

# Onfido

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



# Table of Contents

---

|                                                                             |    |
|-----------------------------------------------------------------------------|----|
| <b>Introduction</b>                                                         | 4  |
| Updates                                                                     | 5  |
| <b>Upgrading an Older Version of the Onfido App</b>                         | 6  |
| Remove or Unassign Onfido Assets from the Org                               | 7  |
| Unassign Packaged Permission Set(s)                                         | 7  |
| Remove Verification Form Visualforce Page from Site                         | 7  |
| Remove Onfido Verification Lightning Components from Lightning Record Pages | 8  |
| Remove Onfido Verification Visualforce Page from Page Layouts               | 8  |
| Uninstalling the Older Onfido Salesforce App                                | 8  |
| <b>Installation</b>                                                         | 10 |
| Installing the Onfido Package                                               | 10 |
| <b><i>Onfido App Configuration</i></b>                                      | 11 |
| <b>Permission Sets</b>                                                      | 11 |
| Onfido API User Permission Set                                              | 11 |
| Onfido Feature Set Access Permission Set                                    | 16 |
| Onfido Setup Access Permission Set                                          | 18 |
| <b>Onfido Setup (Setup Assistant)</b>                                       | 19 |
| Account Setup                                                               | 21 |
| Default Report Settings                                                     | 28 |
| Customer Consent Flag                                                       | 30 |

|                                                                                                            |    |
|------------------------------------------------------------------------------------------------------------|----|
| Data Field Settings                                                                                        | 30 |
| <b>Setup the Salesforce Site URL</b>                                                                       | 34 |
| <b>Add the Onfido Verification Form Visualforce Page to Site</b>                                           | 40 |
| <b>Adding Lightning Components to Record Pages</b>                                                         | 42 |
| Onfido Identity Verification                                                                               | 42 |
| Lightning Record Page Assignment/Activation                                                                | 44 |
| <b>Adding Onfido Verification Component as a Visualforce Page in Page Layouts (for Salesforce Classic)</b> | 46 |
| <b>Add Logo to Email Template</b>                                                                          | 49 |
| JSON examples for Customizations and Language Overrides                                                    | 53 |
| Lightning Flow Support                                                                                     | 55 |
| Invocable (onfido_verificationsInvocable.cls)                                                              | 63 |
| Email Template ID                                                                                          | 66 |
| <b>Digital Experience Site Setup</b>                                                                       | 72 |
| Self Service Identity Verification Flow                                                                    | 72 |
| Step by step guide                                                                                         | 74 |
| Step 1: Getting the Person Account ID                                                                      | 74 |
| Step 2: Calling the invocable method                                                                       | 75 |
| Step 3: Loading our new lightning web component                                                            | 78 |
| <b>Building the Salesforce Digital Experience</b>                                                          | 80 |
| Trusted Domains for Inline Frames                                                                          | 88 |
| Allow framing of site pages on external domains (Good protection)                                          | 89 |
| CSP Trusted Site                                                                                           | 90 |
| Profile (or Permission Set) Permissions Needed for Community Users                                         | 92 |
| <b>Notes &amp; Additional Resources</b>                                                                    | 94 |

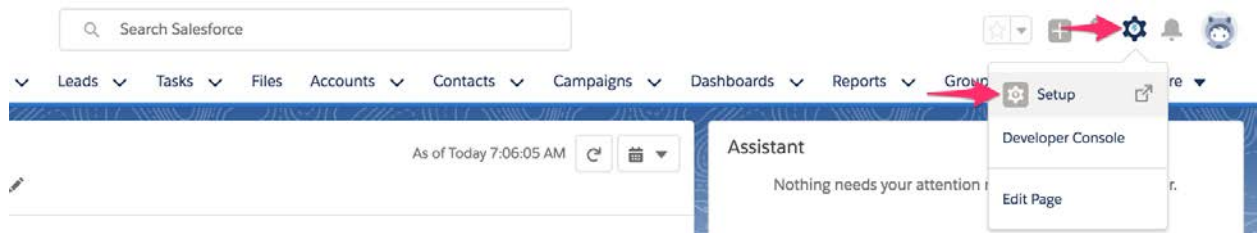
|                                                                     |     |
|---------------------------------------------------------------------|-----|
| Using Lightning Components: Configure a custom Domain in Salesforce | 94  |
| Process Builder Automation                                          | 94  |
| Setting up Person Accounts                                          | 102 |

# 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.



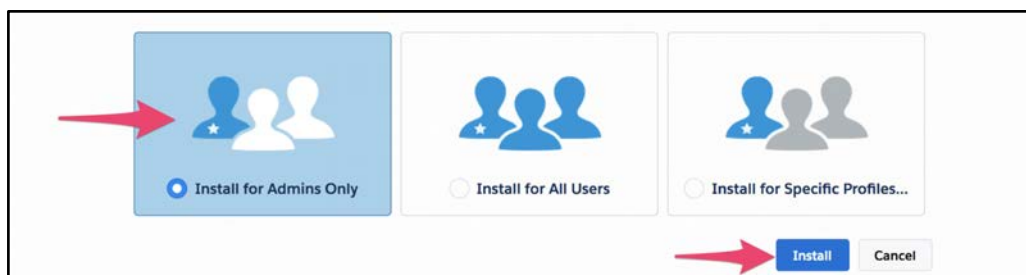
# Installation

---

## 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.

### Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

| Website           | SSL Encrypted                       |
|-------------------|-------------------------------------|
| api.ca.onfido.com | <input checked="" type="checkbox"/> |
| api.onfido.com    | <input checked="" type="checkbox"/> |
| api.onfido.com    | <input checked="" type="checkbox"/> |
| api.us.onfido.com | <input checked="" type="checkbox"/> |
| onfido.com        | <input checked="" type="checkbox"/> |

☒ Yes, grant access to these third-party web sites

ContinueCancel

# Onfido App Configuration

---

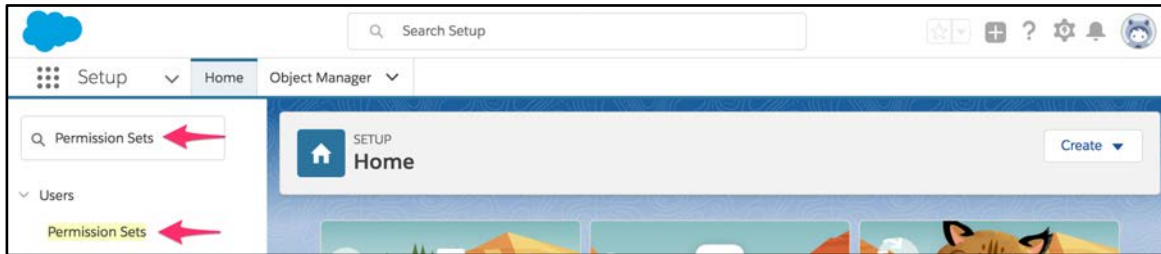
## Permission Sets

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

Permission Set  
**Onfido API User**

Find Settings... Clone Manage Assignments

**Permission Set Overview**

|                             |                                                                |                  |                              |
|-----------------------------|----------------------------------------------------------------|------------------|------------------------------|
| Description                 | Permission set to be assigned to the OnFido Site's Guest User. | API Name         | OnFido_API_User              |
| License                     |                                                                | Namespace Prefix | onfidof                      |
| Session Activation Required | <input type="checkbox"/>                                       | Created By       | Kai Leung, 7/1/2020, 2:19 PM |
| Last Modified By            | Kai Leung, 7/6/2020, 1:04 PM                                   |                  |                              |

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

Permission Set  
**Clone: Onfido API User**

Enter a new label and description for the cloned permission set.

Save Cancel

**Enter permission set information** ⓘ = Required Information

Label

API Name

Description

Session Activation Required ☐

License

Save Cancel

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

**Permission Sets**

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](#) | [Edit](#) | [Delete](#) | [Create New View](#)

| Action                 | Permission Set Label                      | Description                                     | License            |
|------------------------|-------------------------------------------|-------------------------------------------------|--------------------|
| <a href="#">Delete</a> | <a href="#">Onfido API User Clone</a>     | Permission set to be assigned to the OnF...     |                    |
| <a href="#">Delete</a> | <a href="#">Onfido Feature Set Access</a> | Set of permissions allowing the use of the O... |                    |
| <a href="#">Delete</a> | <a href="#">Onfido Setup</a>              | Grants a user the necessary permissions for...  |                    |
| <a href="#">Clone</a>  | <a href="#">Salesforce Console User</a>   | Enable Salesforce Console User                  | Sales Console User |

- Click **Object Settings**

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

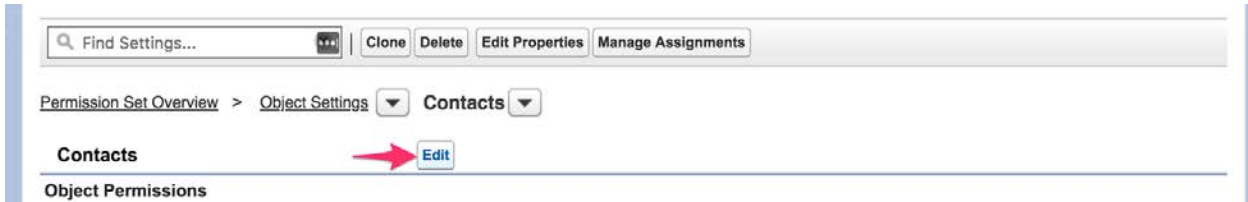
- The following objects will need Read access regardless of what object you are running verifications from: **Account, Case, Contact, Opportunity and Lead.**

- If you have **Person Accounts** enabled, you will need to add permissions to the **Person Account Record Type** for the **Account** object as well

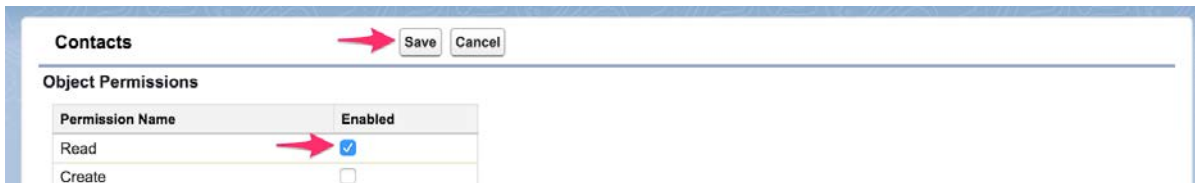
**SETUP** **Permission Sets**

| Object                            | Access    | Count | ... |
|-----------------------------------|-----------|-------|-----|
| <a href="#">Cases</a>             | No Access | 29    | ... |
| <a href="#">Coaching</a>          | No Access | 5     | ... |
| <a href="#">Contacts</a>          | Read      | 29    | ... |
| <a href="#">Content</a>           | --        | --    | ... |
| <a href="#">Contracts</a>         | No Access | 23    | ... |
| <a href="#">D&amp;B Companies</a> | No Access | --    | ... |

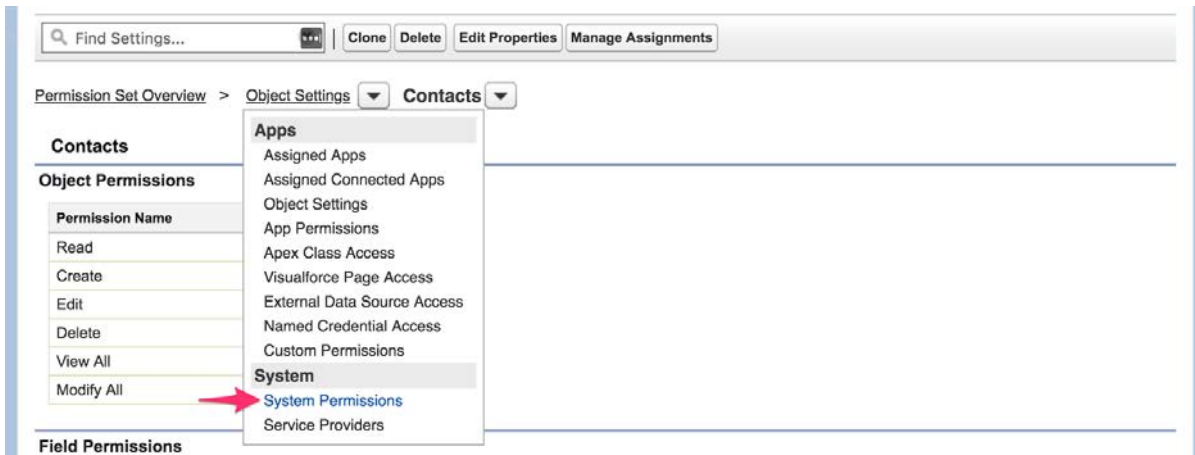
- Click **Edit**



- 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**

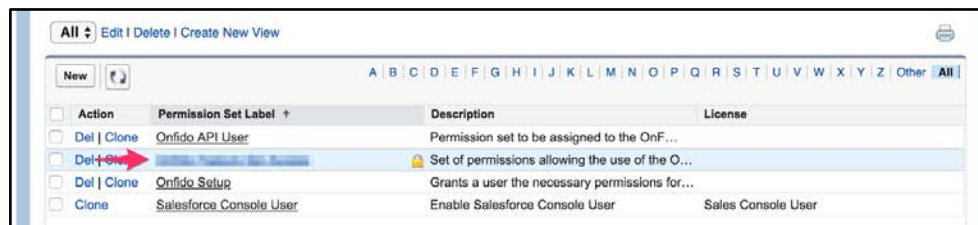
- If you are upgrading the package and have already cloned the API User permission set, you may need to give the following access:
  - Verification object: Read field access to “Onfido Language Override”
  - Onfido Customization object: Read field access to “Additional Head Markup”

## 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

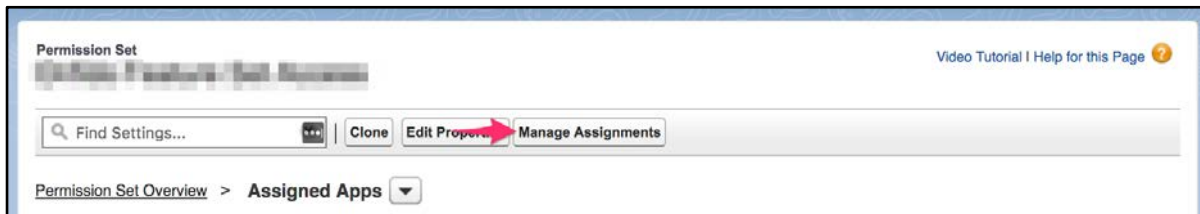


- Navigate to **Object Settings**
  - You will need to grant **Read** object permissions to the following objects:
    - **Accounts, Cases, Contacts, Lead and Opportunities** (If permission set is for Community Users, you do not need to give Read access to Leads and Opportunities. When setting up your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

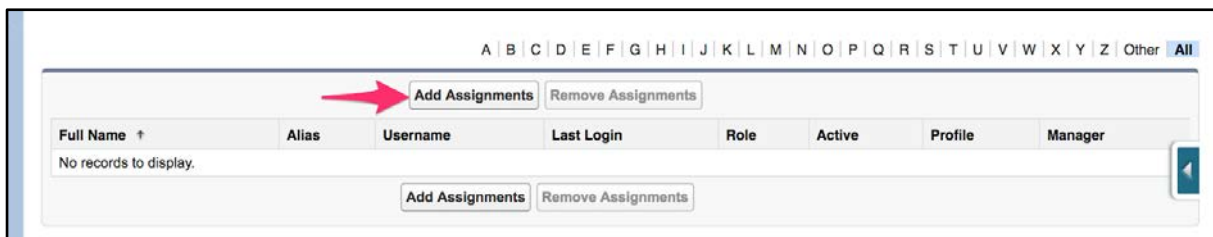
- **Note:** For the objects that you have mapped (thus are running verifications from) you will need additional object permissions:

### 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

AssignCancel

| <input type="checkbox"/>            | Action               | Full Name ↑       | Alias   | Username                                                      | Last Login | Role | Active | Profile                          | Manager |
|-------------------------------------|----------------------|-------------------|---------|---------------------------------------------------------------|------------|------|--------|----------------------------------|---------|
| <input type="checkbox"/>            | <a href="#">Edit</a> | Chatter Expert    | Chatter | chatty.00d0r0000008ijauai.nniuuw8mtxa0@chatter.salesforce.com |            |      | ✓      | Chatter Free User                |         |
| <input checked="" type="checkbox"/> |                      |                   |         |                                                               |            |      | ✓      | System Administrator             |         |
| <input type="checkbox"/>            | <a href="#">Edit</a> | User, Integration | integ   | integration@00d0r0000008ijauai.com                            |            |      | ✓      | Analytics Cloud Integration User |         |
| <input type="checkbox"/>            | <a href="#">Edit</a> | User, Security    | sec     | insightssecurity@00d0r0000008ijauai.com                       |            |      | ✓      | Analytics Cloud Security User    |         |

AssignCancel

### 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:

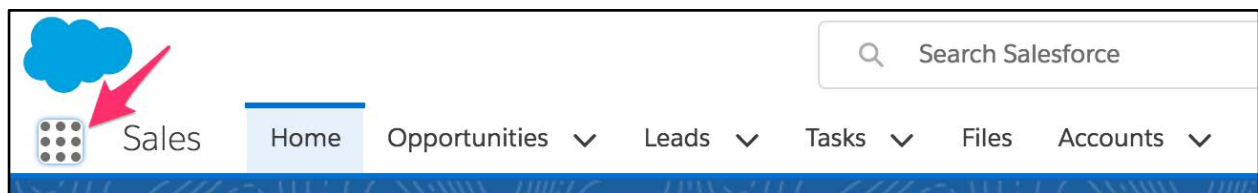
- Customization object: Read/Edit field access to “Additional Head Markup”

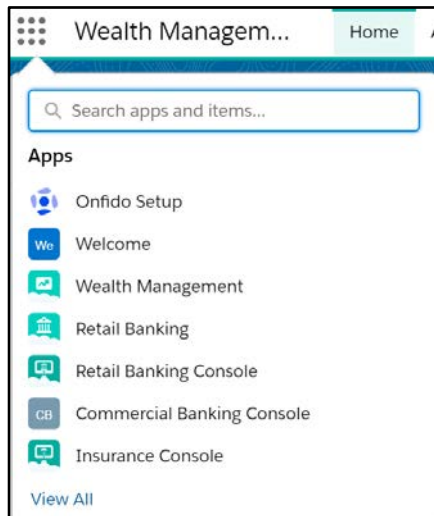
## Onfido Setup Access Permission Set

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.

