

Contact Clean Installation Guide

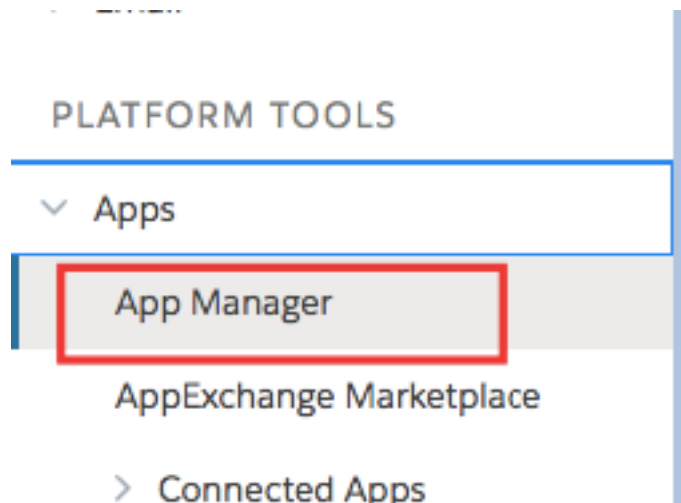
Package Link

Prerequisites

- 1- Data.com must be enabled in your instance.
- 2- Org should support flows.
- 3- My Domain needs to be setup.

Step by Step

- 1- Setup is a little tricky and you need to make sure you follow the steps exactly the same as here. Names must exactly match the names shown in the guide.
- 2- Switch to Lightning Experience.
- 3- From the Menu go to App>App Manager



- 4- Click on "New Connected App"

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

21 items • Sorted by App Name • Filtered by TabSet Type

	APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VIEW
1	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant...	2/12/2018 11:35 AM	Connected (Managed)	
2	App Launcher	AppLauncher	App Launcher tabs	2/12/2018 9:22 AM	Classic	
3	Community	Community	Salesforce CRM Communities	2/12/2018 9:22 AM	Classic	
4	Content	Content	Salesforce CRM Content	2/12/2018 9:22 AM	Classic	

5- Enter the basic information.

Connected App Name
Contact Clean App

[Help for this Page](#)

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

Basic Information

Connected App Name

API Name

Contact Email

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

Legend: ! = Required Information

6- Click on Enable OAuth setting checkbox and follow the screenshot. Callback URL is defined as: **<You Instance URL> + /services/authcallback/Contact_Clean**

API (Enable OAuth Settings)

Enable OAuth Settings ☒

Enable for Device Flow ☐

Callback URL

Use digital signatures ☐

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter data (chatter_api)
- Access and manage your Eclair data (eclair_api)
- Access and manage your Wave data (wave_api)
- Access custom permissions (custom_permissions)
- Access your basic information (id, profile, email, address, phone)
- Allow access to your unique identifier (openid)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Selected OAuth Scopes

- Access and manage your data (api)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)

Add

Remove

Require Secret for Web Server Flow ☒

Include ID Token ☐

Enable Single Logout ☐

Enable Asset Tokens ☐

7- Click on Save. Wait for 10 minutes as this app needs to be registered. It may not work if you don't allow enough time.

Connected App Name
Contact Clean

[Back to List: Custom Apps](#)

Edit Delete Manage

Version 1.0

API Name [redacted]

Created Date 2/13/2018 8:59 PM

By: [redacted]

Contact Email [redacted]

Contact Phone [redacted]

Last Modified Date 2/13/2018 8:59 PM

By: [redacted]

Description

Info URL

Copy Consumer Key and Consumer Secret as we need these later.

API (Enable OAuth Settings)

Consumer Key 3MVG9CEn_O3jvv0x.o9Dar8z8MsyHTzrmPa9V5B9M0IRW2xcpTBMKRfbKvofVstWpRF_dzhQ519b_u7EpAG

Consumer Secret [redacted]

Selected OAuth Scopes

- Access and manage your data (api)
- Full access (full)
- Perform requests on your behalf at any time (refresh_token, offline_access)

Callback URL [redacted]

