Onfido

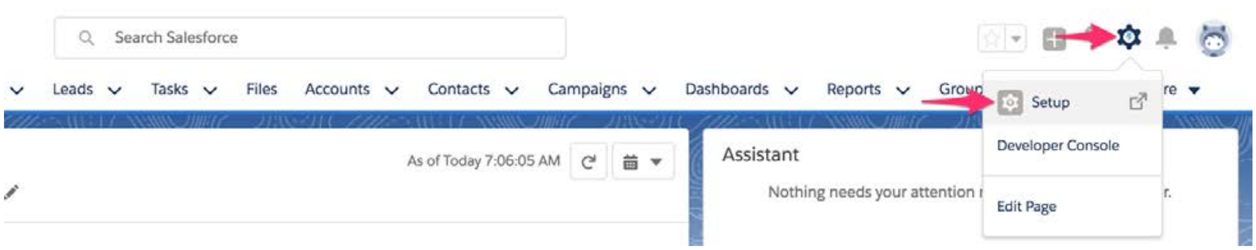
INSTALLATION & CONFIGURATION GUIDE **(Ver 2.72)**

Table of Contents

Introduction

This document serves as a configuration guide for the **Onfido** Salesforce app. The first section covers the installation of the package. The following sections will walk you through applying permission sets and completing the Setup Assistant. This guide is meant to walk you through configuring your org in a Lightning Experience environment.

Throughout this guide, you will be instructed to navigate through Setup. To do so, you will need to click on the gear to the upper right and select Setup. Once in Setup, you may use the Quick Find box to find and navigate to the appropriate section.



Updates

Listed below are the updates included in the new release when installing the latest patch for the Onfido Salesforce App:

- Updated mapper in Setup Assistant
  - Allows mapping up to 7 objects: Account, Contact, Opportunity, Person Account, **Lead** and **User (New Objects added).**
- Packaged Onfido Customizations and Onfido Language Override Tabs
  - These objects will be used to render customizations in the SDK. The admin will be responsible for defining the records of customizations that'll be used with the SDK. Based on the records of the Language Override that are created, the user initiating verifications will be able to select supported languages.
- Added Customer Consent Flag
  - The default report types setup screen will be upgraded to include a Consent capture flag, which will cause the org to use Onfido's consent screen in verification flows if checked.
- Lightning Flow Support
  - A global invocable method will be added to the package that will perform the initialization of a verification check with Onfido by making the required API calls and setting the required values on records within the Salesforce database.

Admins will be able to use this method within lightning flows, process builder, etc.

- Invocable Method
- Email Template ID
- Digital Experiences Guidelines

Upgrading an Older Version of the Onfido App

If you already have an existing version of Onfido installed (package version 2.07 and below), unfortunately this package is not compatible as a direct upgrade due to significant changes in the way the app functions.

In order to use the latest version of the Onfido Salesforce app, the previous package needs to be uninstalled before installing the new package. Please complete the following steps before proceeding with the Installation process below. **Note that this will delete all of your setup and configuration settings related to Onfido - they will need to be redone after you install the latest version.**

Remove or Unassign Onfido Assets from the Org

Any packaged assets that are currently in use in the Salesforce org must be removed or unassigned before Salesforce will allow you to uninstall the Onfido package.

Unassign Packaged Permission Set(s)

Any original, packaged permission sets that were not cloned and altered must be unassigned from users. This will most likely affect the **Onfido Feature Access** permission set but may also include the other packaged permission sets depending on how you have configured access for your users. Permission sets that have been cloned and assigned are not affected by the package uninstall and may need to be deleted manually if a completely blank slate is desired - for example, the cloned and edited Onfido API User Permissions Set that is assigned to your Site's Guest User. You will need to go to the Site Guest User's detail page in order to remove its permission set.

Remove Verification Form Visualforce Page from Site

Remove the **onfidosf.onfido_verificationForm** visualforce page from your site. View the section on adding the vf page here for instructions on where to locate it and make the change.

Remove Onfido Verification Lightning Components from Lightning Record Pages

The **Onfido Identity Verification** lightning component will need to be removed from the Lightning Pages of the objects where it was added. View the configuration instructions here to see how the component can be removed - instead of dragging it onto the page, simply click the **X** in the corner of the component on the page.

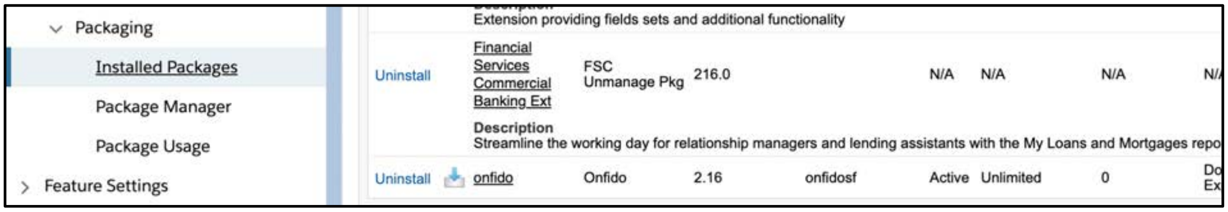
Remove Onfido Verification Visualforce Page from Page Layouts

If there are Onfido users on Salesforce Classic and the Onfido Verification visualforce page has been added to one or more Object's page layouts as detailed here, they will also have to be removed. In order to proceed with uninstalling the package.

Once all the elements of the package have been removed from active use in the org, the package can be uninstalled in preparation for the new Onfido package.

Uninstalling the Older Onfido Salesforce App

The Onfido package can be uninstalled by navigating to **Salesforce Setup** > **Apps** > **Packaging** > **Installed Packages**. Look for the "onfido" package and click on the **Uninstall** link next to the package.



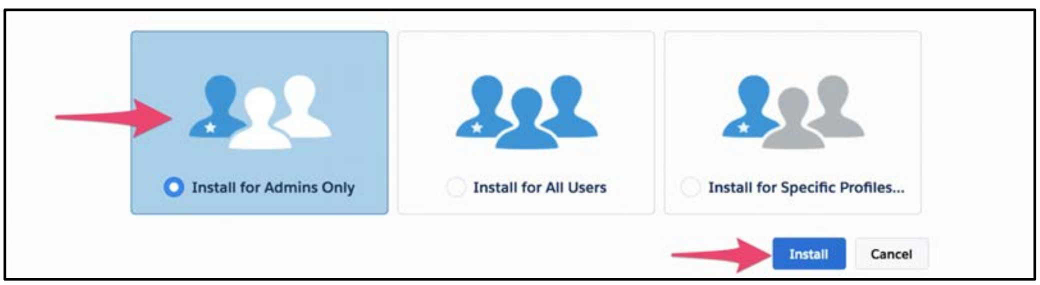
- Scroll down to the bottom of the next page and check the box for “Yes, I want to uninstall this package and permanently delete all associated components”.
- Click **Uninstall**

Installation

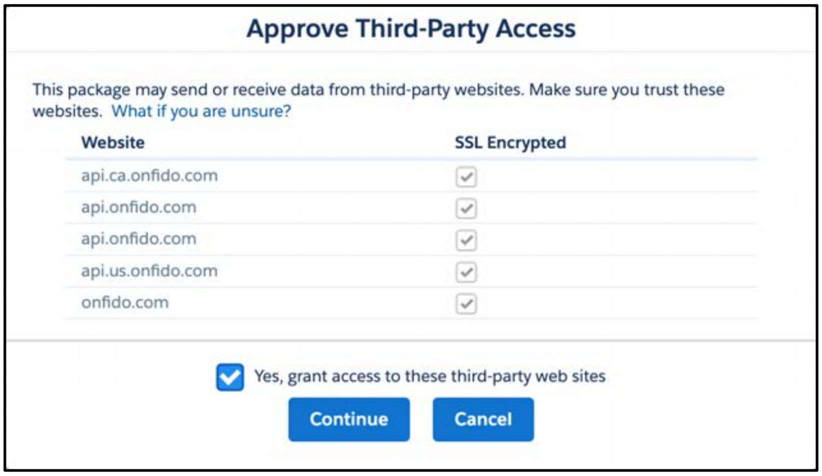
Installing the Onfido Package

Copy and paste the package install URL into your browser's address bar (please contact your administrator for the package link). If you are not already logged into the org you wish to install the package into, salesforce will prompt you to log in. If you already have Onfido installed, see the next section: Upgrading from an Older Version

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed. For further information, please click here to refer to salesforce documentation on Package Installations.



- **Approve Third-Party Access** - check off the box and click **Continue** to start the package installation when the modal appears.



Onfido App Configuration

Permission Sets

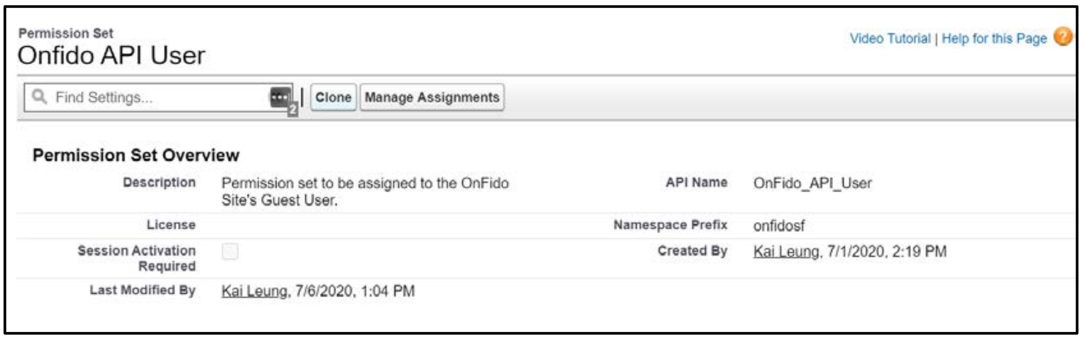
As part of the package, there are three Permission Sets. They are Onfido Setup, Onfido API User, and Onfido Feature Set Access. This section shows how to edit the Permission Sets and assign them to Salesforce Users. This guide will show you how to clone Permission Sets and then assign the proper apps to each.

Onfido API User Permission Set

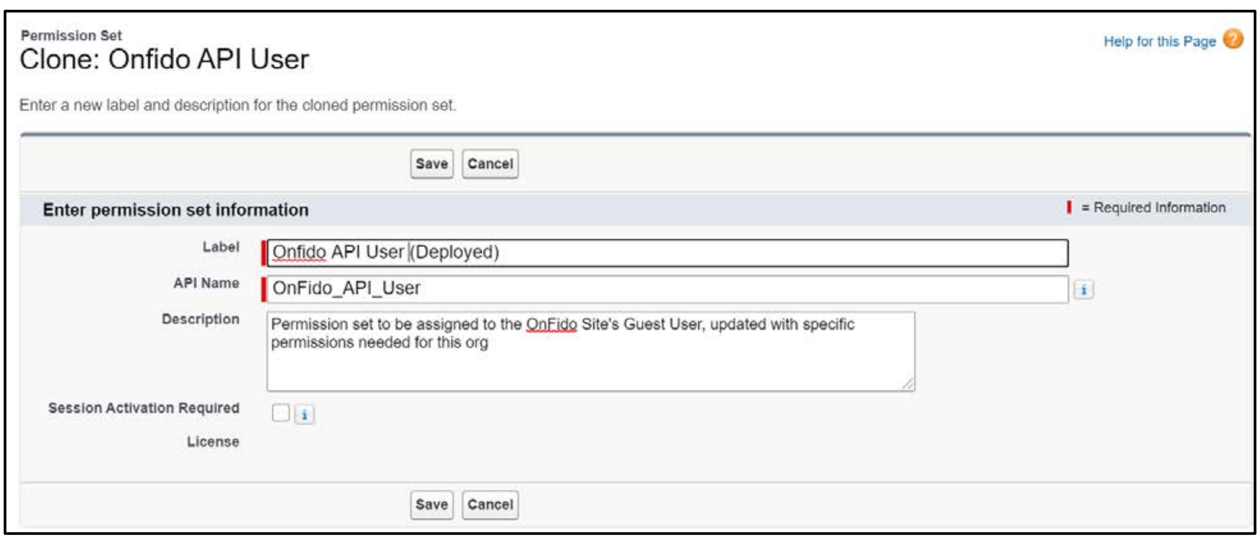
The Onfido API User Clone Permission Set is to be assigned to the Site Guest User during the Setup the Salesforce Site URL section. This will be done mid-flow of running the Onfido Setup app.

- Navigate to the Quick Find > Search “Permission Sets”

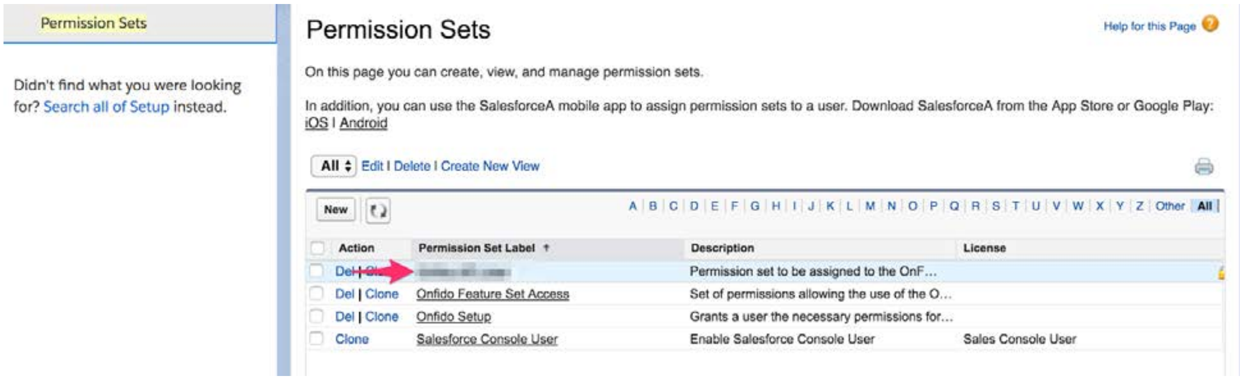
- Click **Clone** next to the Onfido API User Permission Set



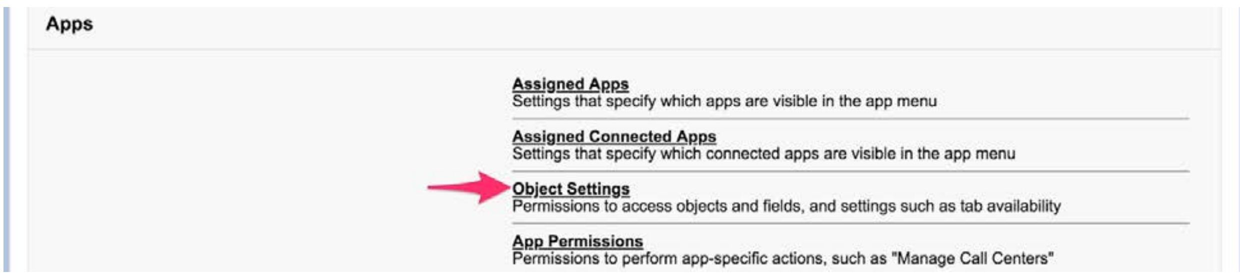
- Enter in a new Label and click API Name field which will automatically populate > Then Click **Save**



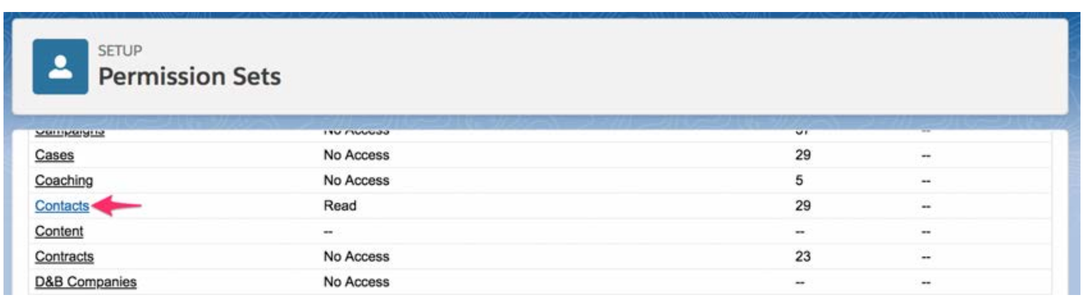
- Select the Onfido API User Clone Permission Set that was just created



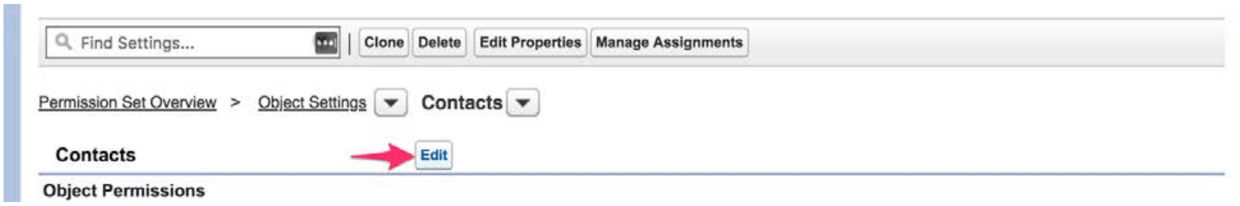
- Click **Object Settings**



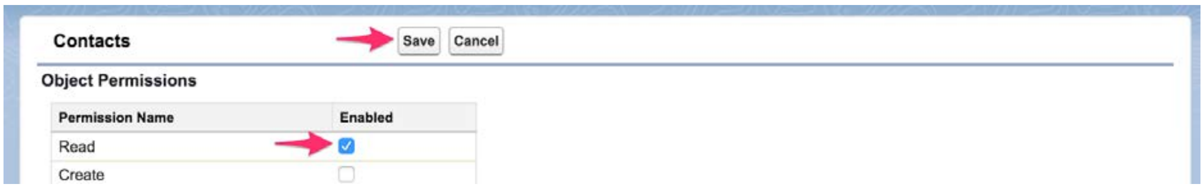
- **The following objects will need Read access regardless of what object you are running verifications from: Account, Case, Contact, Opportunity and Lead.**
    - If you have **Person Accounts** enabled, you will need to add permissions to the **Person Account Record Type** for the **Account** object as well



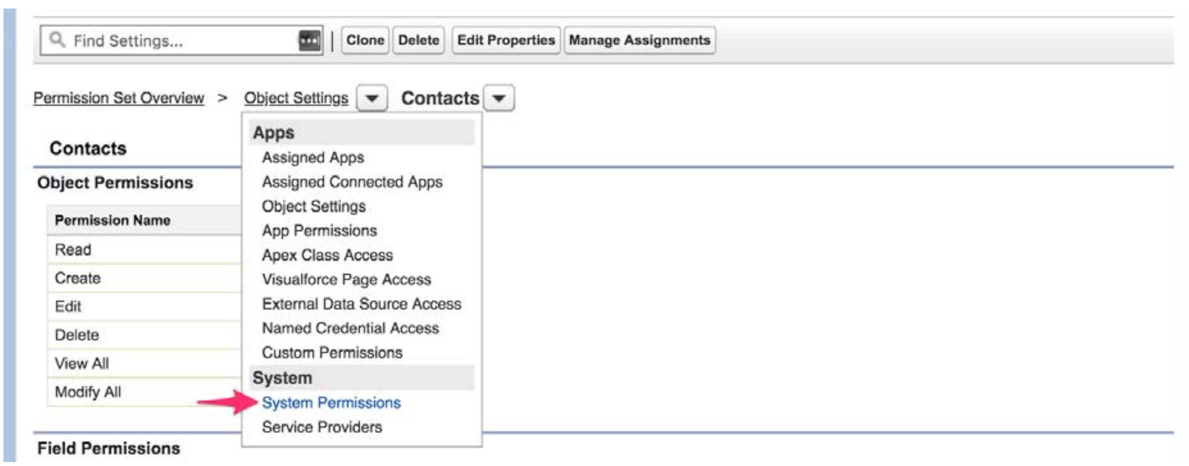
- Click **Edit**



- Object **Permissions** - **Read**
- Click **Save**



- On the cloned the API User permission set, give **Read** access to the Applicant object
- Navigate to **System Permissions**



- Click **Edit**

- Check **API Enabled** > Click Save
- **Note** - *If you are in a Developer Edition org, you will not be able to check this because you will get an error message later when assigning this permission set to the Guest User*

If Upgrading the Package and Not a Fresh Install

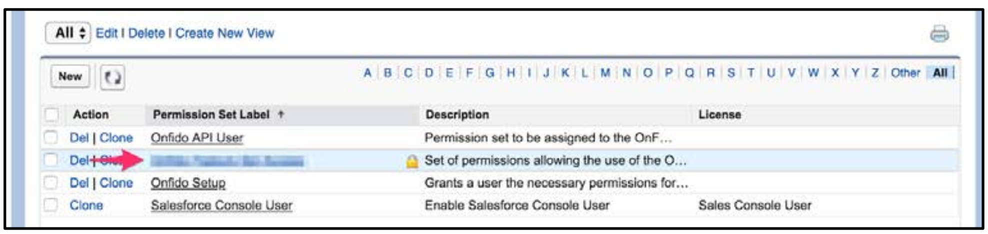
- If you are upgrading the package and have already cloned the API User permission set, you may need to give the following access:
    - Verification object: Read field access to “Onfido Language Override”
    - Onfido Customization object: Read field access to “Additional Head Markup”

Onfido Feature Set Access Permission Set

The purpose of the Onfido Feature Set Access Permission Set is to allow Users in your org to have access to the Onfido identity verification features.

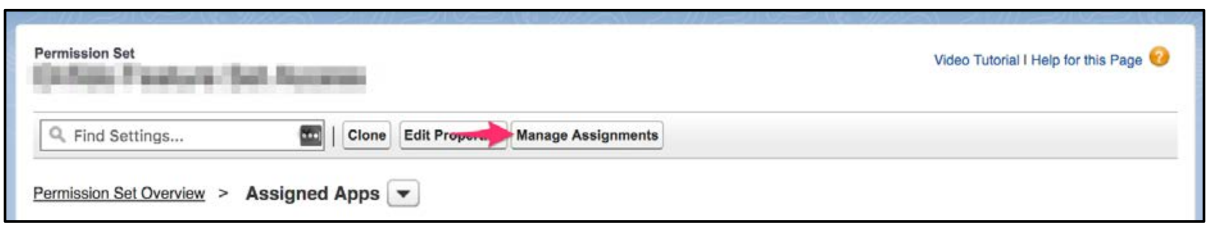
If you're using Experience/Community for implementing the solution and have your customers running verifications there, you may want to consider adding these permissions to their Profile instead of a permission set.

- Repeat the steps shown above to clone the **Onfido Feature Set Access** Permission Set
- Select the **Onfido Feature Set Access** Permission Set that was just cloned

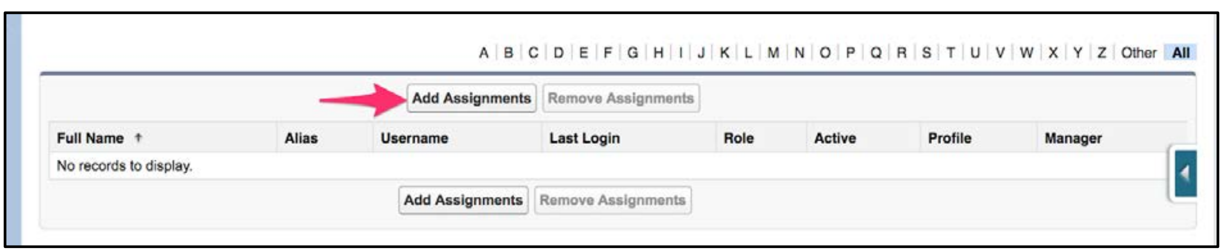


- Navigate to **Object Settings**
  - You will need to grant **Read** object permissions to the following objects:
    - **Accounts**, **Cases**, **Contacts, Lead and Opportunities** (If permission set is for Community Users, you do not need to give Read access to Leads and Opportunities. When setting up your flow, you should specify Without Sharing)

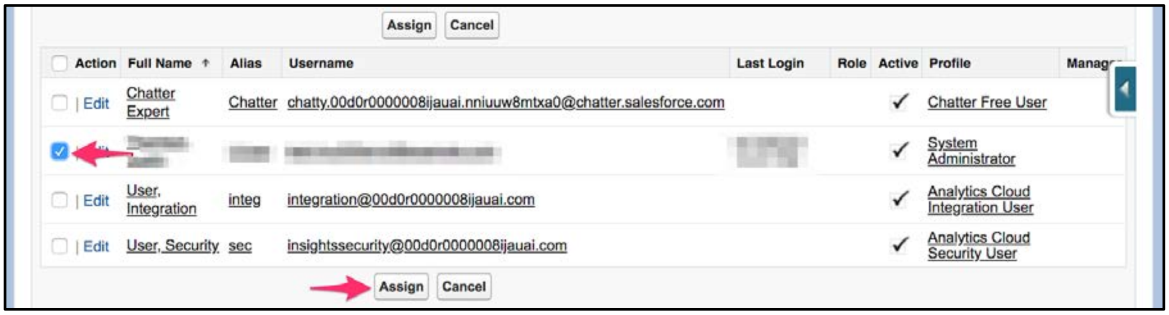
        - **Note:** For the objects that you have mapped (thus are running verifications from) you will need additional object permissions: **Read/Create/Edit**
        - If you are utilizing **Person Accounts**, you will need to give access to that record type by drilling into the Account object settings
    - **Field Permissions** - You will need Read/Edit permissions on all the mapped fields for their respective objects
    - If you are utilizing the "Start Verification" field on these objects, you will need to grant access to that field
- Click **Manage Assignments**



- Click **Add Assignments**



- Select the Users who need access to the Onfido identity verification features > Click **Assign**



If Upgrading the Package and Not a Fresh Install

If you are upgrading the package and have already cloned the Onfido Feature Set Access permission set, you may need to give the following access:

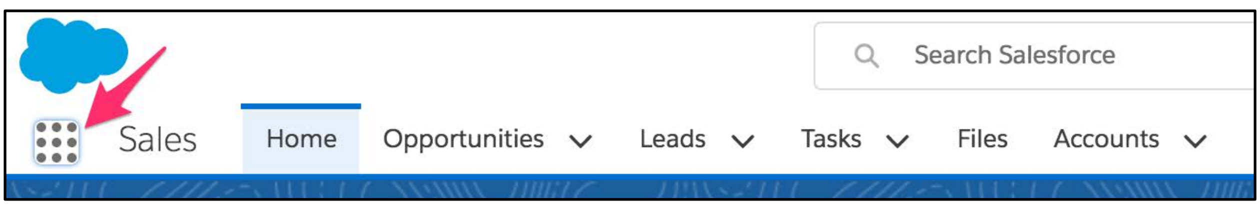
- Customization object: Read/Edit field access to “Additional Head Markup”

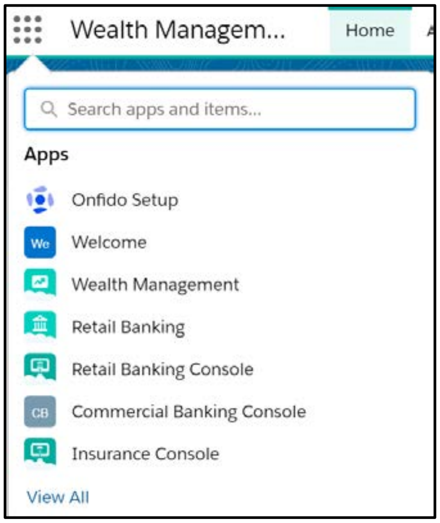
Onfido Setup Access Permission Set

Previous installation instructions included setting up a permission set for the user(s) in charge of completing the Onfido setup wizard. This permission set is still a part of the package. Since it is typically a Salesforce user with System Admin access that is in charge of implementation, this permission set was deemed unnecessary since those users will already have access to all assets from the package as part of the package installation process.