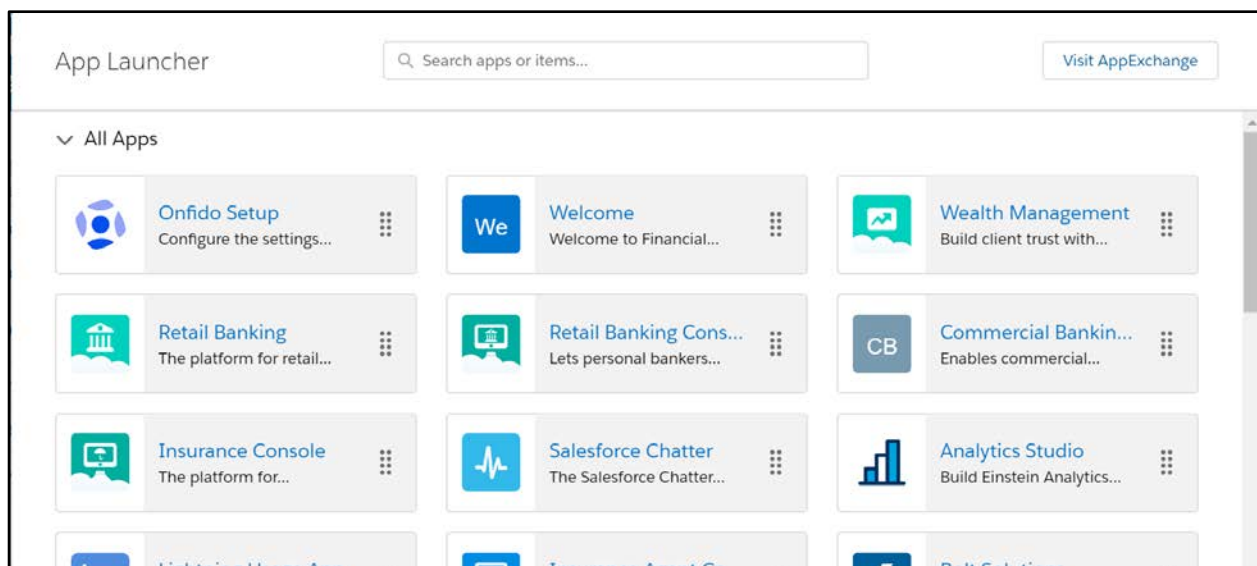
## Onfido Setup (Setup Assistant)

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**



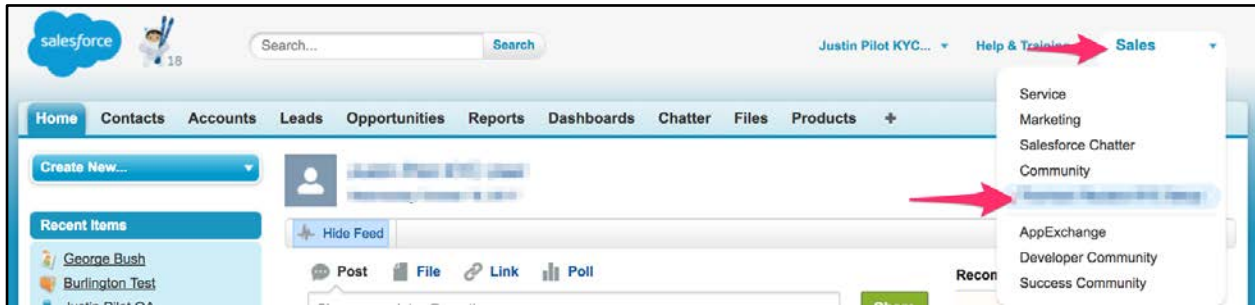


- If you do not see the Onfido Setup app, either type “Onfido” to search for it or click on the **View All** link at the bottom to see the full list of Apps

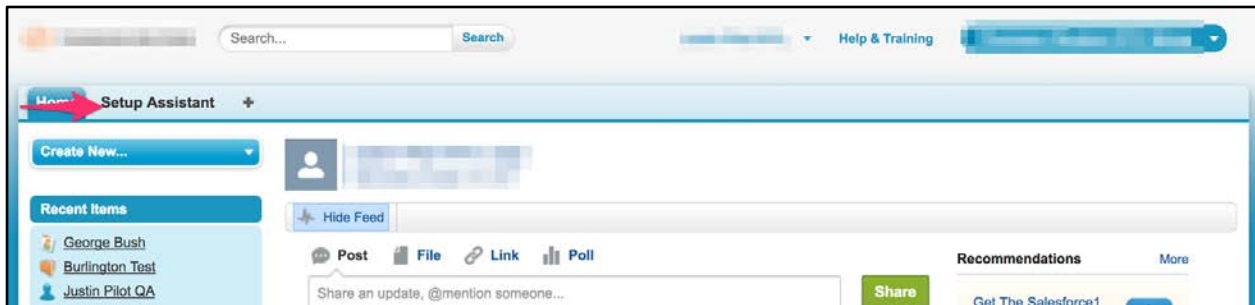


To navigate to the Onfido Setup app using Salesforce Classic follow these steps:

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



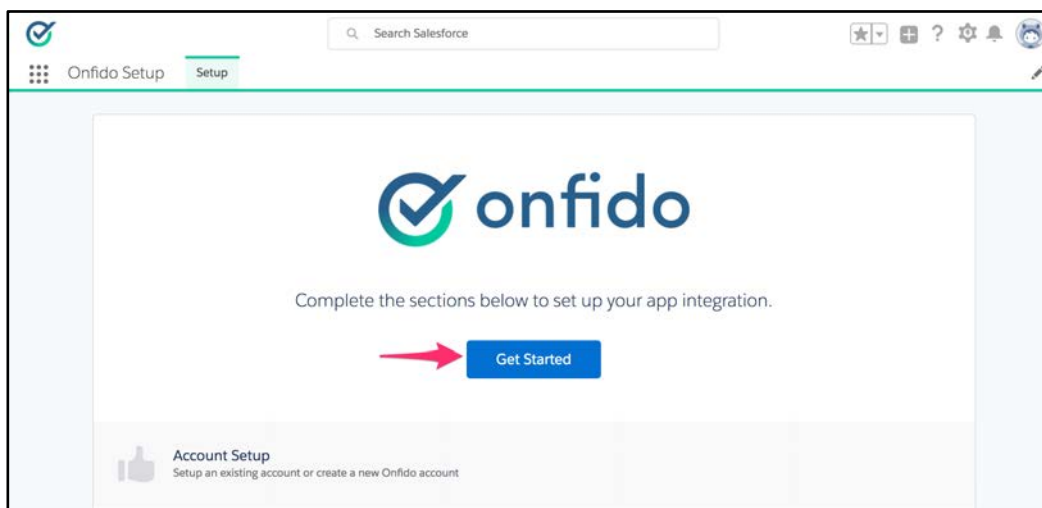
- Click the **Setup** tab



- 

## 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](#)

Account Setup

Onfido API Key

Enter the API key provided by your Onfido account

Do you have an Onfido account?

☒ Yes, I have an existing account.

☐ I need to create a new account.

\* Region

EU

\* Enter your API key

.....

Verify

- 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**

## Account Setup

**Onfido API Key**  
Enter the API key provided by your Onfido account

Do you have an Onfido account?

☐ Yes, I have an existing account.

☒ I need to create a new account.

Enter contact information

\* Company Name

\* Company Location

\* First Name

Justin

\* Last Name

Thornton

\* E-mail Address

\* Areas of Interest

☒ KYC & AML checks

☒ Right to Work

☒ User identity verification

☒ I agree to Onfido sending me marketing communications, as described in the [Website Data Usage and Cookie Policy](#).

☒ I agree to the [Online Sales Agreement](#).

Submit

Cancel

Next

- 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 registered 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 activate 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

## Account Setup

### Onfido Capture Experience URL

Specify how the Onfido Capture Experience will be hosted. This will be the URL that hosts the form users will be provided when asked to verify their identity. The Onfido Capture Experience can be hosted through either a Salesforce Site (the site created in the previous step) or a custom site. To use a different Salesforce Site, proceed with the Self-Hosted Site option.

#### How do you want to host the Onfido Capture Experience?

- ☒ Salesforce Hosted Site  
☐ Self-Hosted Site

\* Onfido Capture Experience Site URL ⓘ

`https://onfidov3prodtest1.secure.force.com`

#### Configuring your Salesforce Site to Host the Onfido Capture Experience

- 1. Open Sites in Setup**  
In Salesforce Setup, search for "Sites" using the quickfind box.
- 2. Open your Salesforce Site**  
At the bottom of the Sites page, select the site you are using to connect to Onfido. This is the site that was created in the Site URL step of the Onfido Setup Assistant.
- 3. Add the Default Form VF Page to your Site**  
Under the Site Visualforce Pages section, click "Edit". In the left list, find "onfido\_verificationForm" and move it to the right list by selecting it and clicking the right arrow button. Click "Save".
- 4. Complete the Onfido Capture Experience URL step in Onfido Setup Assistant**  
Once the VF Page has been added to your Salesforce Site, return to this step and click "Next" to complete it.

- 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

Account Setup

Onfido Capture Experience URL

Specify how the Onfido Capture Experience will be hosted. This will be the URL that hosts the form users will be provided when asked to verify their identity. The Onfido Capture Experience can be hosted through either a Salesforce Site (the site created in the previous step) or a custom site. To use a different Salesforce Site, proceed with the Self-Hosted Site option.

How do you want to host the Onfido Capture Experience?

☐ Salesforce Hosted Site

☒ Self-Hosted Site

\* Onfido Capture Experience Site URL

The provided URL will be appended with the following parameters: "applicantId" and "reportNames".

Configuring your Self-Hosted Site to Host the Onfido Capture Experience

1. Capture the Applicant Id and Report Names

The URL hosting the Onfido Capture Experience you provide will be appended with 2 URL parameters: "applicantId" which will be the Applicant Id, and "reportNames" which will be the list of reports being requested for the check. Ensure your self-hosted site obtains both parameters as they will need to be sent to Onfido when the check is created.

2. Create the Onfido Check

Include the provided "applicantId" and "reportNames" values when creating the check with Onfido.

BackExit

Next

- 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.

### Report Settings

Determine which report types will be available to your org's users. All supported Onfido report types are listed here, but only the ones marked as Active will be available to users in your org. Reports marked as Default will appear pre-selected when a user initiates a new verification and will be used for automatic workflows and processes.

**i** Verify that you are only selecting reports that your Onfido instance is configured to use. Reports not supported by your Onfido instance will fail.

#### DOCUMENT VERIFICATION

| Active                   | Default                  | Report Name |
|--------------------------|--------------------------|-------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Standard    |

#### FACIAL SIMILARITY

| Active                   | Default                  | Report Name           |
|--------------------------|--------------------------|-----------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Photo                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Photo Fully Automatic |
| <input type="checkbox"/> | <input type="checkbox"/> | Video                 |

#### WATCHLIST

| Active                   | Default                  | Report Name                     |
|--------------------------|--------------------------|---------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Enhanced                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Standard                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Politically Exposed Person Only |
| <input type="checkbox"/> | <input type="checkbox"/> | Sanctions Only                  |

#### IDENTITY

| Active                   | Default                  | Report Name |
|--------------------------|--------------------------|-------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Enhanced    |

#### KNOWN FACES

| Active                   | Default                  | Report Name |
|--------------------------|--------------------------|-------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Known Faces |

- 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

APPLICANT CONSENT CAPTURE ENABLEMENT

Enable the applicant consent screen in the Onfido SDK when providing verification for the selected reports above. **If not active, ensure you have incorporated Onfido privacy notices and consent language into your interface with users in the US.**

☒  
Active

- 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”

Onfido Setup Setup Onfido Customizations Onfido Language Overrides

### Object Mapping

Configure your Salesforce objects to determine how data from Onfido will be represented in your Salesforce org.

**Mapped Objects**  
Contact x  
+ Add Object

Applicant Identifier Mapping Extracted Data Mapping Save

Determine how your Salesforce fields will represent the externally created applicant in Onfido by configuring the fields below.

| ONFIDO                               | SALESFORCE                           | REMOVE |
|--------------------------------------|--------------------------------------|--------|
| * Unique Identifier<br>Email Address | * Unique Identifier<br>Informal Name |        |
| * First Name                         | First Name                           |        |
| * Last Name                          | Last Name                            |        |
| * Email                              | Email                                |        |

Add Row

Cancel Next

- 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.**)

**Object Mapping**  
Configure your Salesforce objects to determine how data from Onfido will be represented in your Salesforce org.

**Mapped Objects**  
Contact x  
+ Add Object

Applicant Identifier Mapping | **Extracted Data Mapping** | Save

⚠ Allow Onfido to store data in Salesforce when receiving Onfido verification results. Add the fields that you would like to extract from the document. **Note that any fields that you choose to map that currently have a value will be overwritten with the extracted data.**

| ONFIDO     | SALESFORCE | REMOVE |
|------------|------------|--------|
| First Name | First Name | 🗑      |

Add Row

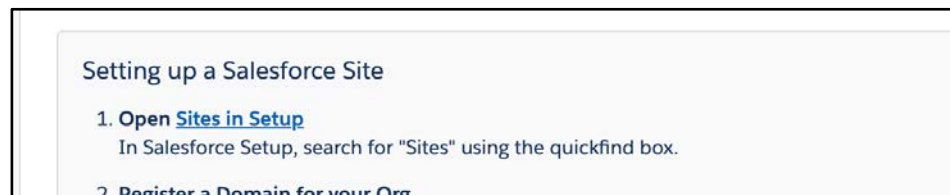
Cancel | Next

- 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**

### What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

**Your Force.com Domain**

MyCompany.force.com

↑  
**Register Your Force.com Domain**

**Your Sites**

- MyCompany.force.com/developers
- MyCompany.force.com/customers
- MyCompany.force.com/marketing

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'

⚠ You cannot modify your Salesforce site domain name after the registration process.

http://  -developer-edition.cs94.force.com Check Availability

Success: The Salesforce site domain name "onfidotestsite-developer-edition" is available.

