



CLOUDTARU
— A CLASS APART —

Deployment Steps

Pre Deployment Steps

Post Deployment Steps

1. Create **Remote Site Settings**
 - a. Login as System Admin
 - b. Setup --> Quick Find --> Remote Site Settings --> New --> 'RCT_Tooling_API_Domain'
 - i. Click **Edit** --> Modify '**Remote Site URL**' --> Give your Salesforce ORG BASE URL
 - ii. Click **Save**
2. Create **Connected App** and **Auth. Provider**
 - a. Login as System Admin
 - b. Setup --> Quick Find --> App Manager --> '**New Connected App**'
 - i. Fill Details below
 1. **Connected App Name**: PLV Editor Connected App
 2. Give **Contact Email** to your Email ID
 3. Paste the **Callback URL** Copied in the below Step **AFTER** Auth. Provider Creation

SETUP

Manage Connected Apps

Connected App Name: PLV Editor Connected App

API Name: PLV_Editor_Connected_App

Contact Email: [Redacted]

Contact Phone: [Empty]

Logo Image URL: [Empty]
[Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL: [Empty]
[Choose one of our sample logos](#)

Info URL: [Empty]

Description: [Empty]

API (Enable OAuth Settings)

Enable OAuth Settings: ☒

Enable for Device Flow: ☐

Callback URL: [https://\[Redacted\].my.salesforce.com/services/authcallback/APCT_ToolingAPIOAuth](https://[Redacted].my.salesforce.com/services/authcallback/APCT_ToolingAPIOAuth)

4. Give API (Enable OAuth Settings) as below

▼ API (Enable OAuth Settings)	
Consumer Key and Secret	Manage Consumer Details
Selected OAuth Scopes	Manage user data via APIs (api) Manage user data via Web browsers (web) Full access (full) Perform requests at any time (refresh_token, offline_access)
Callback URL	https://metadatatoolqa-dev-ed.my.salesforce.com/services/authcallback/APCT_ToolingAPIOAuth
Enable for Device Flow	☐
Require Secret for Web Server Flow	☒
Require Secret for Refresh Token Flow	☒
Introspect All Tokens	☐
Token Valid for	0 Hour(s)
Include Custom Attributes	☐
Include Custom Permissions	☐
Enable Single Logout	Single Logout disabled

ii. Click **Save**

iii. After Save → Click the button '**Generate**' for **Initial Access Token**.

1.

Callback URL	https://metadatatoolqa-dev-ed.my.salesforce.com/services
Enable for Device Flow	☐
Require Secret for Web Server Flow	☒
Require Secret for Refresh Token Flow	☒
Introspect All Tokens	☐
Token Valid for	0 Hour(s)
Include Custom Attributes	☐
Include Custom Permissions	☐
Enable Single Logout	Single Logout disabled

▼ Initial Access Token for Dynamic Client Registration	
Initial Access Token	Generate

▼ Custom Connected App Handler	
Apex Plugin Class	
Run As	

iv. Click '**Manage Consumer Details**' Button → Copy **Consumer Key** and **Secret Key**

c. Setup --> Quick Find --> **Auth. Provider** --> New → Enter Details as below.

i. **Name:** APCT ToolingAPIOAuth

ii. **URL Suffix:** APCT_ToolingAPIOAuth

iii. Change 'Authorize Endpoint URL' and 'Token Endpoint URL' as highlighted below

Auth. Provider

Auth. Provider Edit	
Auth. Provider ID	0505000000000000
Provider Type	Salesforce
Name	ToolingAPIOAuth
URL Suffix	APCT_ToolingAPIOAuth
Consumer Key	3MVG9wt4L4O5wVkp3CF
Consumer Secret	E8ATe70E4AE35549484B
Authorize Endpoint URL	https://metadatatoolqa-dev-ed.my.salesforce.com/services/oauth2/authorize
Token Endpoint URL	https://metadatatoolqa-dev-ed.my.salesforce.com/services/oauth2/token
Default Scopes	refresh_token full
Include Consumer Secret in API Responses	☒
Custom Error URL	
Custom Logout URL	
Registration Handler	Automatically create a registration handler template
Execute Registration As	
Portal	--None--
Icon URL	Choose one of our sample icons
Created Date	8/9/2022, 5:24 AM

iv. Paste **Consumer Key** and **Secret Key** in OAuth Provider:

Auth. Provider Edit

Auth. Provider ID: OS05000000XXHD

Provider Type: Salesforce

Name: ToolingAPIOAuth

URL Suffix: APCT_ToolingAPIOAuth

Consumer Key: 3MVG9w4IL4O5wKp3CF

Consumer Secret: E8A7E70E4AE35549494B

Authorize Endpoint URL: https://my.salesforce.com/services/oauth2/authorize

Token Endpoint URL: https://my.salesforce.com/services/oauth2/token

Default Scopes: refresh_token full

Include Consumer Secret in API Responses: ☒

Custom Error URL:

Custom Logout URL:

Registration Handler: Automatically create a registration handler template

Execute Registration As:

Portal: --None--

Icon URL: Choose one of our sample icons

Created Date: 8/9/2022, 5:24 AM

1.

