Salesforce Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Vertify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

OPTIONAL STEP: SALESFORCE VERTIFY USER ACCESS

Please create an Admin user for the integration and provide the following credentials to your Vertify Implementation Specialist if you'd like them to have access to your CRM's UI. It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Follow this format when creating the log in: passwords+clientname@vertify.com

Example: passwords+vertify@vertify.com

If license/seat is unavailable, it can also be created through a personal account. Please note, it will need to be updated if the user or password is inactivated.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required to be created on the Lead and Contact objects in Salesforce for the integration. Please reference the API name column in the table below for guidance on how to title the fields, needed data type, and the purpose of the fields for additional context.

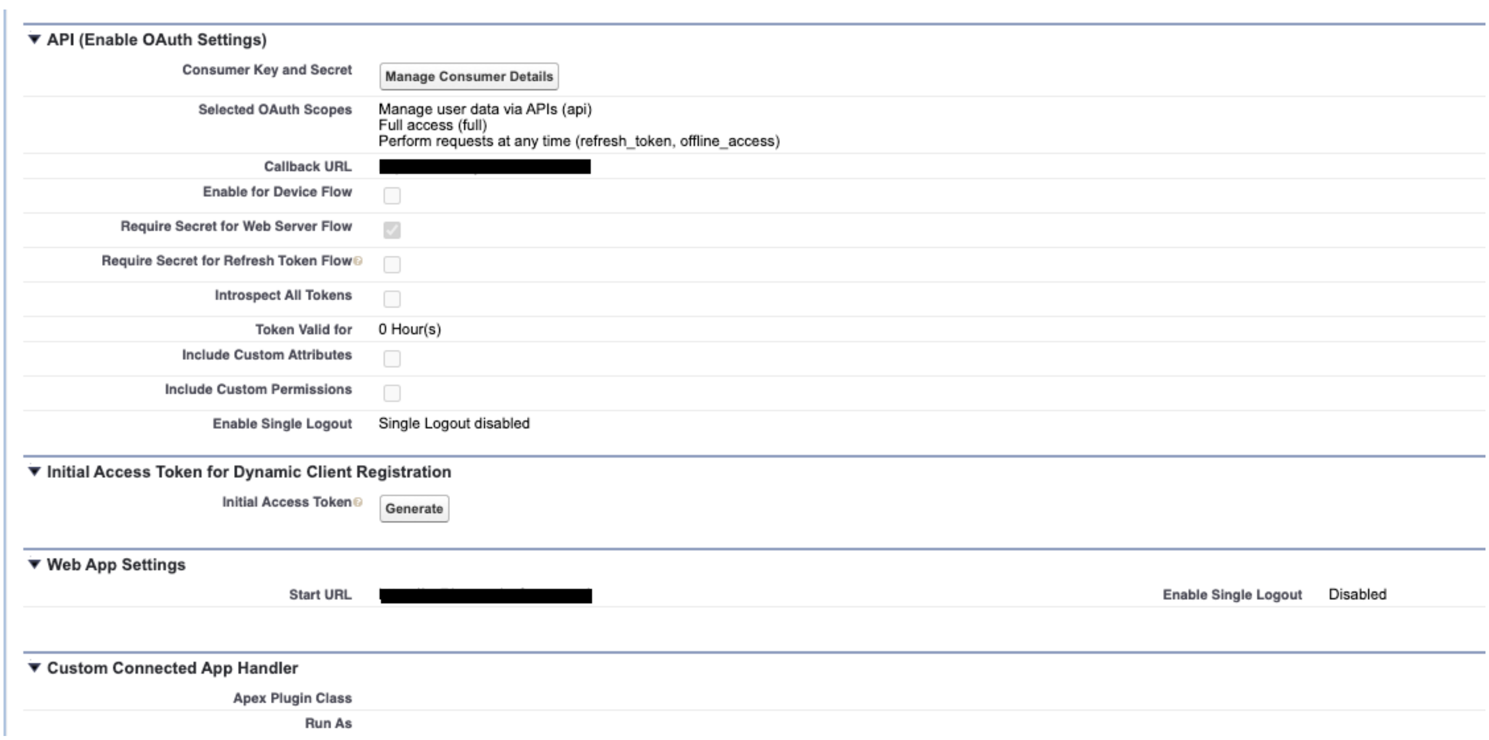
API Name	Data Type	Purpose
ExternalContactId	String	This field will be used to house the external system Contact's internalId, and for merging and lookup purposes in Vertify.
ExternalCompanyId	String	This field will be used to house the external system Company's internalId, and for merging and lookup purposes in Vertify.
SyncToMAP	Boolean	This field will be hard-coded by Vertify or by a workflow in Salesforce. It is used to determine which records are eligible to move back to the external system and for filtering in Vertify.