☒ I have read and accepted the Salesforce [Sites Terms of Use](#) Register My Salesforce Site Domain

- Click **New**

**Sites (sandbox-onfidotestsite-developer-edition.cs94.force.com)** New

| Site Label ↑           | Site URL | Site Description | Active | Site Type | Last Modified By |
|------------------------|----------|------------------|--------|-----------|------------------|
| No records to display. |          |                  |        |           |                  |

- 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**

**Site Edit** Help for this Page ?

**New Site** Save Cancel

Site Label: OnfidoTestSite

Site Name: OnfidoTestSite

Site Description:

Site Contact: Justin Thornton

Default Web Address: http://sandbox-onfidotestsite-developer-edition.cs94.force.com/ OnfidoTestSite

Active: ☒

Active Site Home Page: AccountDetailRedirect

Inactive Site Home Page: InMaintenance [Preview]

Site Template: SiteTemplate

Site Robots.txt:

Site Favorite Icon:

Analytics Tracking Code:

URL Rewriter Class:

Enable Feeds: ☐

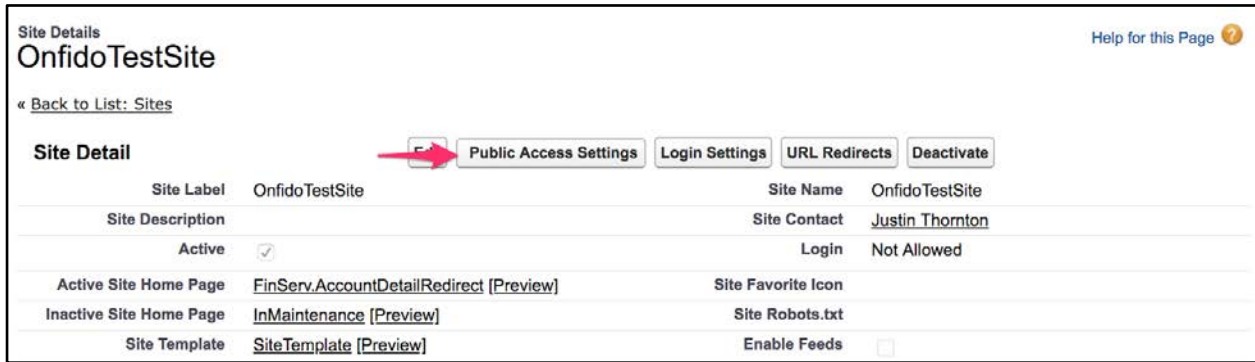
Clickjack Protection Level: Allow framing by the same origin only (recommended)

Require Secure: ☒

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**



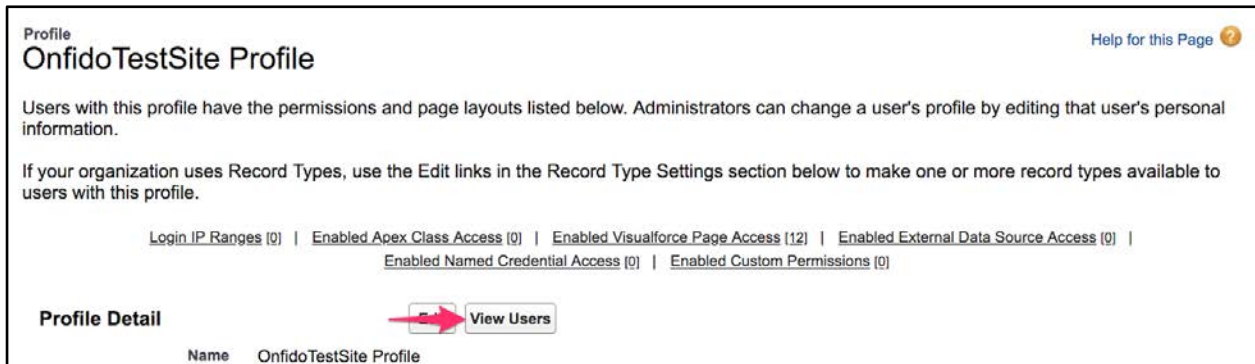
Site Details  
**OnfidoTestSite** [Help for this Page](#)

« [Back to List: Sites](#)

**Site Detail** [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

|                         |                                                         |                    |                                 |
|-------------------------|---------------------------------------------------------|--------------------|---------------------------------|
| Site Label              | OnfidoTestSite                                          | Site Name          | OnfidoTestSite                  |
| Site Description        |                                                         | Site Contact       | <a href="#">Justin Thornton</a> |
| Active                  | <input checked="" type="checkbox"/>                     | Login              | Not Allowed                     |
| Active Site Home Page   | <a href="#">FinServ.AccountDetailRedirect [Preview]</a> | Site Favorite Icon |                                 |
| Inactive Site Home Page | <a href="#">InMaintenance [Preview]</a>                 | Site Robots.txt    |                                 |
| Site Template           | <a href="#">SiteTemplate [Preview]</a>                  | Enable Feeds       | <input type="checkbox"/>        |

- Click **View Users**



Profile  
**OnfidoTestSite Profile** [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[12\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

**Profile Detail** [View Users](#)

Name OnfidoTestSite Profile

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

## OnfidoTestSite Profile

[Help for this Page](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

| Action                                                                            | Full Name ↑                     | Alias | Username | Last Login | Role | Active                              | Profile                | Manager |
|-----------------------------------------------------------------------------------|---------------------------------|-------|----------|------------|------|-------------------------------------|------------------------|---------|
|  | Site Guest User, OnfidoTestSite | guest |          |            |      | <input checked="" type="checkbox"/> | OnfidoTestSite Profile |         |

- Confirm your User is **Activated**

User

## OnfidoTestSite Site Guest User

[Edit Layout](#) | [Help for this Page](#)

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Installed Mobile Apps \[0\]](#)

### User Detail

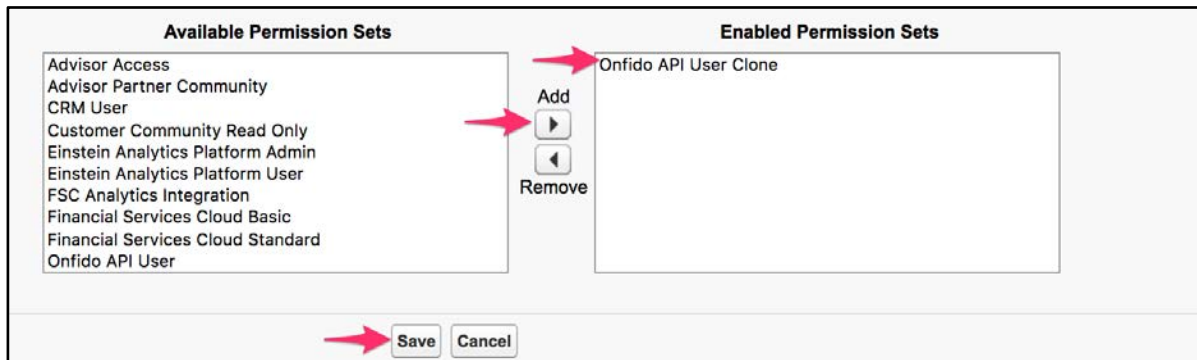
[Edit](#) [Sharing](#)

|          |                                                  |                |                                                                                   |
|----------|--------------------------------------------------|----------------|-----------------------------------------------------------------------------------|
| Name     | OnfidoTestSite Site Guest User                   | User License   |                                                                                   |
| Alias    | guest                                            | Profile        | OnfidoTestSite Profile                                                            |
| Email    | justin@appiphony.com                             | Active         |  |
| Username | onfidotestsite@sandbox-onfidotestsite-developer- | Marketing User | <input type="checkbox"/>                                                          |

- Click **Edit Assignments**

|                                                                                                                       |                                              |                                  |                                   |
|-----------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------------------------|-----------------------------------|
| Security Key (U2F)                                                                                                    | <a href="#">i</a>                            | Used File Space                  | 0 B <a href="#">View</a>          |
| Lightning Login                                                                                                       | <a href="#">i</a>                            |                                  |                                   |
| Temporary Verification Code (Expires in 1 to 24 Hours)                                                                | <a href="#">[Generate]</a> <a href="#">i</a> |                                  |                                   |
| Created By                                                                                                            | Justin Thornton, 4/9/2018 2:32 PM            | Modified By                      | Justin Thornton, 4/9/2018 2:32 PM |
|                                                                                                                       | <a href="#">Edit</a> <a href="#">Sharing</a> |                                  |                                   |
| <b>Permission Set Assignments</b>  |                                              | <a href="#">Edit Assignments</a> |                                   |
| <a href="#">Permission Set Assignments Help</a> <a href="#">?</a>                                                     |                                              |                                  |                                   |
| No records to display                                                                                                 |                                              |                                  |                                   |

- 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](#).

### Salesforce Site URL

Allow Onfido to communicate with this org

**i** 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

#### Setting up a Salesforce Site

1. Open Sites in 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 by searching for “Sites” in Salesforce Setup
- Click on the Site Label for the site you are using again

Rename Tabs and Labels

- ▼ Sites and Domains
  - Custom URLs
  - Domains
  - Sites**
  - Tabs
  - Themes and Branding
  - > Translation Workbench

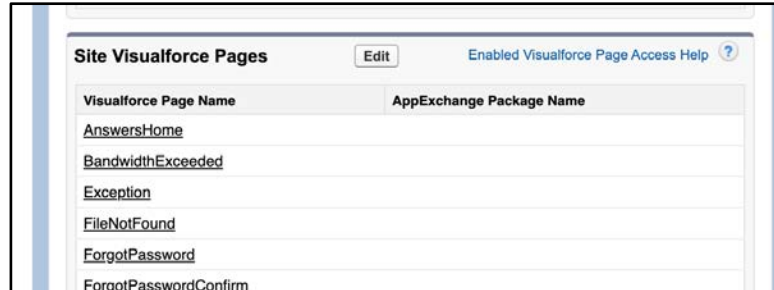
☐ Assign new records created by Salesforce Sites guest users to a default owner in the org [?](#)  
☐ Allow using standard external profiles for self-registration and user creation. [?](#)

Save Cancel

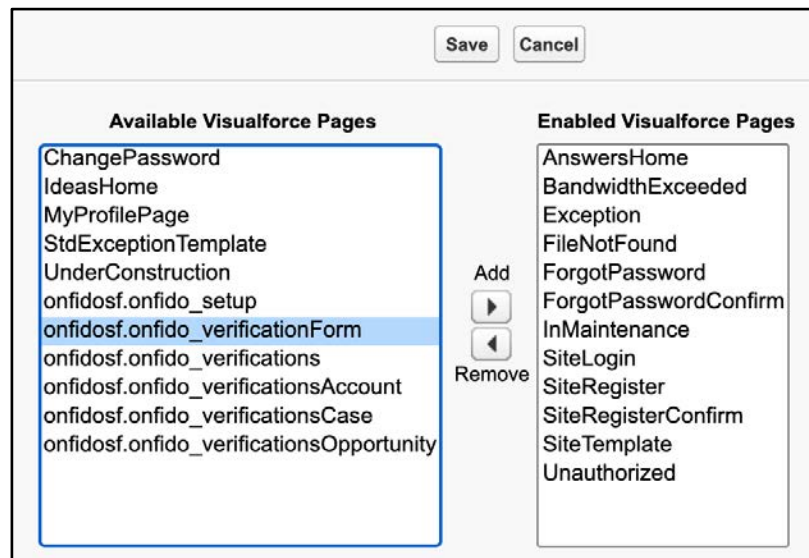
**Sites (onfidosecretv-developer-edition.um6.force.com)** New

| Action                                          | Site Label +             | Site URL                                            | Site Description                                             | Active                   | Site Type | Last Modified By             |
|-------------------------------------------------|--------------------------|-----------------------------------------------------|--------------------------------------------------------------|--------------------------|-----------|------------------------------|
| <a href="#">Edit</a>   <a href="#">Activate</a> | Onfido Verification Site | http://onfidosecretv-developer-edition.um6.force... | Accept responses from Onfido and host the verification form. | <input type="checkbox"/> | Force.com | Kai Leung, 09/07/2020, 23:43 |

- 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



Save Cancel

**Available Visualforce Pages**

- ChangePassword
- IdeasHome
- MyProfilePage
- StdExceptionTemplate
- UnderConstruction
- onfidosf.onfido\_setup
- onfidosf.onfido\_verifications
- onfidosf.onfido\_verificationsAccount
- onfidosf.onfido\_verificationsCase
- onfidosf.onfido\_verificationsOpportunity

Add  
Remove

**Enabled Visualforce Pages**

- AnswersHome
- BandwidthExceeded
- Exception
- FileNotFound
- ForgotPassword
- ForgotPasswordConfirm
- InMaintenance
- SiteLogin
- SiteRegister
- SiteRegisterConfirm
- SiteTemplate
- Unauthorized
- onfidosf.onfido\_verificationForm

- Click **Save**

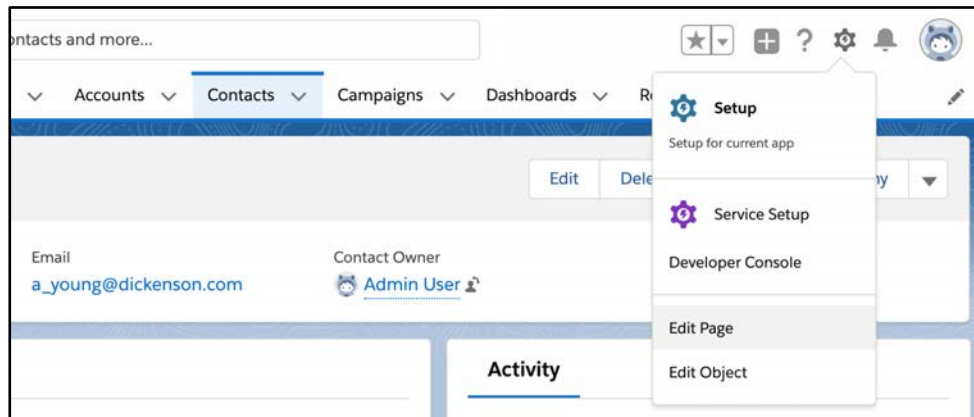
## Adding Lightning Components to Record Pages

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.

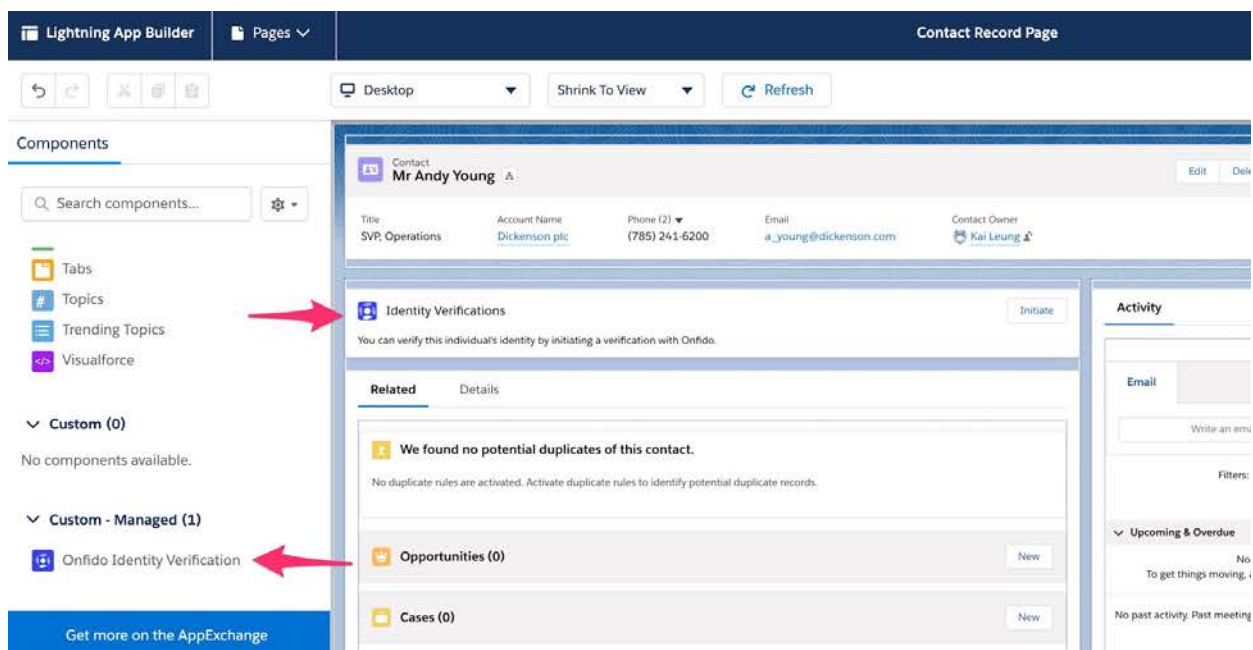
### Onfido Identity Verification

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

Activation: Bot Configuration Record Page

Custom record pages can be assigned at different levels:

- 🌐 **The org default** record page displays for an object unless more specific assignments are made.
- ⤴️ ⚡ **App default** page assignment, if specified, overrides the org default.
- ⤴️ 📄 **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT    **APP DEFAULT**    APP, RECORD TYPE, AND PROFILE

Set this page as the default for Bot Configuration records for specific Lightning apps. An app default page displays for all the object's records in an app unless specific app, record type, and profile assignments are made.