Enable for Device Flow ☐

Require Secret for Web Server Flow ☒

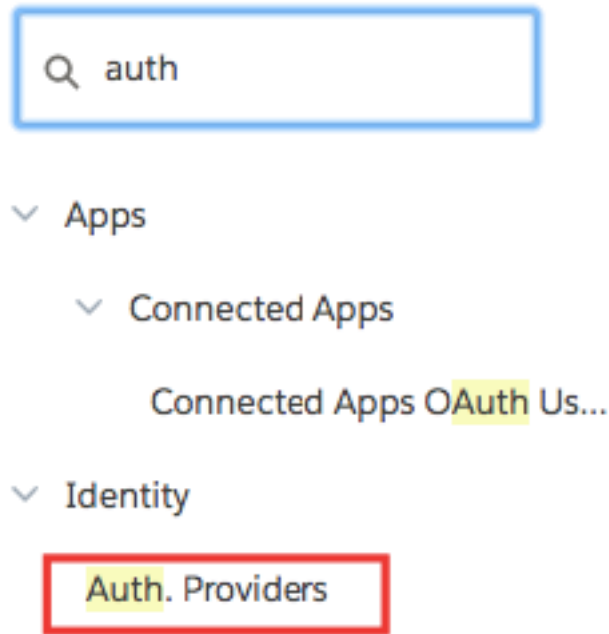
Token Valid for 0 Hour(s)

Include Custom Permissions ☐

Include Custom Attributes ☐

Enable Single Logout Single Logout disabled

8- From setup go to Identity>Auth. Providers



- 9- Enter information needed. You need to have Consumer Key and Secret extracted from Step 6. Click on Save. Auth Provider **Name** Must be “**Contact Clean**” and **URL Suffix** Must be “**Contact_Clean**”

Auth. Provider

Auth. Provider Edit

SaveSave & NewCancel

Provider Type

Name

URL Suffix

Consumer Key

Consumer Secret

Authorize Endpoint URL

Token Endpoint URL

Default Scopes

Custom Error URL

Custom Logout URL

Registration Handler

Execute Registration As

Portal

Icon URL

Salesforce

Contact Clean

Contact_Clean

i

i

https://login.salesforce.com/services/oauth2/authorize

https://login.salesforce.com/services/oauth2/token

i

i

Automatically create a registration handler template

--None--

Get these from Connected Apps

SaveSave & NewCancel

10-From Setup go to Security>Named Credentials

Q named

Security

Named Credentials

Didn't find what you were looking for? [Search all of Setup](#) instead.

Click on New and enter information based on this screenshot. Name must be "Data_com_Auth_Provider". URL Must be <Your Instance URL>

New Named Credential

[Help for this Page](#)

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

SaveCancel

LabelData_com_Auth_Provide

NameData_com_Auth_Provide

URLhttps://[redacted].my.salesforce.com

Name and Label must be Data_com_Auth_Provider

Authentication

Certificate

Identity TypeNamed Principal

Authentication ProtocolOAuth 2.0

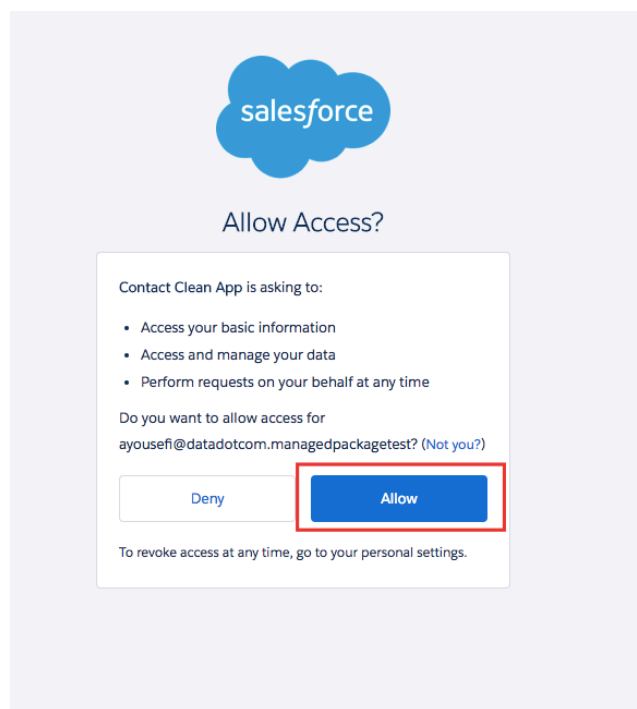
Authentication ProviderContact Clean

Scoperefresh_token full

Authentication StatusPending

Start Authentication Flow on Save☒

- 11- Click on Save. You should be redirected to Salesforce Login page if everything goes well. Enter your username and password. You should see a consent page. Click on Allow.