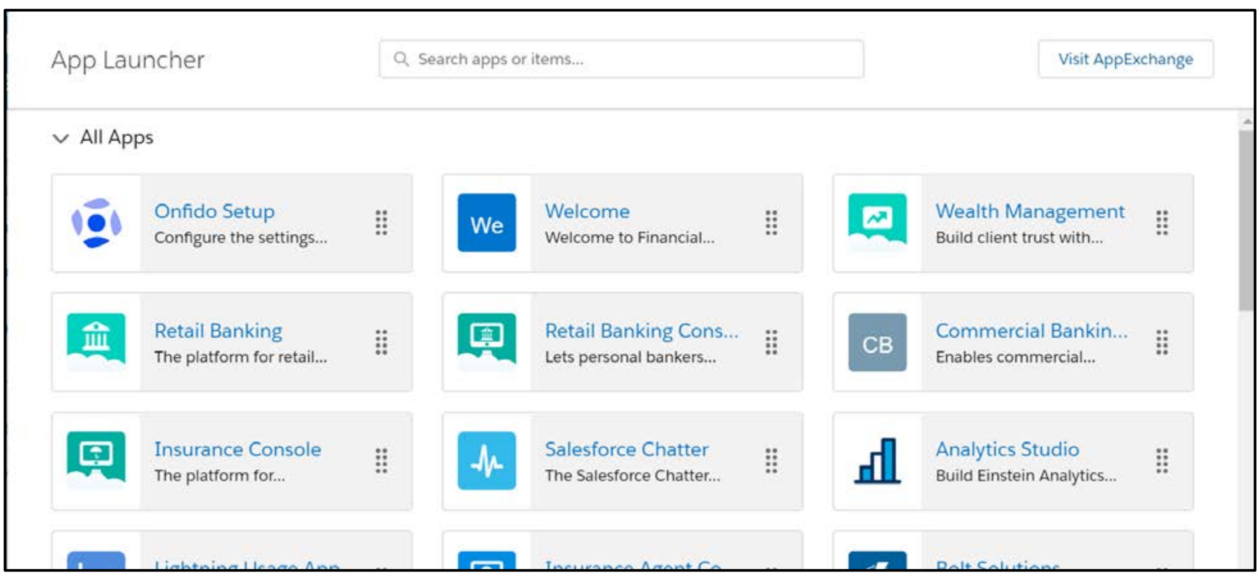
Onfido Setup (Setup Assistant)

The Onfido Setup Assistant will need to be completed to connect your Salesforce org to your Onfido account in order to retrieve your list of bots and devices and to initiate your bots from Salesforce. To start System Connections, navigate to **App Launcher > Onfido Setup**



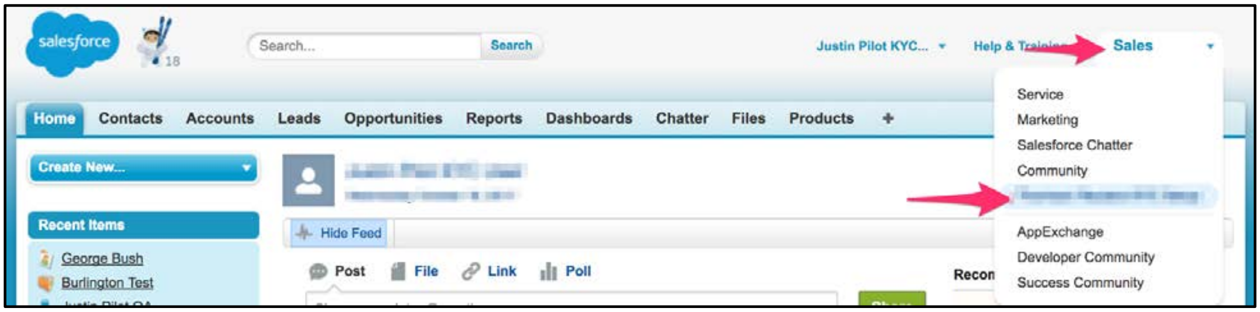


- If you do not see the Onfido Setup app, either type “Onfido” to search for it or click on the **View All** link at the bottom to see the full list of Apps

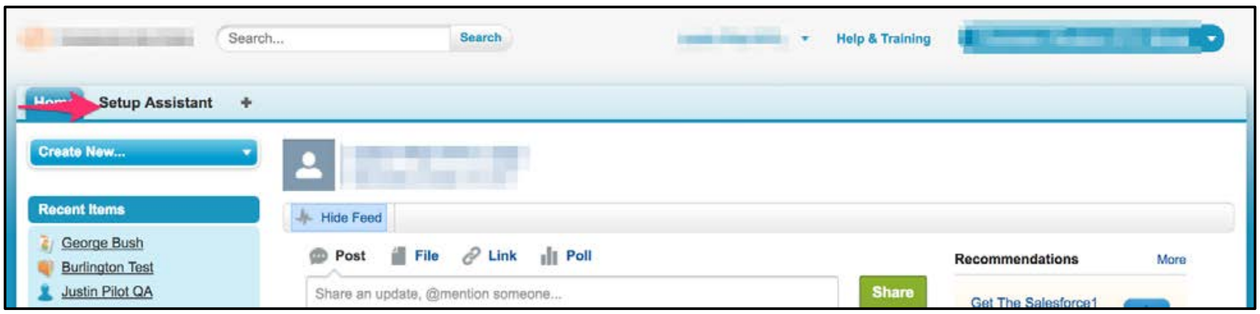


To navigate to the Onfido Setup app using Salesforce Classic follow these steps:

- Click the **Force.com App Menu** > Select the **Onfido Setup** app



- Click the **Setup** tab



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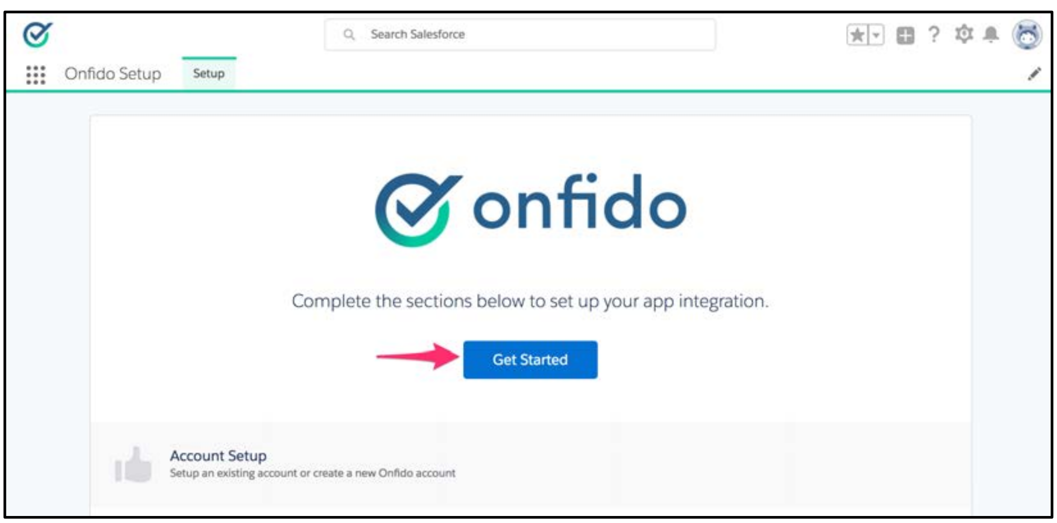
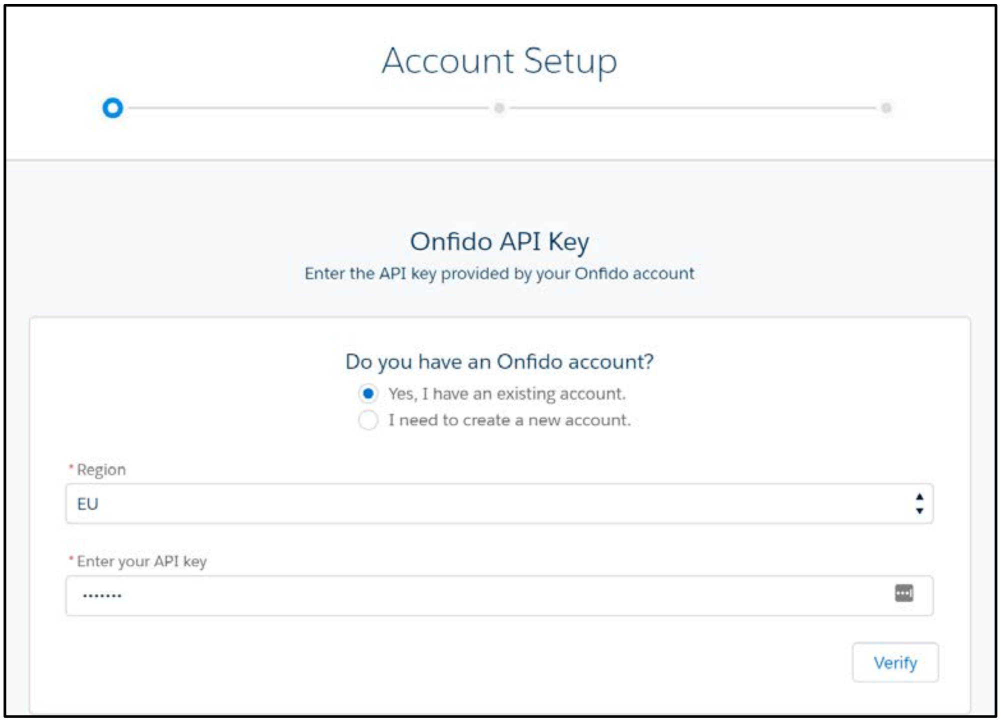
Account Setup

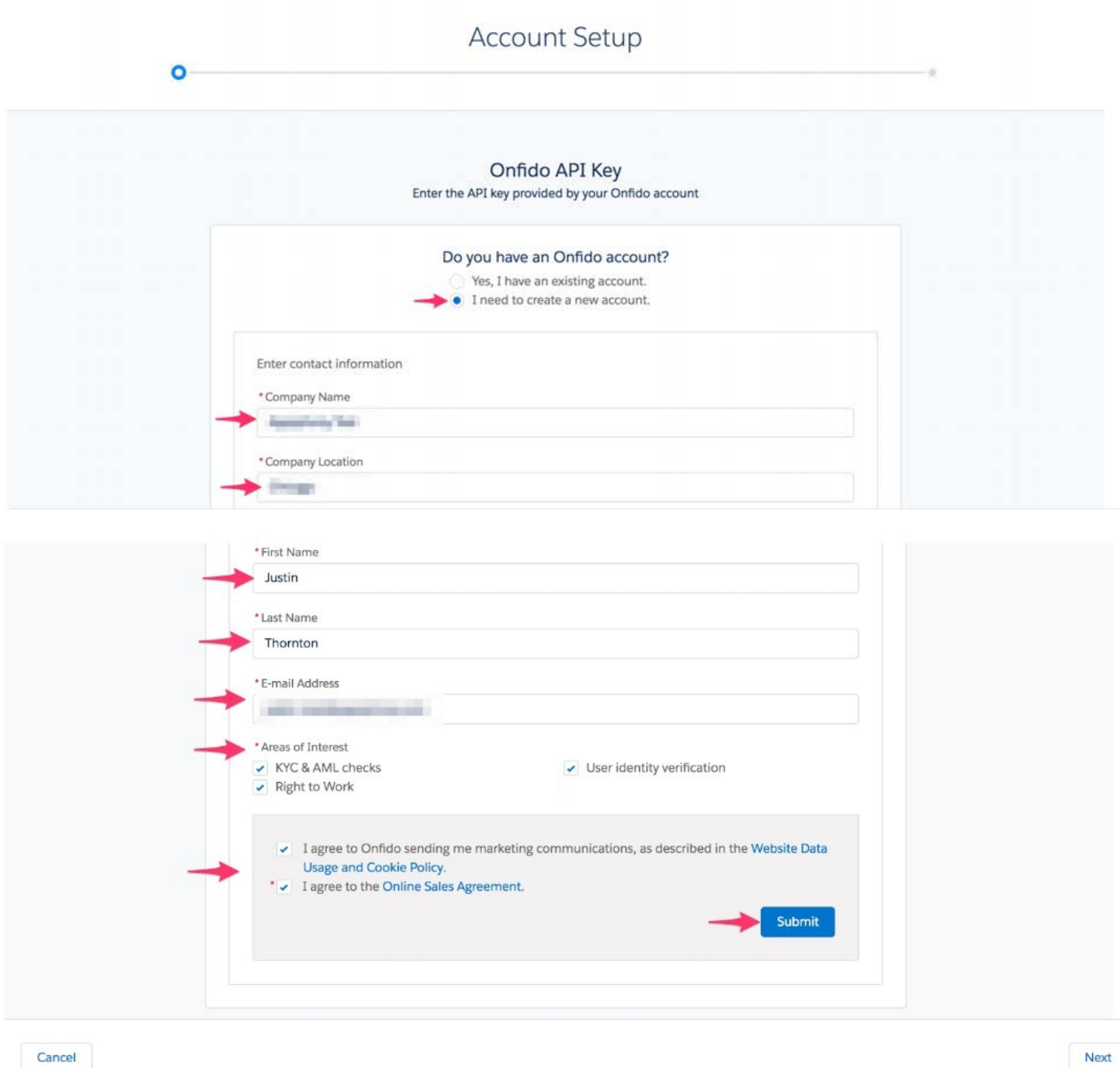
- Click **Get Started**



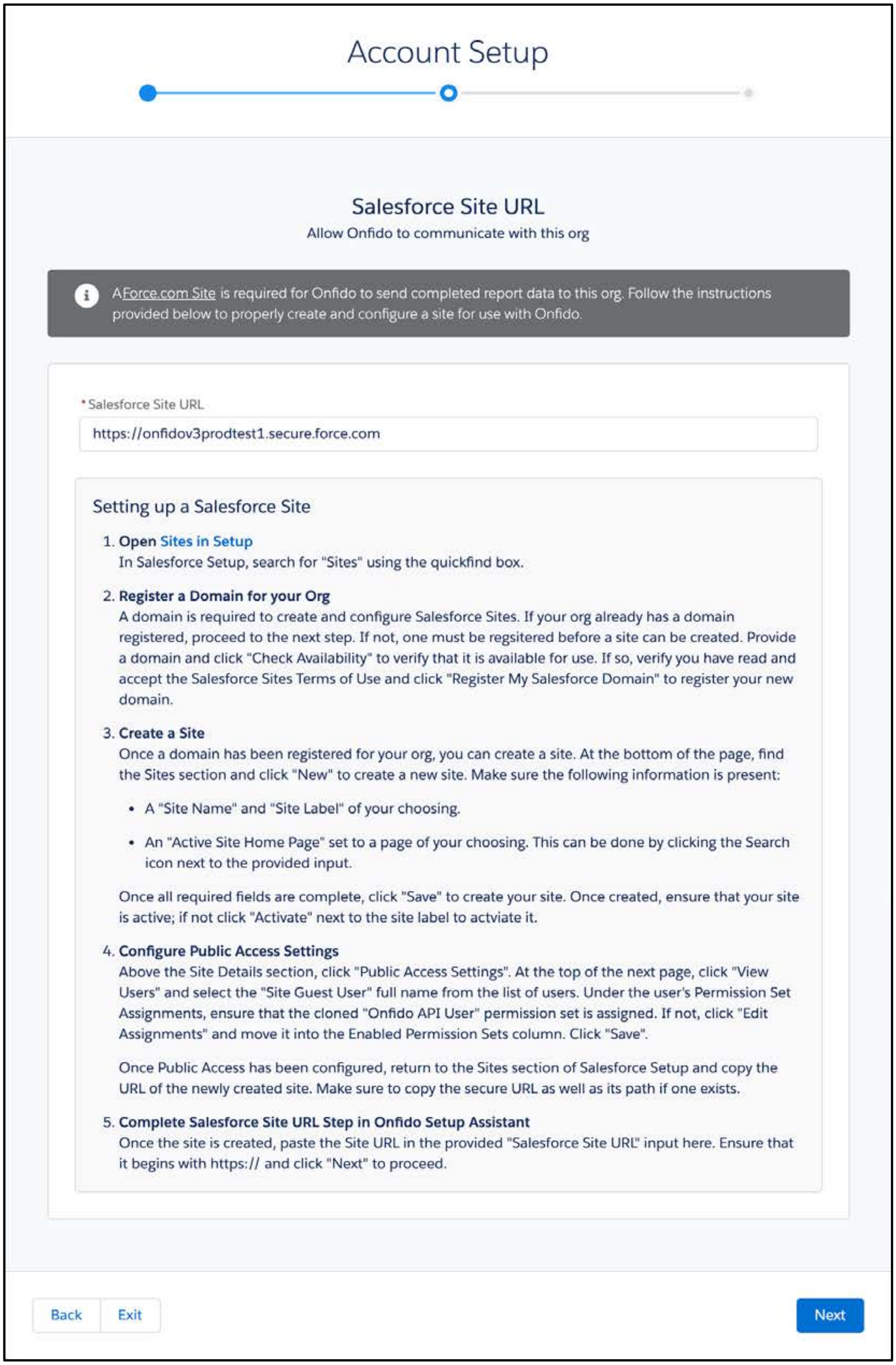
- If you have an existing Onfido Account then Select your region and Enter your API Key, then click Verify > Then click Next > You may now proceed to the section on creating a webhook with your Salesforce Site URL



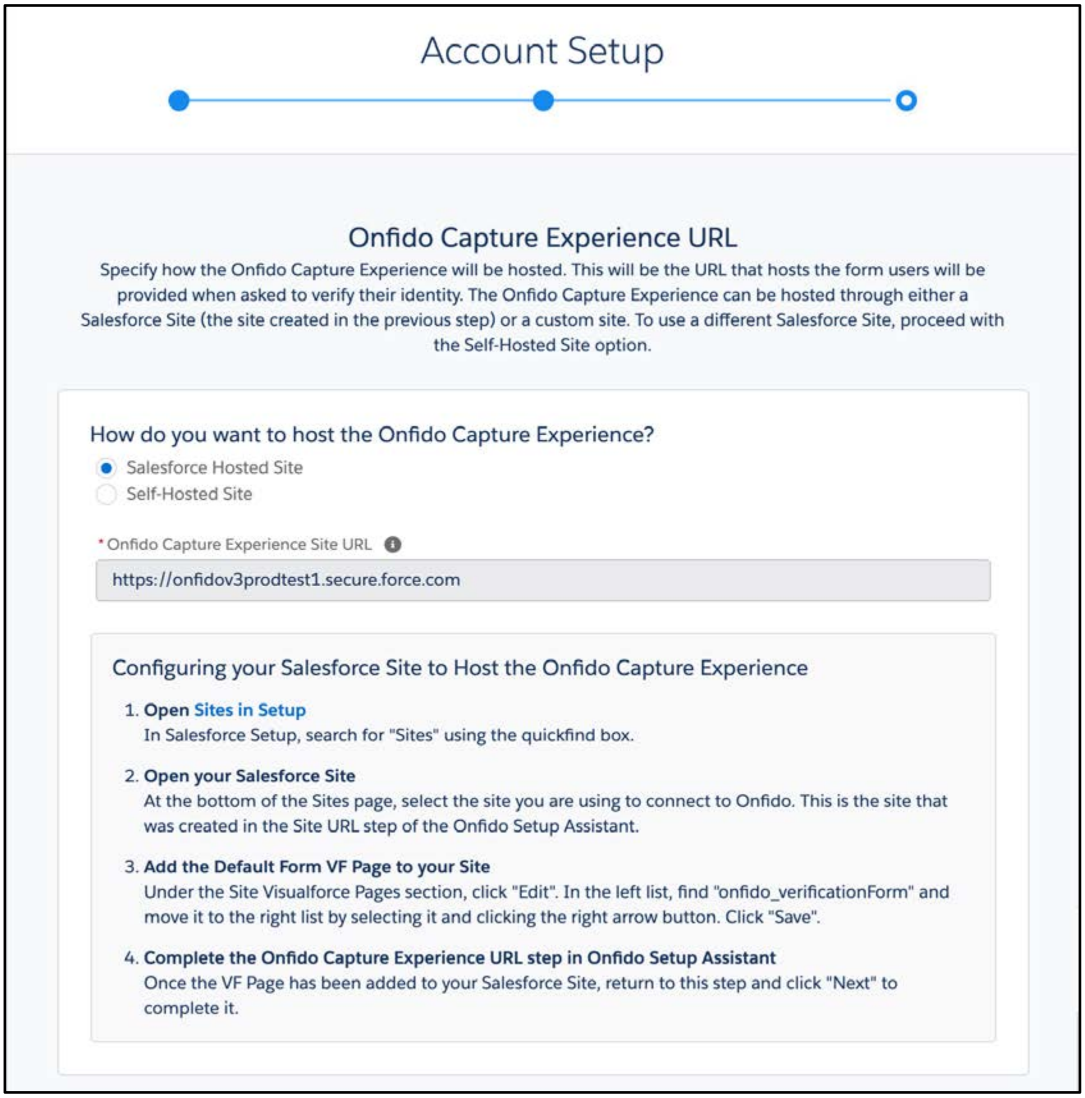
- If you do not have an existing Onfido Account and need to set one up, select "**I need to create a new account**" and fill out the form > Click **Submit**



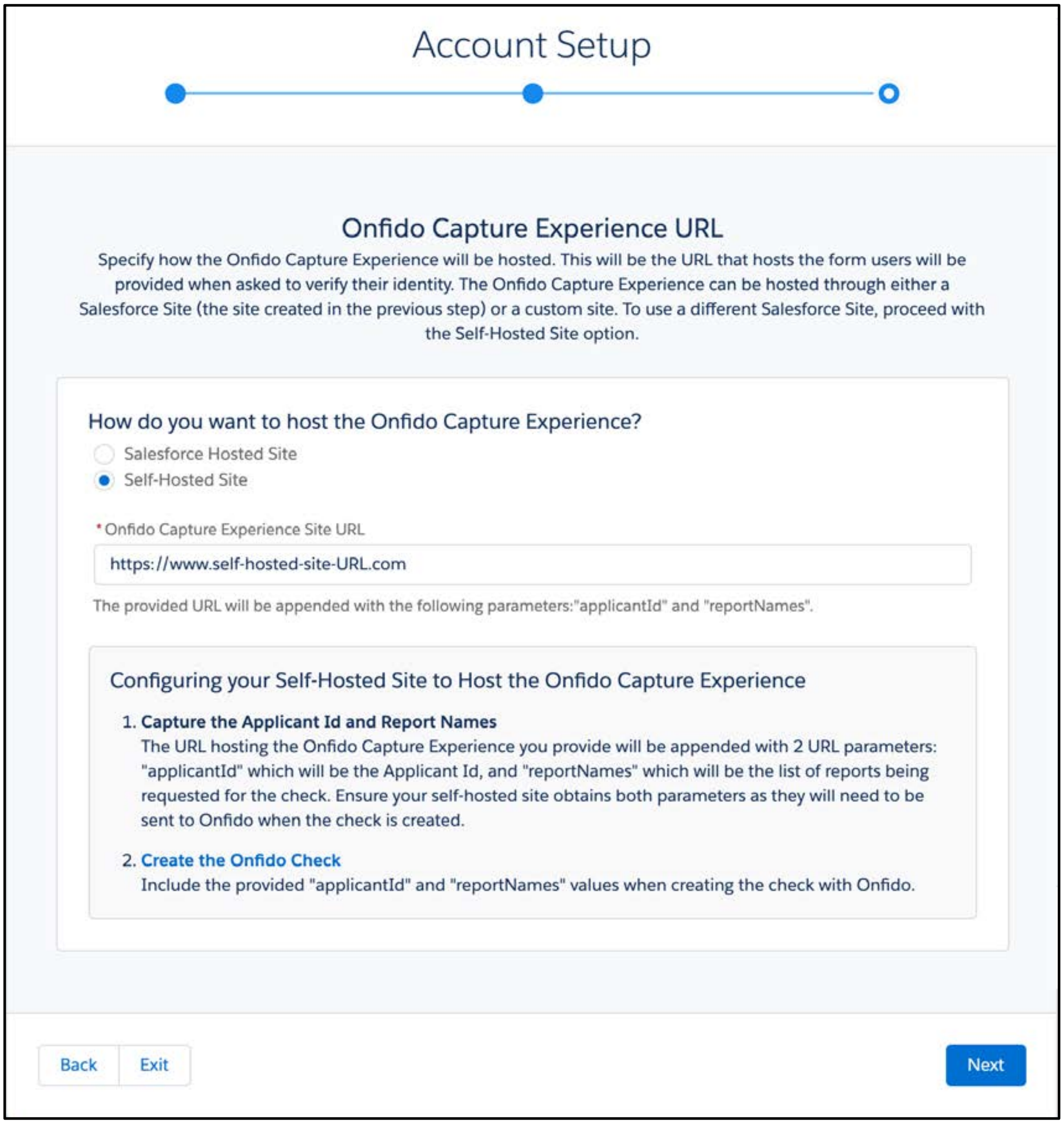
- Click **Next**
- Now you will have to enter the URL of the Salesforce Site that will be used to accept status updates and other data coming from Onfido


Account Setup
Salesforce Site URL
Allow Onfido to communicate with this org
A Force.com Site is required for Onfido to send completed report data to this org. Follow the instructions provided below to properly create and configure a site for use with Onfido.
*Salesforce Site URL
https://onfidov3prodtest1.secure.force.com
Setting up a Salesforce Site
1. Open Sites in Setup
In Salesforce Setup, search for "Sites" using the quickfind box.
2. Register a Domain for your Org
A domain is required to create and configure Salesforce Sites. If your org already has a domain registered, proceed to the next step. If not, one must be regsitered before a site can be created. Provide a domain and click "Check Availability" to verify that it is available for use. If so, verify you have read and accept the Salesforce Sites Terms of Use and click "Register My Salesforce Domain" to register your new domain.
3. Create a Site
Once a domain has been registered for your org, you can create a site. At the bottom of the page, find the Sites section and click "New" to create a new site. Make sure the following information is present:
• A "Site Name" and "Site Label" of your choosing.
• An "Active Site Home Page" set to a page of your choosing. This can be done by clicking the Search icon next to the provided input.
Once all required fields are complete, click "Save" to create your site. Once created, ensure that your site is active; if not click "Activate" next to the site label to actviate it.
4. Configure Public Access Settings
Above the Site Details section, click "Public Access Settings". At the top of the next page, click "View Users" and select the "Site Guest User" full name from the list of users. Under the user's Permission Set Assignments, ensure that the cloned "Onfido API User" permission set is assigned. If not, click "Edit Assignments" and move it into the Enabled Permission Sets column. Click "Save".
Once Public Access has been configured, return to the Sites section of Salesforce Setup and copy the URL of the newly created site. Make sure to copy the secure URL as well as its path if one exists.
5. Complete Salesforce Site URL Step in Onfido Setup Assistant
Once the site is created, paste the Site URL in the provided "Salesforce Site URL" input here. Ensure that it begins with https:// and click "Next" to proceed.
Back
Exit
Next

- Follow the instructions on this page to configure your site.
- For additional information and detailed instructions, see the Setup the Salesforce Site URL section.
- After your site has been configured, copy-paste the URL into the field and click **Next**
- The next step involves selecting the site on which the Onfido verification form will be hosted. Your applicants will be sent here when completing their verification process



- If using the same site from the previous step, the URL field is pre-filled for you
- Follow the guidance instructions for adding the packaged Onfido Verification visualforce page to the site
- If your organization has its own verification site, select the **Self-Hosted Site** option

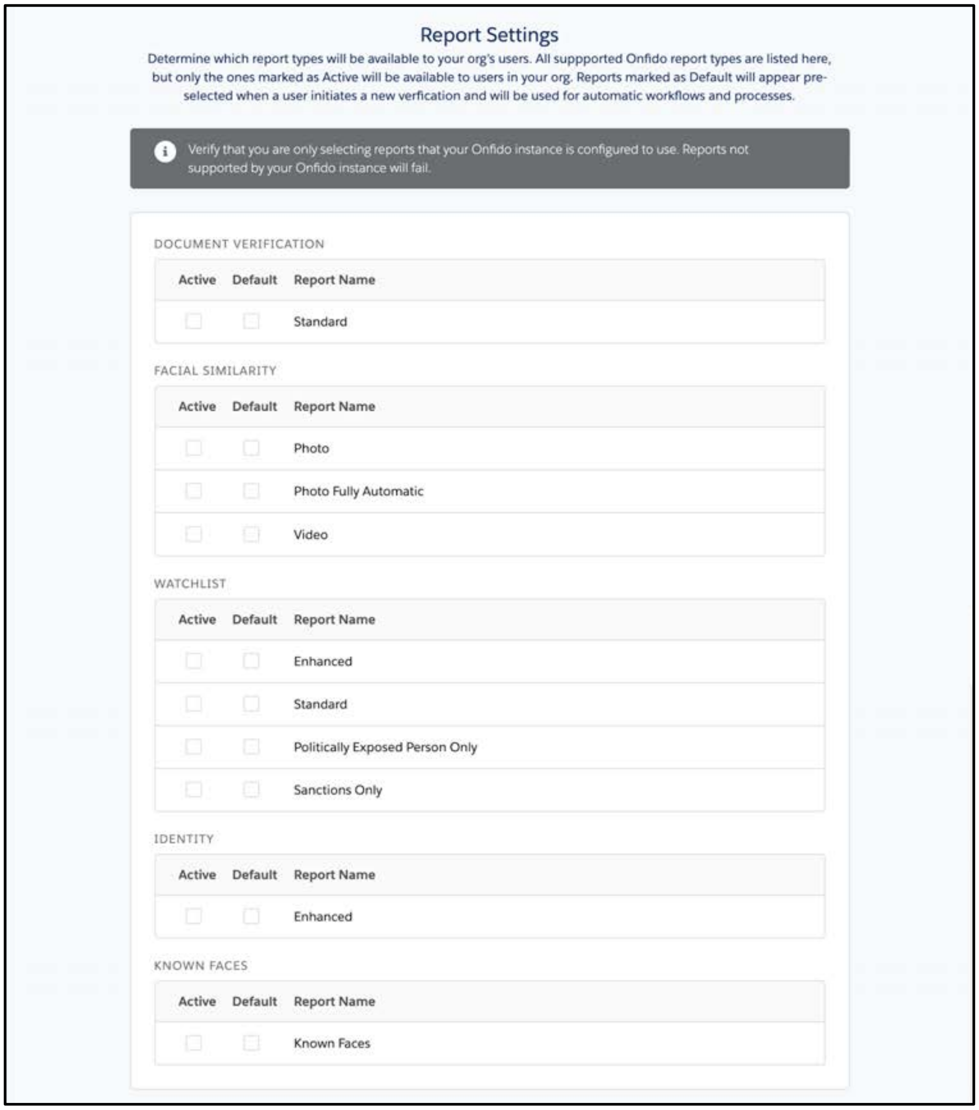


- Here a self-hosted site URL can be entered and saved
- Note that your site will need to have the Onfido verification system implemented
    - Click the **Create the Onfido Check** to view Onfido's API documentation

    - For additional assistance, contact the team responsible for the development of the self-hosted site
- Click **Next** once you are finished

Default Report Settings

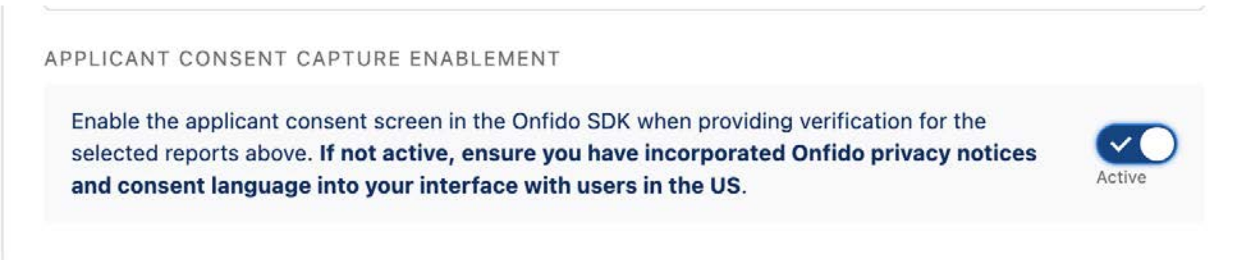
The next part of the setup wizard is for selecting the reports available to your users when they initiate a verification for an applicant. All of the reports available from Onfido will be shown, including reports that your Onfido Account may not have the licensing for.