[Assign as App Default](#)

- 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**

### Select Apps

Select the Lightning apps to display "Bot Configuration Record Page" as the app default page.

Lightning Apps (6)

| APP NAME                                                | DESCRIPTION                                                             |
|---------------------------------------------------------|-------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Onfido Verification | Manage and verify your business solutions designed for your industry.   |
| <input type="checkbox"/> LightningBolt                  | Discover and manage business solutions designed for your industry.      |
| <input type="checkbox"/> LightningInstrumentation       | View Adoption and Usage Metrics for Lightning Experience                |
| <input type="checkbox"/> Sales                          | Manage your sales process with accounts, leads, opportunities, and ...  |
| <input type="checkbox"/> Sales Console                  | (Lightning Experience) Lets sales reps work with multiple records on... |
| <input type="checkbox"/> Service Console                | (Lightning Experience) Lets support agents work with multiple recor...  |

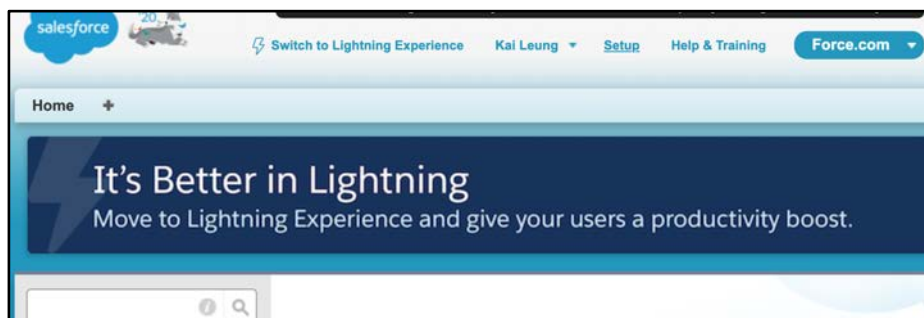
Cancel
Back
Next

- 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](#).

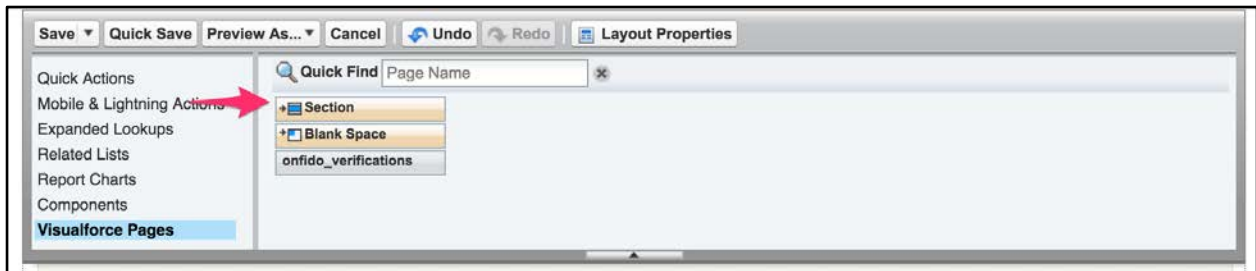
- Click on **Setup** at the top of the page to navigate to Salesforce Setup



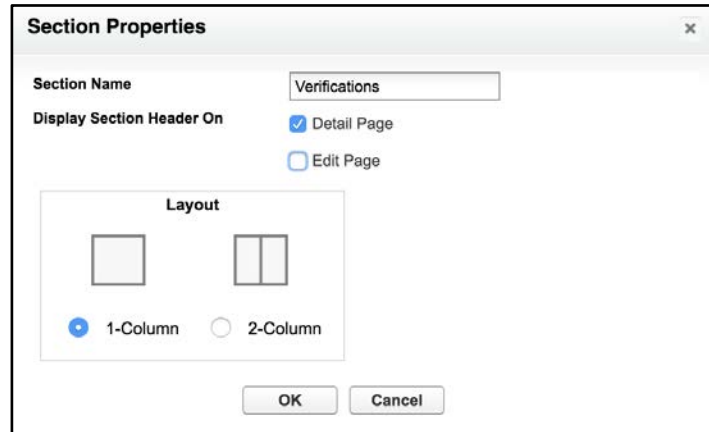
- Scroll down to the **Build** section and click on **Customize** to select the object for which the page layout needs to be updated (for example, "Contact")
- Click **Page Layouts**
- Select the **Page Layout** that needs to be edited - it should be the page layout that is assigned to the users whom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



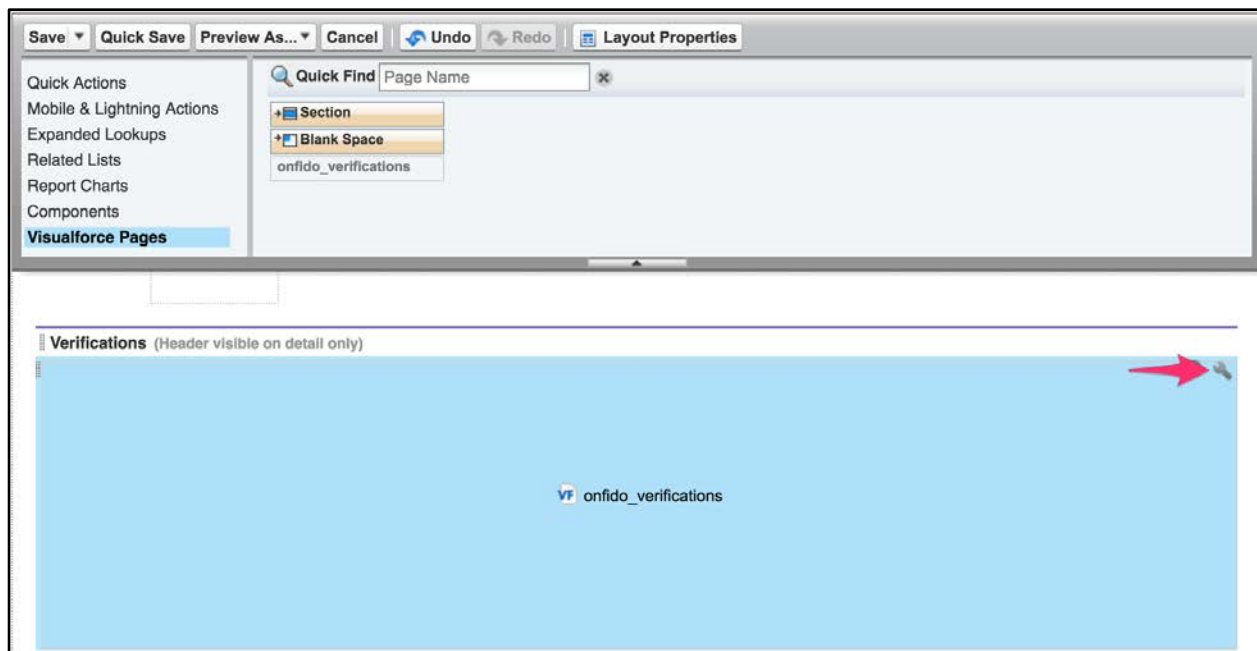
- Note that you can add a **Section** to your Page Layout to store the Visualforce Page in a separate section from your fields and other page elements



- 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

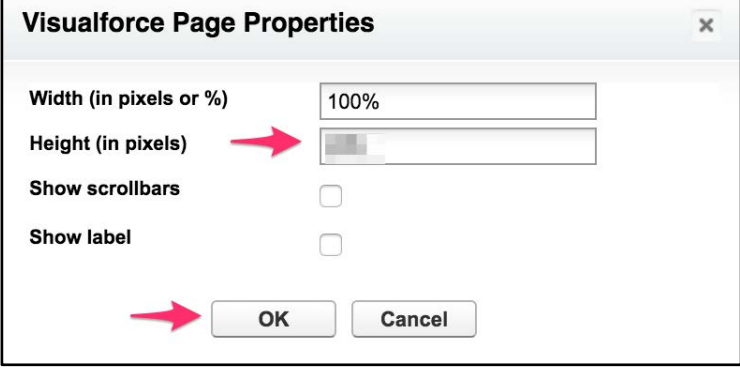


- Add the **onfido\_verification** Visualforce Page into the Page Layout section via drag and drop
- Click the wrench icon



- 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.



The image shows a 'Visualforce Page Properties' dialog box. It has a title bar with a close button. Inside, there are four settings: 'Width (in pixels or %)' with a text input field containing '100%', 'Height (in pixels)' with a slider control, 'Show scrollbars' with an unchecked checkbox, and 'Show label' with an unchecked checkbox. At the bottom are 'OK' and 'Cancel' buttons. Red arrows point to the 'Height' slider and the 'OK' button.

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

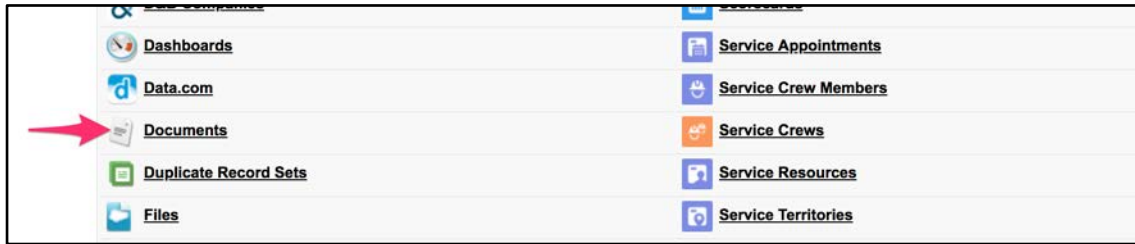
## Add Logo to Email Template

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.

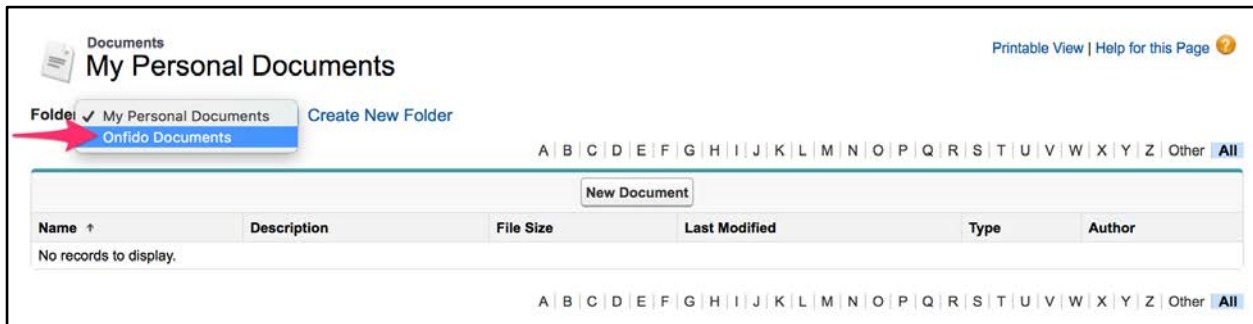
- Navigate to **Salesforce Classic** > Click the **Sales** app > Click the “+” the header



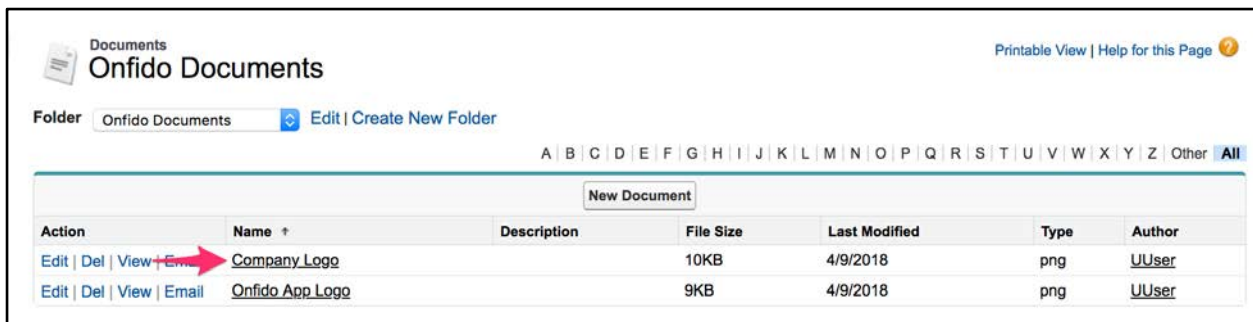
- Click on **Documents**



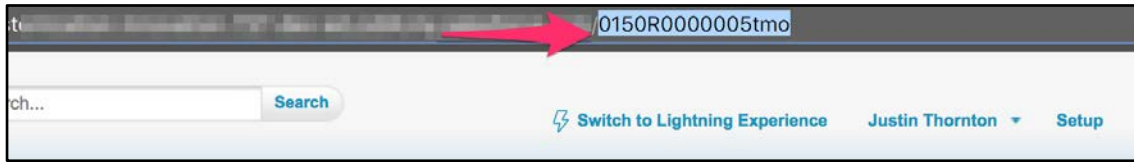
- Click on the folder dropdown in the upper left
- Select **Onfido Documents** (or the folder where your own branding is saved)



- 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

|                             |                                     |
|-----------------------------|-------------------------------------|
| Internal Use Only           | <input type="checkbox"/>            |
| Externally Available Image  | <input checked="" type="checkbox"/> |
| Document Content Searchable | <input type="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 |
|---------------------------------------------------------------------|-----------------------|------------|---------------|------------------|-------------------------------------------------------------------------------------------------------------|-------------|-------------------|------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | Customer Application  | Public     | List          |                  |                                                                                                             | 1,650       | 1                 | 1650       |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | Onfido Api Settings   | Protected  | Hierarchy     |                  |                                                                                                             | 610         | 1                 | 610        |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | 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          |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | Onfido Email Settings | Public     | Hierarchy     |                  |                                                                                                             | 118         | 0                 | 0          |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a> | Onfido Report Type    | Protected  | List          |                  |                                                                                                             | 620         | 3                 | 1860       |

- Click the top **New** button

Custom Setting

## Onfido Email Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you can add data depending on whether a specific user is running the app, a specific profile, or just a general user.

**New**

▼ **Default Organization Level Value**

View: All [Create New View](#)

A B C D E F G H I J K L M N O P Q

**New**

| Setup Owner            | Location |
|------------------------|----------|
| No records to display. |          |

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

## Onfido Email Settings Edit

Provide values for the fields you created. This data is cached with the application.