STEP 2 - CONNECTED APP CREATION

Action Item:

Please create a connected app in Salesforce to use for the integration. If you'd like to move forward with using OAuth to connect, please configure it with the appropriate authorization settings.

1. From Setup, enter Apps in the Quick Find box, and select App Manager.
2. Click New Connected App.
3. Name: Vertify Connect App
4. Select the options listed below for Enabling OAuth Settings:



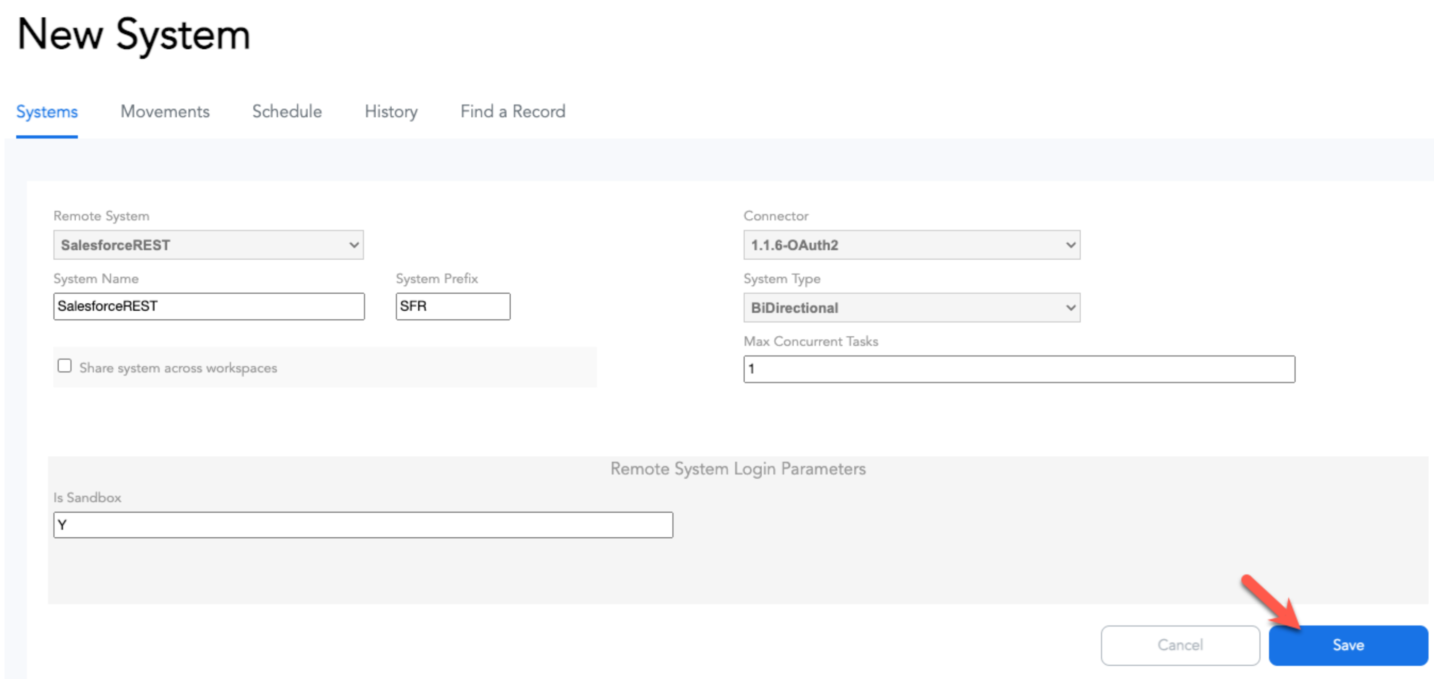
STEP 3 - SALESFORCE USER CREATION

OAuth Setup Steps:

