



USER MANUAL FOR CLOUDCHERRY – SF CRM INTEGRATION



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1. About CloudCherry

CloudCherry is a Real-time, Omni-channel End-To-End Customer Experience Management platform that lets brands track, measure & improve Customer Delight - thereby increasing profitability, reducing customer churn and improving loyalty.

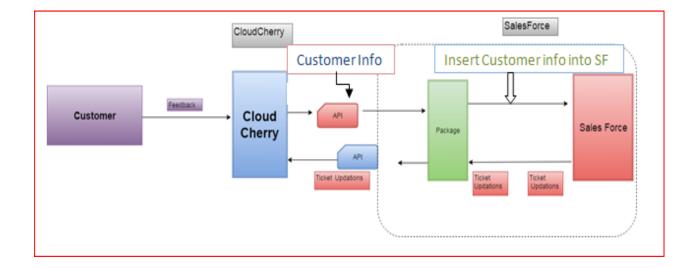
The SaaS product is the perfect tool for Feedback collection, Customer Experience Management and Customer Experience Measurement for SMBs and enterprises.

One of the key aspects to improving Customer Experience is closing the Loop with Customers when they face an issue. Through the integration between Salesforce's ticketing module and CloudCherry, every customer issue provided in the form of feedback can be automatically raised as a ticket in Salesforce and can be tracked, managed and closed effectively.

The app handles the following:

- Set up notifications in CloudCherry and Create and maintain the relation with Salesforce
- Update data on your CloudCherry (CEM) platform whenever any action is taken.

2. Workflow





3. Installation

3.1 Uploading the managed package

3.1.1 Login to Salesforce product with "Admin" role where the entire "Cloudcherry phase2" package is available and click on "Setup".

salesforce	arch Search	Lexicon Test User 🔻 <mark>Setup</mark> Help	Sales 🗸
Home Chatter Campaigns	Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases	Solutions Products Reports Dashboards +	
Create New 🔻	Lexicon Test User Wednesday September 13. 2017	Su	ummer '17 for Developers
Recent Items	- Hide Feed		
No records to display	Post 📲 File 🖉 New Event More 🔻 Rec	commendations	
😨 Recycle Bin		Get The Salesforce1	

3.1.2 Search for "Package" in the searchbox and select packages frpm the search result.

packages	0	Q
Exp	and All Colla	pse All
Build		
Create		
Packages		

3.1.3 **"Managed package"** will be displayed and select **"CloudCherry Phase2"** as shown below and Click on **upload**.