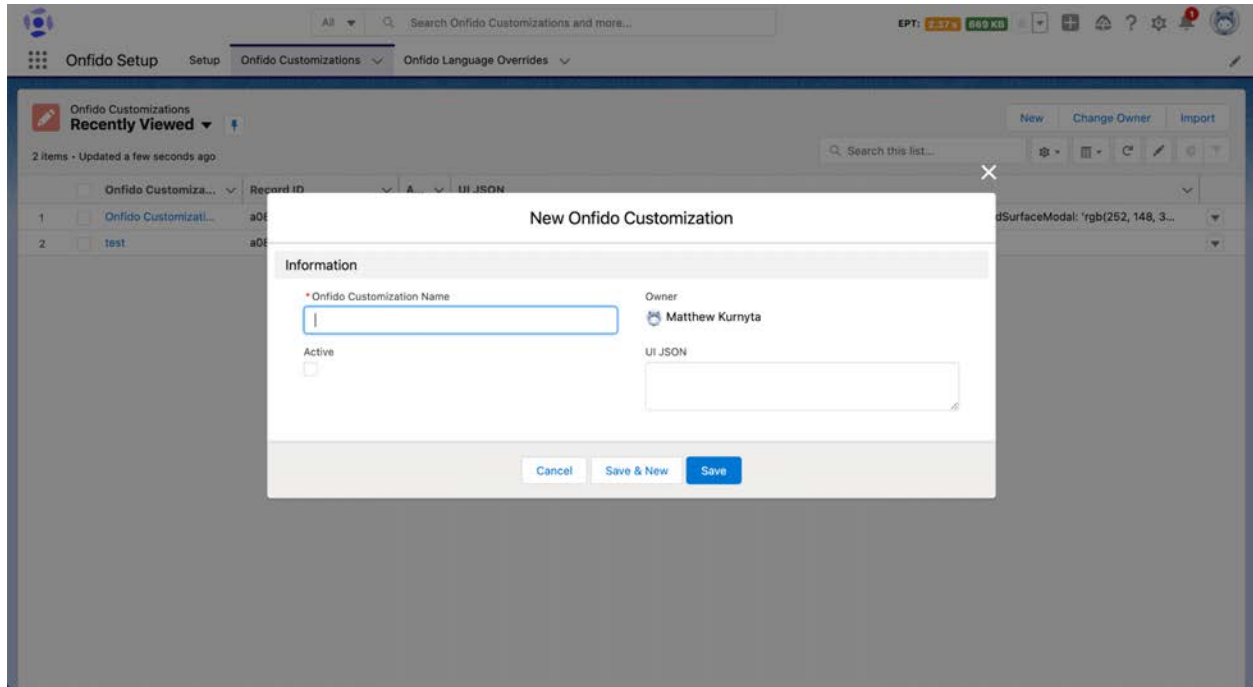
**Edit Onfido Email Settings** **Save** **Cancel**

**Onfido Email Settings Information**

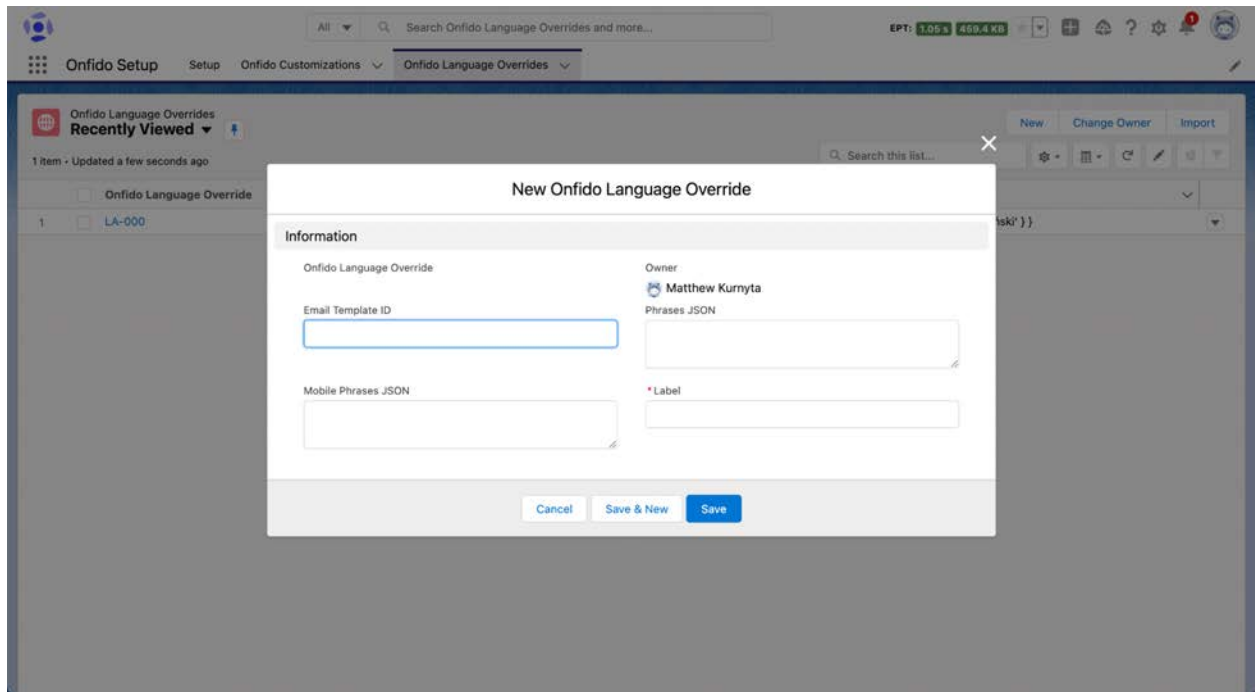
Location

**Company Logo Id**

## 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.)

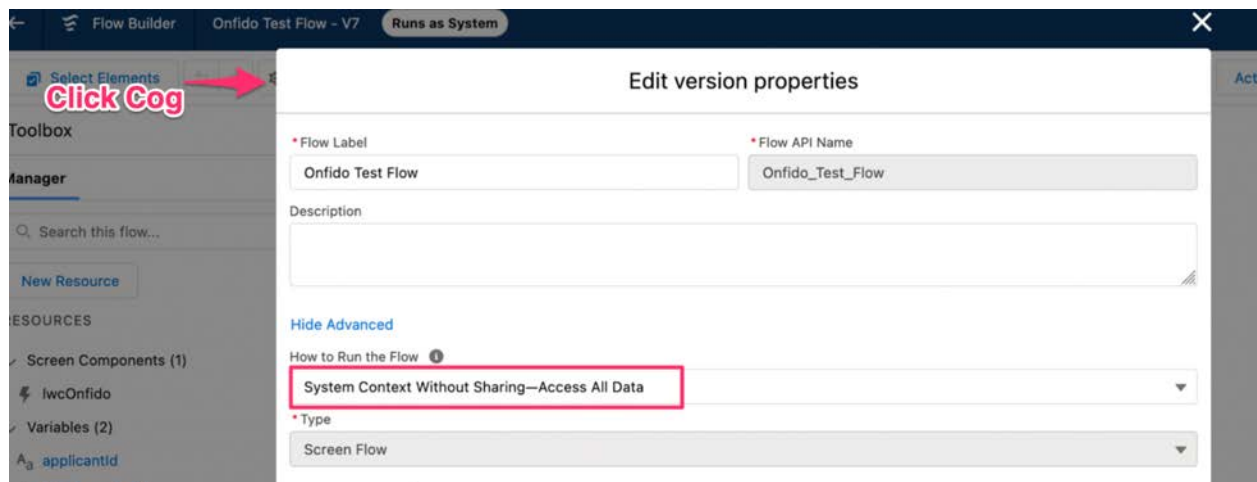


- Click into the Language Overrides tab
- Click New
- Enter the Label which will be displayed in the pick list
- Add Phrases JSON, example: {"welcome":{"title":"My Julian title"}}
- Click Save

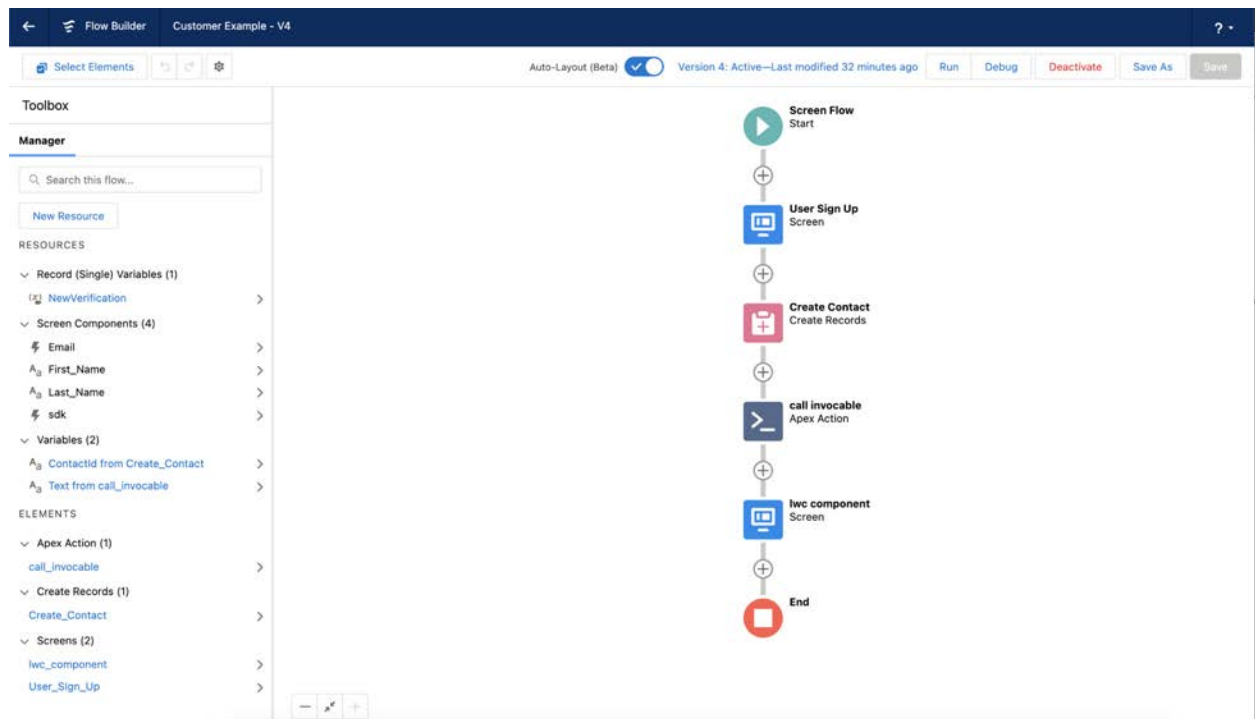
# Lightning Flow Support

*If you're using a flow on a Salesforce record, you will also need to 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.



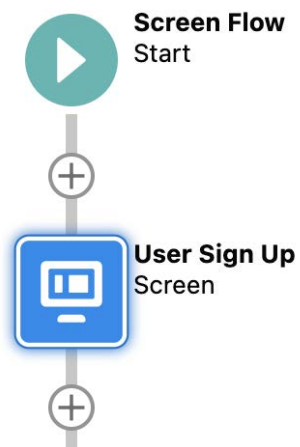
This is an example of a flow that allows a user to sign up with their contact information which then creates a contact record for them within the SF org, creates an applicant record with a lookup to that newly created contact record, then also makes a callout to onfido to create an applicant record,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

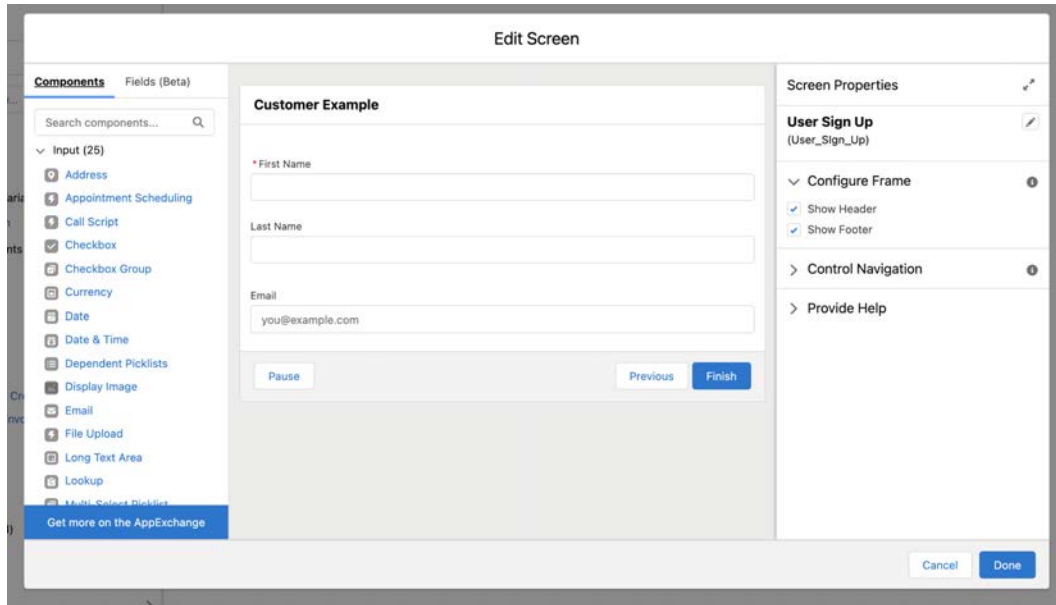
## Step by step guide

## 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.

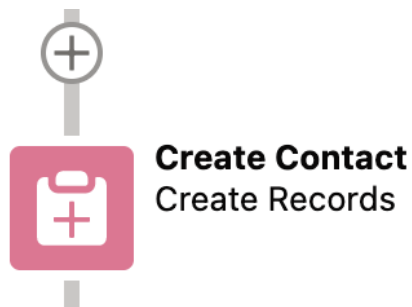


Next you add on text fields for all the information you wish to collect from the user.



## 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.



(Create\_Contact)
Edit Create Records

Create Salesforce records using values from the flow.

**Create Contact** (Create\_Contact)

**How Many Records to Create**

☒ One
☐ Multiple

**How to Set the Record Fields**

☐ Use all values from a record
☒ Use separate resources, and literal values

**Create a Record of This Object**

\* Object

Contact

**Set Field Values for the Contact**

| Field     | Value             |
|-----------|-------------------|
| Email     | ← Email > Value X |
| FirstName | ← First_Name X    |
| LastName  | ← Last_Name X     |

+ Add Field

☐ Manually assign variables

Cancel
Done

- 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**



Edit "Initiate Verification Flow" Apex action

Use values from earlier in the flow to set the inputs for the "Initiate Verification Flow" Apex action. To use its outputs later in the flow, store them in variables.

**call invocable** (call\_invocable)

**Set Input Values**

**A<sub>a</sub>** \*selectedReportNames

**∞** \*sendEmail

**A<sub>a</sub>** applicantId ☐ Don't Include

**A<sub>a</sub>** language  ☒ Include

**A<sub>a</sub>** recordId  ☒ Include

▼ **Advanced**

☐ Manually assign variables

**Transaction Control** ⓘ

☐ Let the flow decide (recommended)

Cancel Done

- selectedReportNames**, **SendEmail** (false - we don't want to send an email), **Language**, and **recordId** (the ID of the contact we just created).

Advanced

☐ Manually assign variables

Transaction Control ⓘ

☐ Let the flow decide (recommended)

The flow determines at run time whether a new transaction is required to successfully execute the action. If this action involves a callout, and the current transaction has pending operations, the current transaction is committed before executing the action in a new transaction.

☒ Always start a new transaction

Before this action is executed, the current transaction is committed. The action is then executed in a new transaction. If the action fails for some reason, Salesforce can't roll back any operations from the previous transaction.

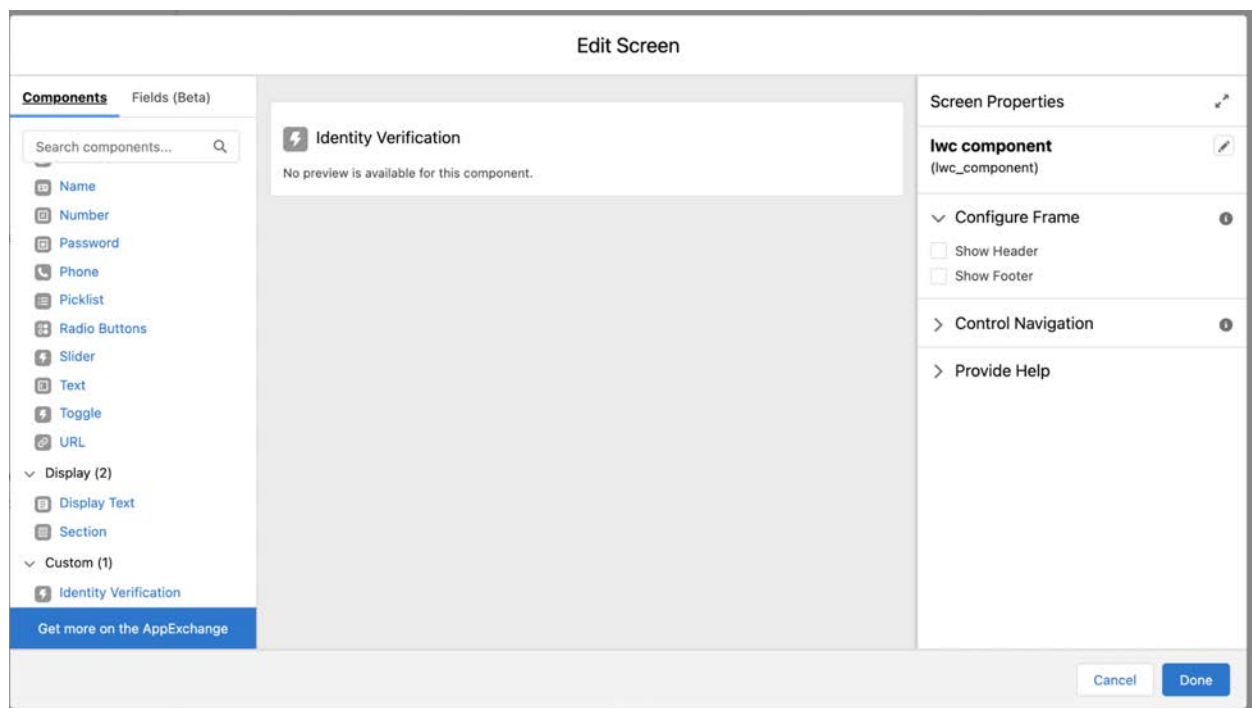
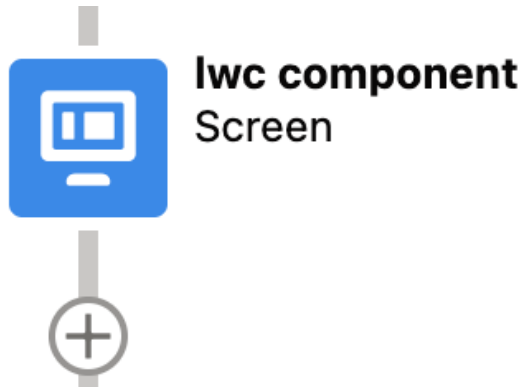
☐ Always continue in current transaction

This action is always executed in the current transaction. If the action involves a callout while the current transaction has pending operations, the flow fails.