- Check the **Active** boxes for the reports that you want to be available for your users
    - **IMPORTANT NOTE:** if an unsupported/unlicensed report is checked as active your users will be able to select it when initiating a verification, BUT the applicant will see an error when they attempt to complete the verification process

- Check the **Default** boxes for the reports that should be selected by default when a user initiates a verification for an applicant
    - Only one default can be selected per report type
- Once finished, click **Next**

Customer Consent Flag

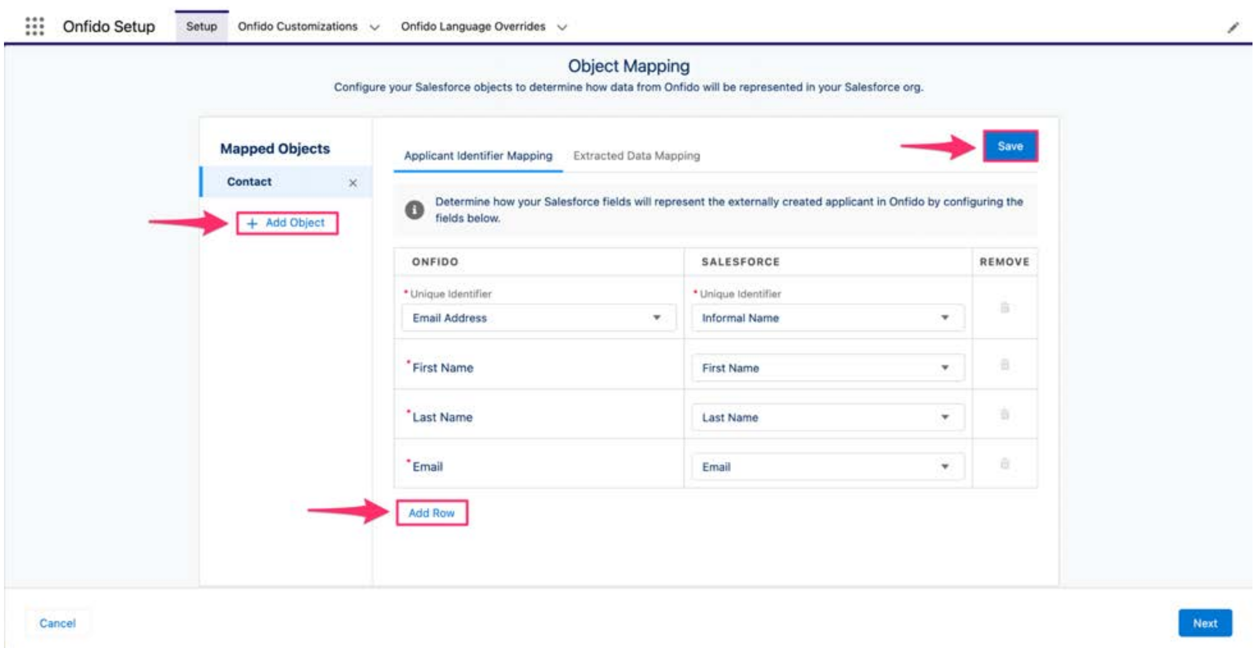


- If enabled, there will be an added step within the Onfido SDK asking for consent

Data Field Settings

In this section you will determine how externally created applicants will be represented in your Salesforce org. As well as the required fields that must be entered on a Salesforce record in order to run a verification. This will also be your object when running Onfido verifications and if at any time you wish to select a different object you will need to change your object and field mappings back in this section of the Onfido Setup app (As well as add the custom component or Visualforce Page to the page layout). You will map the Onfido object to a Salesforce object of your choice, and then map the Onfido fields to Salesforce fields. These will need to be custom fields if you are selecting Account, Case,Opportunity, User, or Lead .

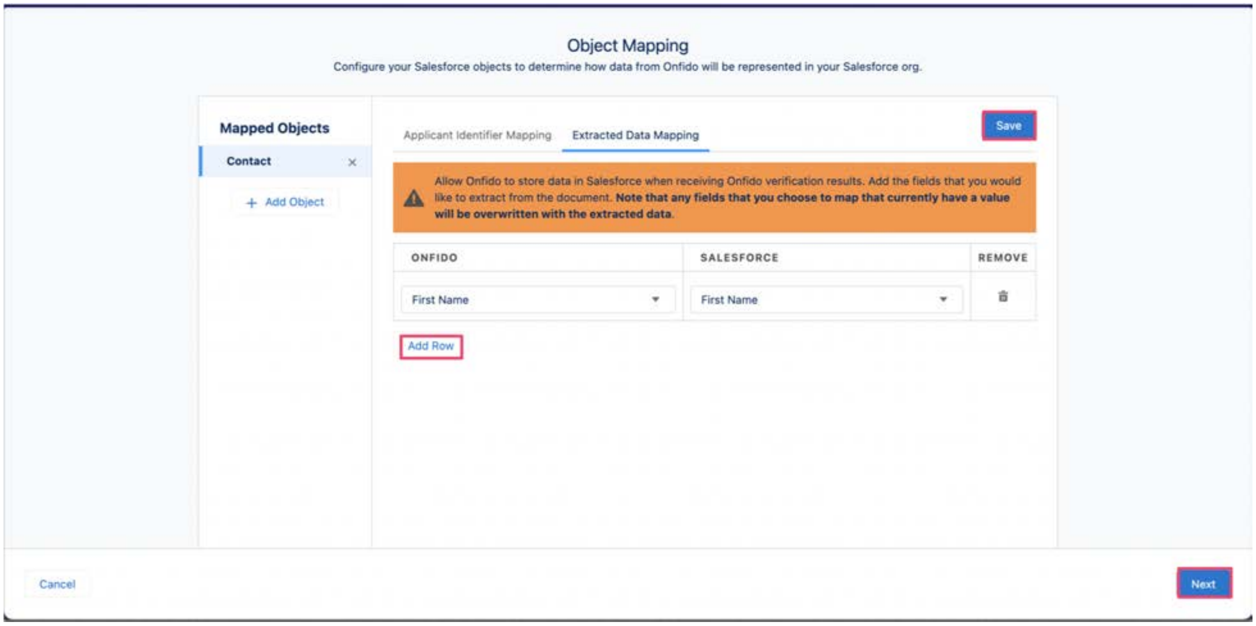
- You will not need to create custom Salesforce fields if your object selection is Contact or Person Account.
  - If **Person Account**, make sure **Email** is on the **Person Account** Page Layout (**Salesforce Classic** > "**Person Accounts**" in Quick Find > **Edit Page Layout** > Add **Email** field)
- Your custom fields should be either of Data Type "Email" or "Text"



- Click Add Object to add a new object or multiple objects

- Click Add Row to add Onfidos fields to the Salesforce Fields (**Note: If there are fields that are unmapped they will get removed.**)
- Click the Save button to save down mappings

- Click into Extracted Data Mapping Tab **(Note: this section is not required.)**



- Click Add Row to add fields
- Click Save to save down mappings
- Click Next to complete Object Mapping Settings section

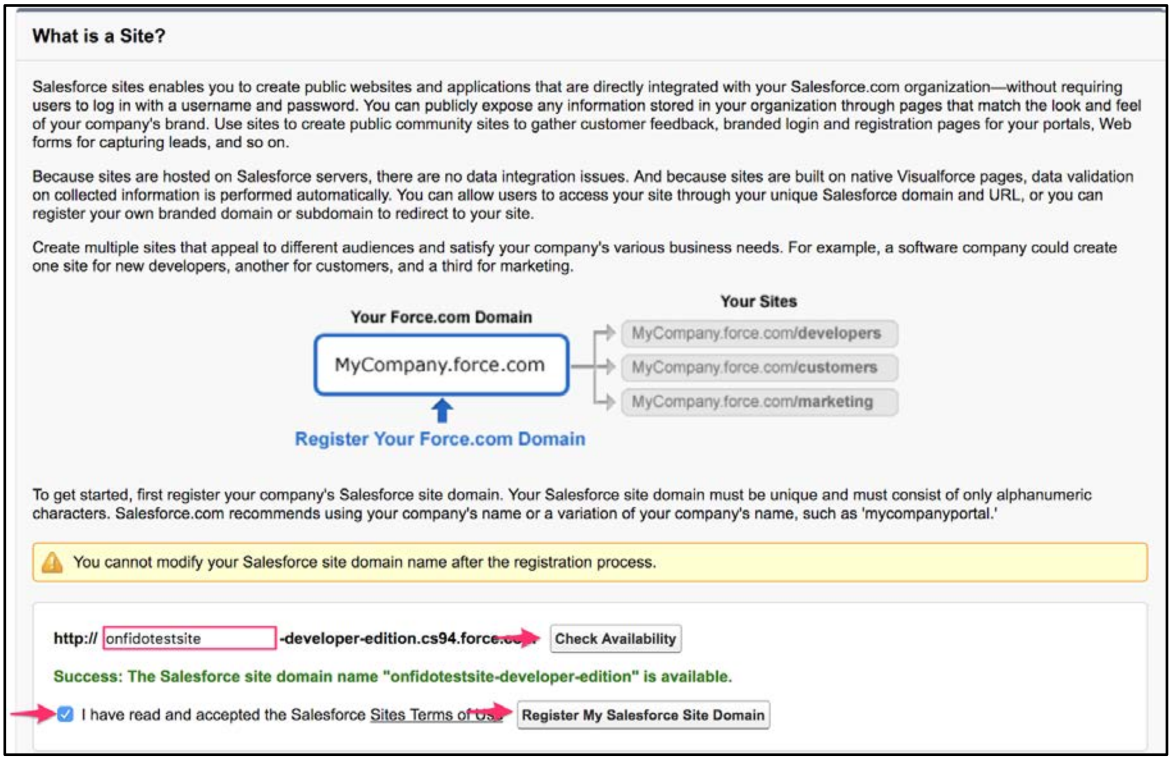
NOTE: If you will be using Identity reports, you must map these additional fields and populate them on your Salesforce record: Street, City, State, Country, Postcode and Date of Birth. The **country** data needs to be the country 3 letter code in order to properly get data for breakdowns.

Setup the Salesforce Site URL

The following includes more in-depth steps with screenshots for setting up your Site used in the Account Setup portion of the Onfido Setup wizard. You will need to make sure that besides having the secure URL, that the Profile that is generated when the Site is/was created gets assigned the Onfido API User Clone Permission Set. Based on the object and fields that you will be mapping to, you will need to make sure you edit this Permission Set so that there are no issues with data that is passed between your Salesforce Org and Onfido.

In the Account Setup step documented above, there is a link to navigate to the Site Setup page in Salesforce. After clicking on the **Sites to Setup** link and navigating to the Sites page, continue with the following steps:

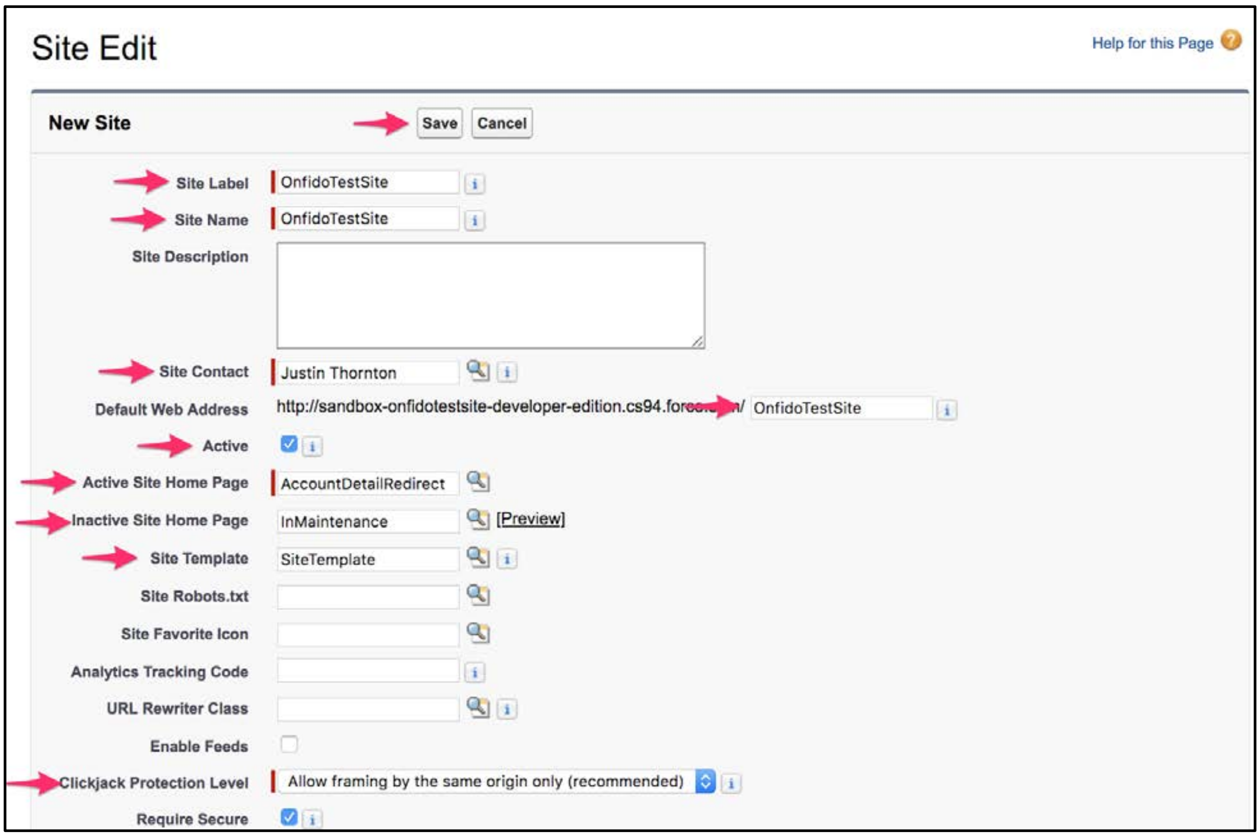
- Enter in a Site domain
    - Click **Check Availability** >
    - Check “I have read and accepted the Salesforce Site Terms of Use
    - Click **Register My Salesforce Site Domain**



- Click **New**

- Enter **Site Label** and **Site Name**
- Select **Site Contact**
- Enter **Default Web Address** suffix
- Check **Active**
- Select **Active Site Home Page**

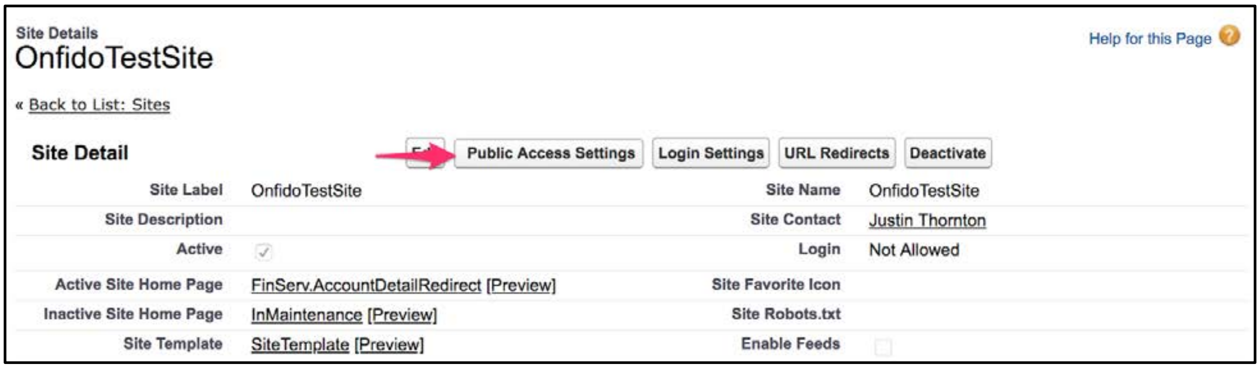
- Select **Inactive Site Home Page**
- Select **Site Template**
- Set **Clickjack Protection Level** to default
    - **Note**: If you are using Experience, you will need to use **Allow framing of site pages on external domains (Good protection)**
- Click **Save**



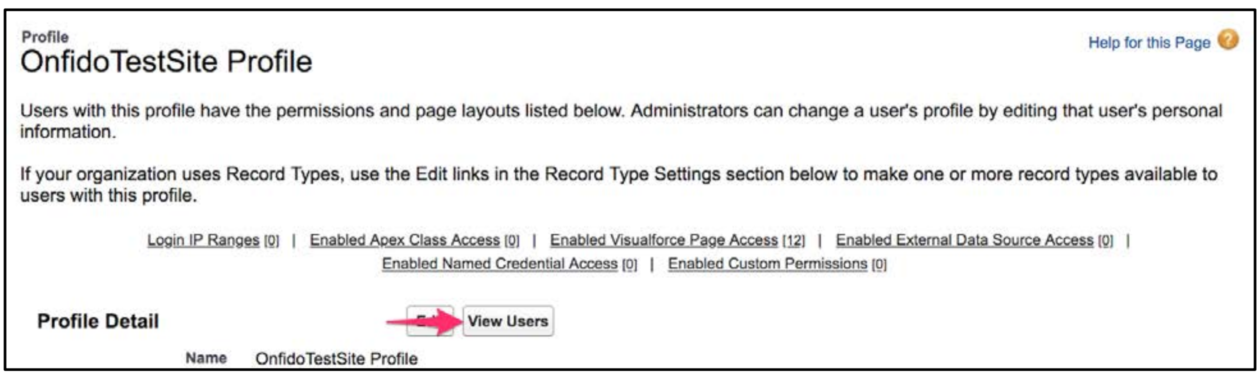
Now that the site has been created, we need to assign the Permission Set cloned and updated from the packaged Onfido API User permission set created in the [Onfido API User Permission](#)

Set section so that the Site has the access it needs to control the flow of information between your Salesforce org and Onfido.

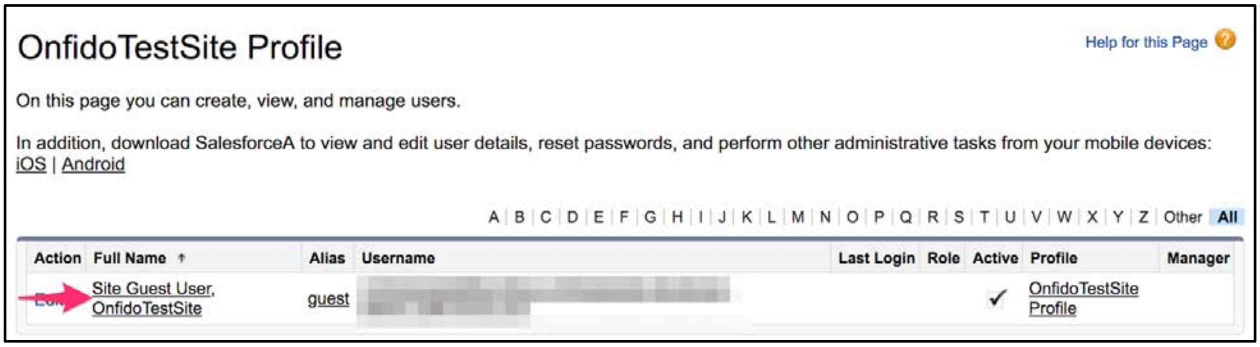
- Click **Public Access Settings**



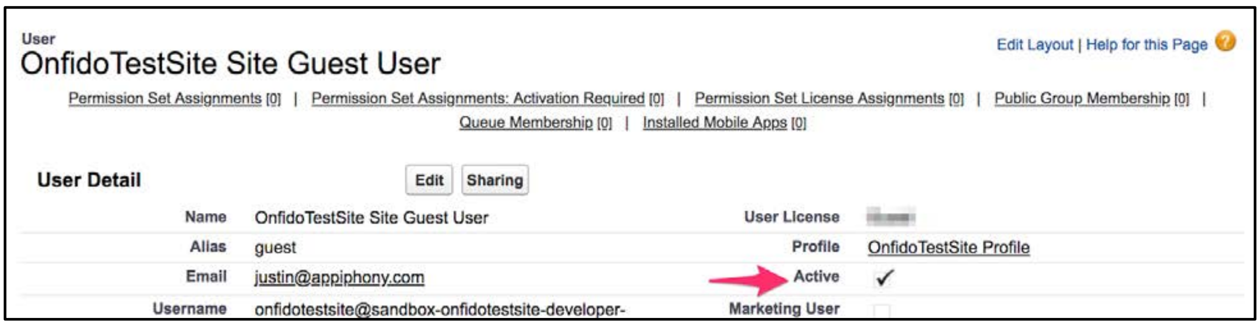
- Click **View Users**



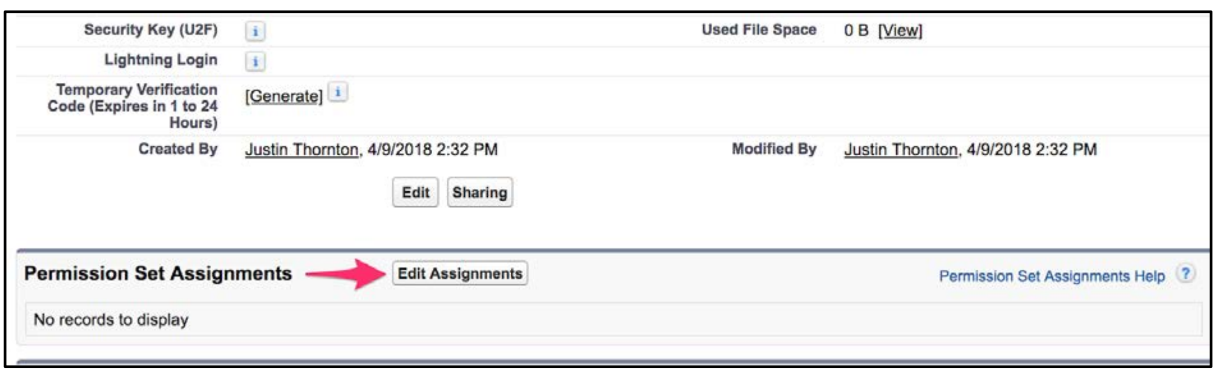
- Click the **Full Name** of the Guest User



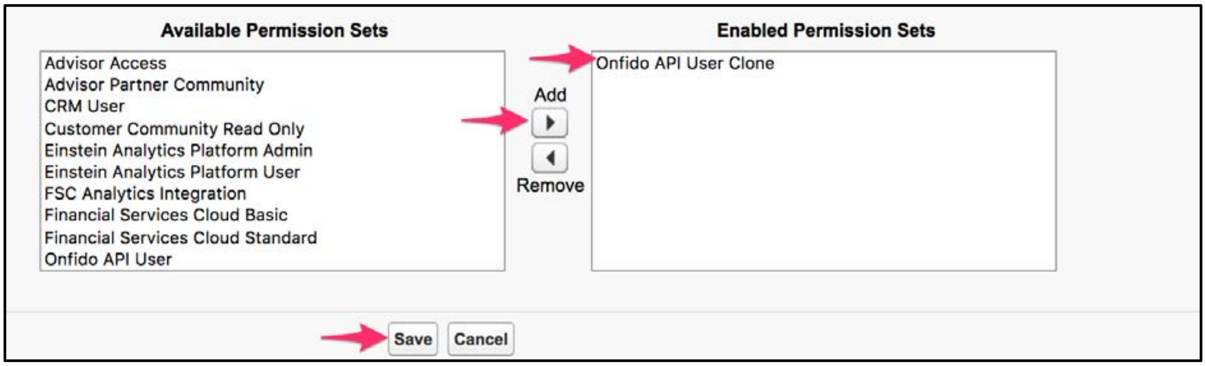
- Confirm your User is **Activated**



- Click **Edit Assignments**

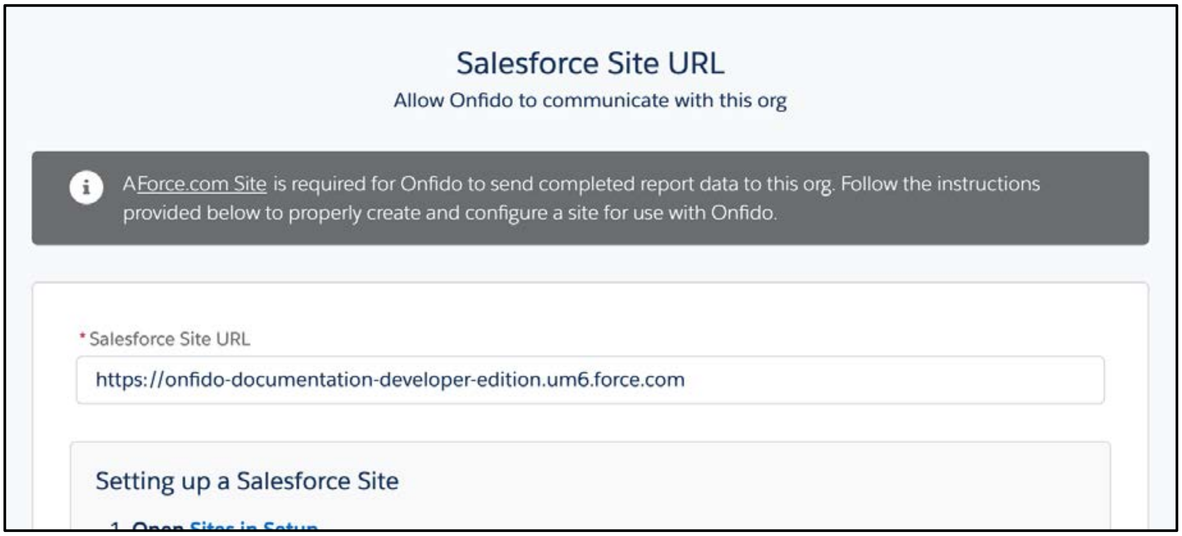


- Assign the cloned and updated version of the Onfido API User Clone Permission Set
- Click **Save**



- Go back to the Site Details Page by clicking the Site Label on the Sites landing page (Can use the Quick Find and search for "Sites")
- Scroll down the page and copy the Custom URL (copy the secure URL), as well as the Path. You will paste this back in the Onfido Setup app and include "https://". If you are in a production environment and have a domain with "http://", change what's entered in the Setup app step to "https://".

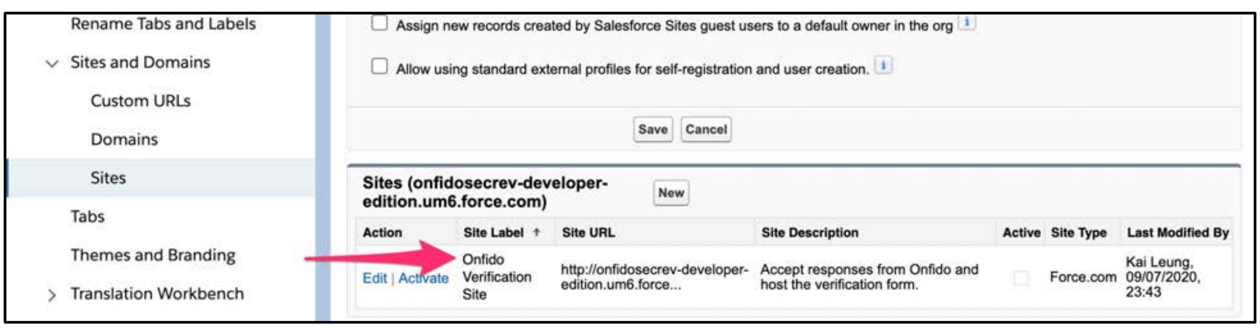
- Paste this URL address into the input in the second step of [Account Setup](#).



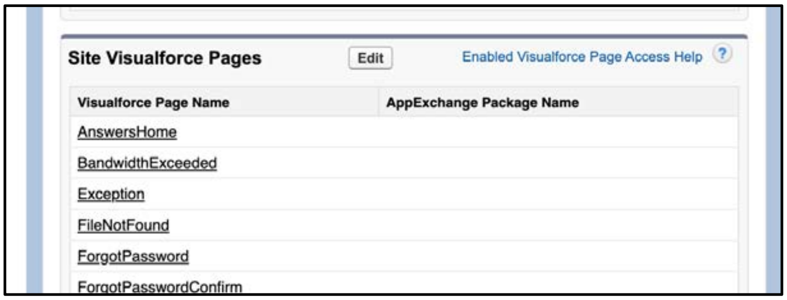
Add the Onfido Verification Form Visualforce Page to Site

In the last step of Account Setup, it is possible to host the Onfido Capture Experience on the same site that was used in the second step. If that is the implementation option that is being executed, an Admin will have to add the visualforce page to the site. If the included guidance is not enough, use the following instructions with screenshots as an additional guide.