Develop	er Settings									
Your curre	nt developer settin	gs are listed below. These	settings determine the type	es of packages you c	an create and upload.					
Package	Types Allowed	Managed and Unmanag		four organization is configured to contain one managed package and an unlimited number of unmanaged packages. Only managed						
Managa	d Package	CloudCherry Phase 2		packages can be upgraded. You have selected the following as the only managed package for this salesforce.com organization: CloudCherry Phase 2						
	ace Prefix	CCUAT		Salesforce.com prepends this prefix (along with two underscores, "") to components that need to be unique such as custom objects and						
Package	s									
A package	e contains compon				an be uploaded to share with others p	rivately or posted on Force.com AppE	exchange to share			
		ys all packages created b	y your organization. To crea	ate a new package, ci	IICK NEW.					
Packages	s		New							
Action	Package Name				Descri	ption				
Edit 🚚	CloudCherry Ph	ise 2								
loud	Cherry Pha	ase 2					Help for this Pe			
Back to P	Package List	ase 2	Edit Delete U	pload			Help for this Pe			
Back to P	Package List		Concerned Concerned Con	pload	Туре	Managed	Help for this Pe			
Back to P	Package List e Detail Package Lang	Name CloudCherry Pha Vage English	ase 2	pload		Managed	Help for this Pa			
Back to P	Package List e Detail Package I Lang Notify on Apex	Name CloudCherry Phi uage English Error <u>CloudCherry UA</u>	ase 2	pload	Post Install Script	Managed	Help for this Pe			
	Package List e Detail Package Lang Notify on Apex Names	Name CloudCherry Phi uage English Error <u>CloudCherry UA</u> pace CCUAT	ase 2 I	pload	Post Install Script Uninstall Script					
Back to P	Package List e Detail Package I Lang Notify on Apex	Name CloudCherry Phi uage English Error <u>CloudCherry UA</u> pace CCUAT ed By <u>CloudCherry UA</u>	ase 2 I	pload	Post Install Script	Managed <u>CloudCherry UAT</u> , 9/13/2017 4:3:				
Back to P	Package List e Detail Package Lang Notify on Apex Name Creat Descri	Name CloudCherry Phi uage English Error <u>CloudCherry UA</u> pace CCUAT ed By <u>CloudCherry UA</u>	ase 2 I I, 8/10/2017 5:00 PM		Post Install Script Uninstall Script					
Package	Package List e Detail Package Lang Notify on Apex Name Creat Descri	Name CloudCherry Phy uage English Error <u>CloudCherry UA</u> pace CCUAT d By <u>CloudCherry UA</u> ption	ase 2 I I, 8/10/2017 5:00 PM		Post Install Script Uninstall Script Last Modified By					
Package Compone	Package List Package Notify on Apex Notify on Apex Name: Creat Descri ents Versions	Name CloudCherry Phy uage English Error <u>CloudCherry UA</u> pace CCUAT d By <u>CloudCherry UA</u> ption	ase 2 I I, 8/10/2017 5:00 PM Add View Depe	andencies View Del	Poet Install Script Uninstall Script Last Modified By leted Components	CloudCherry UAT, 9/13/2017 4:3	8 PM			
Package Compone	Package List Detail Package Lan Notify on Apex Name Versions Name	Name CloudCherry Phy uage English Error <u>CloudCherry UA</u> pace CCUAT d By <u>CloudCherry UA</u> ption	Add View Depe Parent Object	andencies View Del Type	Post Install Script Uninstall Script Last Modified By eted Components Included By	CloudCherry UAT, 9/13/2017 4:34 Available in Versions	8 PM			
Compone Action	Package List Detail Package Lang Notify on Apex Name Creat Versions Name Account	Aame CloudCherry Ph English English CloudCherry LA pace CCUAT d V CloudCherry UA ption	Add View Depu Add View Depu Parent Object CloudCherry Response	endencies View Del Type Custom Field	Post Install Script Uninstall Script Last Modified By deted Components Included By CloudCharg Response	CloudCherry UAT, 9/13/2017 4.3/ Available in Versions 1.0 - Current	8 PM			
Compone Action Remove	Package List Detail Package Lan Notify on Apex Name Creat Descri Name Account Account	Aame CloudCherry Ph English English CloudCherry LA pace CCUAT d V CloudCherry UA ption	Add View Depu Add View Depu Parent Object CloudCherry Response	ndencies) [View Del Type Custom Field Custom Field	Post Install Script Uninstall Script Last Modified By and the second sec	CloudCherry UAT, 9/13/2017 4.34 Available in Versions 1.0 - Current 1.0 - Current	8 PM			
Compone Action Remove	Package List	Aame CloudCherry Ph English English CloudCherry LA pace CCUAT d V CloudCherry UA ption	Adul View Depr Adul View Depr Parent Object CitoudCherry Response Case	endencies) [View Del Type Custom Field Custom Field Apex Class	Post Install Script Uninstall Script Last Modified By Included By ClauaChery, Response User Selected User Selected	CloudCherry UAT, 9/13/2017 4.3/ Available in Versions 1.0 - Current 1.0 - Current 1.0 - Current	8 PM			
Compone Action Remove	Package List Package Lang Notify on Apox Creat Description Name Ascounti Accounting Acc	tame CloudCherry Ph english English English CloudCherry UA pace CCUAT could be CCUAT of the CloudCherry UA ption Remote Access	Add View Depr Add View Depr Parent Object CloudCherry Response Case Account	andencies) [View Del Type Custom Field Custom Field Apex Class Custom Field	Post Install Script Uninstall Script Last Modified By eted Components Included By Cloud/honry.Response User Selected User Selected User Selected	CloudCherry UAT, 9/13/2017 4:34 Available in Versions 1.0 - Current 1.0 - Current 1.0 - Current	8 PM			

