloud Security User

Selected Profiles

- System Administrator

**Select Permission Sets**

Available Permission Sets

- SCRT2 Integration User
- Experience Profile Manager

Selected Permission Sets



Now, go to next tab 'Settings' and scroll below to 'App Settings' section and click on the hyperlink 'Consumer Key and Secret' → it takes you to new screen to verify '**access an external client app**' → Put the verification code sent to the email address you provided and get the 'Consumer Key' and 'Consumer Secret' to be filled in external credentials in future steps.

The screenshot shows the 'OAuth Settings' section with a sub-section 'App Settings'. A yellow box highlights the 'Consumer Key and Secret' link. Below it, the 'Callback URL' is set to 'https://login.salesforce.com/oauth2/callback'. Under 'OAuth Scopes', two scopes are listed: 'Access Interaction API resources (interaction\_api)' and 'Access all Data Cloud API resources (cdp\_api)'.

The screenshot shows the 'External Client App Name' section with the name 'Centric\_Metadata\_Explorer'. Under 'Consumer Details', the 'Consumer Key' and 'Consumer Secret' are displayed as blacked-out text, each with a 'Copy' button next to it.

5. Go to Setup, Named Credentials → Click on 'Metadata Named Creds' → Edit

1. Update existing **URL**: Provide the current org URL with the domain name.
2. Add 'CentricMeta' in the 'Allowed Namespace for Callouts' column.



Q named

Security

Named Credentials

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

SETUP

Named Credentials

Named Credentials External Credentials External Auth Identity Providers

1 Items - Sorted by Label

New

| Label                | Type             | URL                                     | External Credential | Actions |
|----------------------|------------------|-----------------------------------------|---------------------|---------|
| Metadata Named Creds | Secured Endpoint | https://efficiency-efficiency-80152-... | Admin EC            |         |

Edit Metadata Named Creds

\* Label

Metadata Named Creds

\* Name

Metadata\_Named\_Creds

\* URL

https://efficiency-efficiency-80152-dev-ed.scratch.my.salesforce.com

Enabled for Callouts

☒

Cancel

Save

Edit Metadata Named Creds

Allow Formulas in HTTP Header ⓘ

☐

Allow Formulas in HTTP Body ⓘ

☐

Outbound Network Connection ⓘ

Select an Option

Managed Package Access

Allowed Namespaces for Callouts ⓘ

CentricMeta

Cancel

Save



6. Go to **Named Credentials** again in Salesforce Setup → Click on 'External Credentials' tab → Click 'Admin EC' → Click 'Edit' button → Update below and 'Save':

- a. **Identity Provider URL:** Base My Domain URL + '/services/oauth2/token'

The screenshot shows the Salesforce Setup interface for Named Credentials. The left sidebar shows the navigation menu with 'Security' expanded and 'Named Credentials' selected. The main content area shows the 'Named Credentials' list with the 'External Credentials' tab active. A table lists one item, 'Admin EC', with an 'Authentication Protocol' of 'OAuth 2.0'. Below the table is a modal window titled 'Edit Admin EC'.

**Edit Admin EC**

OAuth 2.0

\* Authentication Flow Type: Client Credentials with Client Secret Flow

Scope:

\* Identity Provider URL: <https://efficiency-efficiency-80152-dev-ed.scratch.my.salesforce.com/services/oauth2/token>

☒ Pass client credentials in request body ⓘ

Cancel Save

7. Scroll down to '**Principals**' section → Click Actions dropdown menu → 'Edit'

The screenshot shows the 'Principals' section in Salesforce Setup. A table lists one principal, 'MetadataAccess', with a 'Client ID' field. The 'Actions' column has a dropdown menu.

| S. ▾ | Parameter Na... ▾ | Client ID | Authenti... ▾ | Actions |
|------|-------------------|-----------|---------------|---------|
| 1    | MetadataAccess    |           | Configured    | ⌵       |

Update the following fields:

- a. **Client ID**— Paste Consumer Key values from created Connected App above in step 4.
- b. **Client Secret** — Paste Consumer Secret from the created Connected App above in step 4.



Edit Principal

---

\*Parameter Name  
MetadataAccess

\*Sequence Number  
1

Client ID  
[REDACTED]

Client Secret  
[REDACTED]

Principal Access

| Name | Entity Type | ID |
|------|-------------|----|
|------|-------------|----|

Cancel

Save

8. Go to 'Profiles' → System Administrator → search for 'Connected App Access' → Check the check box showing the connected app you just created.

Connected App Access

Centric Meta Explorer ☒

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

|           |            |                              |         |
|-----------|------------|------------------------------|---------|
| Home      | Default On | Invoices                     | Default |
| Accounts  | Default On | IT Services Configured Items | Default |
| All Sites | Tab Hidden | Journey Home                 | Default |

9. **Note:** Do this step only if you have chosen option 1 to create the connected app. As this is not required for Option 2.

Assign this Principal to the **System Administrator** profile:

- Go to the profile settings and add the Principal under **Enable External Credential Principal Access**.
- Click **Save**.



### Enable External Credential Principal Access

Save

Cancel

Available External Credential Principals

--None--

Enabled External Credential Principals

Admin\_EC - MetadataAccess

Add

Remove

SETUP

Profiles

Enabled Named Credential Access

Edit

No Named Credential enabled

Enabled External Credential Principal Access

Edit

| External Credential Principal Name | AppExchange Package Name |
|------------------------------------|--------------------------|
| Admin_EC - MetadataAccess          |                          |

Once everything is set up, you can see the application named 'Metadata Accelerator' in the 'App Launcher' on the Home page.