- 12- If you see Application Status populated with your username, you are all set.

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

[« Back to Named Credentials](#)

Label: Data_com_Auth_Provider
Name: Data_com_Auth_Provider
URL: [REDACTED]

Authentication

Certificate

Identity Type: Named Principal
Authentication Protocol: OAuth 2.0
Authentication Provider: Contact Clean
Scope: refresh_token api
Authenticated as: [REDACTED]

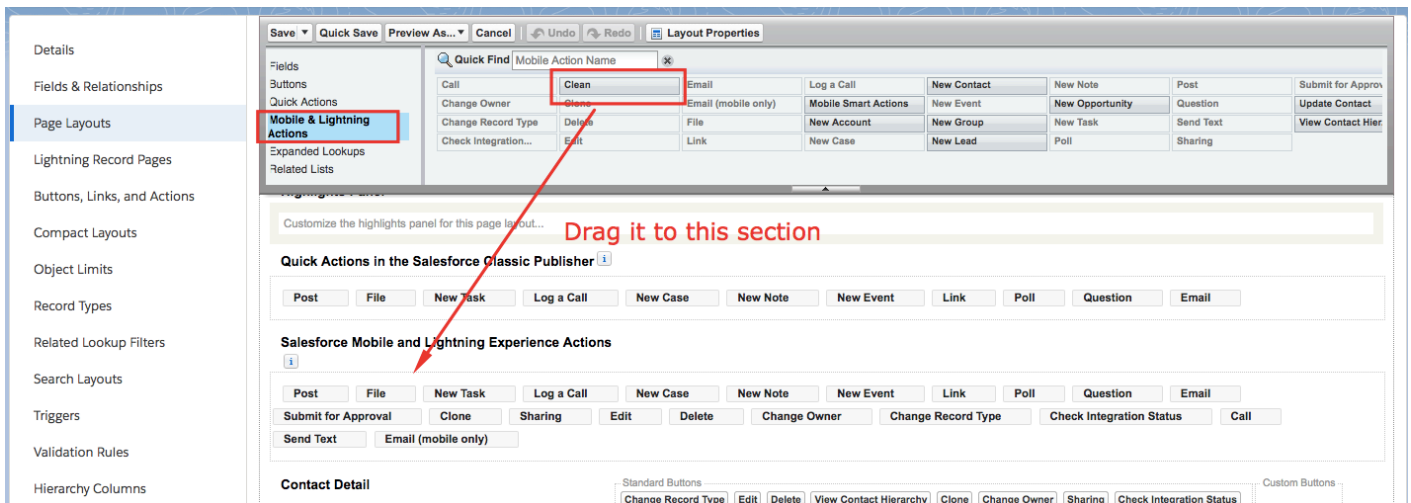
Callout Options

This means everything went well.

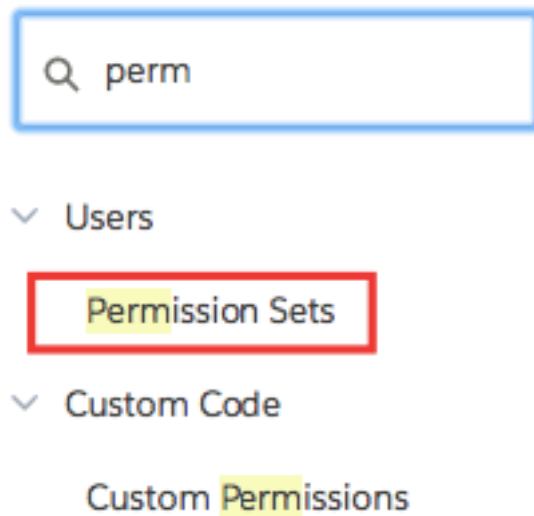
13- Go to object manager and open Contact object.



14- Open the Page Layout you would like to add the Clean button and follow the screen shot.



15- Go to Setup>User>Permission Sets



16-Find Data.com Permissions and assign the users to this Permission Set.

Permission Sets

[Help for this Page](#) ?

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets [Edit](#) | [Delete](#) | [Create New View](#) 

☐ Action	Permission Set Label ↑	Description	License
☐ Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
☐ Clone	Data.com Permissions		
☐ Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
☐ Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
☐ Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User

17- Congratulations, you have successfully setup Contact Clean.