3.1.3 Enter version details and click on **Upload**.



Package Details	Upload	Cancel				
Version Name	testing3	Example: Spring 2017				
Version Number	1.0					
Release Type	 Managed - Released: use v release. <u>Tell me more</u> 	when you are ready to publish to Force.com	AppExchange. Note: you	will not be able to ec	lit some properties af	ter
	Managed - Beta: use to tes installed in Developer Ed	t and validate this package internally and wit ition, sandbox organizations, or testing or	h selected customers befo rganizations for registere	ore release. Note: this ed partners.	type of package can	only be
Release Notes	None					
	O URL					
	This link will be available during t	he installation process, and available from th	e package detail view afte	r installation.		
Post Install Instructions	None					
	O URL					
	Visualforce Page					
	Shown after installation, and avai	lable from the package detail view after insta	allation.			
Description						
		a				
oudCherry Phase 2	Version 1.0					Help for this
ack to Package	2, 00131011 1.0					
Uploading Version 1.0 Running Apex test 1 of 19						
ersion Detail						
Package Name	CloudCherry Phase 2		Uploaded By	CloudCherry UAT,	9/13/2017 5:27 PM	
Version Name	testing2		Post Install Script			
Version Number	1.0		Uninstall Script			
Description			Password Protected			

3.1.4 O successful uploading, system will generate URL for installing package in SF org.

Package Version						Help for this Page 🥹
CloudCherry Phase	2, Version 1.0					
« Back to Package						
Vpload Complete	able for install using the insta	llation URL below. To publish on AppExchange, log on with you	ur publisher	login to access your	public listings	
	ubic for instan doing the insta		ar paononer	login to access you	public listings.	
Version Detail	E	eprecate				
Package Name	CloudCherry Phase 2	Uplo	loaded By	CloudCherry UAT,	9/13/2017 5:27 PM	
Version Name	testing2	Post Inst	tall Script			
Version Number	1.0 (Beta 2)	Uninst	tall Script			
Description		Password F	Protected	Change Passy	vord]	
Installation URL	https://login.salesforce.com	/packaging/installPackage.apexp?p0=04t7F000000s0AA				

3.2 Steps for installing package

- 3.2.1 Login to the account in which user want to install the package.
- 3.2.2 Copy the installation URL that is generated while uploading the package and paste in a new window.
- 3.2.3 This will ask for a package installation.
- 3.2.4 Select required option and click on install.



3.2.5 Select any one option to give the privileges to the users.



Install for Admins Only	Install for All Users	Install for Specific Profiles
		Install

Note: As this application contains lightening components, Users should have "Domain" for installing the package. While installing the package if there is no domain, then system will ask for the creation a Domain. Please follow steps provided in Section 4.to create a Domain.

By CloudCl	nerry		
	න්දී Installing and	d granting access to a	ill Users
App Name	Publisher	d granting access to a Version Name	Version Number
App Name CloudCherry Phase 2			

- 3.1.5 Once the app is installed, you will see the installed package for CloudCherry.
 - > Click on "**Setup**" button on top right corner of the salesforce home screen.
 - Search "install package" in search box on left of the salesforce Setup screen.

salesfo		÷. (Search		Se	earch					CloudCherr	y UAT 👻	Setup
Home	Campaigns	Leads	Accounts	Contacts	Cases	CloudCherry Responses	Drive Details	Opportunities	CCLifeTimeToken	CC Setup	CC Dashboard Login	+	
Instal		0 2											
	Expand All	Collapse All	Getting	g Started								Dismiss ;	×
Build Install	ed Packages		×	C 0	Build App Senerate a b licks or code Add	easic app with just one step, and e.	then easily extend	that app with	Learn More Next Steps Force.com Wo Force.com Fur Download Sale Android	damentals	obile app for admins: iOS		