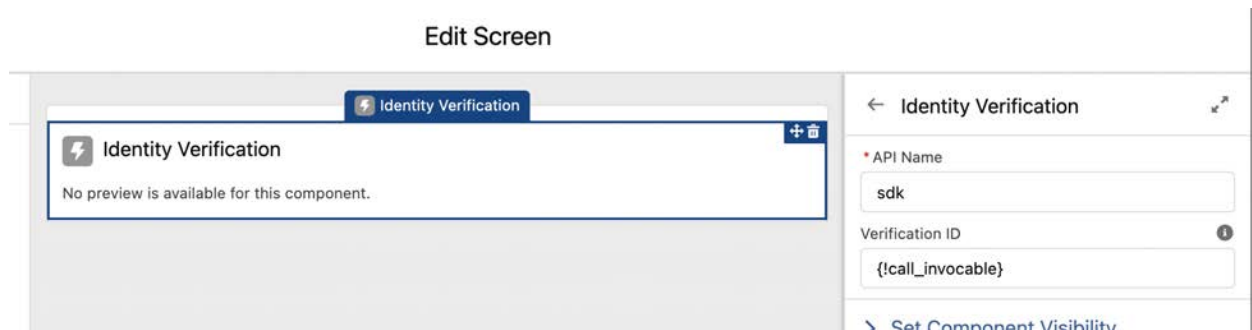
- invocable will fail.

## 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

**SETUP**  
**Email Alerts**

Edit Email Alert  
**Send Webform Email** [Help for this Page](#)

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit** [Save](#) [Save & New](#) [Cancel](#)

**Edit Email Alert** ! = Required Information

Description

Unique Name

Object

Email Template

Protected Component ☐

Recipient Type Search:  for:  [Find](#)

Recipients

| Available Recipients   |                                                                                       | Selected Recipients          |
|------------------------|---------------------------------------------------------------------------------------|------------------------------|
| User: Integration User | Add<br><input type="button" value="→"/><br><input type="button" value="←"/><br>Remove | Email Field: Recipient Email |
| User: Security User    |                                                                                       |                              |
| User: User User        |                                                                                       |                              |

You can enter up to five (5) email addresses to be notified.

Additional Emails

- 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.

**SETUP Workflow Rules**

### Edit Rule Send Webform Email

Step 2: Configure Workflow Rule

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

**Edit Rule**

Object: Email Proxy  
 Rule Name: Send Spanish Webform  
 Description:

**Evaluation Criteria**

Evaluate the rule when a record is:

- ☒ created
- ☐ created, and every time it's edited
- ☐ created, and any time it's edited to subsequently meet criteria

How do I choose?

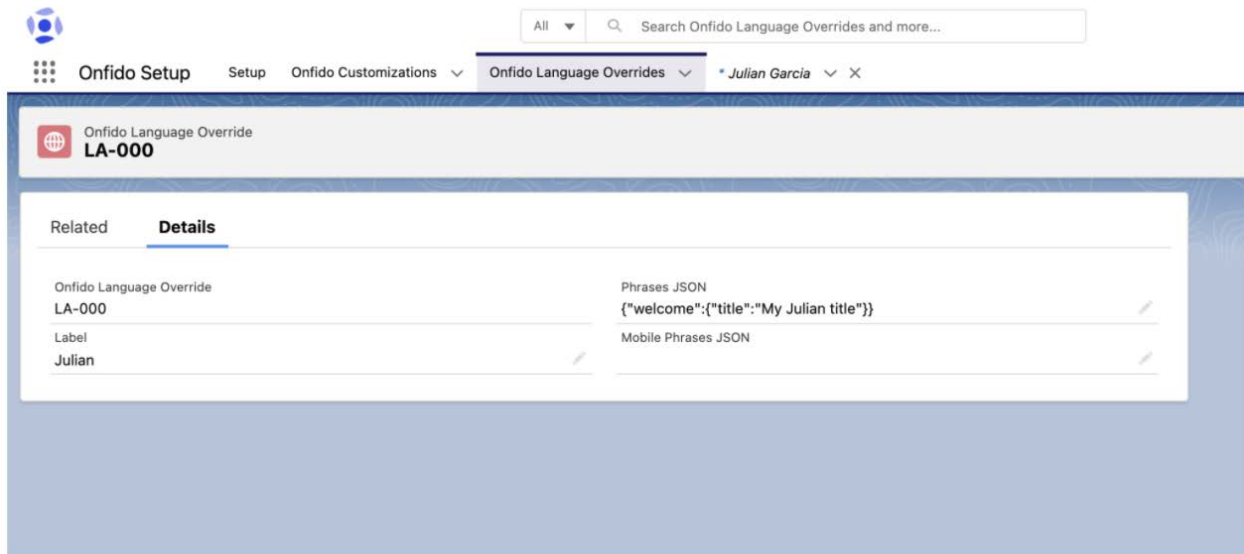
**Rule Criteria**

Run this rule if the criteria are met:

| Field                    | Operator     | Value |     |
|--------------------------|--------------|-------|-----|
| Email Proxy: Webform Uri | not equal to | null  | AND |
| Email Proxy: Language    | equals       | es_ES | AND |
| --None--                 | --None--     |       | AND |
| --None--                 | --None--     |       | AND |
| --None--                 | --None--     |       |     |

Add Filter Logic...

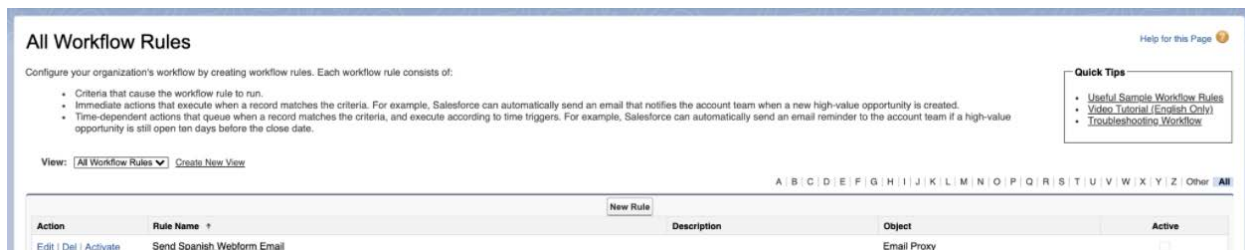
- If we wanted an email to be sent on verifications with a Onfido Language Override selected we would enter the value as the label of our override record in this example below it would simply be Julian



The screenshot shows the Onfido Setup interface. The top navigation bar includes 'Onfido Setup', 'Setup', 'Onfido Customizations', and 'Onfido Language Overrides'. A search bar is present with the text 'Search Onfido Language Overrides and more...'. The user 'Julian Garcia' is logged in. The main content area is titled 'Onfido Language Override LA-000'. It features a 'Details' tab with the following information:

|                          |                                                      |
|--------------------------|------------------------------------------------------|
| Onfido Language Override | Phrases JSON                                         |
| LA-000                   | <code>{"welcome":{"title":"My Julian title"}}</code> |
| Label                    | Mobile Phrases JSON                                  |
| Julian                   |                                                      |

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



The screenshot shows the 'All Workflow Rules' page. It includes a 'Quick Tip' section with links to 'Useful Sample Workflow Rules', 'Video Tutorial (English Only)', and 'Troubleshooting Workflow'. Below this is a table of workflow rules:

| Action                                                                | Rule Name                                  | Description | Object      | Active                   |
|-----------------------------------------------------------------------|--------------------------------------------|-------------|-------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a> | <a href="#">Send Spanish Webform Email</a> |             | Email Proxy | <input type="checkbox"/> |

- No click edit under workflow actions

**Workflow Rule**  
Send Spanish Webform Email

**Workflow Rule Detail**

|               |                                                                                       |                     |                                            |
|---------------|---------------------------------------------------------------------------------------|---------------------|--------------------------------------------|
| Rule Name     | Send Spanish Webform Email                                                            | Object              | Email Proxy                                |
| Active        | <input type="checkbox"/>                                                              | Evaluation Criteria | Evaluate the rule when a record is created |
| Description   |                                                                                       |                     |                                            |
| Rule Criteria | (Email Proxy: Webform Uri NOT EQUAL TO null) AND (Email Proxy: Language EQUALS es_ES) |                     |                                            |
| Created By    | User User, 8/26/2021, 6:16 PM                                                         | Modified By         | User User, 8/26/2021, 6:16 PM              |

**Workflow Actions**

**Immediate Workflow Actions**

No workflow actions have been added.

**Time-Dependent Workflow Actions**

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

- 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.

**Select Existing Actions**

Choose Action Type: Search: Email Alert for: Find

| Available Actions               |               | Selected Actions                        |
|---------------------------------|---------------|-----------------------------------------|
| Email Alert: Send Webform Email | Add<br>Remove | Email Alert: Send SPANISH Webform Email |

- Now you click activate and you're done.

Workflow Rule  
Send Spanish Webform Email Help for this Page

**Workflow Rule Detail** Edit Clone Deactivate

|               |                                                                                       |                     |                                            |
|---------------|---------------------------------------------------------------------------------------|---------------------|--------------------------------------------|
| Rule Name     | Send Spanish Webform Email                                                            | Object              | Email Proxy                                |
| Active        | <input checked="" type="checkbox"/>                                                   | Evaluation Criteria | Evaluate the rule when a record is created |
| Description   |                                                                                       |                     |                                            |
| Rule Criteria | (Email Proxy: Webform Url NOT EQUAL TO null) AND (Email Proxy: Language EQUALS es_ES) |                     |                                            |
| Created By    | User User: 8/26/2021, 6:16 PM                                                         | Modified By         | User User: 8/26/2021, 6:27 PM              |

**Workflow Actions** Edit

**Immediate Workflow Actions**

| Type        | Description                |
|-------------|----------------------------|
| Email Alert | Send SPANISH Webform Email |

**Time-Dependent Workflow Actions** [See an example](#)

 You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

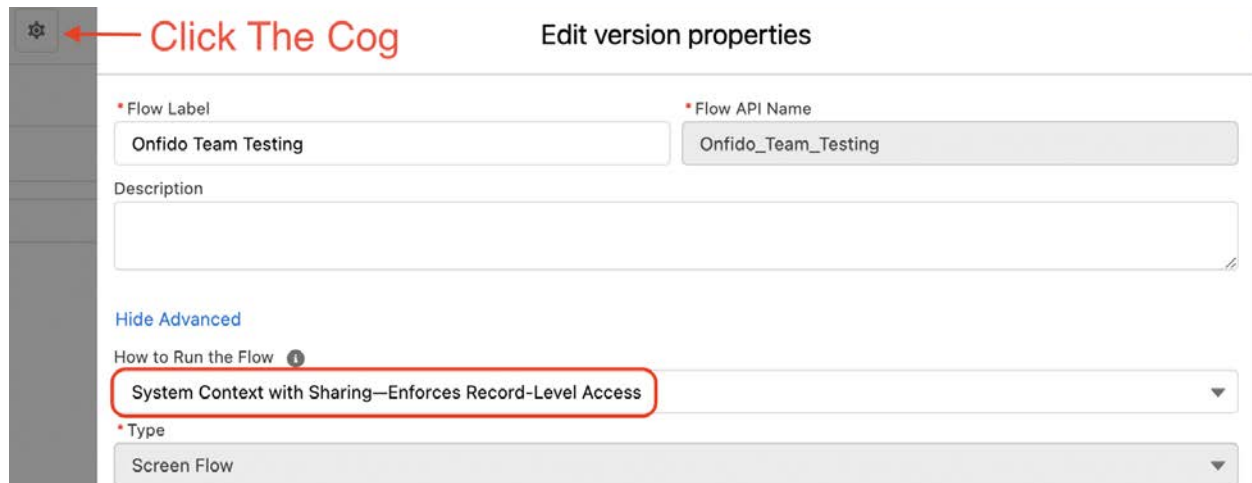
Edit

- 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.*



**Edit version properties**

Click The Cog

\* Flow Label: Onfido Team Testing

\* Flow API Name: Onfido\_Team\_Testing

Description

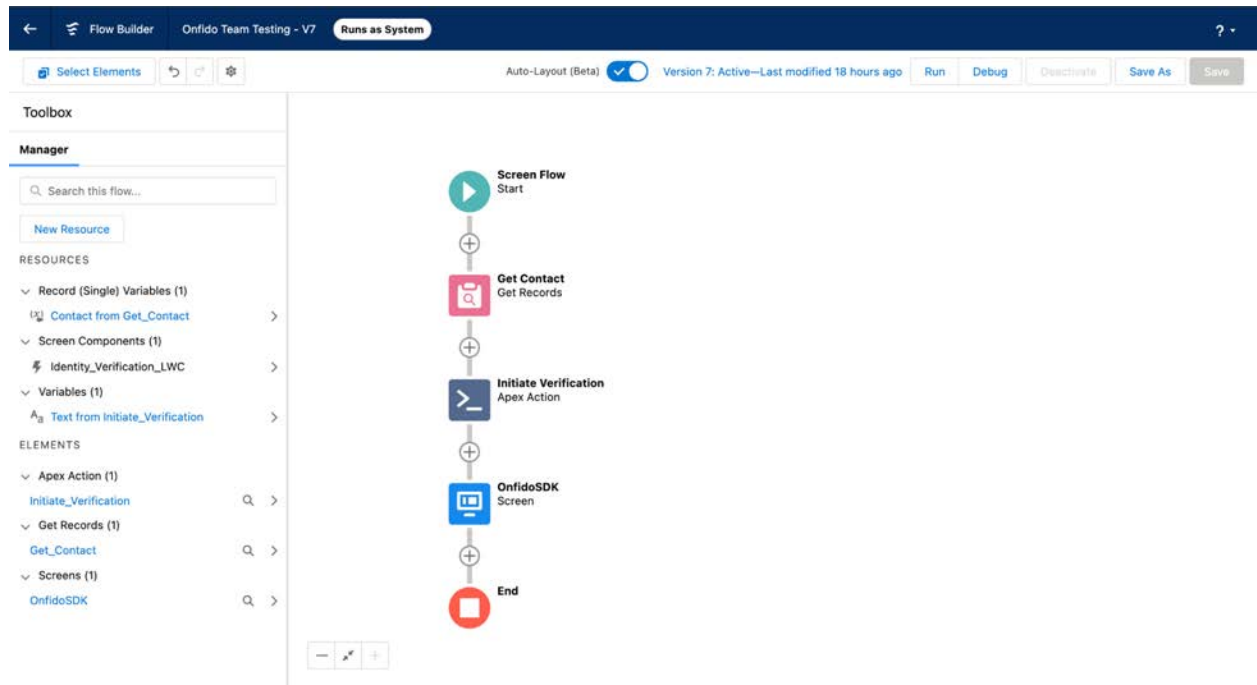
Hide Advanced

How to Run the Flow ⓘ

System Context with Sharing—Enforces Record-Level Access

\* Type: Screen 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.



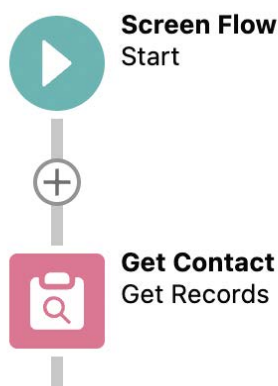
This is an example of a flow that allows an experience site customer to initiate their own identity verification.

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



Edit Get Records

Get Contact (Get\_Contact)

Get Records of This Object

Object
Contact

Filter Contact Records

Condition Requirements
All Conditions Are Met (AND)

| Field | Operator | Value                 |
|-------|----------|-----------------------|
| Id    | Equals   | Aa \$User.ContactId x |

+ Add Condition

Sort Contact Records

Sort Order
Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record
☐ All records

Cancel

Done

## Step 2: Calling the invocable method

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



### Edit "Initiate Verification Flow" Apex action

Use values from earlier in the flow to set the inputs for the "Initiate Verification Flow" Apex action. To use its outputs later in the flow, store them in variables.