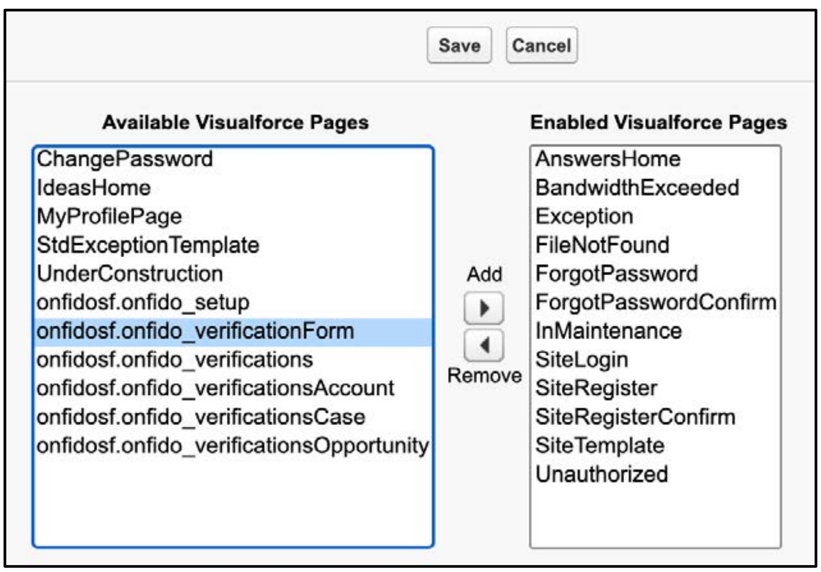
- Return to the Salesforce Sites Page be searching for “Sites” in Salesforce Setup
- Click on the Site Label for the site you are using again

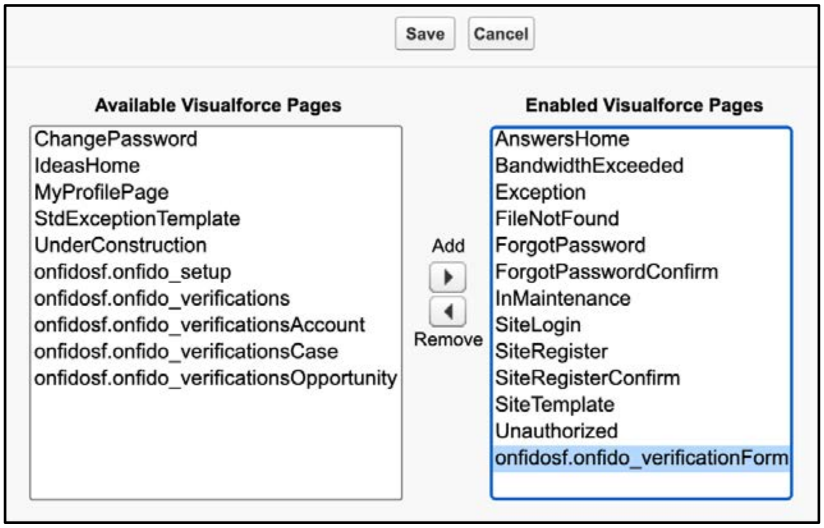


- After navigating to the detailed settings for the site, scroll down until seeing a section of growth called **Site Visualforce Pages**



- Click **Edit**
    - Select the **onfidosf.onfido_verificationForm** under Available Visualforce Pages
    - Click the **Add** button





- Click **Save**

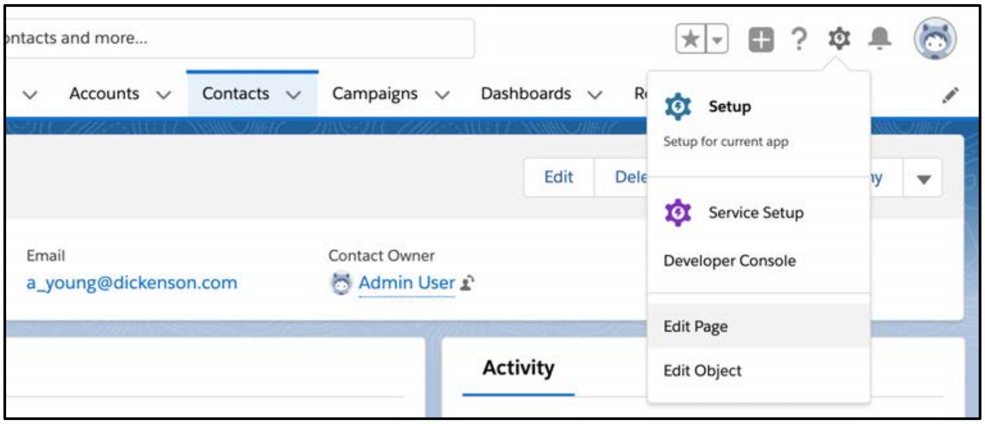
Adding Lightning Components to Record Pages

Included as part of the Onfido package is the **Onfido Identity Verification** lightning component. This lightning component will allow your users to initiate Onfido Verifications based on the object selected in the Data Field Settings step above and send the verification email to an applicant.

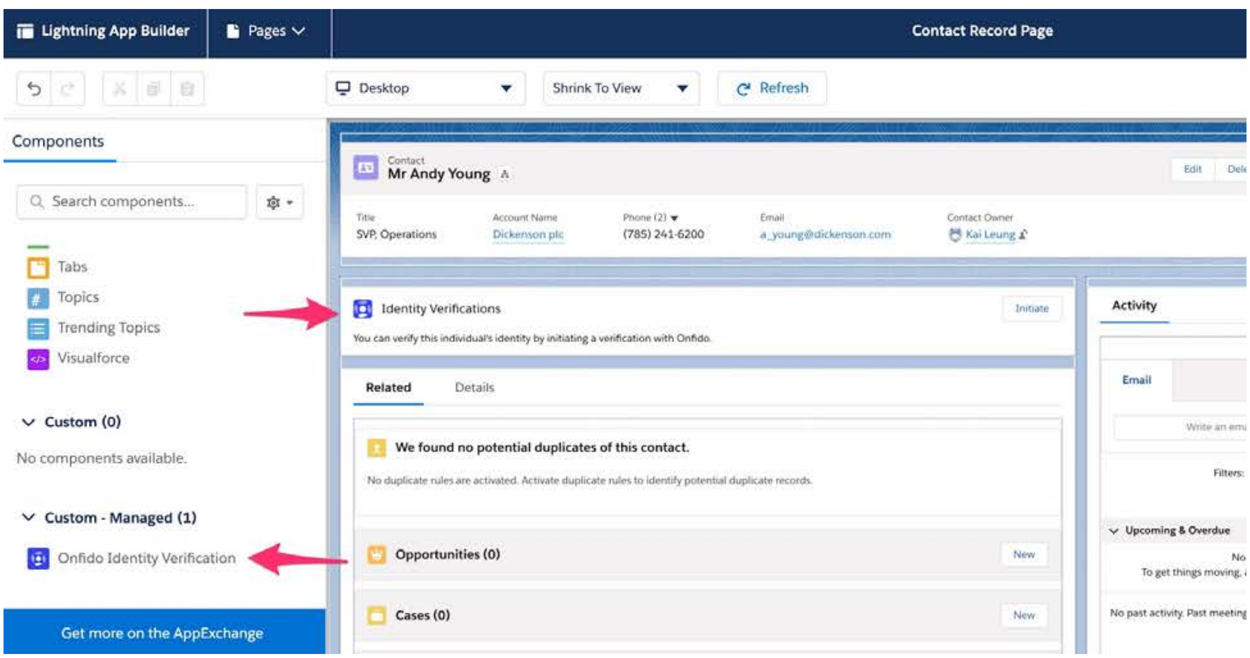
Onfido Identity Verification

The **Onfido Identity Verification** lightning component needs to be added to the record page where you want it to be used.

- While on a Lightning record page, click on the setup gear and select **Edit Page**.



- Drag and drop **Onfido Identity Verification** lightning component from the **Custom - Managed** section onto the main panel.



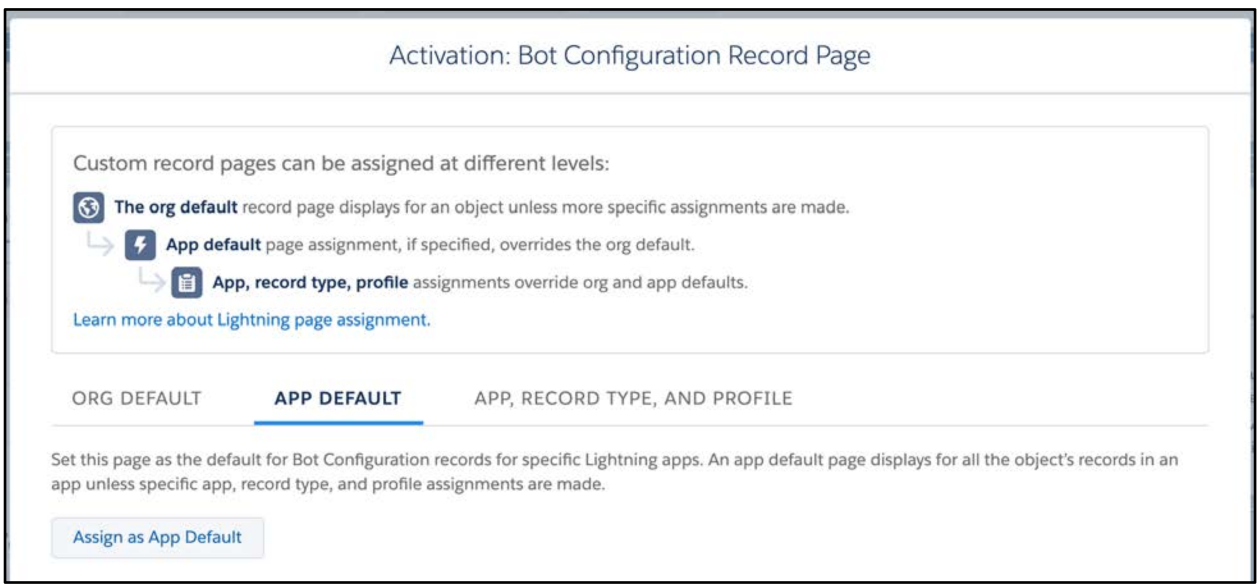
- Save the edited lightning page.
    - If this is the first time the lightning page for that object has been edited, the edited page may need to be activated.

  - Activate the page as the default for the entire org, just a specific app, or according to profiles etc. as required for that specific record

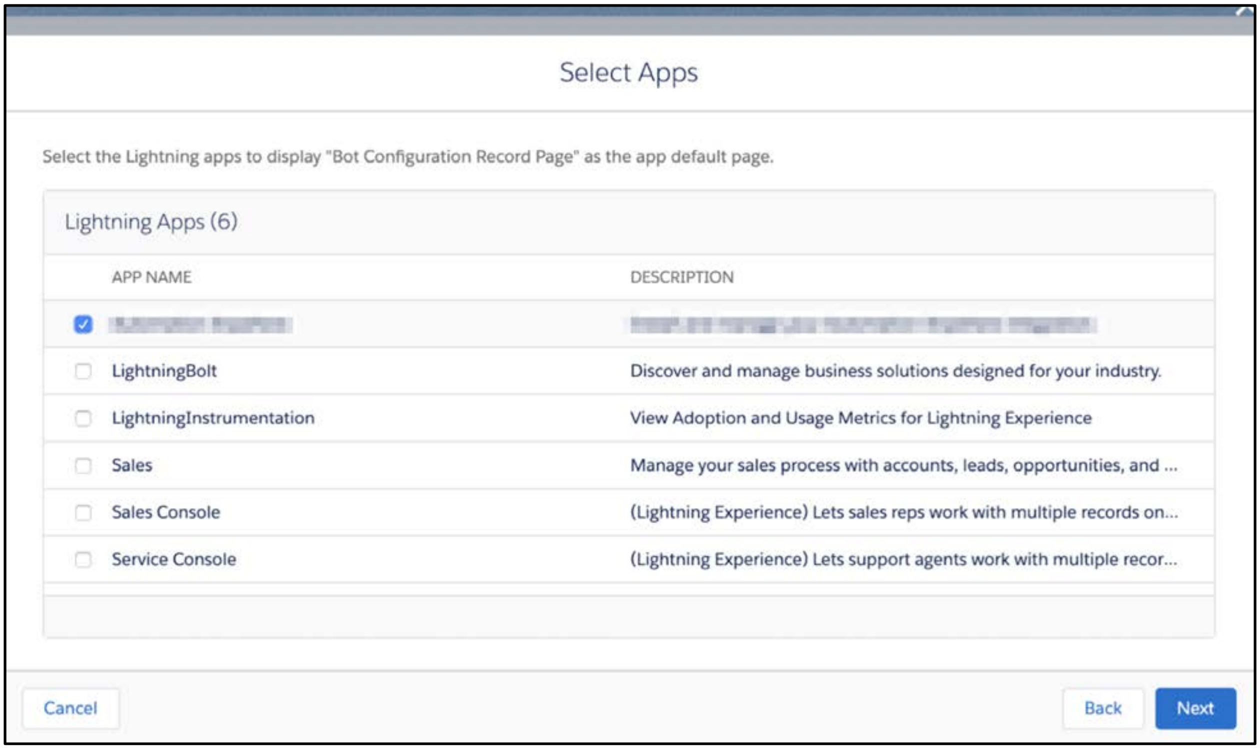
Lightning Record Page Assignment/Activation

If this is the first time the lightning record page is being activated, you will need to activate it. To change the settings at any time, you can click on the blue **Activation** button while editing the lightning record page.

- On the next few screens, assign this Lightning Record Page as the App Default for the **Onfido** App



- Click on **Assign as App Default** after clicking on the **App Default** tab
- Select the **Onfido** App, click Next until **Save** is available - click **Save**

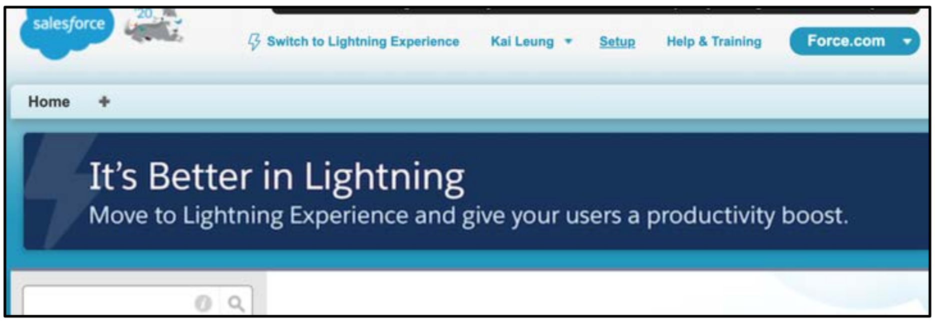


- Included with the package is an **Onfido** App that contains tabs for the objects that can be selected in Setup
- If your org has its own app or configuration and you want to activate the lightning record page for the entire org or for specific record types or profiles etc., select the other options. The Onfido Verification lightning component will work however your record pages are configured

Adding Onfido Verification Component as a Visualforce Page in Page Layouts (for Salesforce Classic)

The Onfido Salesforce App also includes support for users of Salesforce's Classic mode. To initiate verifications from Classic, the visualforce page will need to be added to the Page Layout for the selected object from Data Field Settings.

- Click on **Setup** at the top of the page to navigate to Salesforce Setup

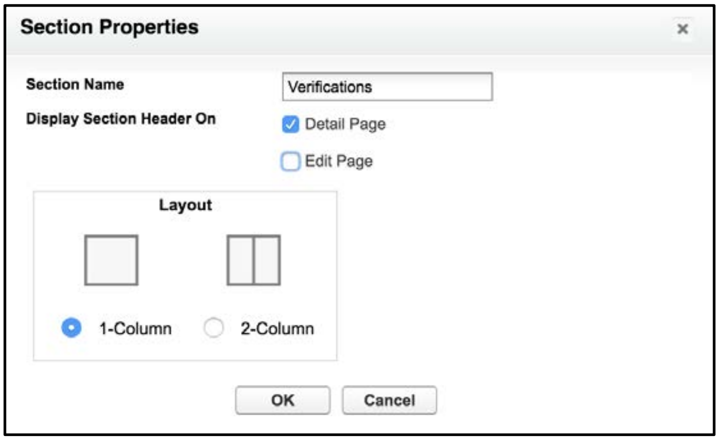


- Scroll down to the **Build** section and click on **Customize** to select the object for which the page layout needs to be updated (for example, "Contact")
- Click **Page Layouts**
- Select the **Page Layout** that needs to be edited - it should be the page layout that is assigned to the users whom you expect to initiate Onfido Verifications
- Click **Visualforce Pages** in the topmost toolbar and note the onfido_verifications Visualforce Page

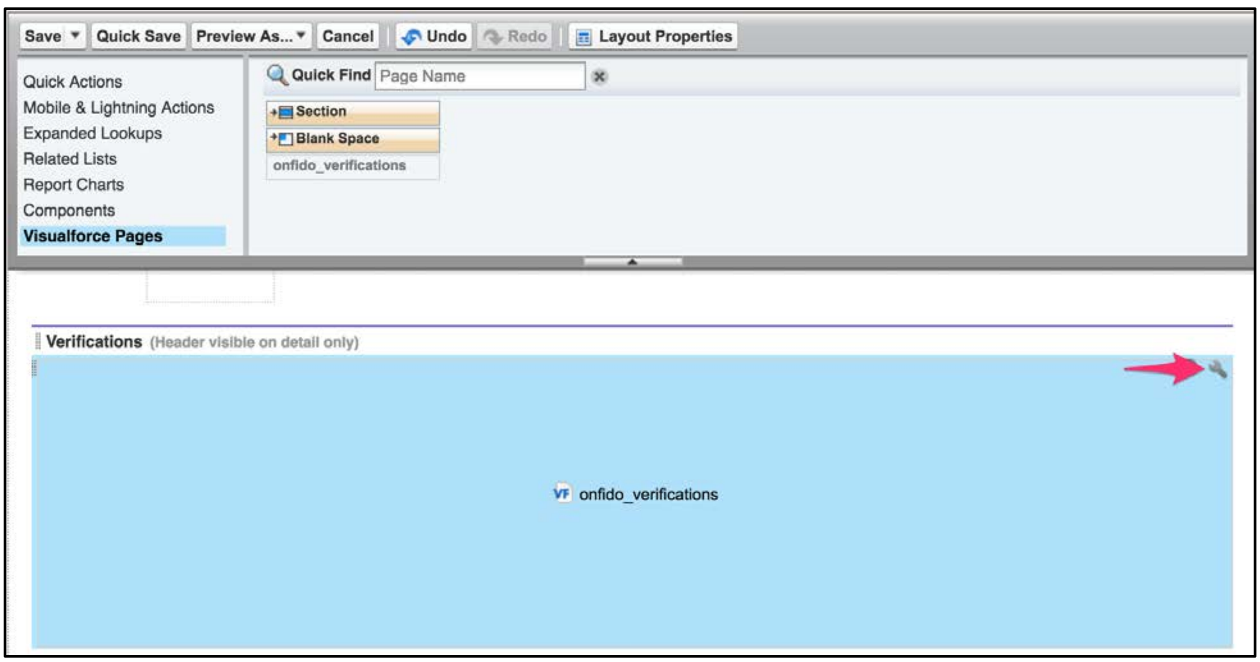
- Note that you can add a **Section** to your Page Layout to store the Visualforce Page in a separate section from your fields and other page elements

- When configuring the new section, give it a name and decide when the header will display (if at all)

- We suggest using the 1-Column layout although there are no limits to which one you choose to use

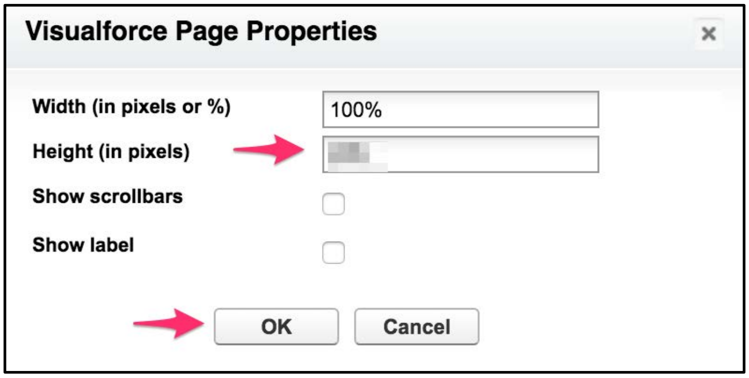


- Add the **onfido_verification** Visualforce Page into the Page Layout section via drag and drop
- Click the wrench icon



- The default height is 200px, we suggest using at least 400-550px for a more usable view of the Onfido Verification lightning component

- Click OK after entering in a height.



- Click **Save** from the topmost toolbar to save your changes.

Add Logo to Email Template

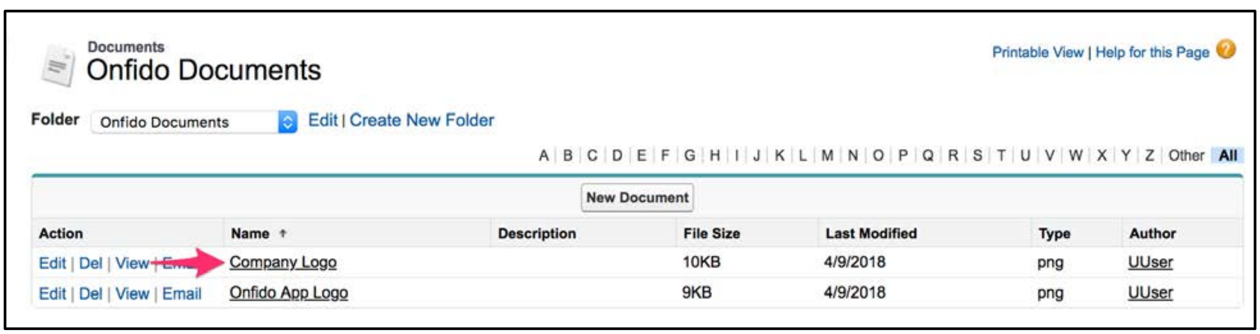
The Onfido App also comes packaged with a default Onfido logo that can be added to the template for the email that users will send to applicants once the verification process has been initiated in the Onfido Verification lightning component. The same process can be done for a company's branding after uploading the logo image/graphic to Salesforce Documents.

- Navigate to **Salesforce Classic** > Click the **Sales** app > Click the "**+**" the header

- Click on **Documents**

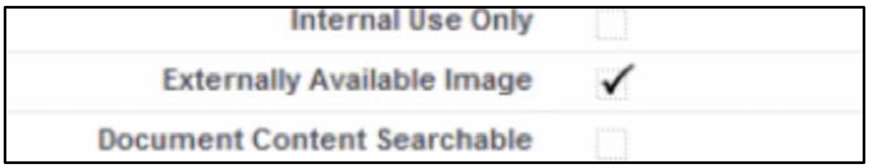
- Click on the folder dropdown in the upper left
- Select **Onfido Documents** (or the folder where your own branding is saved)

- Click **Company Logo**

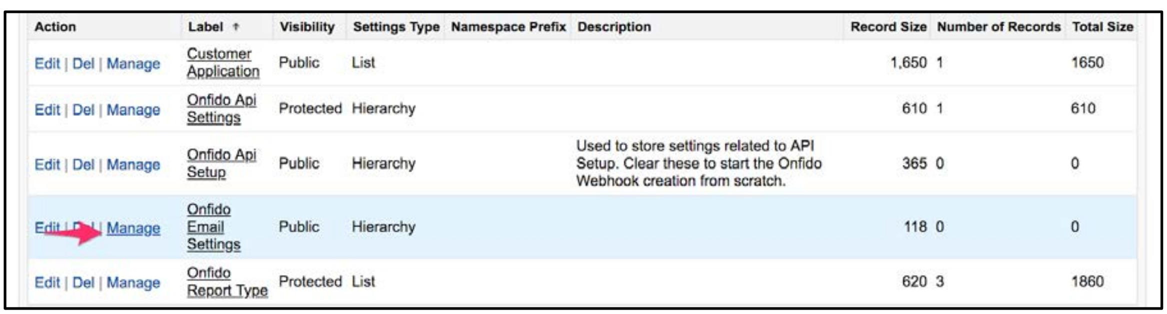


- Copy the **Salesforce ID** of the **Logo**
  - It can be found in the address bar of your browser at the end of the URL

- You also need to make sure that the logo is externally available. To do that, check the "Externally Available Image" checkbox

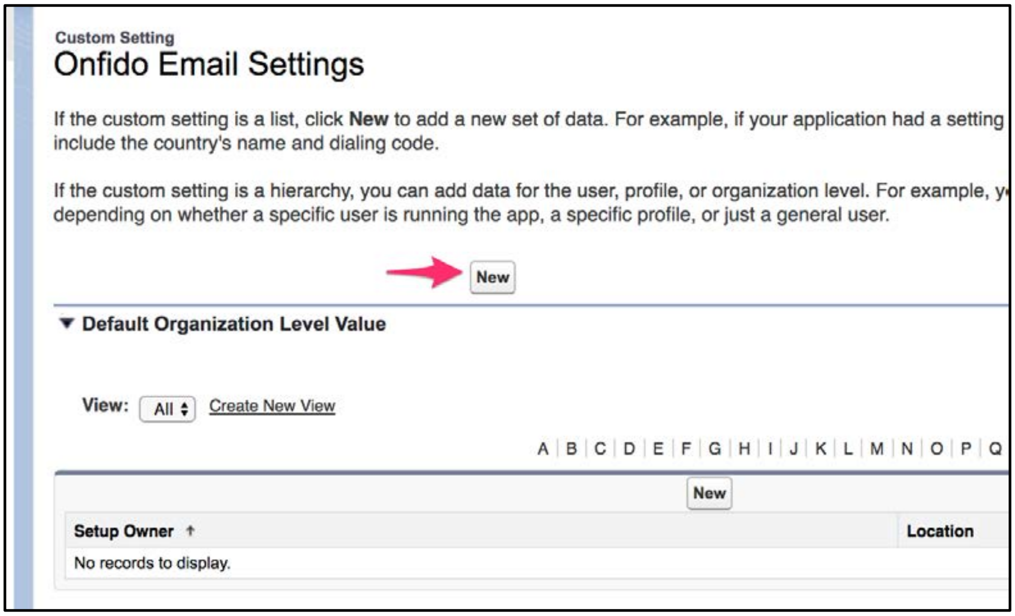


- You will now need to head to **Custom Settings** to paste the Company Logo Salesforce ID into **Onfido Email Settings**:
- Search **Custom Settings** in the Quick Find > Click **Manage** next to **Onfido Email Settings**



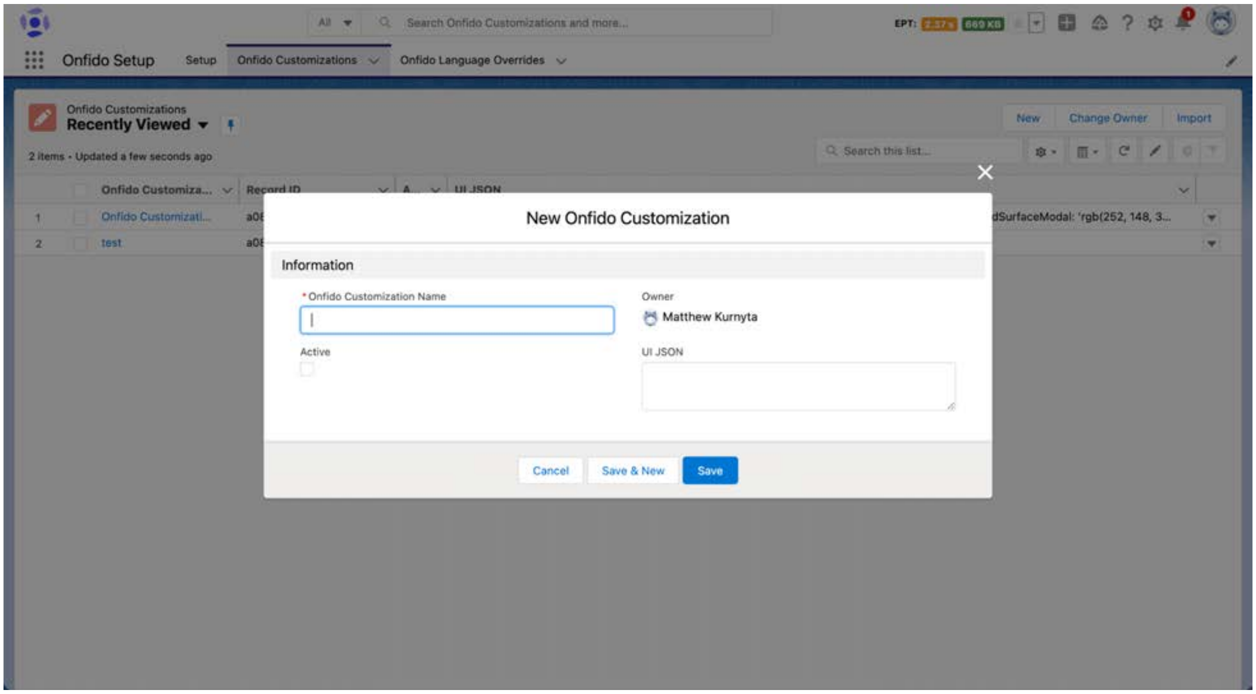
Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit | Del | Manage	Customer Application	Public	List			1,650	1	1650
Edit | Del | Manage	Onfido Api Settings	Protected	Hierarchy			610	1	610
Edit | Del | Manage	Onfido Api Setup	Public	Hierarchy		Used to store settings related to API Setup. Clear these to start the Onfido Webhook creation from scratch.	365	0	0
Edit | Del | Manage	Onfido Email Settings	Public	Hierarchy			118	0	0
Edit | Del | Manage	Onfido Report Type	Protected	List			620	3	1860

- Click the top **New** button

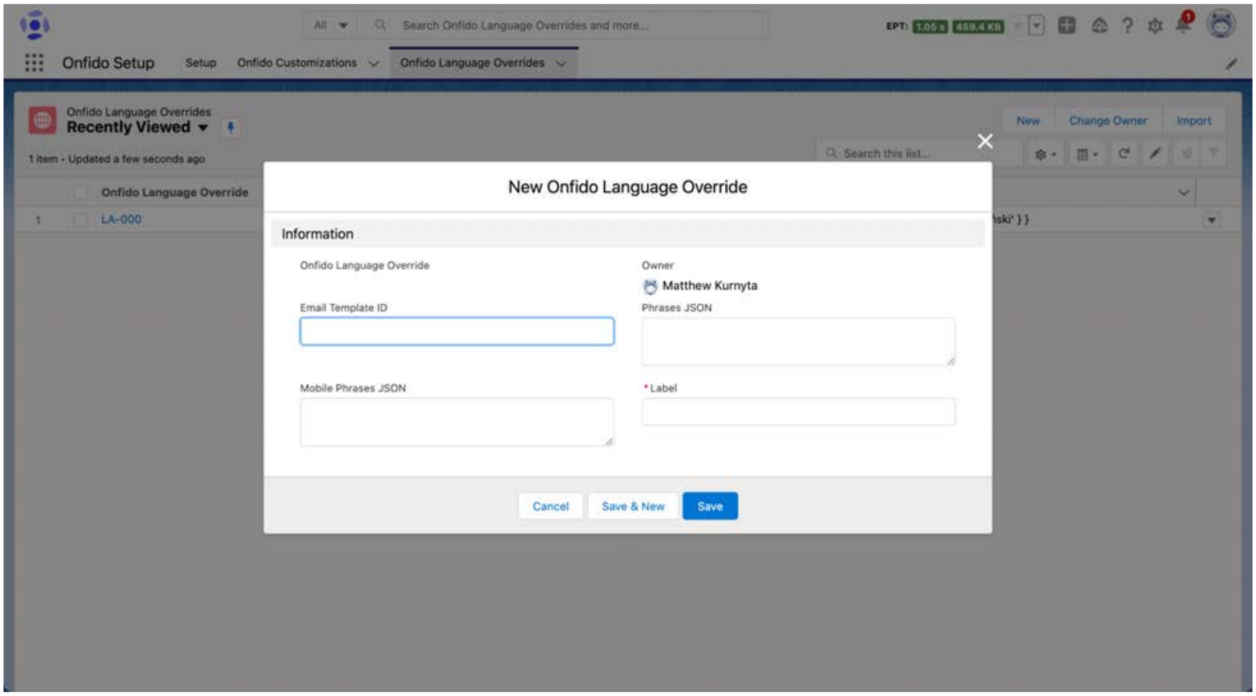


- **Paste** in the **Company Logo Salesforce ID** that was copied from the URL earlier
- Click **Save**

JSON examples for Customizations and Language Overrides



- Click into the Onfido Customization tab
- Click New
- Add UI JSON, example:{"colorBackgroundSurfaceModal":"rgb(252, 148, 3)","fontSizeTitle":"100px","fontFamilyTitle":"Impact, fantasy","borderRadiusButton":"500px"}
- Click Save
- Check active (Note: Only one can be active at a time.)