Click on "Installed package" from search result



Help for this Page 🥝

Home Can	mpaigns	Leads	Accounts	Contacts	Cases	CloudCherry Responses	Drive Details	Opportunities	CCLifeTimeToken	CC Setup	CC Dashboard Login	+			
Quick Find /	/ Search Excand All I C		Instal	led Pa	kages	6								Help fo	or this Page 🔞
	Expansion 1 o	renapse r n	On Force.co	om AppExcha	inge you car	browse, test drive, download,	and install pre-bui	it apps and compone	ents right into your sales	force.com envi	ronment. Learn More about I	nstalling Packag	<u>es</u> .		
×	¦ → 7					packages. Any custom apps, t deploy the components individ					deployed to your users. Thi	s allows you to te	est and	alesforce app	pexchange
	ng Experie		Depending	on the links n	ext to an ins	talled package, you can take di	fferent actions fro	m this page.						Visit AppEx	schange »
Migratio	ion Assist	ant	To remove	a package, cli	ck Uninstal	. To manage your package lice	nses, click Manaç	e Licenses.						visit Appea	change »
Switch to the		telligent						-							
Sa	alesforce.		Installed	l Packages											
Ge	et Started		Action	Packag	e Name	P	ublisher	Version Numb	oer Namespac	e Prefix	Install Date	Limits	Apps	Tabs	Objects
			Uninstall	<u>Salesfo</u> Descri	rce Connect	ed Apps S	alesforce.com	1.7	sf_com_ap	ops	6/9/2017 2:55 PM	1	0	0	0
Salesforce1	Quick Sta	rt				ins Connected Applications for	all the officially su	innorted Salesforce r	lient applications such a	is Touch, Sales	force for Outlook. Sa				

- 3.1.6 After Installation, Admin / User need to complete the following steps. (This is optional; however, we suggest that you do it since the "CC Ticket" Field needs to be non-editable for agents /sub-users
 - 1. Making the "CCTicket" Field as "Non-Editable" for the non-administrator users.
 - Search for "**Page Layouts**" in the search box of **SETUP**.
 - Click on "Cases" >> Page Layouts

 \geq

Cases	
Page Layouts	
Macros	
Page Layouts	
Contracts	
Click on "EDIT"	
Case Page Layout	
This page allows you to create different page layou After creating page layouts, click the Page Layout .	ts to display Case data. Assignment button to control which page layout users see by default.
Case Page Layouts	New Page Layout Assignment

Case Pag	e Layouts	New Page Layout Assignment		
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Case (Marketing) Layout	Cloud Cherry, 1/13/2017 6:42 PM	Cloud Cherry, 1/13/2017 7:32 PM	1
Edit Del	Case (Sales) Layout	Cloud Cherry, 1/13/2017 6:42 PM	Cloud Cherry, 1/13/2017 7:32 PM	✓
Edit Del	Case (Support) Layout	Cloud Cherry, 1/13/2017 6:42 PM	Cloud Cherry, 1/13/2017 7:32 PM	1
<u>Edit</u> Del	Case Layout	Cloud Cherry, 1/13/2017 6:42 PM	Cloud Cherry, 1/19/2017 4:43 PM	1
	cord 4 - Case Layout	New Page Layout Assignment		
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Dol	Close Case Lavout	Cloud Chorps 1/12/2017 6:42 PM	Cloud Chorpy 1/12/2017 7:22 PM	

Search for "CCTicket" field by using Quick Search, system will automatically navigate to the position of that field.

Case Layout -		Feed View Custom Console Components	Mini Page Layout Mini Console View Video	Tutorial Help for this Page 🧿
Save V Quick Save Preview As	🔻 Cancel 🕼 Undo 🐴 Redo 📑 Layout P	Properties		
Custom Links	Quick Find cc *	ĸ		
Quick Actions Salesforce1 & Lightning Actions	+≣ Section +■ Blank Space			
Expanded Lookups	CCTicket Name: CCTicket			
Related Lists Report Charts	Type: Text Length: 50			

Once you are navigated, search for the "CCTicket" field and click on it for making modifications / update field details i.e., to make it as "Read only / non-editable" field for Agents.