**Initiate Verification** (Initiate\_Verification) 

**Set Input Values**

|                                     |                                                                |                                             |
|-------------------------------------|----------------------------------------------------------------|---------------------------------------------|
| A <sub>a</sub> *selectedReportNames | <input type="text" value="document, facial_similarity_photo"/> |                                             |
| <hr/>                               |                                                                |                                             |
| 🔊 *sendEmail                        | <input type="text" value="{!\$GlobalConstant.False}"/>         |                                             |
| <hr/>                               |                                                                |                                             |
| A <sub>a</sub> applicantId          |                                                                | <input type="checkbox"/> Don't Include      |
| <hr/>                               |                                                                |                                             |
| A <sub>a</sub> language             | <input type="text" value="en_US"/>                             | <input checked="" type="checkbox"/> Include |
| <hr/>                               |                                                                |                                             |
| A <sub>a</sub> recordId             | <input type="text" value="{!Get_Contact.AccountId}"/>          | <input checked="" type="checkbox"/> Include |

> Advanced

- 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.

✓ Advanced

☐ Manually assign variables

Transaction Control ⓘ

☐ Let the flow decide (recommended)

The flow determines at run time whether a new transaction is required to successfully execute the action. If this action involves a callout, and the current transaction has pending operations, the current transaction is committed before executing the action in a new transaction.

☒ Always start a new transaction

Before this action is executed, the current transaction is committed. The action is then executed in a new transaction. If the action fails for some reason, Salesforce can't roll back any operations from the previous transaction.

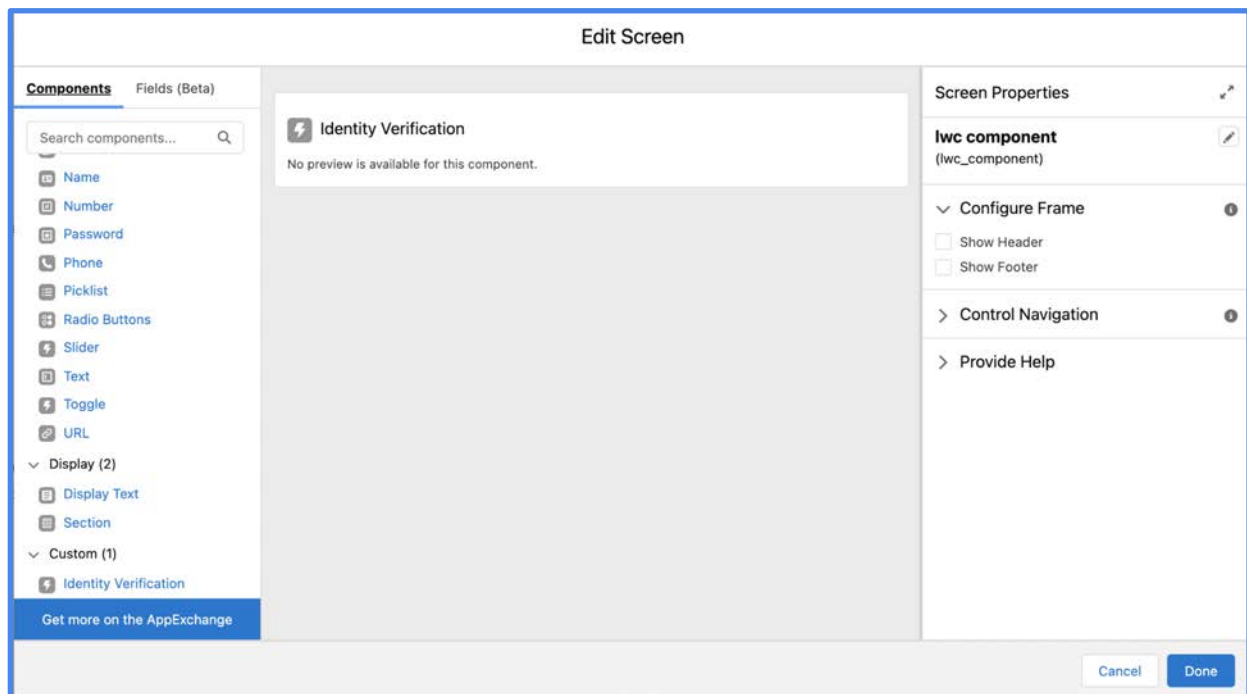
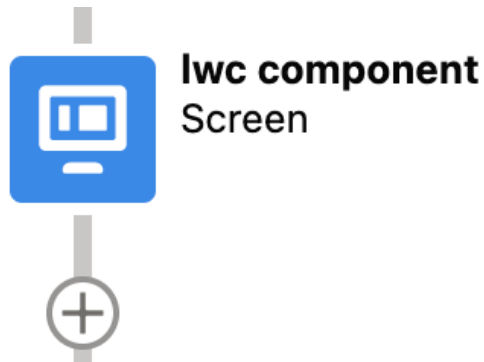
☐ Always continue in current transaction

This action is always executed in the current transaction. If the action involves a callout while the current transaction has pending operations, the flow fails.

- 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

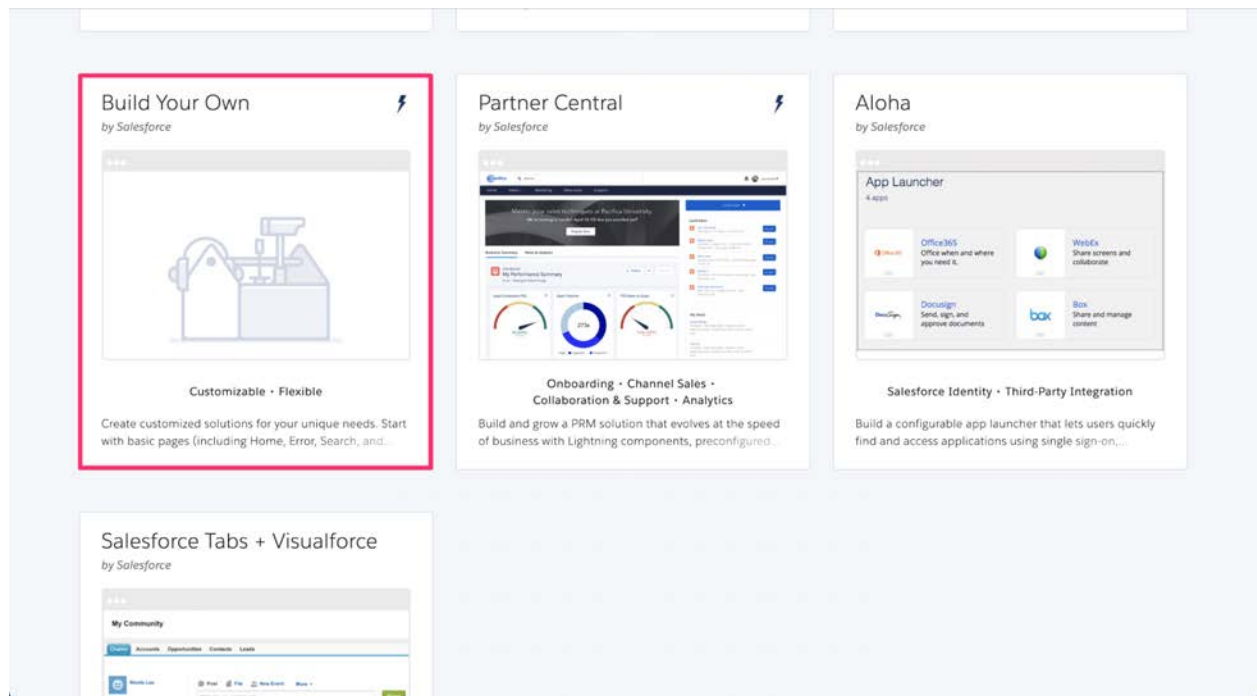
The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' sidebar is visible with a search bar containing 'Digital Experiences'. Under 'Feature Settings', 'Digital Experiences' is expanded, and 'All Sites' is highlighted with a red box. Below this, a message reads: 'Didn't find what you're looking for? Try using Global Search.' The main content area shows the 'SETUP Home' dashboard. It features three cards: 'Einstein Recommendation Builder' (with a 'Get Started' and 'Tell Me More' button), 'Einstein Prediction Builder' (with a 'Get Started' button), and 'Get Started with Einstein Bots' (with a 'Get Started' button). Below these cards is a 'Most Recently Used' section with a table listing 10 items.

| NAME                      | TYPE           | OBJECT |
|---------------------------|----------------|--------|
| Matt Standard             | User           |        |
| Onfido Feature Set Access | Permission Set |        |
| Case Record Page          | Lightning Page |        |

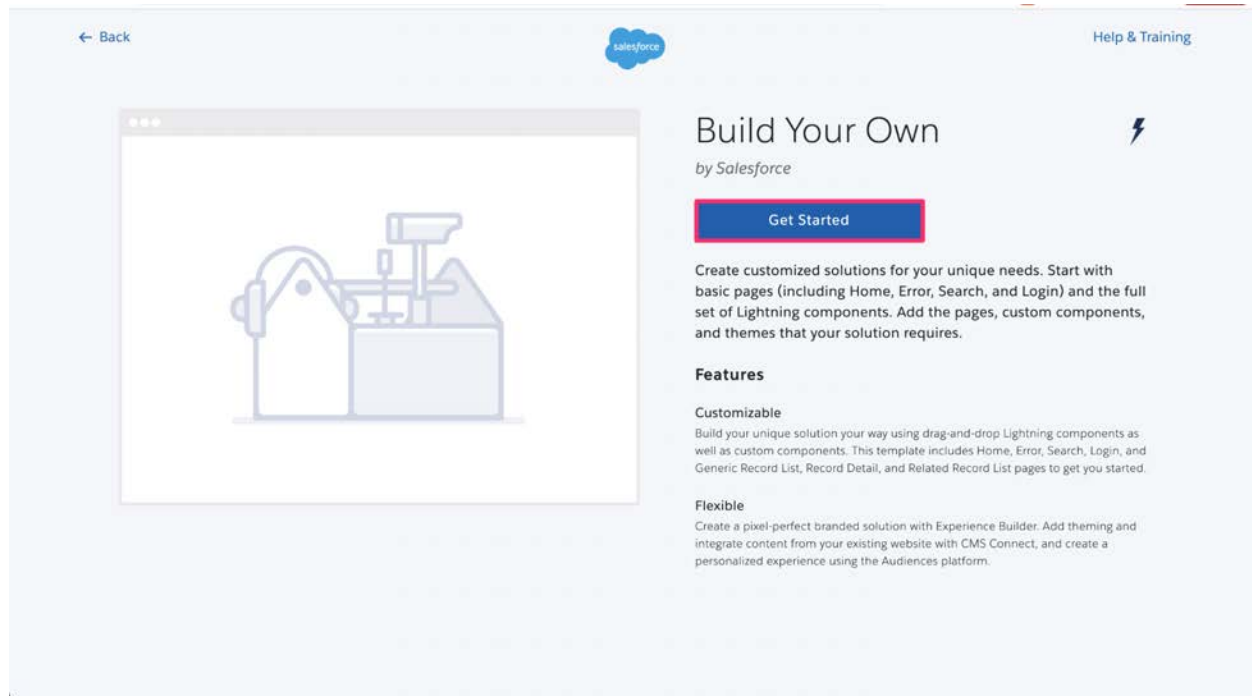
- Click New

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this is a search bar labeled 'Quick Find'. The left sidebar contains a list of setup options: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (with sub-items Users, Data, Email), PLATFORM TOOLS (with sub-items Apps, Feature Settings, Analytics, Chatter, Commerce, Data.com). The main content area is titled 'All Sites' and includes a 'New' button. Below the button, it says 'No Sites'. A link to 'Visit our Trailblazer Community Help for this Page' is also present.

- 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

URL

Create

- Select Builder

Workspaces  
Onfido Digital Experience

Onfido Digital Experience ( Preview · Unpublished ) [Add Metrics](#)

See your favorite metrics right here by getting the latest AppExchange package. [Install AppExchange Package](#)

My Workspaces



**Builder**

Build, brand, and customize your site's pages.



**Moderation**

Monitor posts and comments, create rules.



**Content Management**

Organize, manage, and build collections for your Experience Cloud site.



**Gamification**

Keep your members engaged with recognition badges.



**Dashboards**

Examine the health of your site with reports and dashboards and engage with members.



**Administration**

Configure settings and properties for your experience.



**Guided Setup**

Quick Links

- [Experience Pulse Metrics](#)
- [Lightning Carousel and Banner Components](#)
- [Trailblazer Community: Experience Cloud - Best Practices Group](#)
- [Set Up and Manage Experiences Guide](#)
- [AppExchange](#)

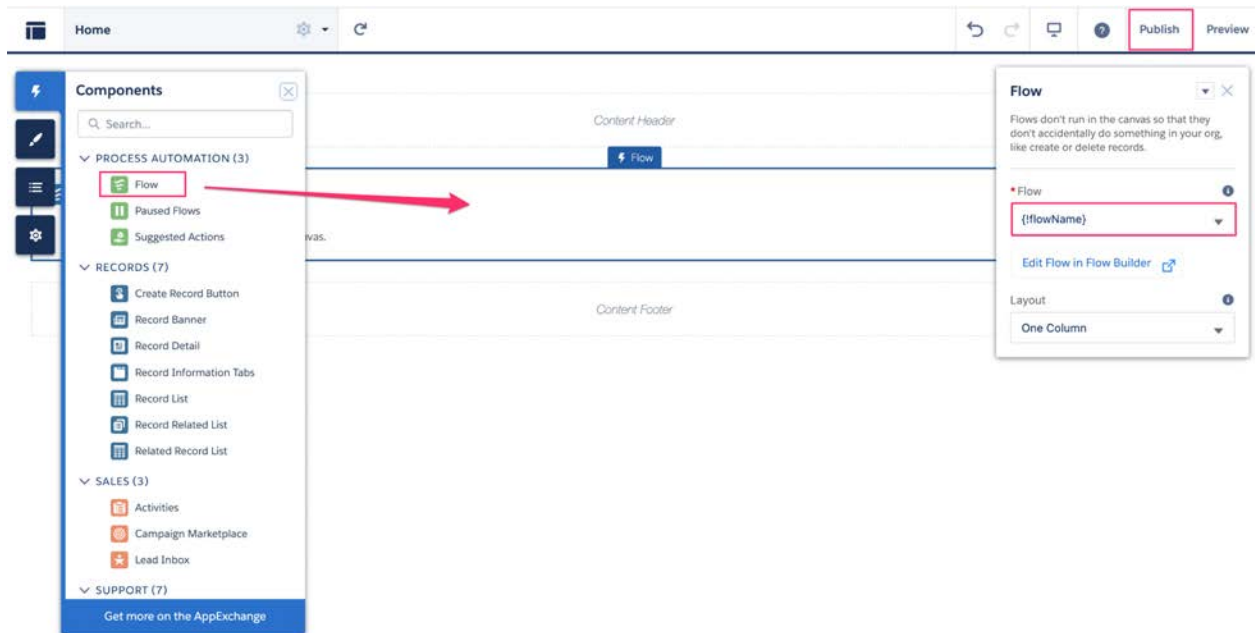
Expand Your Reach with Communities 

[START LEARNING >](#)

 **Salesforce Summer '21 Release Notes**

New Salesforce CMS Home Experience, drag and drop with flexible layouts, increase of audiences per site and more...