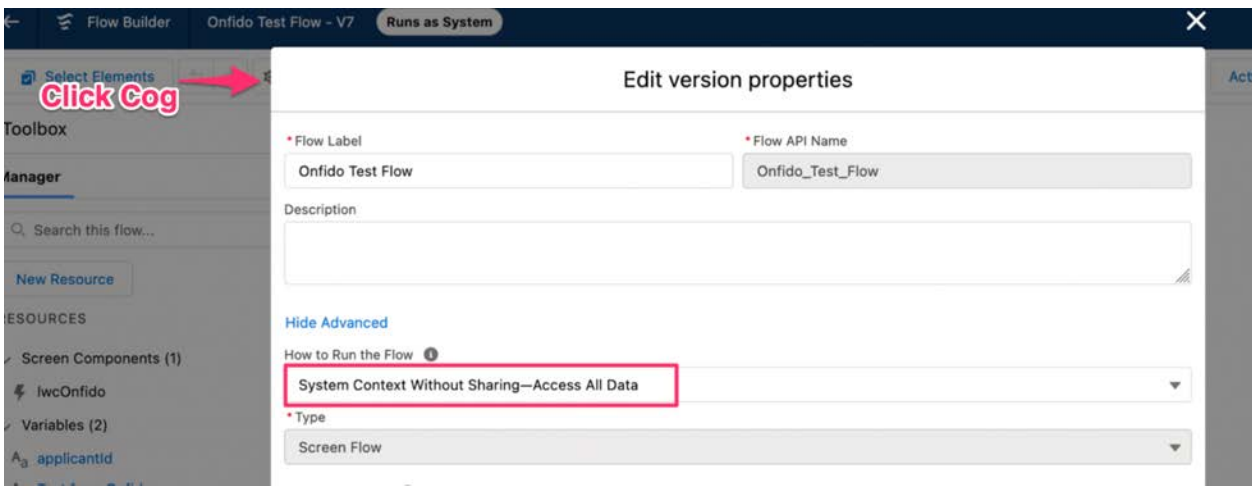


- Click into the Language Overrides tab
- Click New
- Enter the Label which will be displayed in the pick list
- Add Phrases JSON, example: {"welcome":{"title":"My Julian title"}}
- Click Save

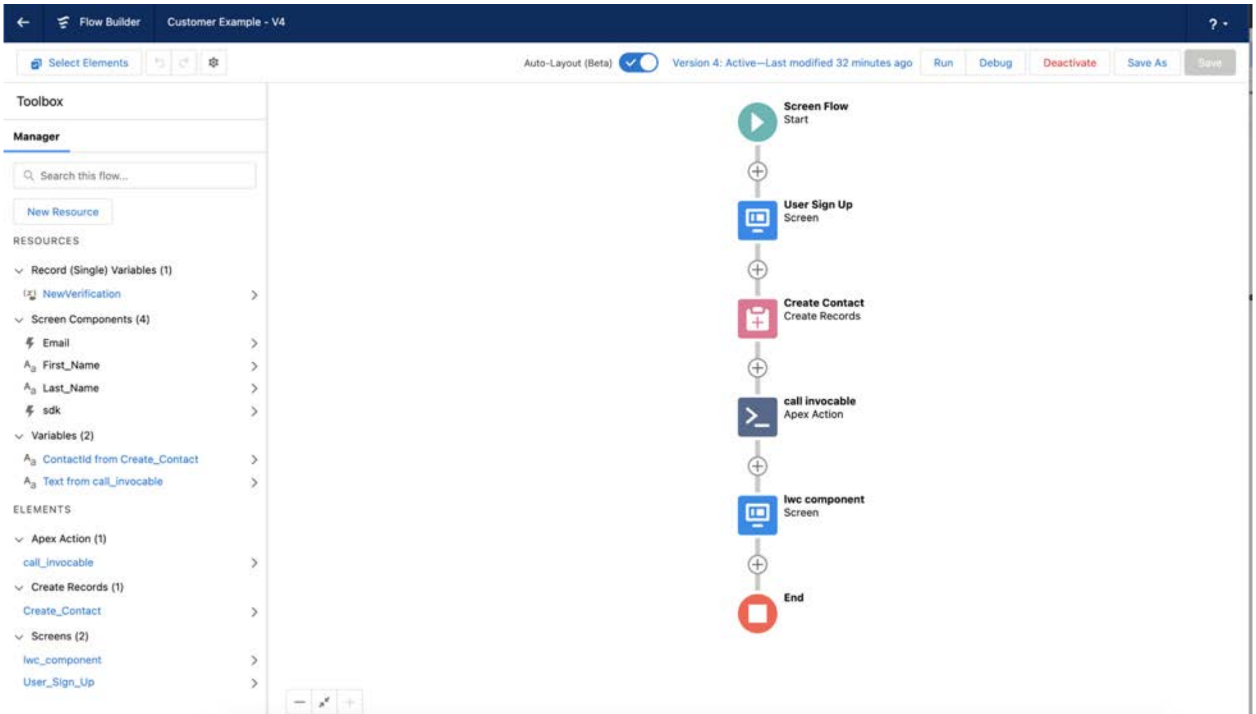
Lightning Flow Support

If you're using a flow on a Salesforce record, you will also need to to follow [these additional steps](#).

If you're using a flow inside a community and your org does not allow create access to standard Salesforce objects (such as Contact), you will need to select "Without Sharing" when creating your flow.



Goal: Create a flow that takes advantage of our invocable method and Lightning Web Component to display the SDK.



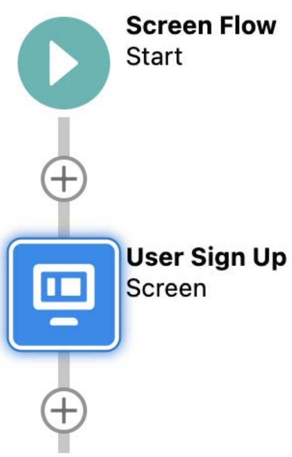
This is an example of a flow that allows a user to sign up with their contact information which then creates a contact record for them within the SF org, creates an applicant record with a lookup to that newly created contact record, then also makes a callout to onfido to create an applicant record, then finally creates a verification record within SF.

After the verification record is created we pass the verification ID to our LWC component to render the SDK within the flow. Allowing the user to verify their identity right after signing up.

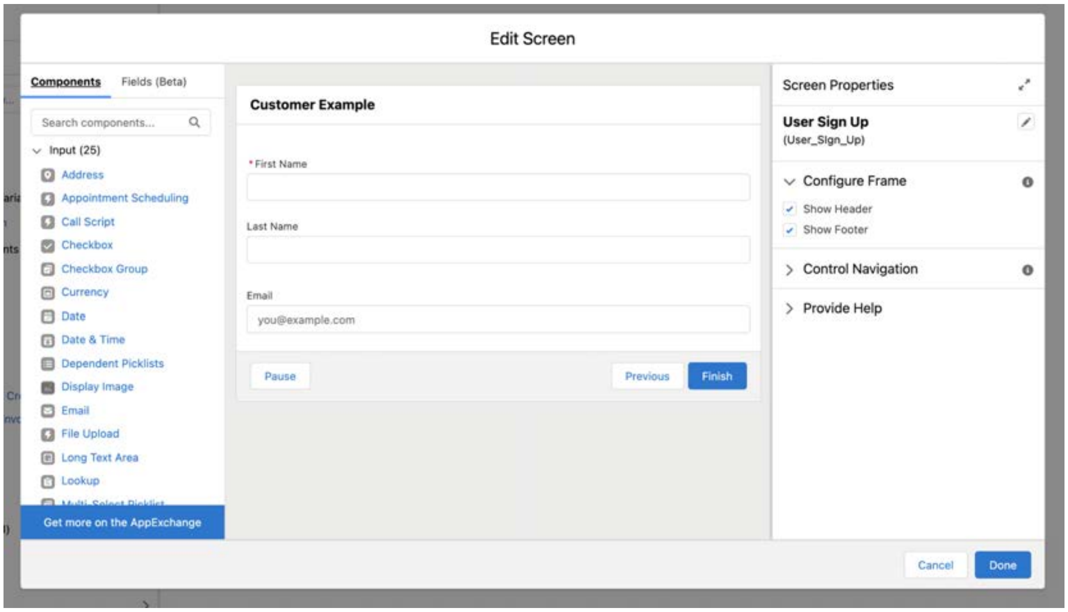
Step by step guide

Step 1: creating a sign up screen

First you add a screen to collect user information by clicking the plus button and adding a screen.

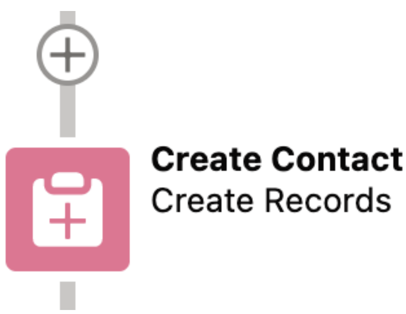


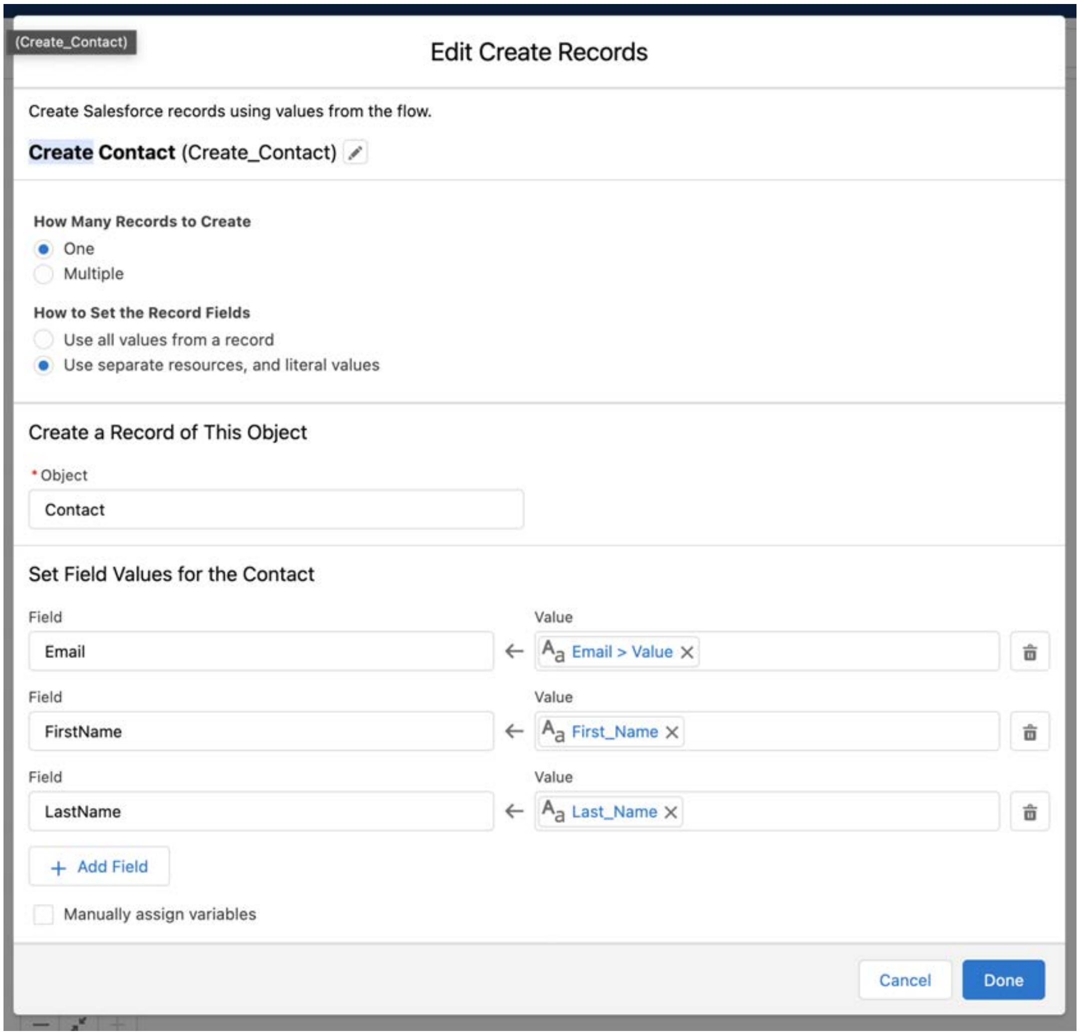
Next you add on text fields for all the information you wish to collect from the user.



Step 2: creating a record in SF

- Next you add a create record element of the object type of your choice. In this example we are creating a contact.

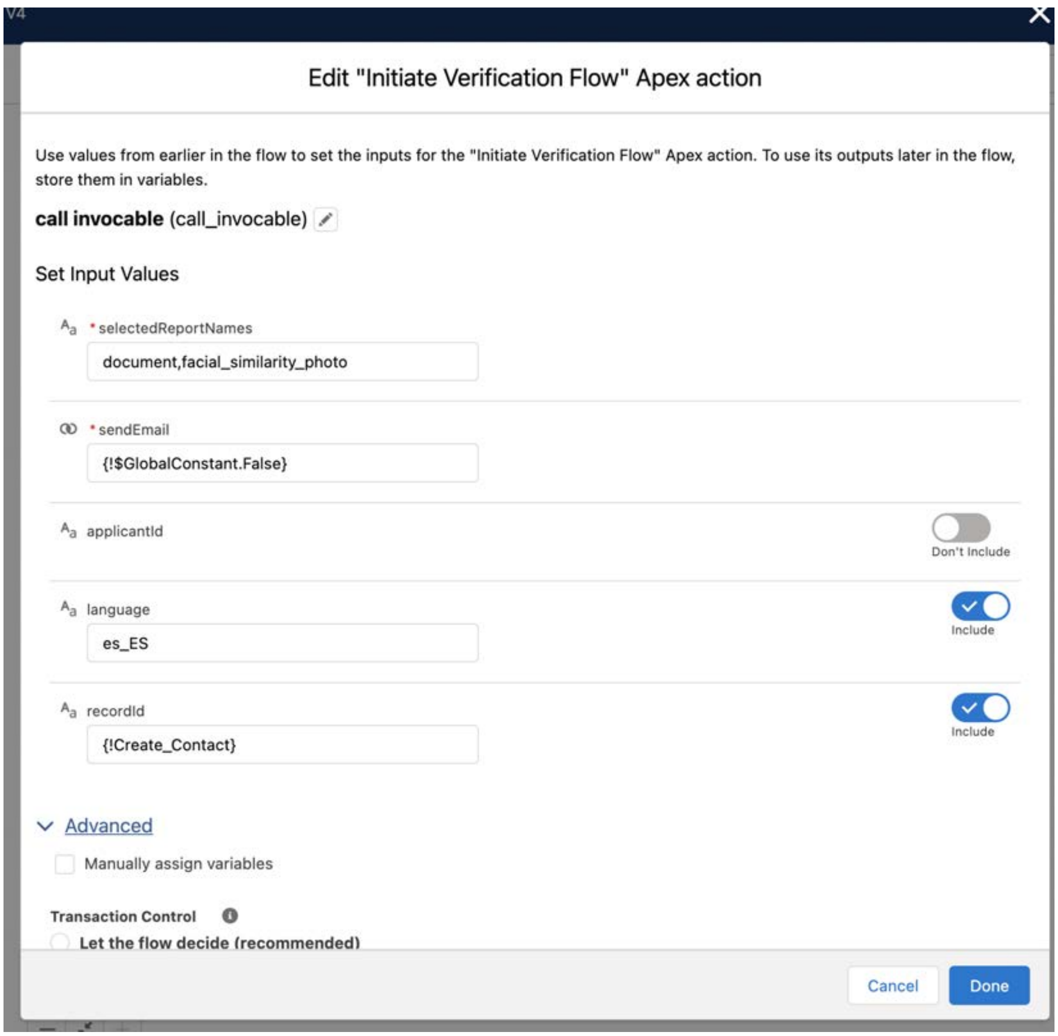




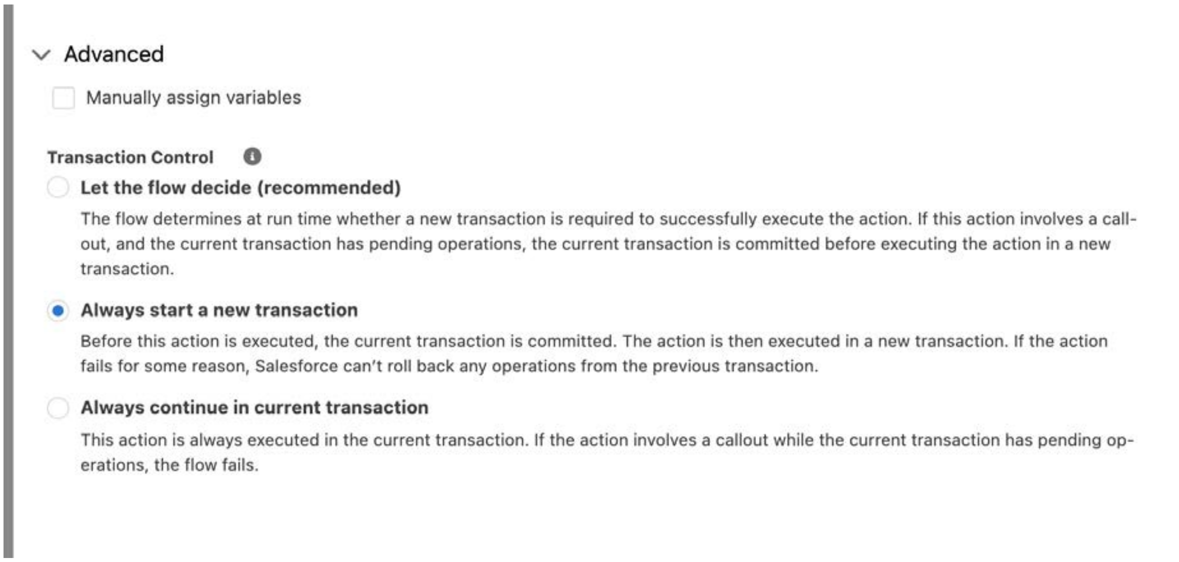
- Click into the create record element and attach the fields you collected in the previous screen to the corresponding fields on the contact record. Once this step is hit the record will be created and the ID of the record will be returned.

Step 3: adding the invocable method

- Add an apex action element and search for the flow titled **Initiate Verification Flow**



- Set all the variables that you want to provide here. In our example we are creating a new applicant based on our contact record we just created so we pass in the following **selectedReportNames**, **SendEmail** (false **-** we don't want to send an email), **Language**, and **recordId** (the ID of the contact we just created).

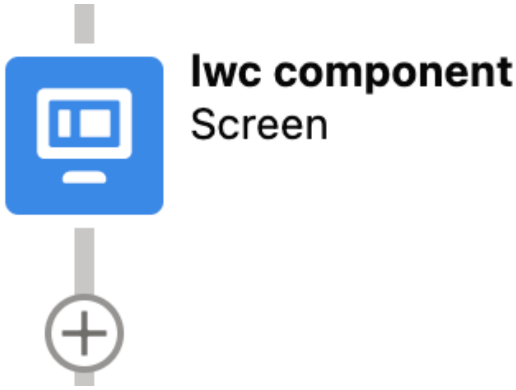


- In the advanced section of this same screen we **NEED** to select this option or else the invocable will fail.

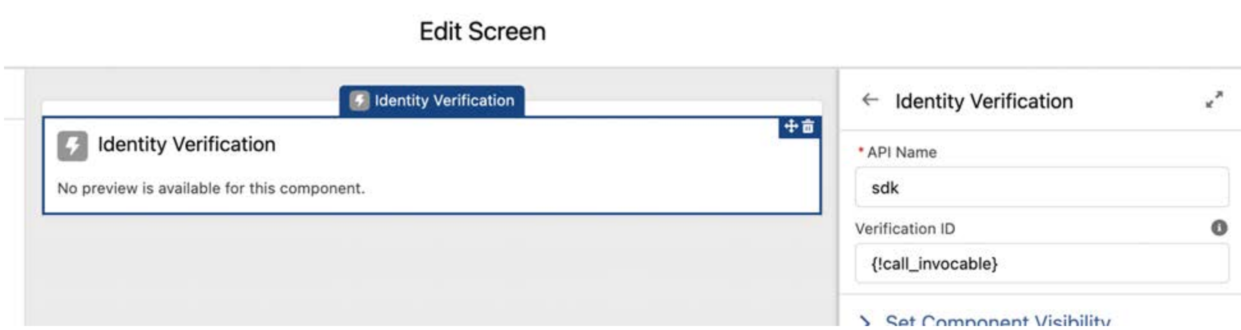
- Our flow will now return the ID of the newly created Verification ID (to be used next) while also creating the Applicant in onfido and in SF.

Step 4: loading our new lightning web component

- Next we add a new screen that will host our new Lightning Web Component.



- Here we drag on our custom component from the left side and turn off Show Header and Show Footer on the right side.



- When you drag the component on we get these options on the right side. Here we name the component on the flow (sdk in our case) and pass the Verification ID we received from the Invocable on the previous step. In our case the variable is called {!call_invocable} as that's what we named our apex action.

- This is the last step. Now we can Save and activate our component to be used wherever we wish to call this flow.

Invocable (onfido_verificationsInvocable.cls)

Description: the purpose of this invocable is to allow onfido users within salesforce to create Applicants and initiate verifications just as our standard verification component can, but automated. This can be done through flows or process builders.

- Our invocable takes the following variables

```
global class initiateVerificationRequest {
    @InvocableVariable(required = true )
    global String selectedReportNames;

    @InvocableVariable
    global String applicantId;

    @InvocableVariable(description = 'Record ID the newly created Applicant record will be based off.')
    global String recordId;

    @InvocableVariable (description ='Can be an ID to a Language Override Record or default language string (ex. es_ES).')
    global String language;

    @InvocableVariable(required = true)
    global Boolean sendEmail;

}
```

- As you can see selectedReportNames and SendEmail are the only required fields.

- recordId: the ID of the Case, Opportunity, Lead, User etc - that the new applicant will be based off of. This is where we will use your mappings for the corresponding object to pull the first name, last name, and email to create the applicant in onfido. Optional but required if applicantId is not provided.

- applicantId: if the applicant already exists you can pass the record ID of the applicant within salesforce into the invocable and we will only create a new verification for the applicant. Optional.

  If applicant id is provided you do not need to provide a recordId.

- language: this field can either be the record ID of a Language Override Record or a default language string that exists within the SDK (ex. es_ES, en_US, fr_FR etc). This will be added to the newly created verification and this is the language the SDK will initialize in. if nothing is provided we default to en_US. Optional.

- sendEmail: determines if we send an email alert to the applicant after the verification record is created. Required.

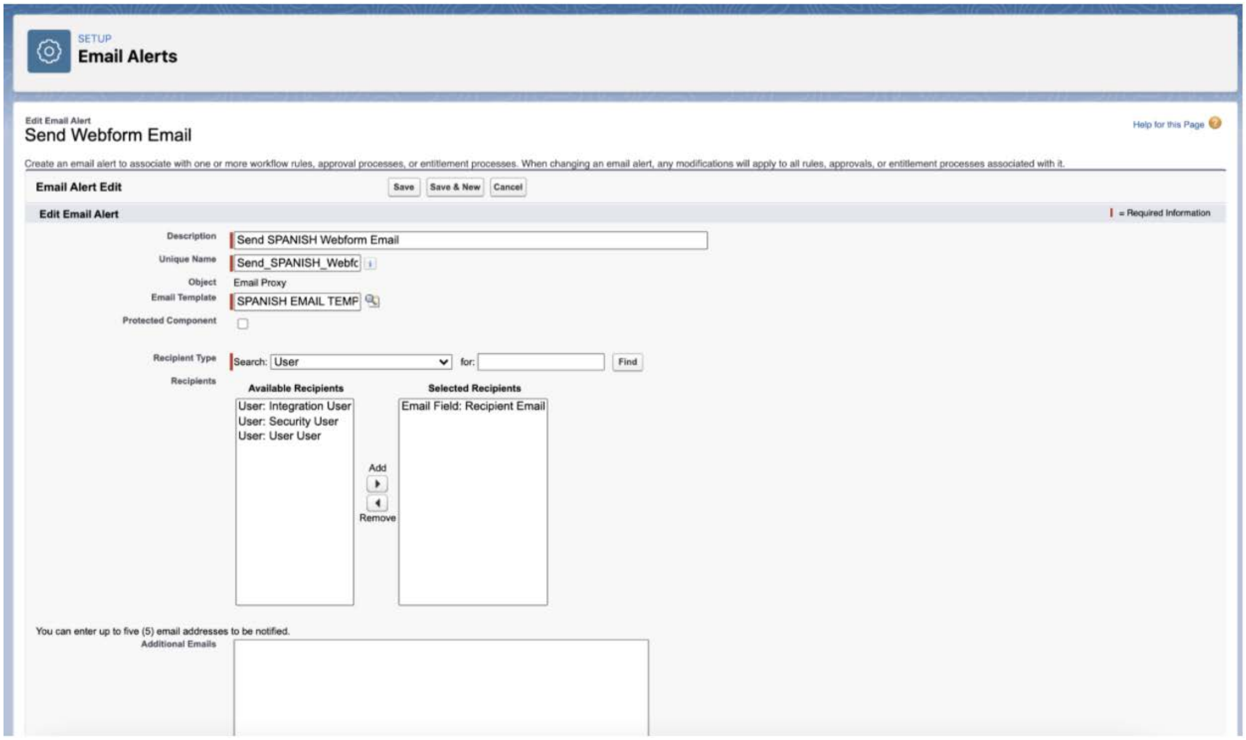
- selectedReportNames: the report types you wish to run within the SDK. must be in the format of string separated by commas (ex. document,facial_similarity_photo). Required.

Email Template ID

Description: in the previous builds when you send an email to applicants there is only one language for the email template which is english. Now that we added support for multiple standard and custom language overrides we wanted to give the Onfido Users the ability to send email templates in different languages based on the language they selected for the verification.