Case Detail		Standard Buttons Editt Delete Change Owner Change Record Type Close Case Clone Sharing
Case Information (Head	er visible on edit only)	
Case Owner	Sample User	★ ● Status Sample Status
🙆 Case Number	GEN-2004-001234	Priority Sample Priority
Contact Name	Sample Contact	Contact Phone 1-415-555-1212
Account Name	Sample Account	Contact Email sarah.sample@company.com
Туре	Sample Type	* Case Origin Sample Case Origin
Case Reason	Sample Case Reason	
CCTicket	Sample CCTicket	



Once you select "CCTicket" a popup will be displayed on your screen, as shown below. Check "Read-Only" checkbox and click "OK".

ns in the Quick Actions in the Field Properties	e Salesforr	e Classic Puł	nlishersection and	I have saved the
cc	F CTicket	Read-Only 💌	Required	18
<u>.</u>	ОК	Cancel		
<u>) e user</u>				otatus

Note: All the fields of Cloudcherry objects (i.e. Campaigns, Leads, Accounts, Contacts, Cases, Opportunities) need to be added manually from respective page layouts.

4. Step for creating Domain (If Domain is not available)

- 4.1 Go to "Setup" and search for Domain.
- 4.2 Select "My Domain".



- 4.3 Enter domain name in the **"Domain Name"** textbox.
- 4.4 Click on "Check availability" to navigate to Step 2.

Quick Find / Search Ø Q	My Domain Help for this P
Expand All Collapse All	
Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce.	My Domain Step 1 Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce Results require it. It's easy to set up My Domain—the hardwat part is choosing a name that your stakeholders can agree on. Step 1. Choosise Domain Name
Get Started	Choose Domain Registration
Force.com Home	Name Pending Tosting to Users
Administer	
Manage Users Manage Apps Manage Territories Company Profile Security Controls Domains Domains Custom URLs	Choose Your Oomain Manne Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Bupport can change your domain name once it's registered. Your domain name can be up to 4 d characters, it can include letters, numbers, and hyphens; but it can't start or end with a hyphen. https://t.exiconTestUser
My Domain	Register Domain After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done.

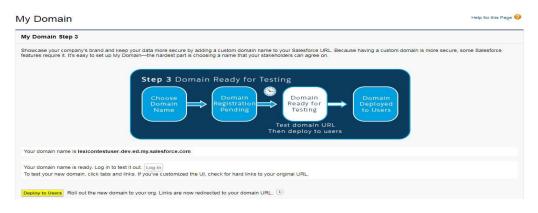
4.5 System will send a Domain confirmation Email to the respective email address.

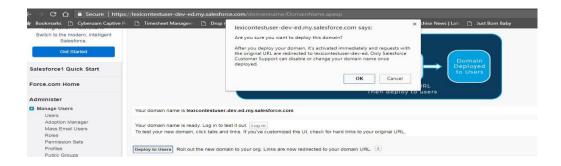


My Domain Step 2	
Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on. Step 2 Domain Registration Pending Choose Domain Registration faither Registration takes less than 2 minutes	having a custom domain is more secure, some Salesforce
Your domain name is lexicontestuser.dev.ed.my.salesforce.com	
Salesforce domain ready for testing Inbox x	÷
support@salesforce.com <support@salesforce.com> to me</support@salesforce.com>	10:34 AM (4 minutes ago) 🖞 🦒
Your Salesforce domain lexicontestuser-dev-ed.my.salesforce.com is ready for testing.	
To log in and test it, go to https://lexicontestuser-dev-ed.my.salesforce.com	

After testing, you can deploy your domain to your users by going to My Domain in Setup.

- 4.6 Once the confirmation email is received, either select the link from the email or refresh the "My Domain" screen in SF Org.
- 4.7 Click on "Deploy Users" to append the Domain for all the Users in the SF Org.