- 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

View Onfido Digital Experience

Workspaces

Salesforce Setup

MY WORKSPACES

- Builder
- Moderation
- Content Management
- Gamification
- Dashboards
- Administration**
- Guided Setup

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

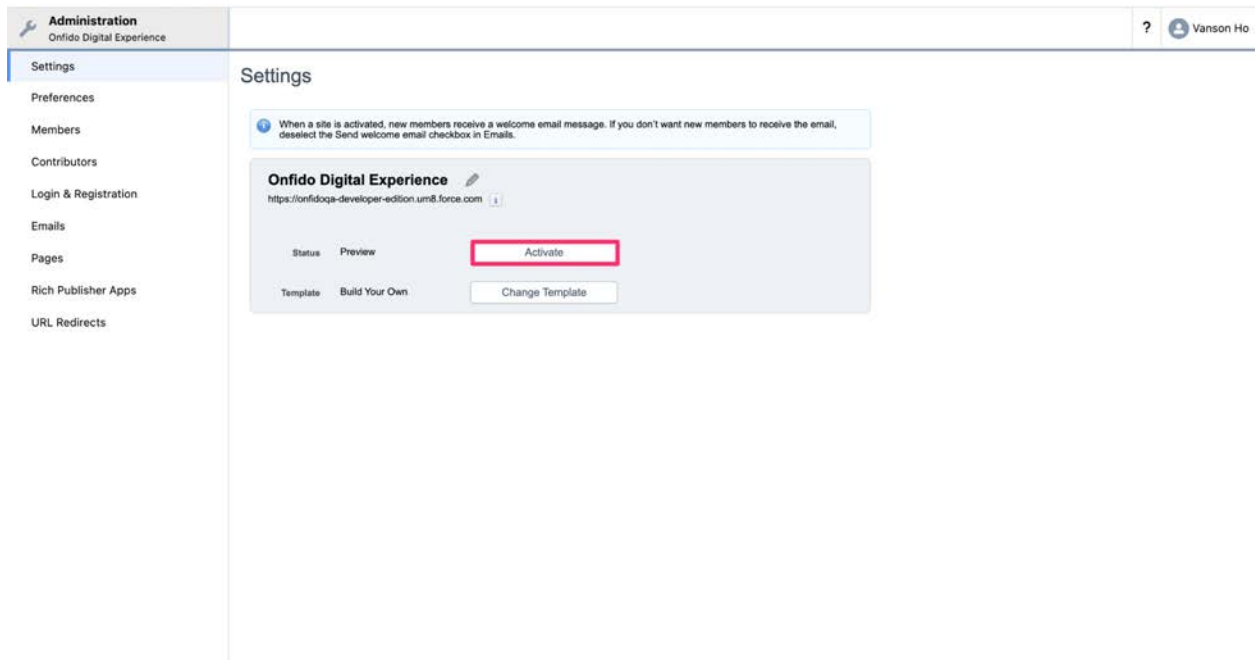
{flowName}

Edit Flow in Flow Builder

Layout

One Column

- Click Activate to activate your Digital Experience



## Trusted Domains for Inline Frames

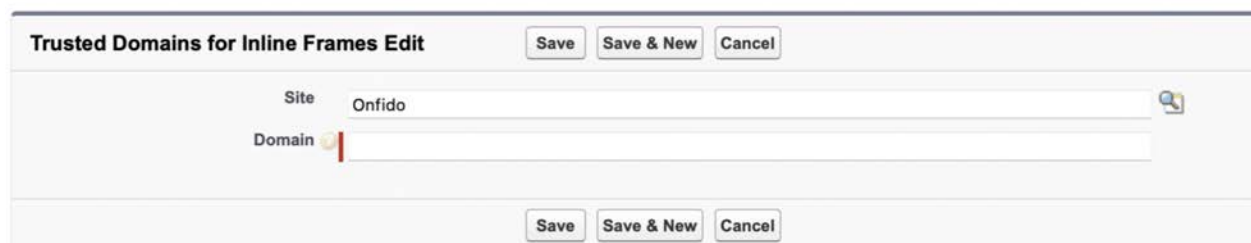
- From Salesforce Setup > Go to the Experience Site > Grab the URL
- Go to the quick find and go to "Sites" (listed under "Sites and Domains") > Click into the Site (label) that you created as part of the Onfido Setup app steps
- Scroll down and click **Add Domain** next to "Trusted Domains for Inline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

### Trusted Domains for Inline Frames



Trusted Domains for Inline Frames Edit

Site Onfido

Domain

Save Save & New Cancel



Enable Feeds ☐

Clickjack Protection Level | Allow framing of site pages on external domains (Good protection)

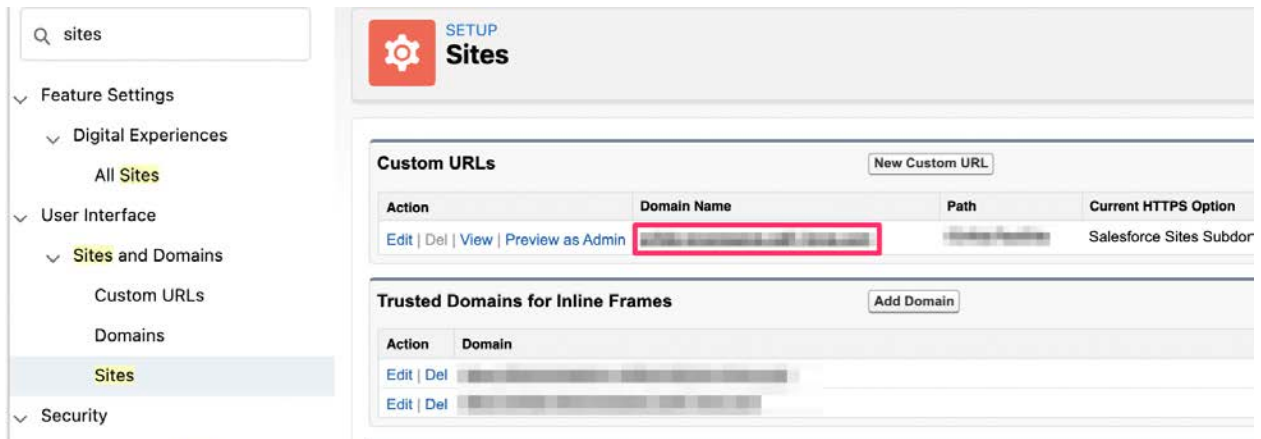
Lightning Features for Guest Users ☒

Enable Content Sniffing Protection ☒

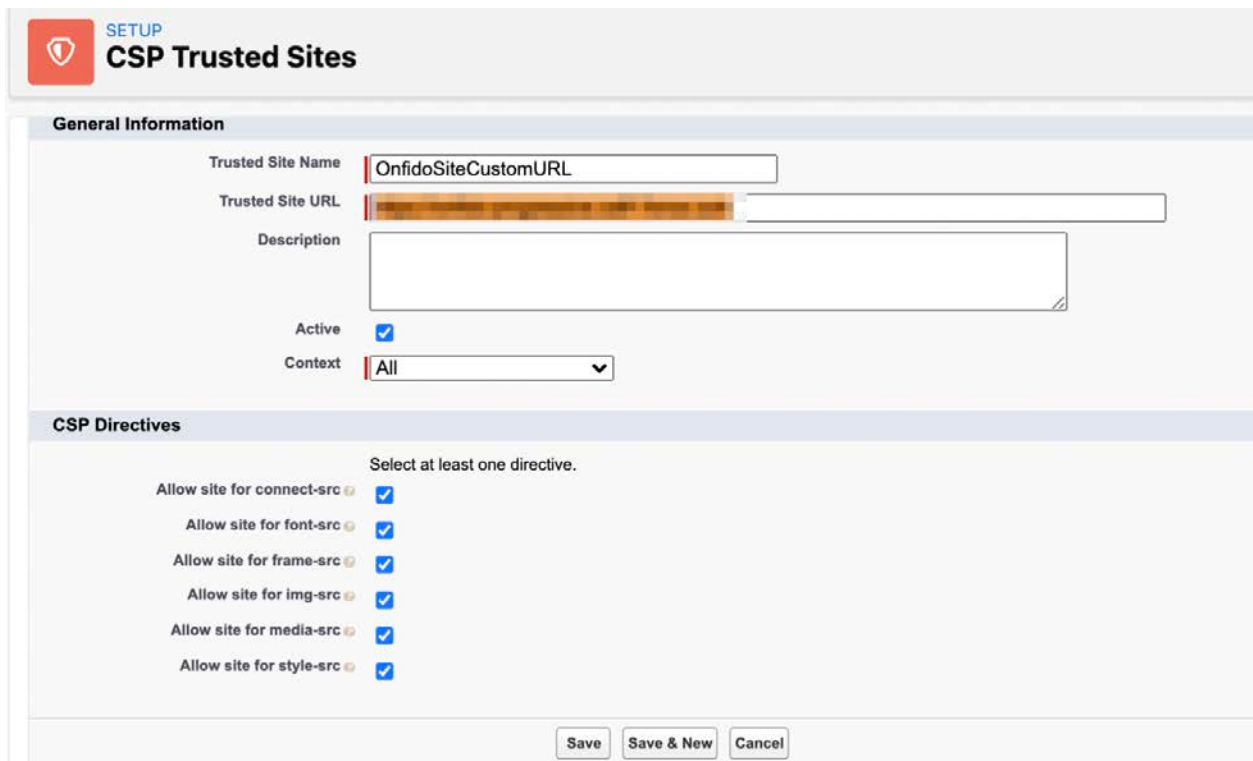
Enable Browser Cross Site ☒

## 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



The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with 'sites' in the search bar. The 'Sites and Domains' section is expanded, showing 'Custom URLs' and 'Domains'. The 'Custom URLs' section is active, displaying a table with columns: Action, Domain Name, Path, and Current HTTPS Option. A red box highlights the 'Domain Name' column. Below this is the 'Trusted Domains for Inline Frames' section with an 'Add Domain' button.



The screenshot shows the 'CSP Trusted Sites' configuration page. The 'General Information' section includes fields for 'Trusted Site Name' (OnfidoSiteCustomURL), 'Trusted Site URL' (a redacted URL), and a 'Description' text area. There are checkboxes for 'Active' (checked) and a 'Context' dropdown menu set to 'All'. The 'CSP Directives' section has a heading 'Select at least one directive.' and a list of six directives, each with a checkbox: 'Allow site for connect-src', 'Allow site for font-src', 'Allow site for frame-src', 'Allow site for img-src', 'Allow site for media-src', and 'Allow site for style-src'. All checkboxes are checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.



## 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

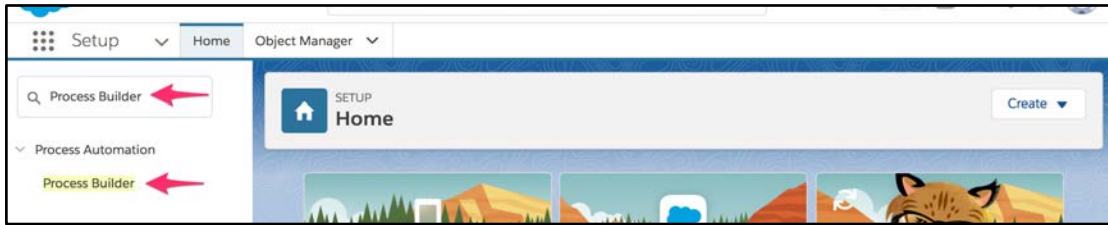
Lightning Components can only be used in Salesforce orgs with a custom domain. For additional help or information on setting up a domain in your Salesforce org to enable lightning components, click on the following link:

<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**

### New Process

Process Name \*

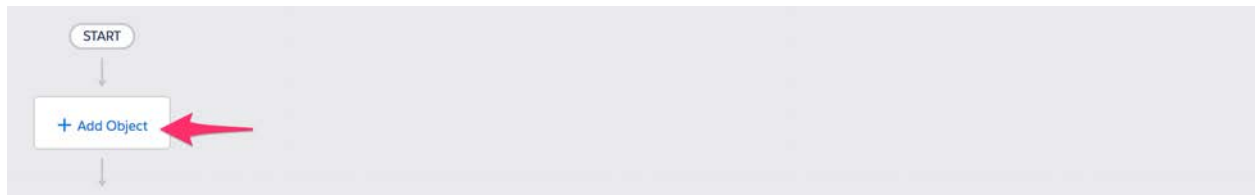
API Name \* ⓘ

Description

The process starts when \*

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

- Click Add Object



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

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

+ Add Object

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

FALSE

STOP

Choose Object and Specify When to Start the Process

Object\*

Contact

Start the process\*

☒ only when a record is created

☐ when a record is created or edited

> Advanced

Save Cancel

- Click Add Criteria

Process Builder - Contact Verification Back To Setup ? Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Contact

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULED ACTIONS

Set Schedule

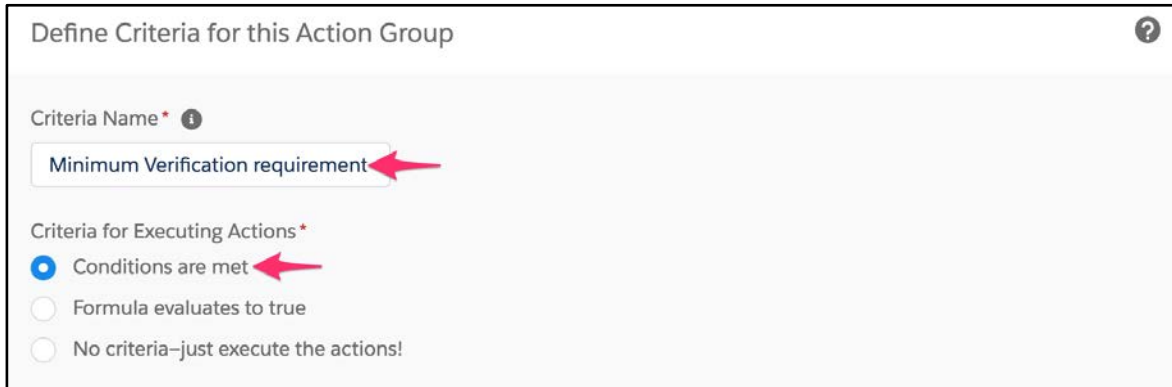
+ Add Action

FALSE

STOP

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

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



Define Criteria for this Action Group

Criteria Name \* ⓘ

Minimum Verification requirement

Criteria for Executing Actions \*

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

- 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?”

Conditions \*

☐ All of the conditions are met (AND)  
☐ Any of the conditions are met (OR)  
☐ Customize the logic

✓ Advanced  
 Do you want to execute the actions only when specified changes are made to the record? ⓘ  
☒ Yes

○ 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.

Define Criteria for this Action Group

Set Conditions

|   | Field *              | Operator *      | Type *          | Value *                                                               |
|---|----------------------|-----------------|-----------------|-----------------------------------------------------------------------|
| 1 | [Contact].First... Q | Does not equal▼ | Global Constan▼ | ✓ Select One<br>\$GlobalConstant.Null<br>\$GlobalConstant.EmptyString |
| 2 | [Contact].First... Q | Does not equal▼ | Global Constan▼ |                                                                       |
| 3 | [Contact].Last... Q  | Does not equal▼ | Global Constan▼ | \$GlobalConstant.N▼ ×                                                 |
| 4 | [Contact].Last... Q  | Does not equal▼ | Global Constan▼ | \$GlobalConstant.Er▼ ×                                                |
| 5 | [Contact].Email Q    | Does not equal▼ | Global Constan▼ | \$GlobalConstant.N▼ ×                                                 |
| 6 | [Contact].Email Q    | Does not equal▼ | Global Constan▼ | \$GlobalConstant.Er▼ ×                                                |

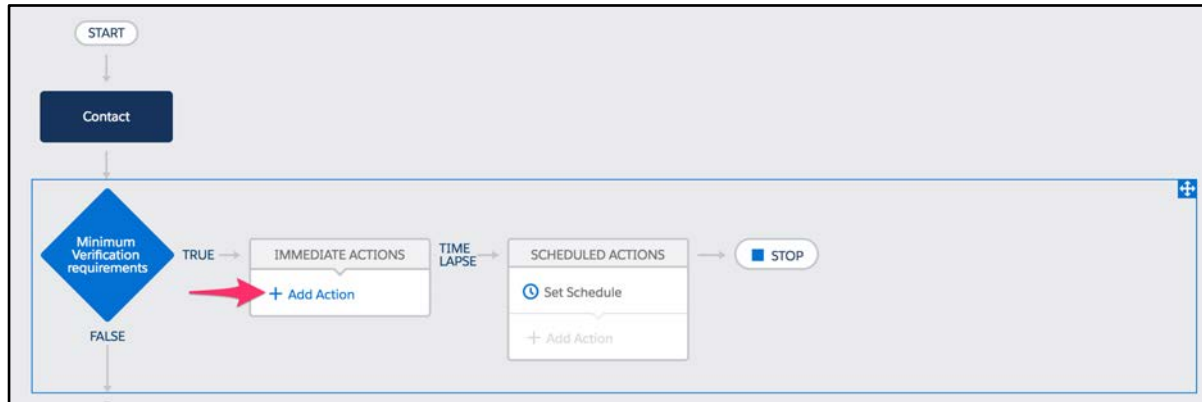
+ Add Row

Conditions \*

☒ All of the conditions are met (AND)  
☐ Any of the conditions are met (OR)  
☐ Customize the logic

IMMEDI  
 + Add A  
 Save Cancel

- Click **Add Action**



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

Select and Define Action

Action Type \*  
Update Records

Action Name \* ⓘ  
Initiate Verification

Record Type \*  
[Contact]

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

Select a Record to Update

☒ Select the Contact record that started your process

☐ Select a record related to the Contact

You have selected the following field:

Contact  
Type: SObject

Cancel Choose

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

Criteria for Updating Records \*

☐ Updated records meet all conditions

☒ No criteria—just update the records!

Set new field values for the records you update

| Field *            | Type *  | Value * |
|--------------------|---------|---------|
| Start Verification | Boolean | True    |

+ Add Row

Save Cancel

- Click **Activate**

Process Builder - Contact Verification

Back To Setup Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

- Click **Confirm**

Activate Version

Activating this process automatically deactivates any other active version. The deactivated version will be available in your version history.

Cancel 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](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](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](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](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/e>  
[dit?usp=sharing](#)