- v. **Authorize Endpoint URL** :: https://YOUR_DOMAIN/services/oauth2/authorize
- vi. **Token Endpoint URL** :: https://YOUR_DOMAIN/services/oauth2/token
- vii. **Default Scopes**: refresh_token full
- viii. Click **Save**
- ix. After saving, Copy **Callback URL** as shown below and paste it in Callback URL in Connected App.

1.

Auth. Provider Detail

Auth. Provider ID: OS05000000XXHD

Provider Type: Salesforce

Name: ToolingAPIOAuth

URL Suffix: APCT_ToolingAPIOAuth

Consumer Key: [Redacted]

Consumer Secret: Click to reveal

Authorize Endpoint URL: https://my.salesforce.com/services/oauth2/authorize

Token Endpoint URL: https://my.salesforce.com/services/oauth2/token

Default Scopes: refresh_token full

Include Consumer Secret in API Responses: ☒

Custom Error URL:

Custom Logout URL:

Registration Handler: Automatically create a registration handler template

Execute Registration As:

Portal: --None--

Icon URL: Choose one of our sample icons

Created Date: 8/9/2022, 5:24 AM

Salesforce Configuration

Test-Only Initialization URL: https://my.salesforce.com/services/auth/test/APCT_ToolingAPIOAuth

Existing User Linking URL: https://my.salesforce.com/services/auth/link/APCT_ToolingAPIOAuth

OAuth-Only Initialization URL: https://my.salesforce.com/services/auth/oauth/APCT_ToolingAPIOAuth

Callback URL: https://my.salesforce.com/services/oauth/callback/APCT_ToolingAPIOAuth

Single Logout URL: https://my.salesforce.com/services/auth/vp/oidc/logout

3. Create Named Credentials

- a. Login as System Admin
- b. Setup → **Named Credentials** → New → Give details as below
 - i. **Details Screenshot**

Named Credential Edit: ToolingAPINamedCreds

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

The screenshot shows the 'Named Credential Edit' interface for 'ToolingAPINamedCreds'. At the top, there are 'Save' and 'Cancel' buttons. The form fields are as follows:

- Label:** ToolingAPINamedCreds
- Name:** NCT_ToolingAPINamedCred (This field is highlighted with a red checkmark)
- URL:** https://clarumetadataservice.com (This field is highlighted with a red underline)

Below the form fields are two expandable sections:

- Authentication:**
 - Certificate:** (Empty field with a search icon)
 - Identity Type:** Named Principal (Dropdown menu)
 - Authentication Protocol:** OAuth 2.0 (Dropdown menu)
 - Authentication Provider:** ToolingAPIOAuth (Field with a search icon)
 - Scope:** refresh_token full (Field)
 - Authentication Status:** Authenticated as clarumetadataservice@cloudtaru.com
 - Start Authentication Flow on Save:** ☒
- Callout Options:**
 - Generate Authorization Header:** ☒
 - Allow Merge Fields in HTTP Header:** ☐
 - Allow Merge Fields in HTTP Body:** ☐
 - Outbound Network Connection:** (Empty field with a search icon)

At the bottom, there are 'Save' and 'Cancel' buttons.

- ii. **Label:** NCT ToolingAPINamedCreds
 - iii. **Name:** NCT_ToolingAPINamedCreds
 - iv. **URL:** https://YOUR DOMAIN URL
 - v. **Identity Type:** Named Principal
 - vi. **Authentication Protocol:** OAuth 2.0
 - vii. **Authentication Provider:** ToolingAPIOAuth
 - viii. **Scope:** refresh_token full
 - ix. Click **Save**
- c. It redirects to OAuth Login page of YOUR ORG. Please Login with your Credentials
 - d. After Successful Login Click '**Allow**' for the Prompt

4. Assign Permission Set

- a. Login as System Admin
- b. Setup --> Users --> Select required User --> **Permission Set Assignments** --> Click Edit Assignments
- c. Add Permission Set '**PCT_PLV_Editor_PS**'
- d. Click **Save**