Showcase your company's brand a features require it. It's easy to set u	Id keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce My Domain—the hardest part is choosing a name that your stakeholders can agree on. Step 4 Domain Deployed to Users Choose Domain Name Domain Name Domain Name Domain Pending Pending Domain Pending
Your domain name is lexicontestu	
	ser-dev-ed.my.salesforce.com
My Domain Settings	ser-dev-ed.my.salesforce.com
My Domain Settings	ser-dev-ed.my.satesforce.com Edit Prevent login from https://login.salesforce.com Page requests that don't use the new domain name, such as old bookmarks using the instance name, are:

5. Establishing connection between Salesforce and Cloudcherry:

5.1 Click on **"CC Setup"** tab from menu bar, this will direct user to the following screen.

salesforce	Se	earch		S	earch				CloudCh	erry UAT 🔻 Setup	Help	CloudCherry 🔻
Home Campaigns Lea	ads /	Accounts	Contacts	Cases	CloudCherry Responses	Drive Details	Opportunities	CCLifeTime⊺oken	CC Setup	CC Dashboard Logi	n +	
Create New	-	CC Set	up									
Recent Items		CC Aut	hentication									
LioudCherry UAT			CC	User Nam	e CC User Name							
			CC Life	Time Toke	CC Life Time Token							
👿 Recycle Bin					Get CCToken							
							Connect To	o CC				

5.2 To get "cc Life Time Token" from CC, click on "Get CC Token" link and this will navigate user to following screen

Customer Analytics Technologies Inc [US]	https://www.getcloudche	rry.com/explore/#/				\$
\varTheta swagger	Username	Password	Get API Token	-Or-	Enter oAuth 2	0 Bearer Token
Explore Cloud C	herry API					
CloudAPI			Show/	Hide	List Operations	Expand Operations
oAuth 2.0 API Token			Show/	Hide	List Operations	Expand Operations
[BASE URL: , API VERSION: V1]						VALID {···}

- 5.3 Enter "Username" and "Password" in the textbox provided and click on "Get API token"
- 5.4 Click on **"Show/Hide"** for CloudAPI
- 5.5 Search for **GetAPI key**, as shown in below screen to find the GetAPI key link

Customer Analytics Technologies	ac [US] https://www.getcloudcherry.com/explore/#/	☆	0.47
	Query Detail CEM Activity for Acco GetAPI		1 of 1
GET /api/Accol	ntActivityExcel/{limit}/{fromDay}/{tillDay}/{subUser}/{eventType}/{onItem}		
	Query Detail CEM Activity for Account or From a User (As Excel)		
GET /api/Accol	ntActivityCount/{limit}/{fromDay}/{tillDay}/{subUser}/{eventType}/{onItem}		
	Count Number of CEM Activity for Account or From a User		
GET /api/MyVi	vReportEmail/Open		
GET /api/MyNo	ificationEmail/Open		
GET /api/MyVi	vReportEmail/Unsubscribe		
GET /api/MyNo	ificationEmail/Unsubscribe		
GET /api/ <mark>GetA</mark>	Key Get API Key On File		



E. Select "GET" and click on "Try it out to get the CC Life Time Token.

ap I/ <mark>GetAPI</mark> Key	GetAPI
esponse Class (Status 200) ring	
Try it out Hide Response	
curl -X GETheader 'Accept: application/json'header 'Authorization: Bearer ABszCkQ3oTJ2ZadDhQruii4zMoHBmCE	EYae5jFOserhviLrlmdg
equest URL	
https://api.getcloudcherry.com/api/GetAPIKey	
esponse Body	
"apikey-16E3M1j5uJ6tv301:no3tVSnSTuJoaWL1x7H1CW/658!"	