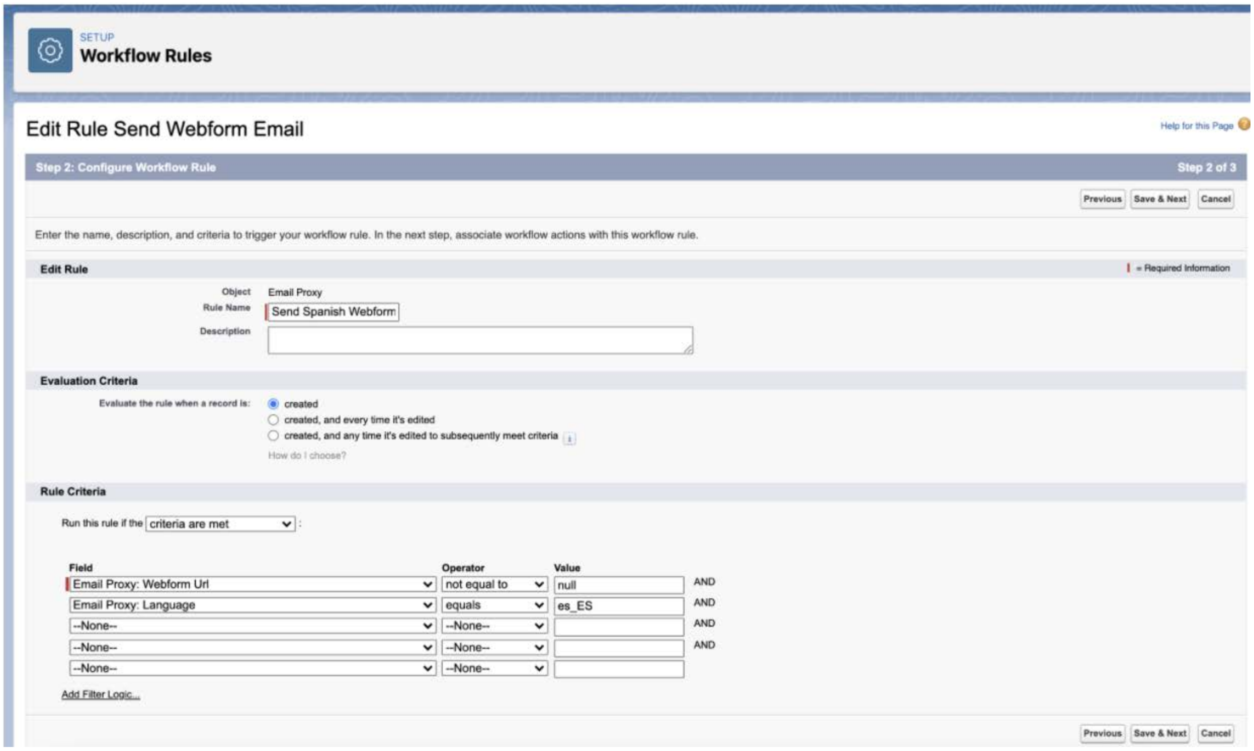
How it works

- Email alerts are sent on creation on an Email Proxy record. We added a new field called Language__c.
- Based on the language you select for the initiation of a verification we will set the Language__c field on Email Proxy record to the Label__c of the Onfido Override Language record (if selected) or the default language string (es_ES) of that's on the Verification Record
- Example: if i create a verification record with the language of spanish (es_ES) at the end of the Verification creation flow we create an Email Proxy record that has a lookup to the verification and a Language__c field of 'es_ES'.
- After the record is created our email alert will be triggered that will send the applicant an email that has an email template in spanish.
- Setup example for an email in spanish
- Clone the email alert called Send Webform Email

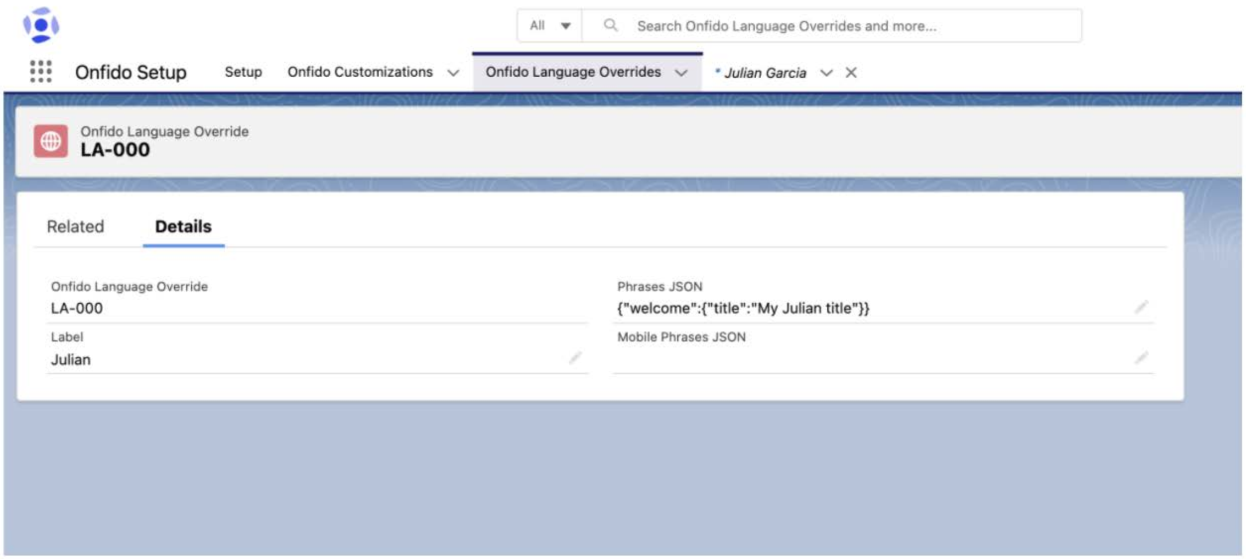


- Change the name to match the language you're supporting - this case spanish
- Select an email template that you create in spanish (could clone the existing email template and translate everything to spanish)

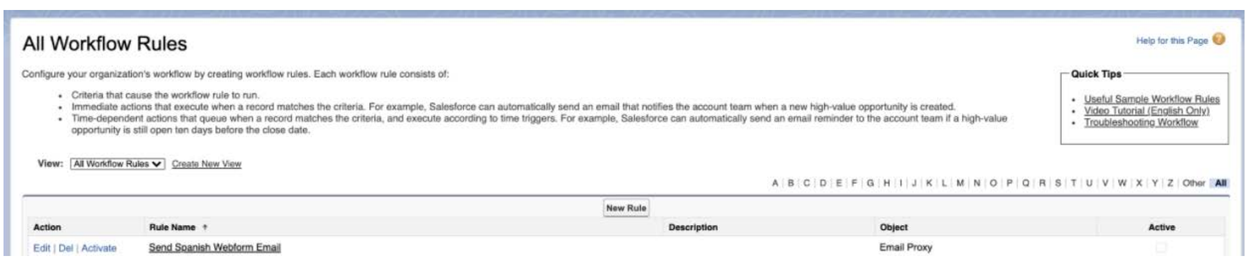
- Next you clone the packaged workflow rule called Send Webform Email and edit the rule criteria to match the new language you want to support. In this example spanish (es_ES) as its default language.



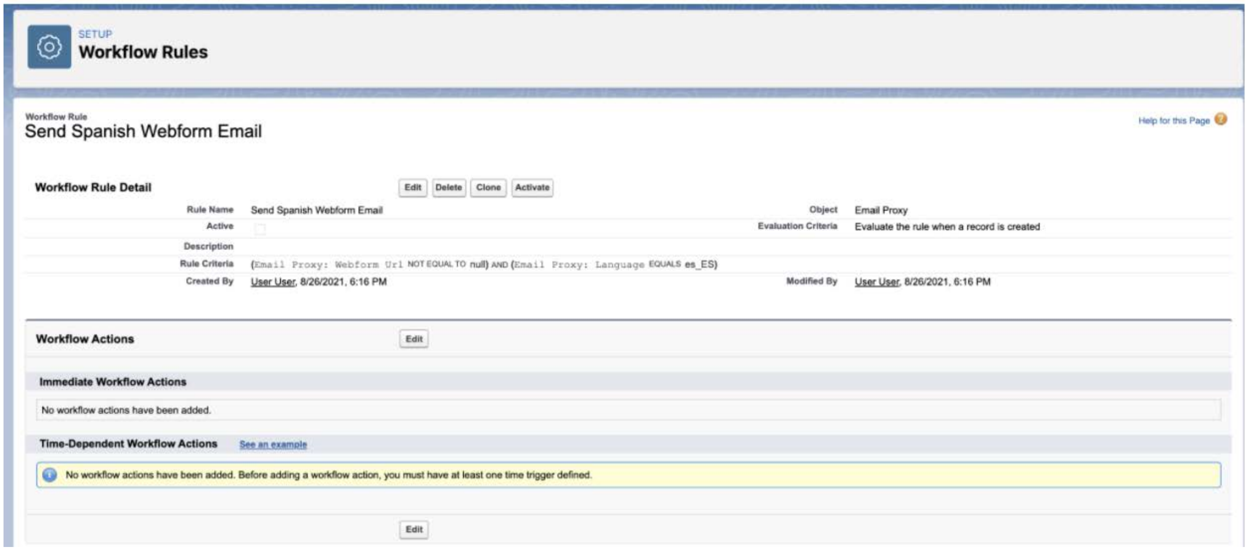
- If we wanted an email to be sent on verifications with a Onfido Language Override selected we would enter the value as the label of our override record in this example below it would simply be Julian



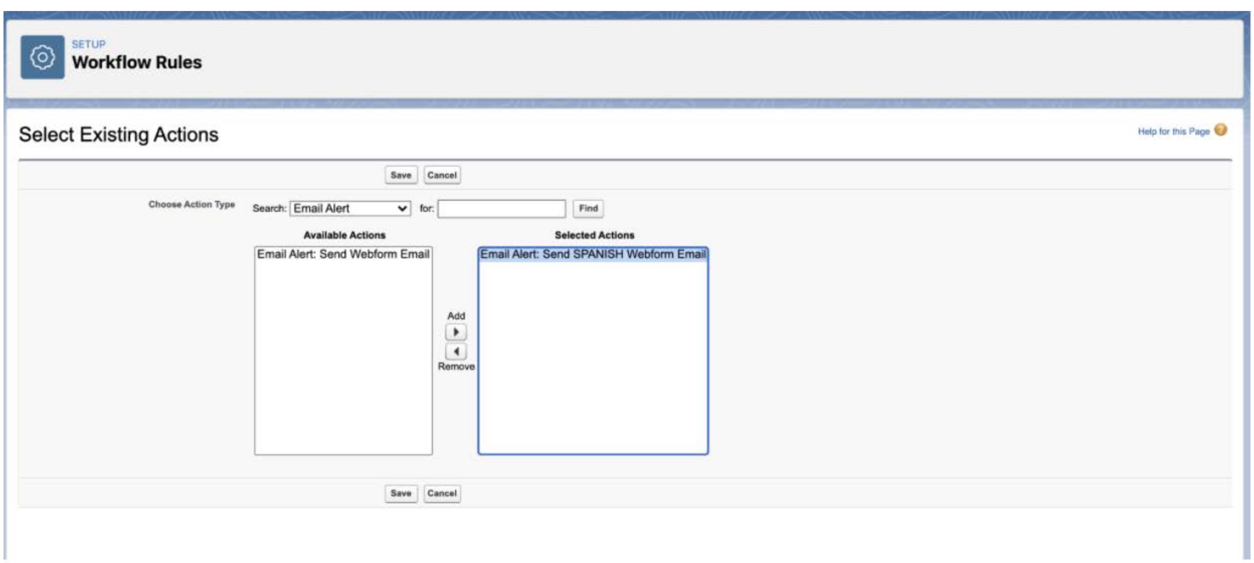
- Moving on, we click on your newly created rule in our case Send Spanish Webform Email



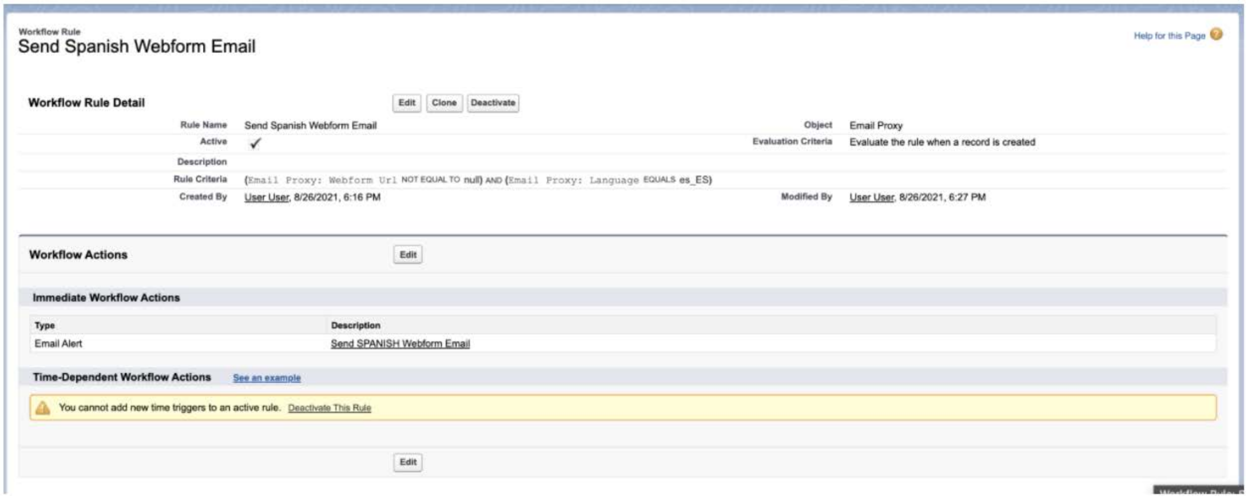
- No click edit under workflow actions



- Then click add workflow action and select 'Select Existing Action'
- Select your new email alert that was created for the spanish template. Click save then done on the next step.



- Now you click activate and you're done.

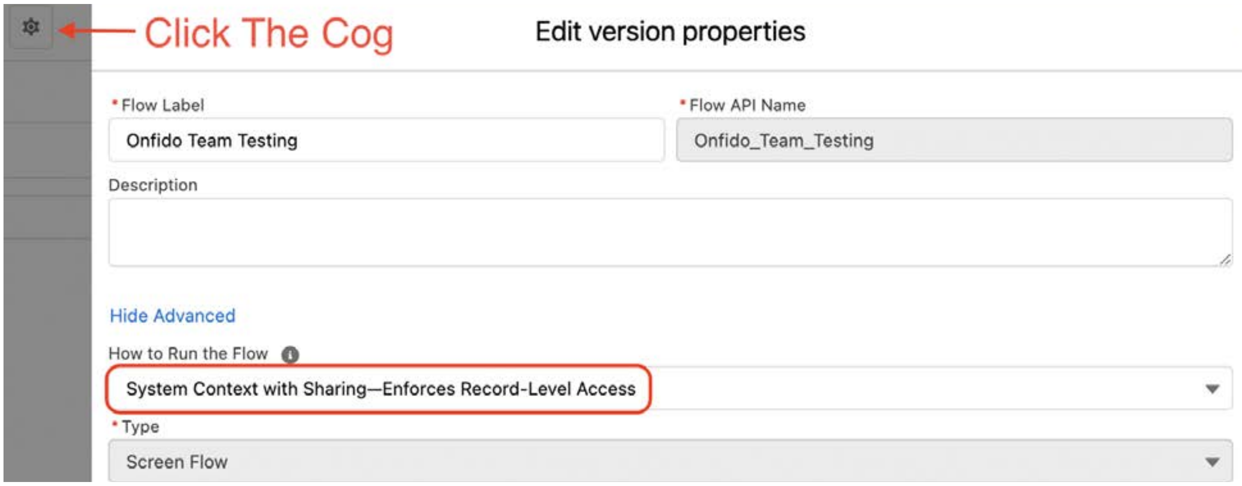


- Now this email will be sent whenever a verification is created with the spanish default language.

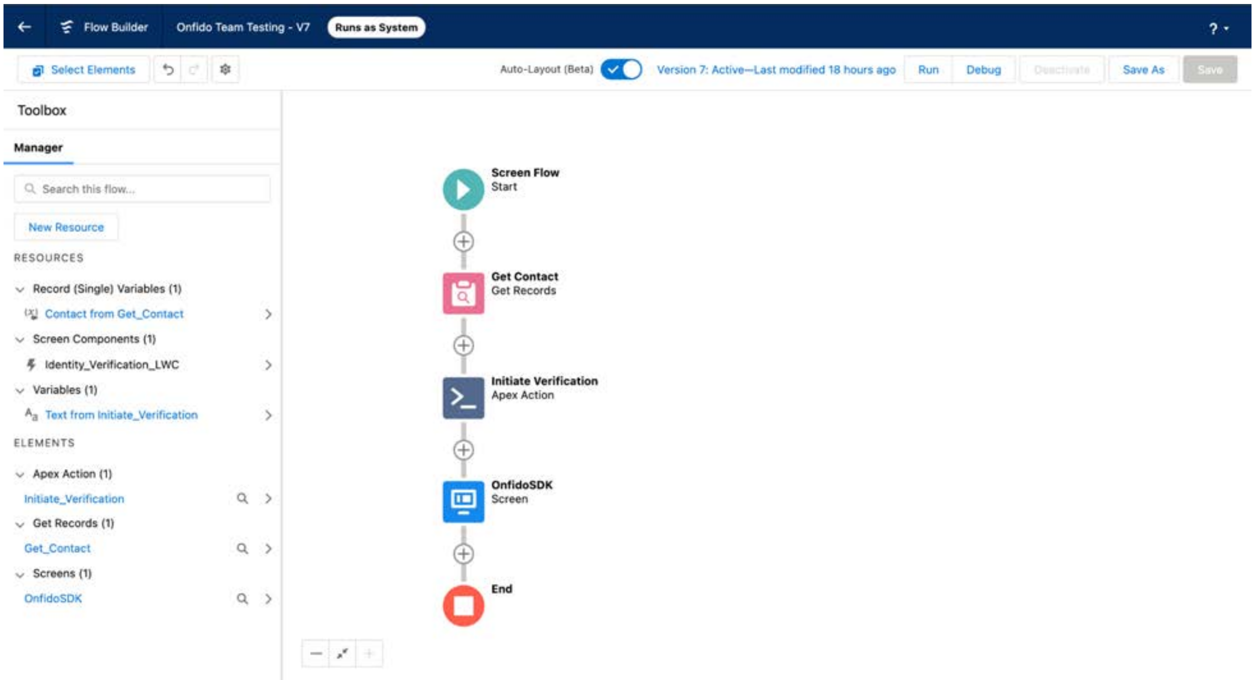
Digital Experience Site Setup

Self Service Identity Verification Flow

You will need to select "System Context With Sharing" when creating your flow.



Goal: Create a flow that takes advantage of our invocable method and Lightning Web Component to display the SDK for self service identity verification in an experience site.



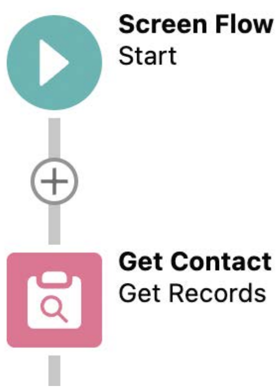
This is an example of a flow that allows an experience site customer to initiate their own identity verification.

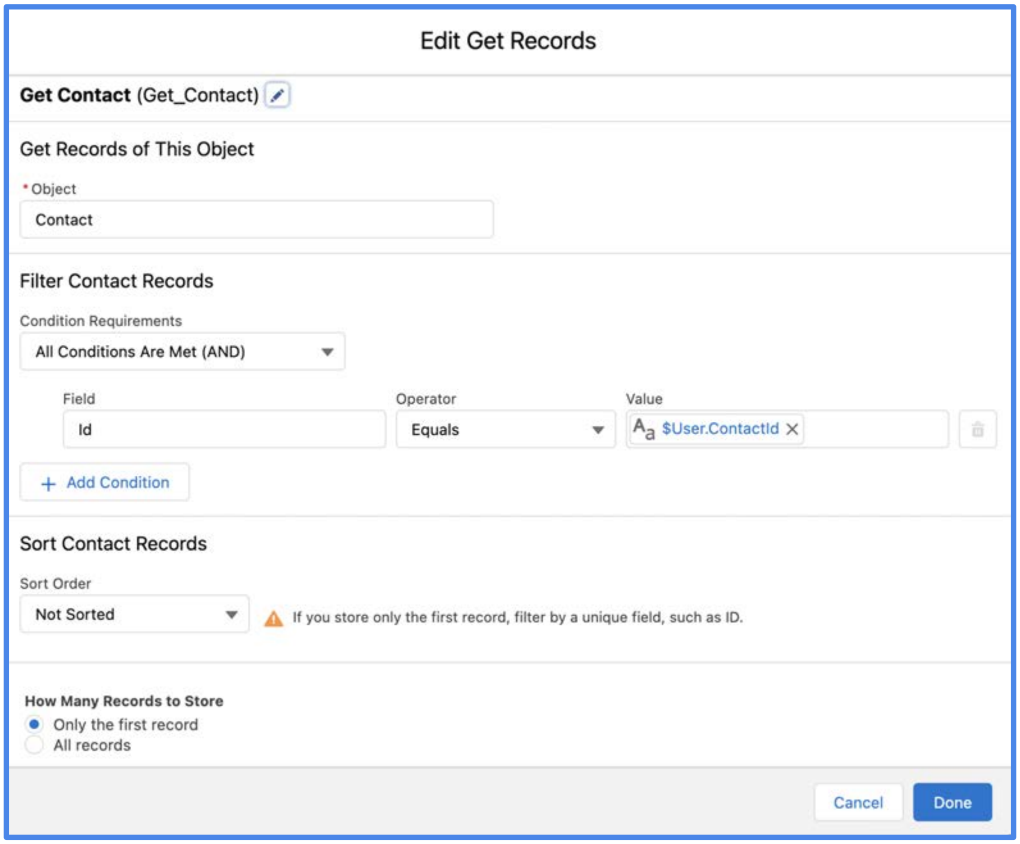
After the verification record is created we pass the verification ID to our LWC component to render the SDK within the flow. Allowing the user to verify their identity right after signing up.

Step by step guide

Step 1: Getting the Person Account ID

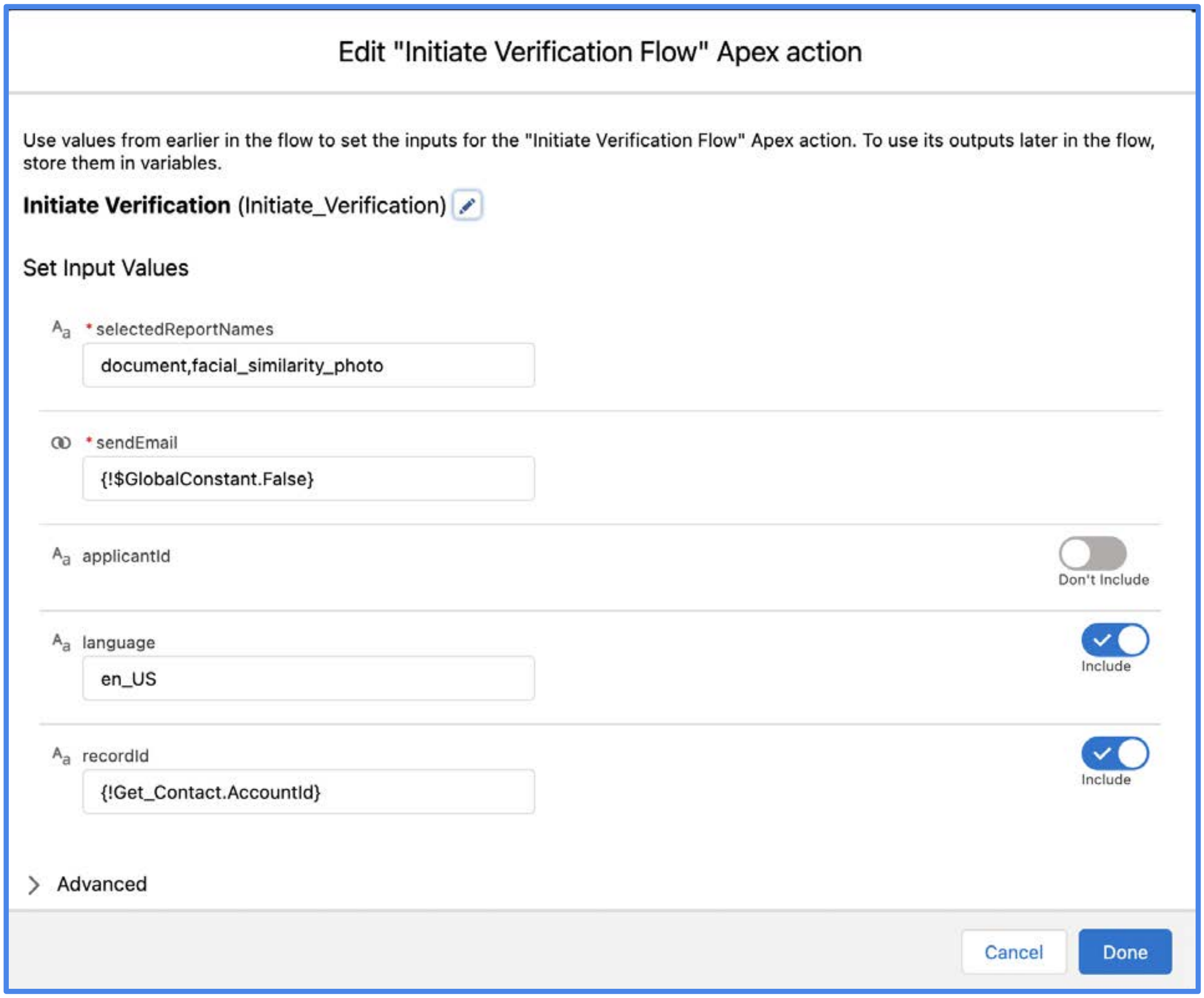
First, we need to grab the contact record by using the customer's "ContactId". This record has a field on it called "AccountId", which is what we will be using to initiate the identity verification



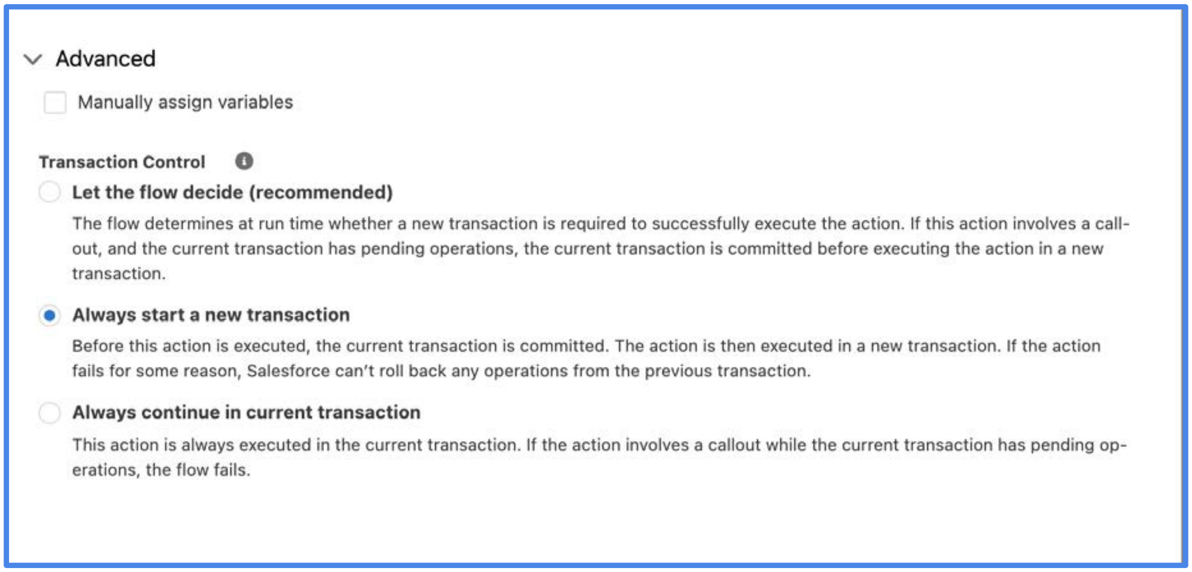


Step 2: Calling the invocable method

- Add an apex action element and search for the flow titled **Initiate Verification Flow**



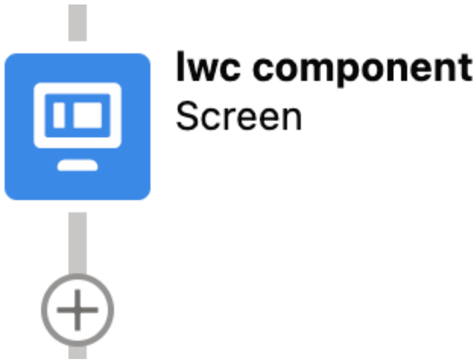
- Ensure that the **recordId** input value is set to the AccountId from the contact record: **{!Get_Contact.AccountId}**. Set all other parameters to fit your company's needs.