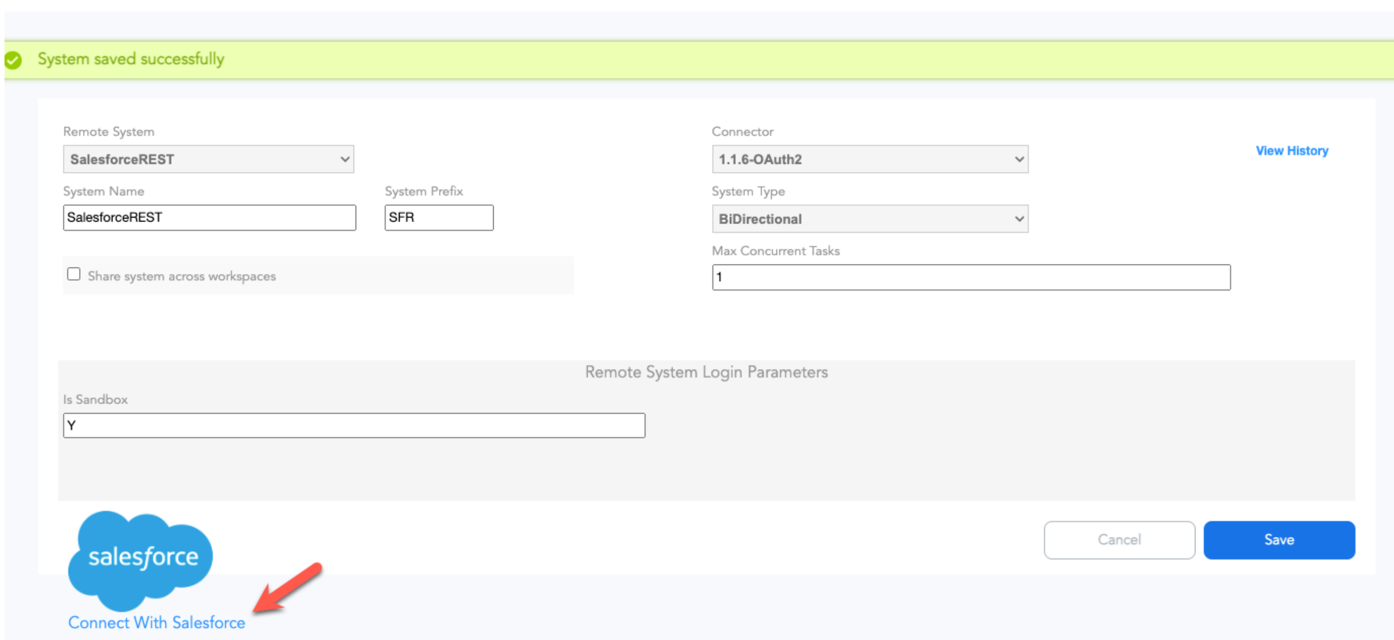
If you'd prefer to connect using OAuth, please be sure to review and configure the enable OAuth settings for the API Integration in your instance of Salesforce.

1. Navigate to your Vertify tenant site provided by your Customer Success Manager.
    - Reach out to them directly if you have any questions or need assistance.
    - Follow the reset password link to pick a permanent password for your account, if needed.

2. On the main **Dashboard**, click **Workspaces**.
3. Click the Workspace link you want to create a system in.
4. Select **New System** > **SalesforceREST** > choose the latest version of the Connector dropdown (ex: 1.1.6-OAuth2) > **BiDirectional** as System Type > and then click **Save**:

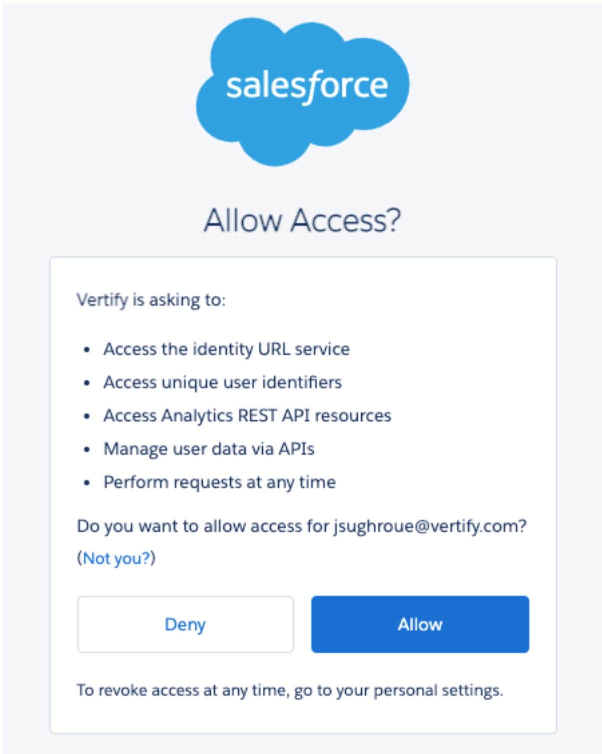


5. Click Connect With Salesforce:



6. Ensure you're logged into your Salesforce account and click the link to "Connect With Salesforce":

7. If logged into the User Account created for the integration, it should navigate to a page that will have a "Grant Access" button to select.
    - If not logged into that account already, it will navigate to a page to log into the correct user account or choose the account to grant access to.



8. Once these steps are completed, return to the Salesforce System page in Vertify and click Save again at the bottom right-hand corner of the page.
9. This will initiate the scan and authentication step of connecting with the provided credentials
10. Look for a green Scan Complete message; if failed or error, connect with the system administrator and let your Vertify One team know of the issue.