5.6 Enter the **"CC User Name"** and **"CC Life Time Token"** (the Permanent API Key given by CloudCherry) and Click on **"Connect To CC".** Following screen will be displayed

CC Setup			
CC Authentication			
CC User Name	CC User Name		
CC Life Time Token	CC Life Time Token		
		Connect To CC	
		Connect To CC	
Email Configuration For Campaign	ı, Lead, Opportunity and Ca	se	Help ?
Select Object Campaign 🔻			
		New Delete	
Email Configuration Settings on Campaign	were not defined		
Email Configuration For Account a	and Contact		Help ?
Select Object Account V			
		New Delete	
Email Configuration Settings on Account we	re not defined		
Email Configuration For Custom O	bjects		Help ?
Custom Object Select Custom Object	•		
		New Delete	
Connected App			
Connected App Settings			

6. Establishing connection between Cloudcherry and Salesforce:

To establish a connection between Cloudcherry to Salesforce user needs to create a connected app in salesforce org.

6.1 Steps to create Connected App:

6.1.1 By clicking on "**Connected App settings"** link user will navigate to **Apps page** in salesforce.

Connected App	
Connected App Settings	



Quick Find / Search () Q	Apps An app is	a group of tabs that work a	as a unit to p	rovide fund	tionality. Users can switch between apps using the Force com app drop-down menu at the top-right corner of every page.			
Xou can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.								
Lightning Experience Migration Assistant	0 c	ustom apps work in conjunct	tion with User	Profile Tab	Visibility settings. <u>View User Profiles now.</u>			
Switch to the modern, intelligent Salesforce.	Apps				Quick Start New Reorder			
Get Started	Action	App Label	Console	Custom	Description			
	Edit	App Launcher			App Launcher tabs			
	Edit Del	CloudCherry		1				
Salesforce1 Quick Start	Edit	Community			Salesforce CRM Communities			
	Edit	Content			Salesforce CRM Content			
Force.com Home	Edit	Marketing			Best-in-class on-demand marketing automation			
	Edit	Platform			The fundamental Force.com platform			
Administer	Edit	Sales			The world's most popular sales force automation (SFA) solution			
 Manage Users 	Edit	Salesforce Chatter			The Salesforce Chatter social network, including profiles and feeds			
 Manage Apps 	Edit	Sample Console	1		(Salesforce Classic) Lets agents work with multiple records on one screen			
Manage Territories Company Profile	Edit	Service			Manage customer service with accounts, contacts, cases, and more			
Security Controls	Edit	Site.com			Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.			
Domain Management								
Communication Templates	Subtab	Apps						
Translation Workbench	Action	App Label		Desc	ription			
Data Management Mobile Administration	Edit	Profile (Others)			tabs displayed when users view someone else's profile			
Mobile Administration Desktop Administration	Edit	Profile (Self)		The	tabs displayed when users view their own profile			
Lightning for Outlook								
Lightning for Gmail	Connec	ed Apps			New			
Lightning Sync	Action	Connected App Name			Description Version			
Email Administration	ristion	connected App Name			ecompton version			

6.2 Creating a "Connected APP" in Salesforce for generating "Client ID" and "Secret Key".

6.2.1 In "**CONNECTED APPS**" section, click on "**New**" button to create a connected app in Salesforce for CloudCherry.

Connected	Apps	New		Connected Apps Help 🕐
Action	Connected App Name		Description	Version

6.2.2 On clicking "New" the following screen will appear.

New Connected App	Help for this Page 😢
Save	
To publish an app, you need to have chosen a namespace prefix. Click here to choose a namespace prefix.	
Basic Information	
Connected App Name	= Required Information
API Name Contact Email	
Contact Phone	
Logo Image URL @ Upload logo image or <u>Choose one of our sample logos</u>	
Icon URL @	
Info URL	
Description 🥥	
▼ API (Enable OAuth Settings)	
Enable OAuth Settings	

- 6.2.3 Enter a name in the Connected App textbox. [The API Name will be populated automatically on entering the APP Name.]
- 6.2.4 Provide the Email ID and other mandatory information.
- 6.2.5 Check "Enable OAuth Settings" checkbox in API Section.
- 6.2.6 On checking the enable **"OAuth"** settings checkbox, you will see the following screen.