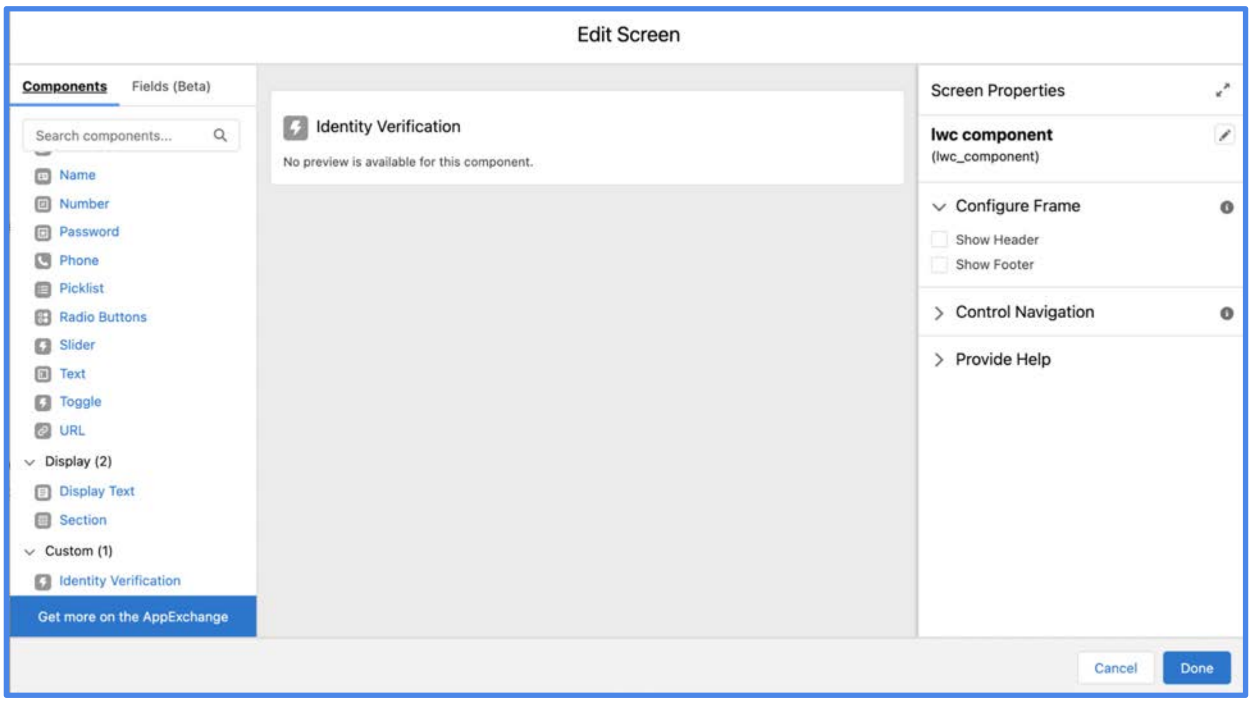


- In the advanced section of this same screen we **NEED** to select “Always start a new transaction” or else the invocable will fail.
- This action will create a new Applicant record and Verification record in Salesforce and Onfido.
- The action will return the ID of the Verification record for us to use in the next step.

Step 3: Loading our new lightning web component

- Next we add a new screen that will host our new Lightning Web Component





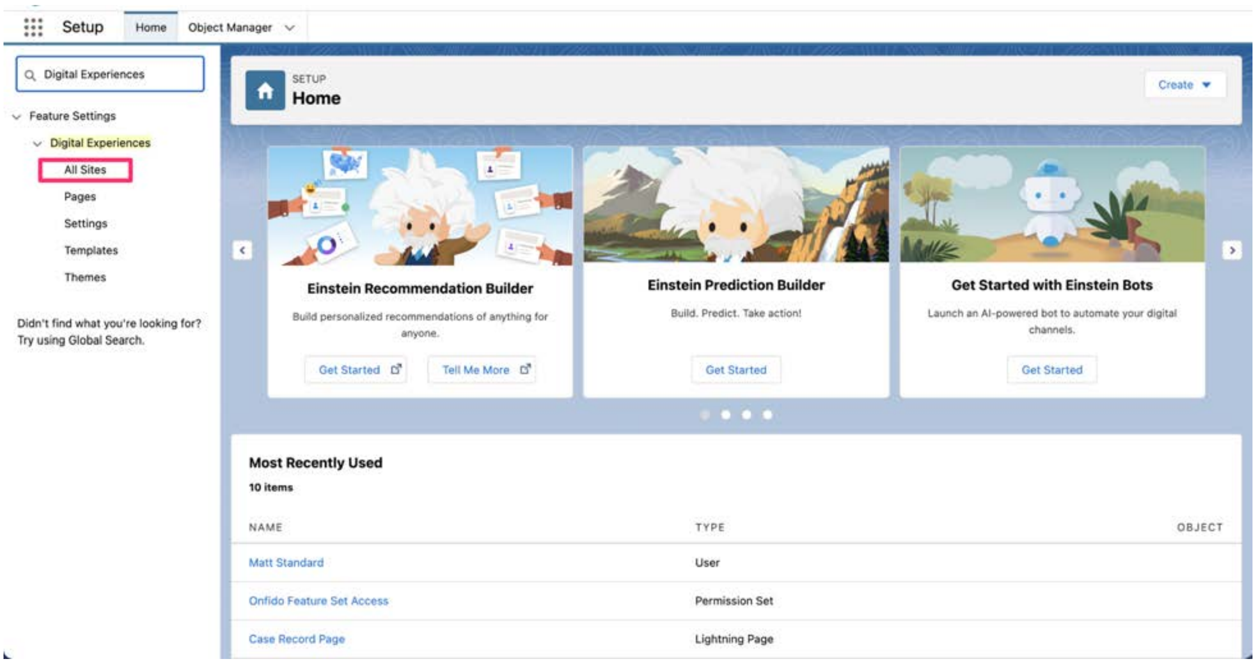
- Here we drag on our custom component from the left side and turn off Show Header and Show Footer on the right side.

- When you drag the component on we get these options on the right side. Here we name the component on the flow (sdk in our case) and pass the Verification ID we received from the Invocable on the previous step. In our case the variable is called {!initiate_verification} as that's what we named our apex action.

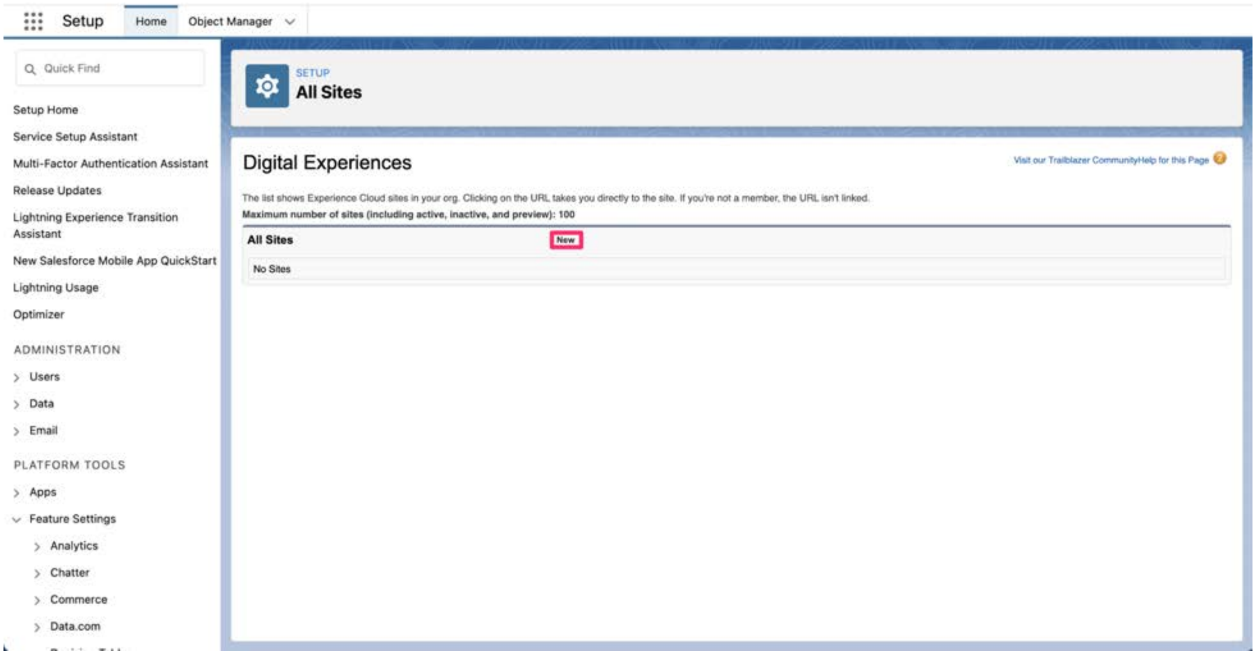
- This is the last step. Now we can Save and activate our component to be used wherever we wish to call this flow.

Building the Salesforce Digital Experience

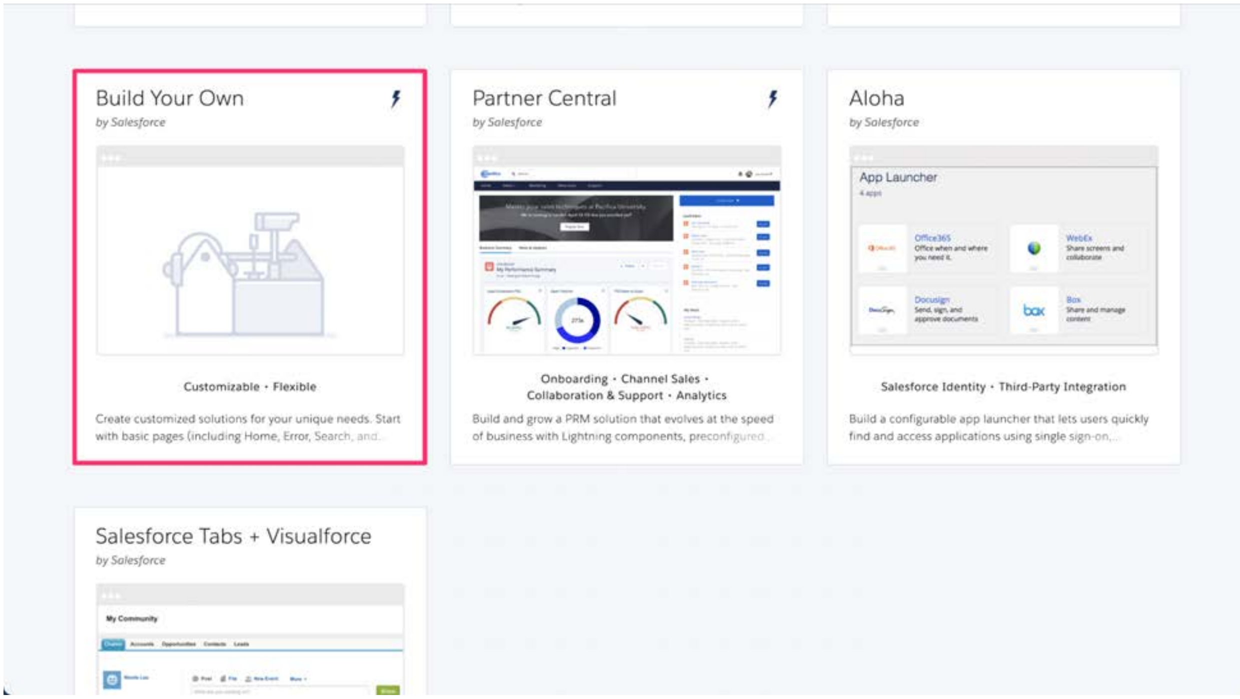
- Search for Digital Experiences in Setup
- Click into All Sites



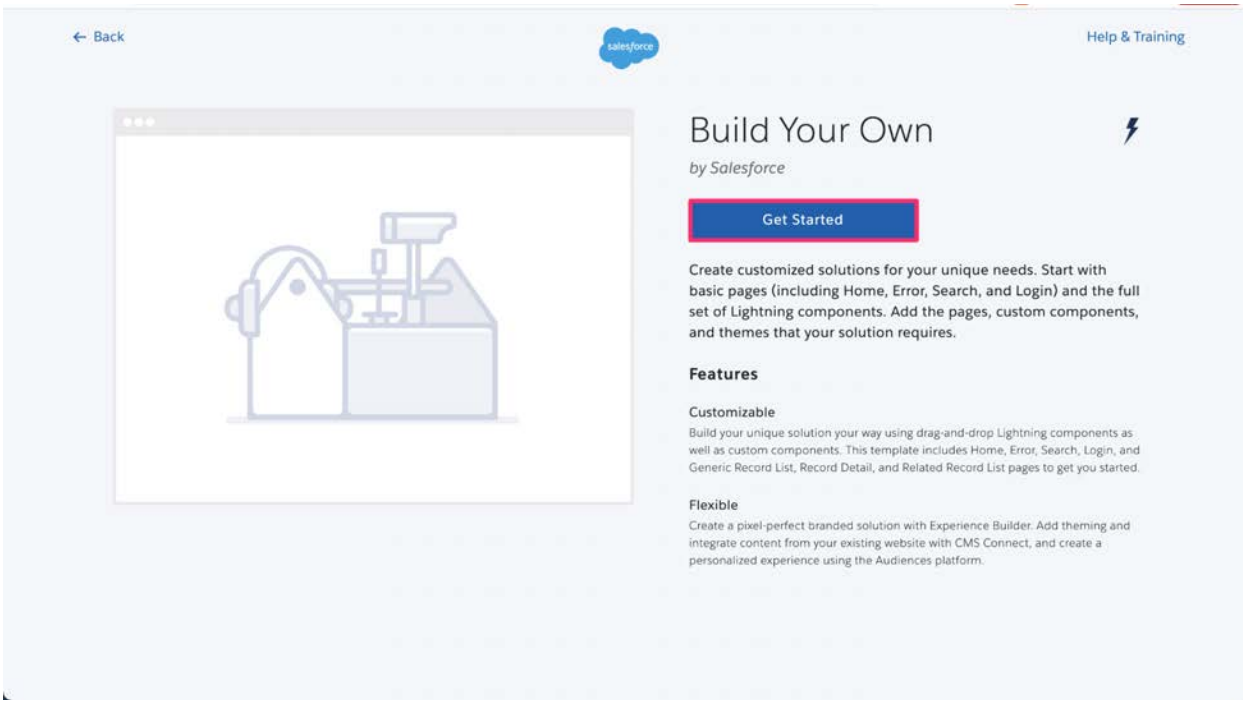
- Click New


Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings
Analytics
Chatter
Commerce
Data.com
SETUP
All Sites
Digital Experiences
Visit our Trailblazer CommunityHelp for this Page
The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a member, the URL isn't linked.
Maximum number of sites (including active, inactive, and preview): 100
All Sites
New
No Sites

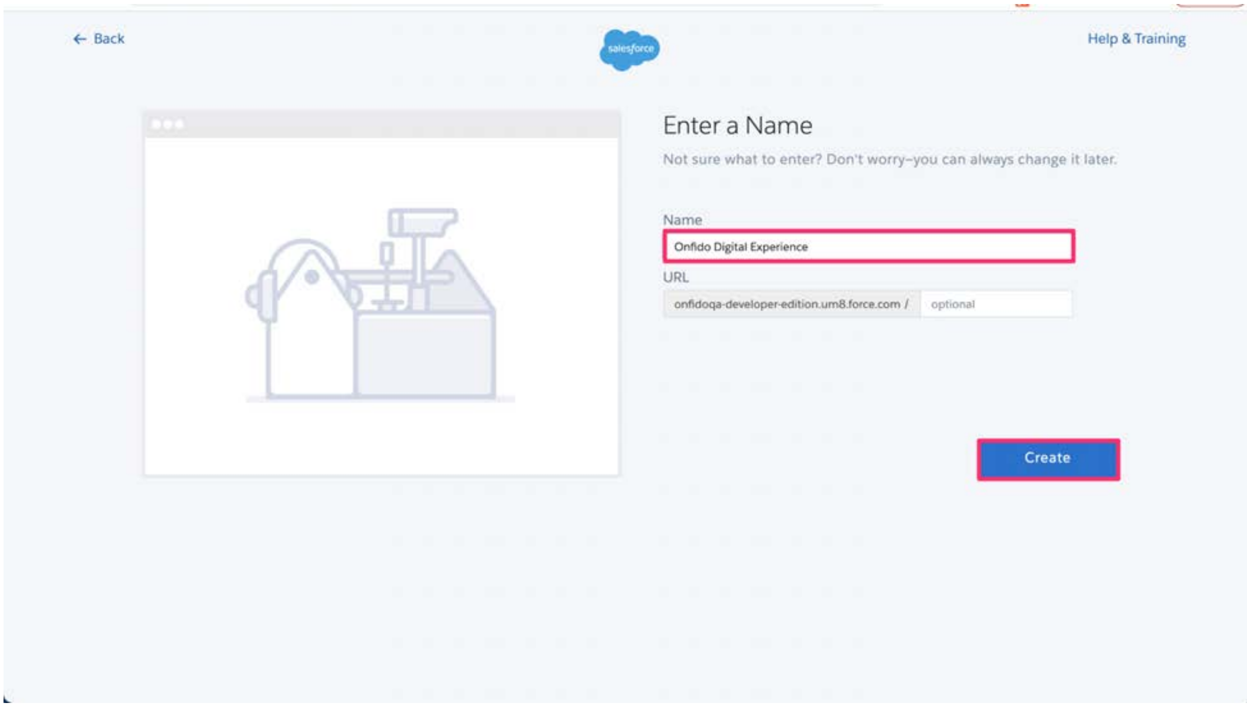
- Select the Build Your Own Template



- Click Get Started

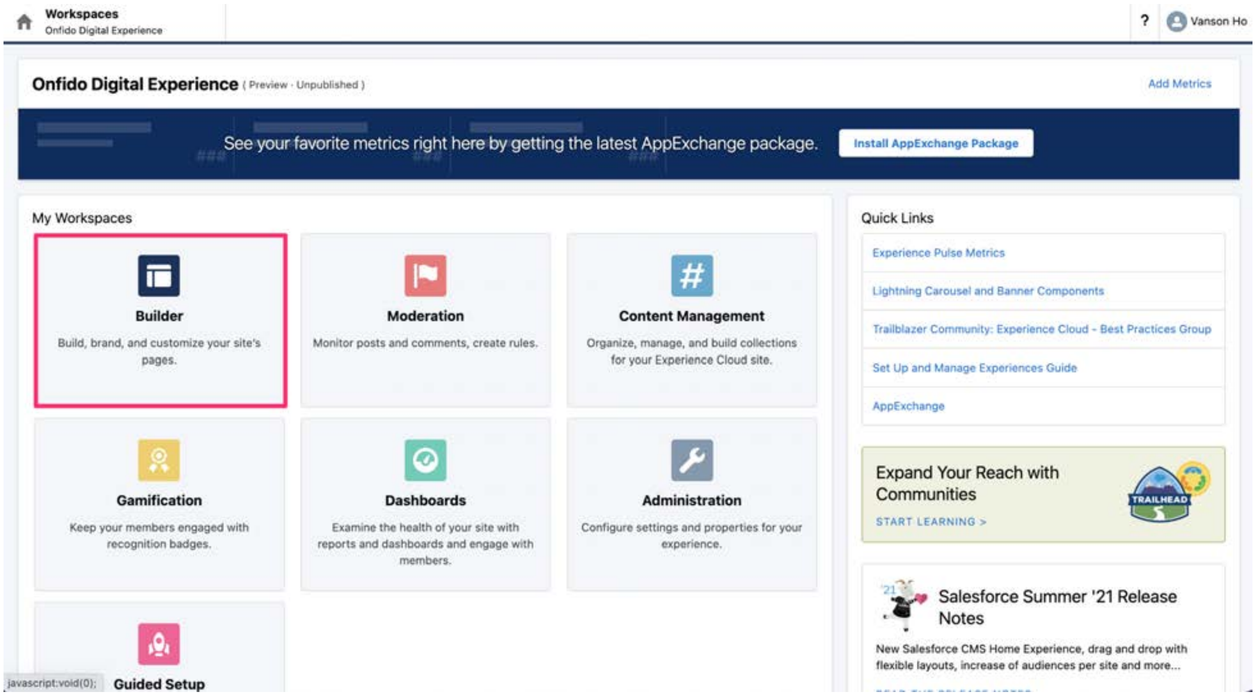


- Enter Name
- Click Create

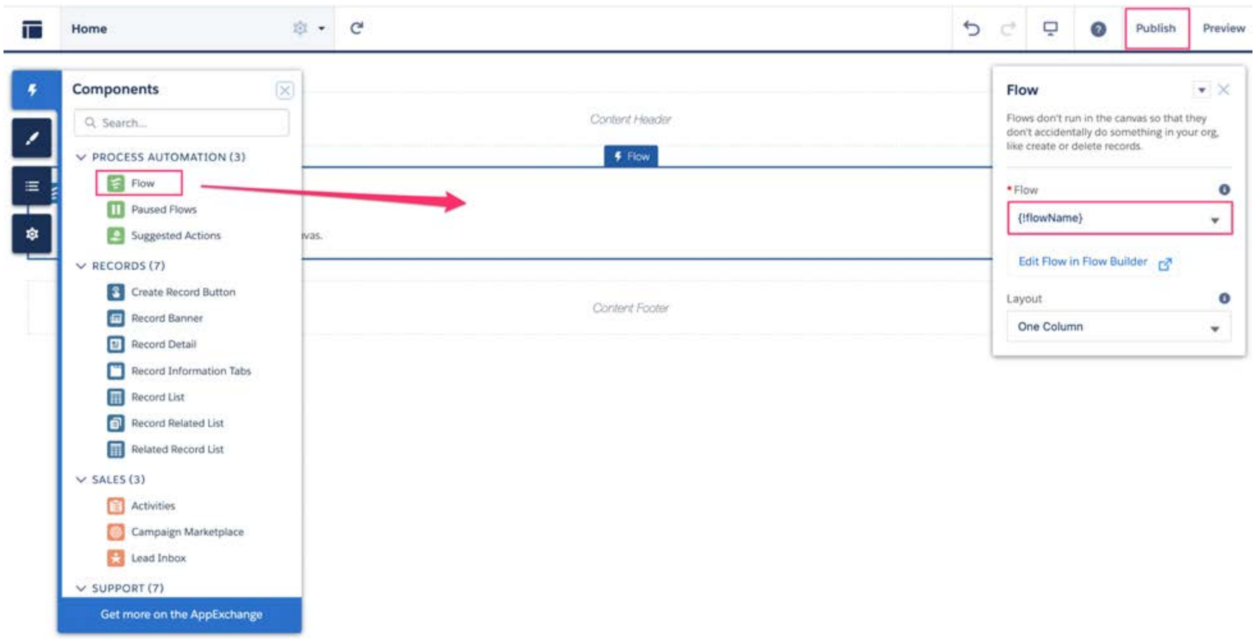


← Back
salesforce
Help & Training
Enter a Name
Not sure what to enter? Don't worry–you can always change it later.
Name
Onfido Digital Experience
URL
onfidoqa-developer-edition.um8.force.com /
optional
Create

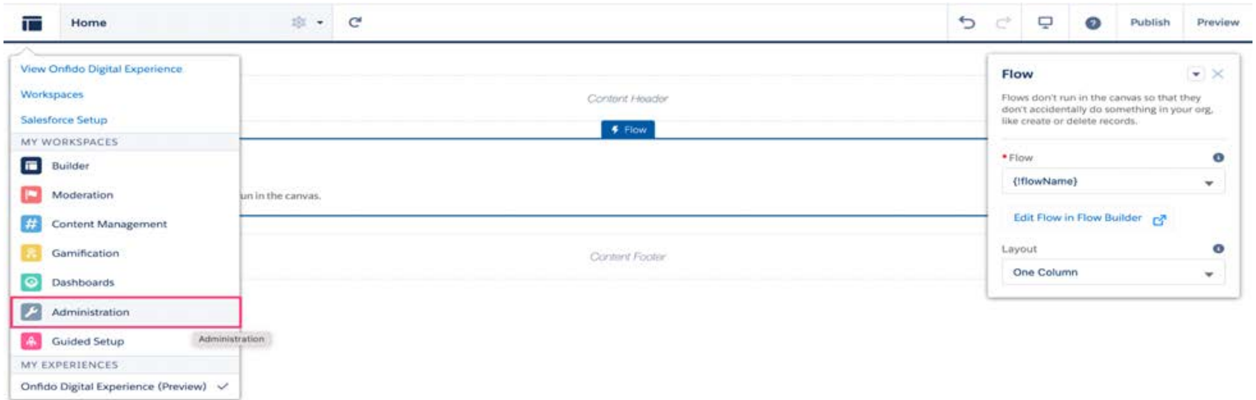
- Select Builder



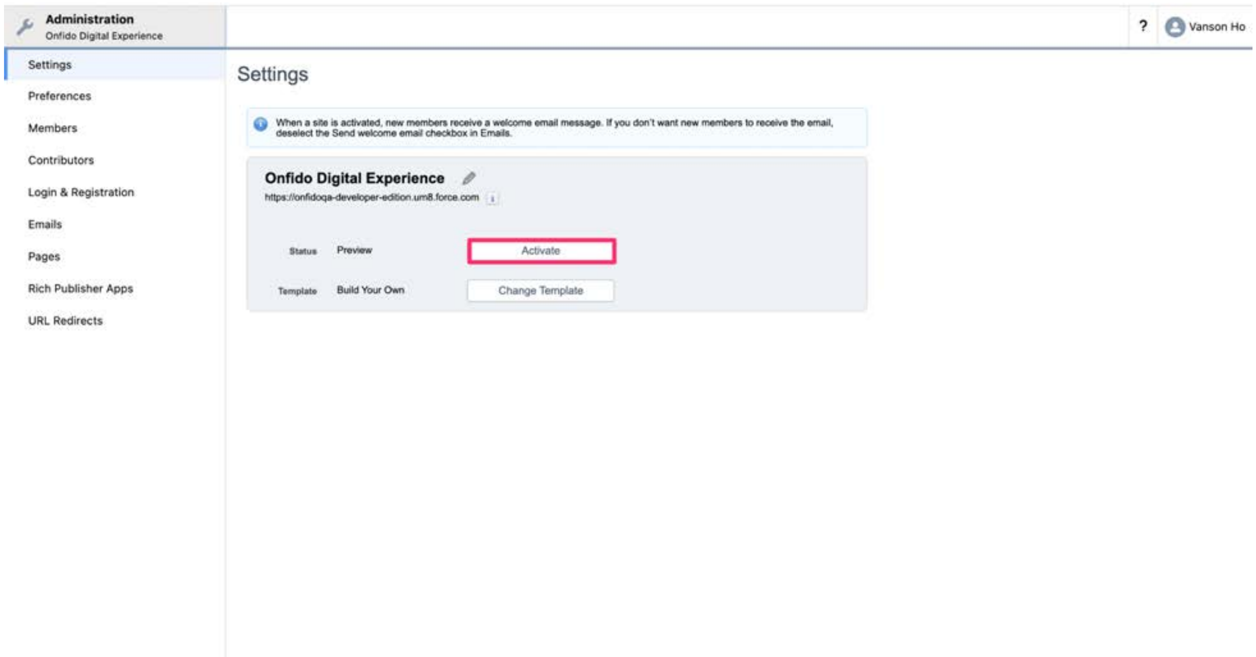
- Click and drag the flow component onto the page
- Select the flow you created within Salesforce under Flow
- Click Publish



- Click the drop down next to home
- Click Administration


Home
Publish
Preview
View Onfido Digital Experience
Workspaces
Salesforce Setup
MY WORKSPACES
Builder
Moderation
Content Management
Gamification
Dashboards
Administration
Guided Setup
Administration
MY EXPERIENCES
Onfido Digital Experience (Preview)
Content Header
Flow
un in the canvas.
Content Footer
Flow
Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
* Flow
{!flowName}
Edit Flow in Flow Builder
Layout
One Column

- Click Activate to activate your Digital Experience



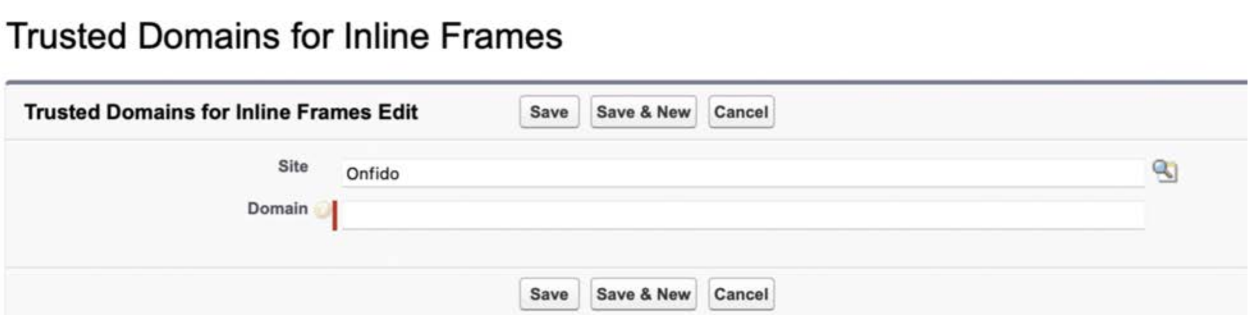
Trusted Domains for Inline Frames

- From Salesforce Setup > Go to the Experience Site > Grab the URL
- Go to the quick find and go to "Sites" (listed under "Sites and Domains") > Click into the Site (label) that you created as part of the Onfido Setup app steps
- Scroll down and click **Add Domain** next to "Trusted Domains for Inline Frames" and leave the "Site" pre-populated and paste the domain of your Digital Experience and click Save

- If you're using your flow inside Salesforce org, you'll need to add the url from the Salesforce record (everything up to .com)

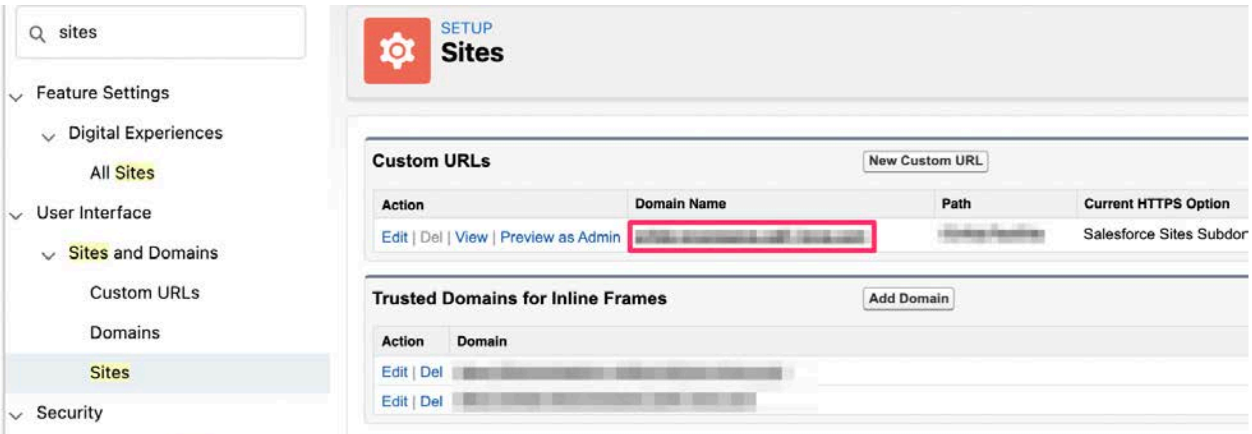
Allow framing of site pages on external domains (Good protection)

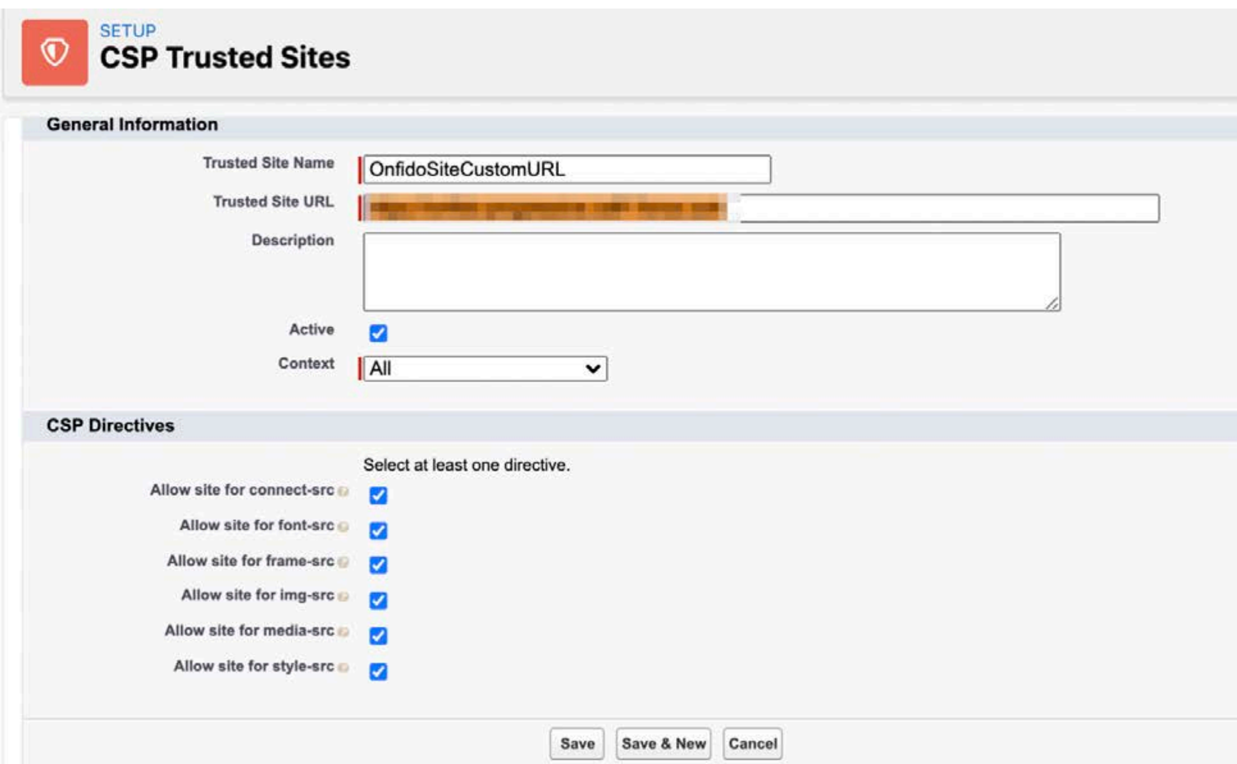
- Click Edit > Change the "Clickjack Protection Level" to **Allow framing of site pages on external domains (Good protection)** > Click Save



CSP Trusted Site

- Copy the Custom URL from the Onfido Site that you created during setup > Add it as a CSP Trusted Site and check the CSP Directives checkboxes





Profile (or Permission Set) Permissions Needed for Community Users

You do not need create access to Account, Case, Contact if you create your flow using Without Sharing.