0			
Callback URL 🥝			
Use digital signatures			
	Choose file No file chosen		
Selected OAuth Scopes	Available OAuth Scopes		Selected OAuth Scopes
	Access and manage your Chatter data (chatter_api)		None- 🔺
	Access and manage your Wave data (wave_api)	A et et	
	Access and manage your data (api) Access custom permissions (custom permissions)	Add	
	Access your basic information (id, profile, email, address, phone)		
	Allow access to your unique identifier (openid)	Remove	<u>م</u>
	Full access (full)		·
	Perform requests on your behalf at any time (refresh_token, offline_access Provide access to custom applications (visualforce)	5)	
	Provide access to your data via the Web (web)		

- 6.2.7 Enter the "CallBack URL" given by CloudCherry along with the CloudCherry Permanent API Key. Ex: https://xxxxxx.com?ccAccessToken=xxxxxx
- 6.2.8 In the "Selected OAuth Scopes" section, select following
 - a) Full Access
 - b) Perform requests on your behalf at any time (refresh token, offline access).
- 6.2.9 Click on **"SAVE".** Following screen will be displayed. Please note that **"CONSUMER KEY"** and **"CONSUMER SECRET"** are generated automatically.

Connected App Name			Help for this Page
Back to List: Custom	Apps		
		Edit	Delete Manage
	Version	1.0	
		API Name	
		Created Date	11/7/2016 6:58 PM
			By:
		Contact Email	
		Contact Phone	
		Last Modified Date	
		Description	
		Info URL	
▼ API (Enable OAu	th Settings)		
Consumer Key	3MVG9ZL0pp0	3P5UrBGuX1tmVYIS37PFc7YC	QF3bRLGt_S_WrEWgViMLopXyDxl9kJHuXae5TnyZlMxOpErmi4Ot Consumer Secret 1713101981953542741
Selected OAuth Scopes	Full access (ful Perform reques	l) sts on your behalf at any time (r	refresh_token, offline_access)

- 6.2.10 Now, Type "apps" in the search box on top left corner of the page.
- 6.2.11 Select "Connected Apps" from the search result.

salesfo		Sea
Home	Chatter	Campaigns I
apps		0 9
	Expan	nd All Collapse All
Adminis	ster	
🖸 Manag	je Apps	
Cor	nnected App	ps
Cor	nnected App	ps OAuth Usage
App	o Menu	

6.2.12 This will display all the existing connected apps.



lanage the apps that connect to your Sales	force organization.	
App Access Settings	Edit	
Allow users to install canvas personal ap	ne	
iour All - Croate New View		
iew: All Create New View	A B C	D E F G H I J K L M N O P Q R S T U V W X
iew: All ▼ Create New View	A B C Application Version	D E F G H I J K L M N O P Q R S T U V W X Permitted Users
Action Master Label +	Application Version	Permitted Users
Action Master Label + Edit	Application Version 5.0	Permitted Users All users may self-authorize

6.2.13 Click on the "Edit" link of the app which was created earlier to edit app details.

Note: Please ensure that the inputs for this screen are, as follows:

Input for the "Expire Refresh Token "can be given according to the requirement.

Basic Information	= Required Information
Start URL 1	Mobile Start URL
OAuth policies	
Permitted Users All users may self-authorize	IP Relaxation Relax IP restrictions Refresh Token Policy: Refresh token is valid until revoked Immediately expire refresh token Expire refresh token if not used for Month(s) Expire refresh token after Month(s)
Session Policies	
Timeout ValueNone •	High assurance session required
Custom Connected App Handler	
Apex Plugin Class 🗳 i Run As 🗳 i	
User Provisioning Settings	
Enable User Provisioning i	
Save Cancel	

6.2.14 **"Consumer Key**" and **"Consumer Secret**" that are generated in Salesforce should be entered in CC settings screen as **"Client id"** and **"Secret key"**, to establish a connection between CloudCherry and Salesforce as shown below.

Freshdesk	KailChimp	КооКоо	cisco	Exotel	Q Custom SMTP	Capillary	Sales force	Zendesk
	ıcPLs5S1bJJ6Nr6w.м		<mark>.γ∗</mark> 470918432165		Enable	SALES FO	RCE	system that also

On successful establishment of connectivity between Cloudcherry and Salesforce, objects will function as per the configuration settings.