- Objects:
    - Account: Read, Create, Edit
    - Applicants: Read, Create
        - Field access: Read
        - Field access: Edit on Account, Case, Contact, Onfido Applicant Id, User
    - Case: Read, Create, Edit
    - Contact: Read, Create, Edit
    - Email Proxies: Read, Create
        - Field access: Read
        - Field access: Edit on Account, Case, Contact, Recipient Email, Recipient Name, Verification, Webform URL
    - Onfido Customizations: Read
        - Field access: Read
    - Onfido Language Overrides: Read
        - Field access: Read

- Setup Assistant Data: Read
    - Field access: Read
- Verifications: Read, Create
    - Field access: Read and Edit

- Apex Class Access:
    - onfido_verificationForm
    - Onfido_verifications
    - onfido_verificationsInvocable
- Visualforce Page Access:
    - onfido_verificationForm
    - onfido_verifications

Notes & Additional Resources

Using Lightning Components: Configure a custom Domain in Salesforce

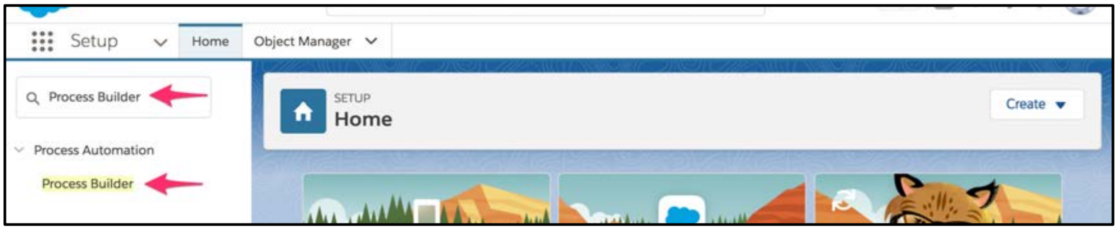
Lightning Components can only be used in Salesforce orgs with a custom domain. For additional help or information on setting up a domain in your Salesforce org to enable lightning components, click on the following link:

https://docs.google.com/document/d/1wpz-dzsFV6Ouuipn7uUncMjjO4GjAGAJIUvUB0SOv3M/edit?usp=sharing

Process Builder Automation

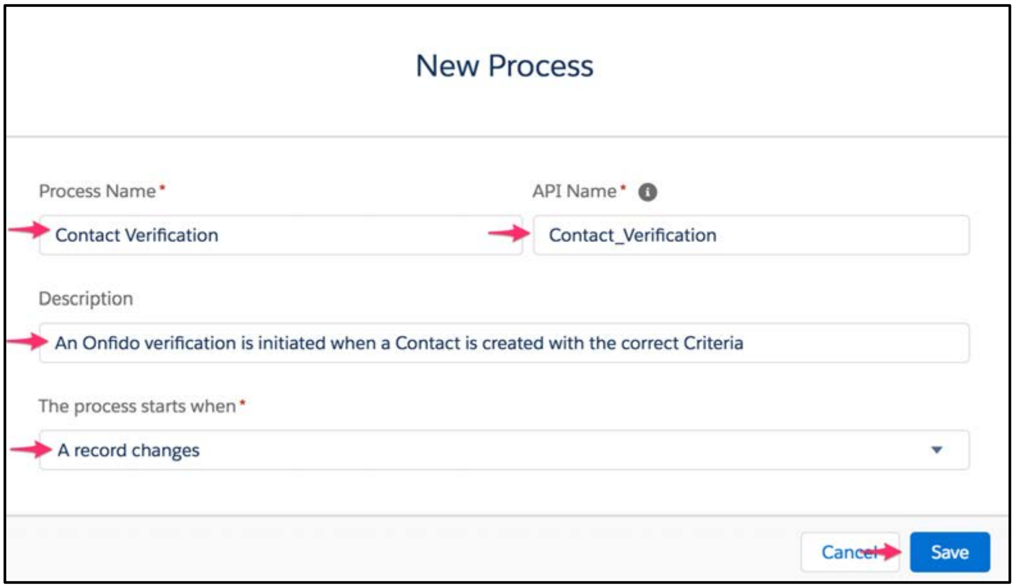
There's an Apex Trigger that monitors a Boolean (Checkbox) field on the Contact, Account, Case and Opportunity objects. When the value is changed to True, checked, the trigger initiates the Onfido Verification process for that record. This Process Builder shows you how to leverage this trigger when certain criteria have been met on your chosen object.

- Navigate to the Quick Find > Search "**Process Builder**"

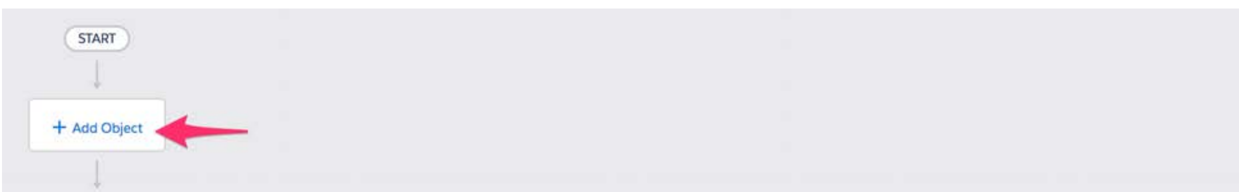


- Click **New**

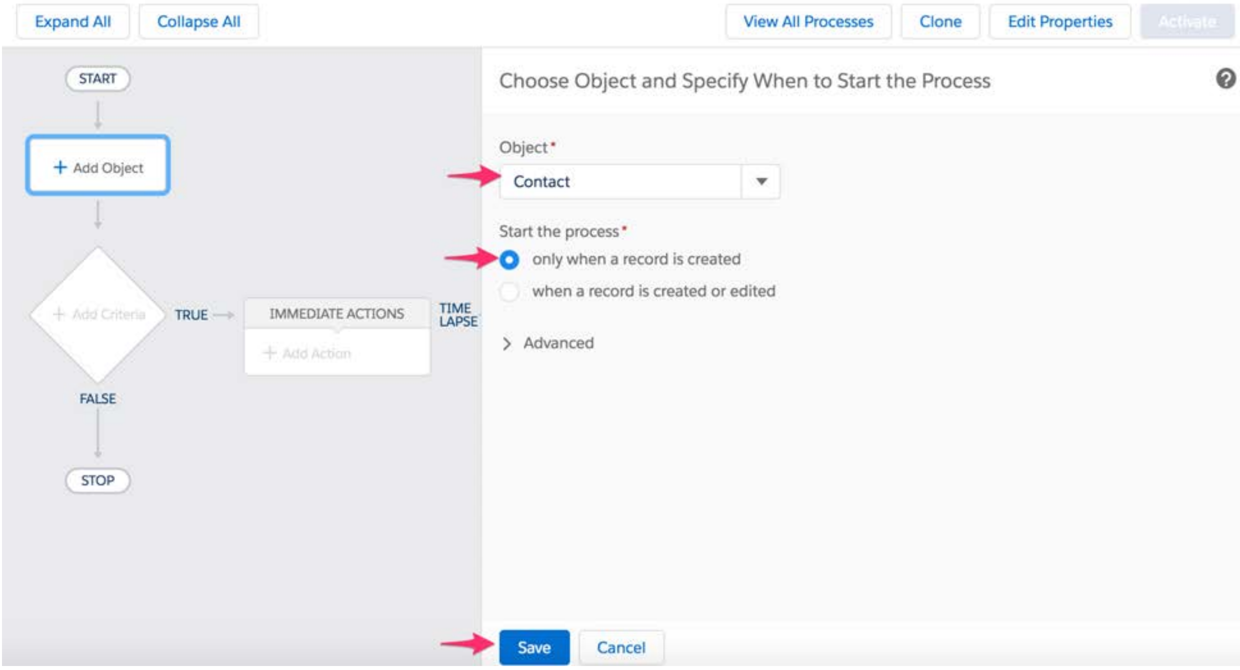
- Enter a **Process Name**
    - (For example, “Contact Verification”) - You may create a Process Builder configuration for the object that you will be running verifications on
- Enter **Description**
    - (For example, “An Onfido verification is initiated when a Contact is created with the correct Criteria”)
- Select **Process runs when a record is changed**



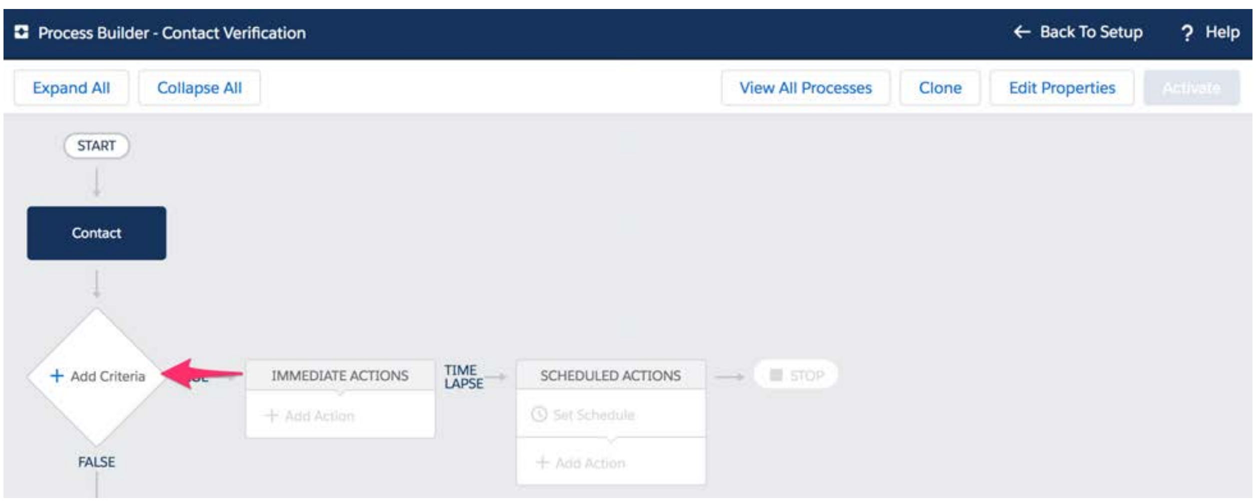
- Click Add Object



- Select your Object from the picklist (For example, Contact) > Start the process only when the record is created > Click Save



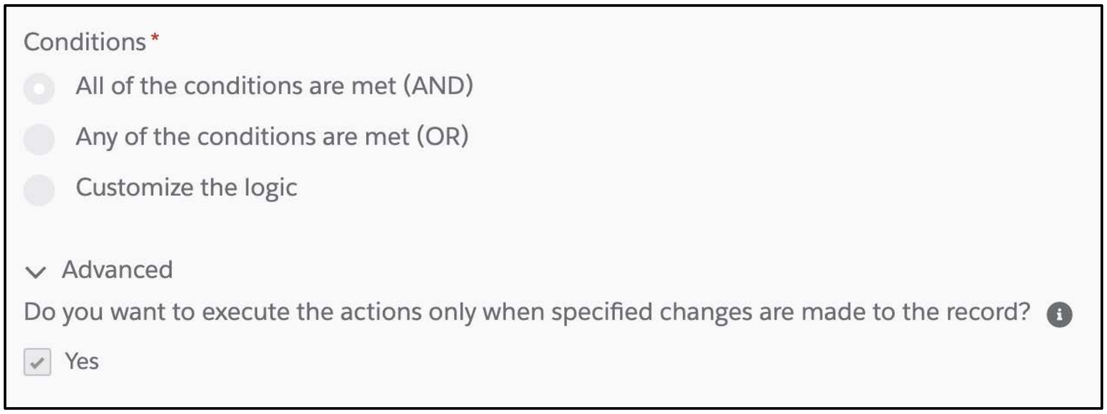
- Click Add Criteria



- Enter a Criteria Name
    - (For example, “Minimum Verification requirements”)

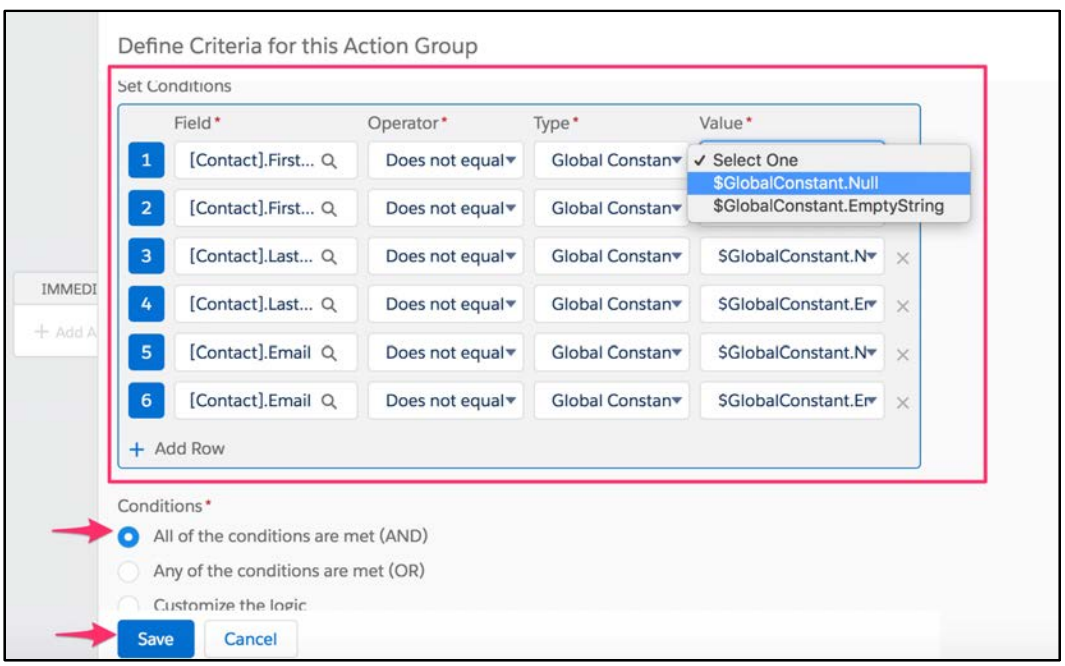
- Define Criteria so that the Action will be executed only when the conditions are met

- Since the Verification requires at a minimum the First Name, Last Name, and an Email on Contact we show the following below
    - First Name - Does not equal - Global Constant - Null
    - First Name - Does not equal - Global Constant - Empty String
    - Last Name - Does not equal - Global Constant - Null
    - Last Name - Does not equal - Global Constant - Empty String
    - Email - Does not equal - Global Constant - Null
    - Email - Does not equal - Global Constant - Empty String
    - Conditions - **All of the conditions are met (AND)**
- Select **Yes** for “Do you want to execute the actions only when specified changes are made to the record?”

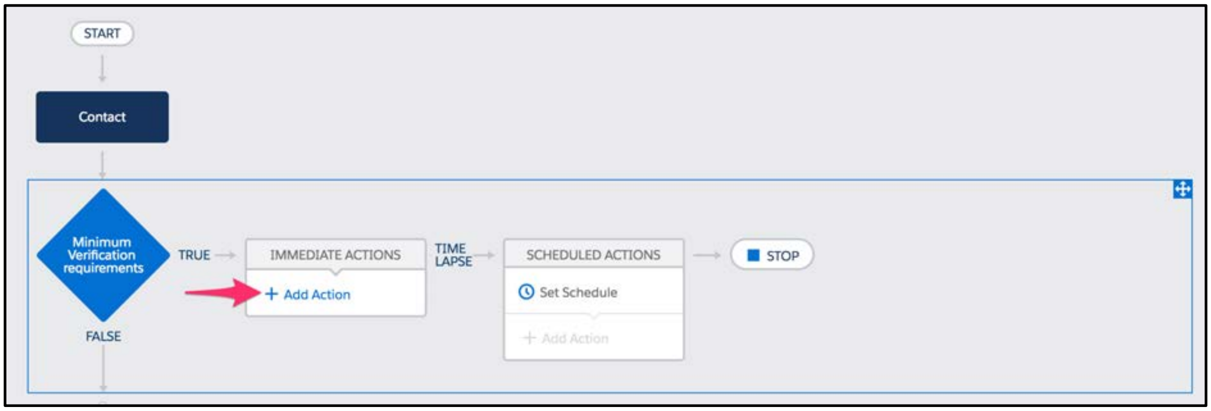


- Click **Save**

- **Note that based on the object you selected in Data Field Settings of the Onfido Setup app, you will set the fields below corresponding to your Field Mapping selections.**

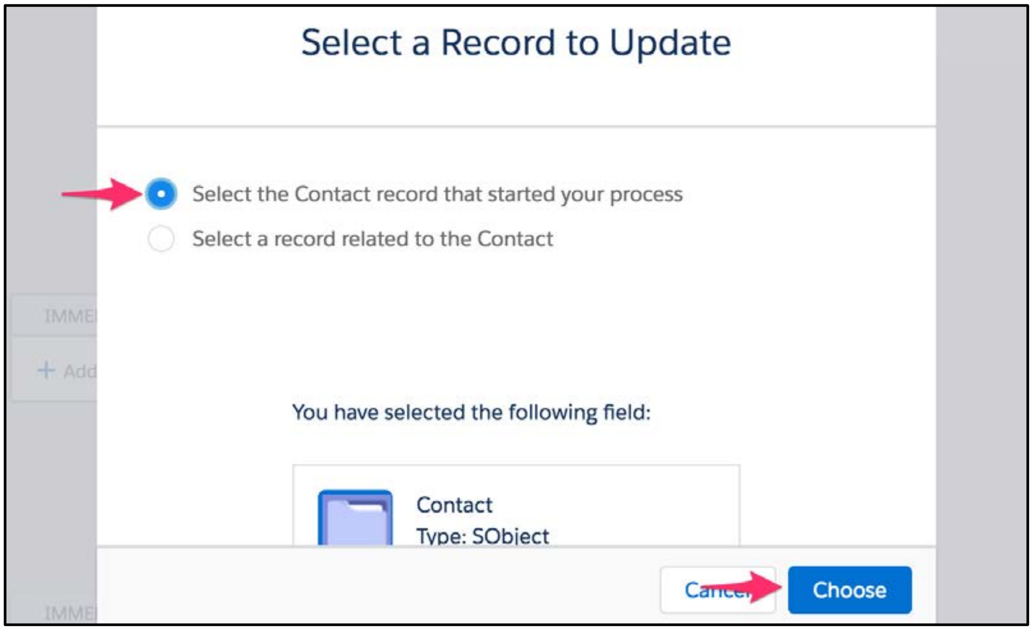


- Click **Add Action**

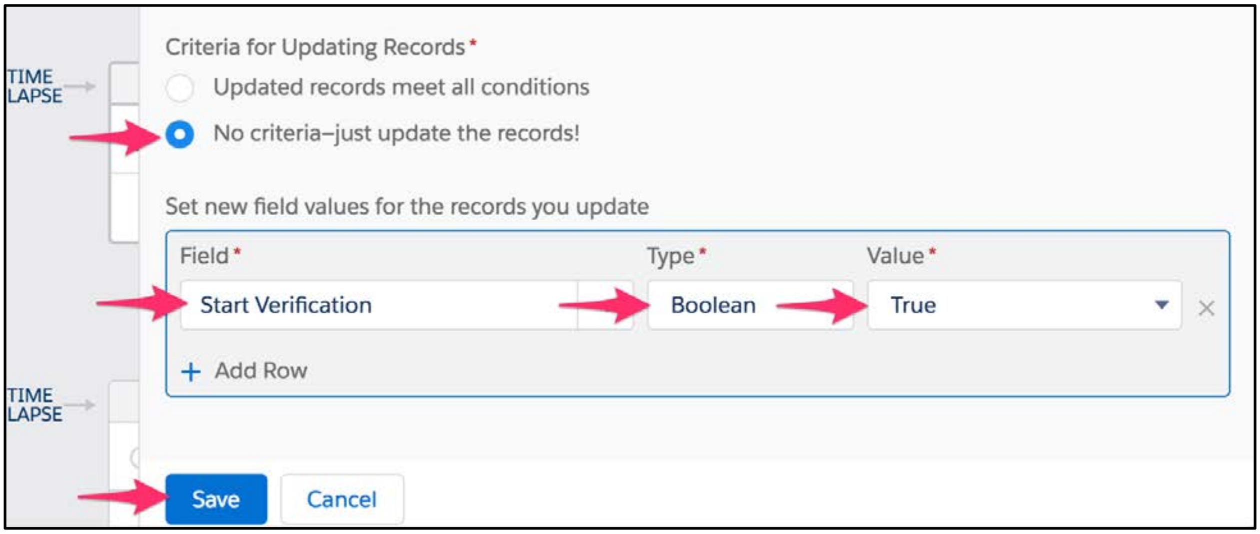


- Select Action Type - **Update Records**
- Enter Action Name - (For example, "Initiate Verification")

- Check Record Type - **Select the (Contact) record that started your process**

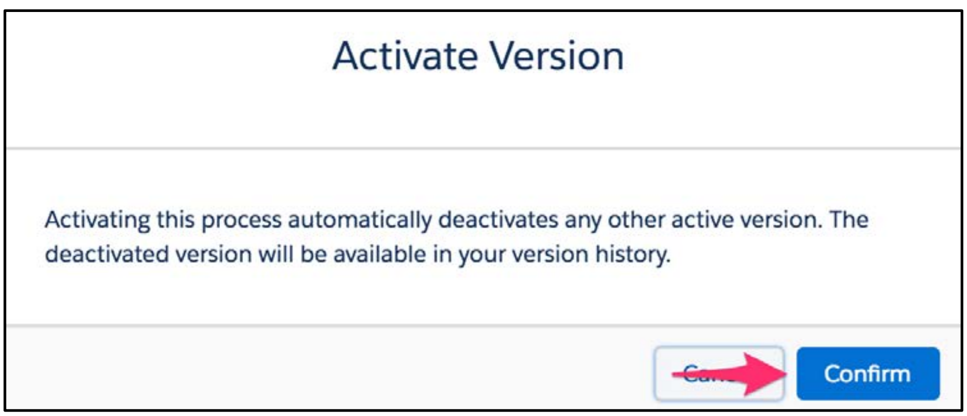


- Criteria for Updating Records - **No criteria - just update the records!**
- Select Field- **Start Verification**
- Select Type - **Boolean**
- Set the Value to **True**
- Click **Save**



- Click **Activate**

- Click **Confirm**



Setting up Person Accounts

The Onfido app is compatible with Person Accounts. If you want to use Person Accounts, there is Salesforce documentation that you should reference to learn more about them, as well as how to enable this feature. Also note that once enabled, you will not be able to remove Person Accounts from your org.

Check the following Salesforce documentation:

Enable Person Accounts:

https://help.salesforce.com/articleView?id=account_person_enable.htm&type=5

In-depth PDF on Setting Up Person Accounts:

https://resources.docs.salesforce.com/212/latest/en-us/sfdc/pdf/salesforce_B2C_implementation_guide.pdf

Quick guide to Create a Support Case:

https://help.salesforce.com/articleView?id=workcom_contact_support.htm

As of this writing, the steps taken to enable and set up Person Accounts are as follows:

- Create a Record Type for Account (Business Account)
- Get your Organization ID (Setup > Quick Find "Company Information" > Copy down Salesforce.com Organization for when opening a support case with Salesforce
- Setup > Quick Find "Sharing Settings" > Contact is set to Controlled by Parent (or both Contact and Account are set to Private)
- Quick Find "Account Settings" > Click "Edit" > Check "Allow Customer Support to enable Person Accounts."

    - If this doesn't save down, you may be in a dev org and will just need to ask when opening support case if they can help save this down
- Give login access to Salesforce Support by clicking your avatar icon > Choose "Settings" > Click on "Grant Account Login Access" in the sidebar > Set the access expiration date for Salesforce.com to minimum 1 month > Save
- Open a case with Salesforce Support
    - Feature Activation > Person Accounts
    - Case Subject - "Activate Person Accounts"
    - Enter description found in link in the section called "Request Person Accounts (open a case with Salesforce Support)"
        - https://help.salesforce.com/articleView?id=000171021&language=en_US&type=1
        - It is worth noting in your description of email that once in activated, Person Accounts can't be disabled

NOTE - If you choose to run verifications on Person Accounts, after they are enabled, you will need to go to the Salesforce Classic Quick Find and search "Person Accounts" and click Page Layouts and add the Email field on to the Page Layout (for purposes of the Onfido app). It is also advised that you go to the Profiles > And the Record Types Settings section and add Person Accounts (Do this for the Profile that will need access to Person

Accounts). For more information on Person Accounts it is recommended that you read the Salesforce documentation, especially when it comes to integrating with Financial Services Cloud.

- Furthermore, you may also need to add "Individual" Record Type on the Profile's Record Type Settings (as well as "Person Account")
- Some more steps that may need to be taken if using Person Accounts in FSC
    - Quick Find "Custom Metadata Types"
        - Individual Record Type Mapper
        - Create New > Person Account
    - Quick Find "Custom Settings"
        - B2C Lead Company Name Config Edit
        - Edit System Administrator
        - Uncheck "Override Company Name"
    - Quick Find "Custom Settings"
        - Use Person Account
        - Create New > Use Person Account

For a visual guide with screenshots, please refer to the additional documentation below:

https://docs.google.com/document/d/12425fNZMgaM08K6vtPjwzfZcQhzd8QmnnV8BcqbzplE/edit?usp=sharing