

# Salesforce Connector

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## Overview

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This connector allows you to access data around leads, opportunities, and other objects available to your Salesforce account. This will mean that you can monitor the performance on a company and individual sales person level.

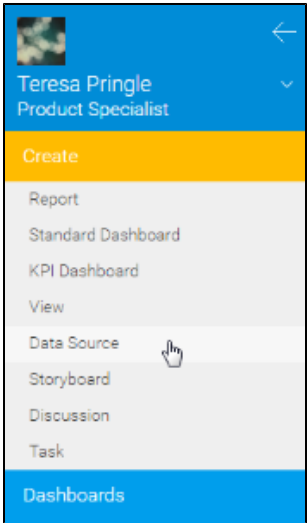
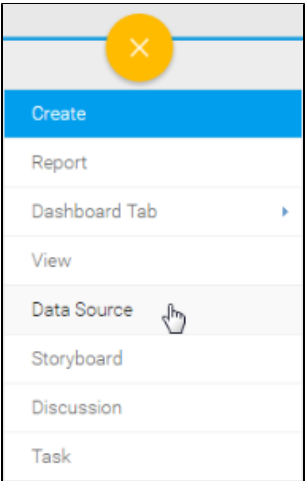
## Install

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All third-party connectors are loaded into the system in the same way. See [Loading Connectors](#) for instructions.

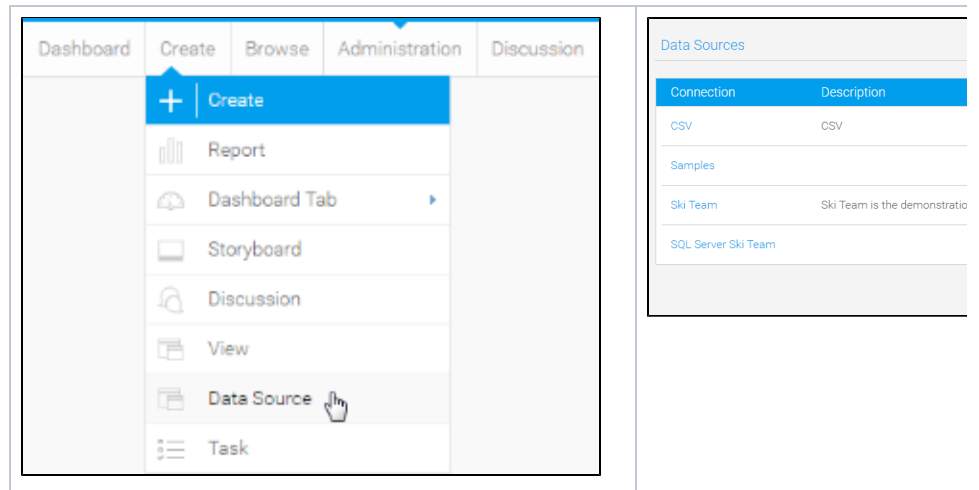
## Connect

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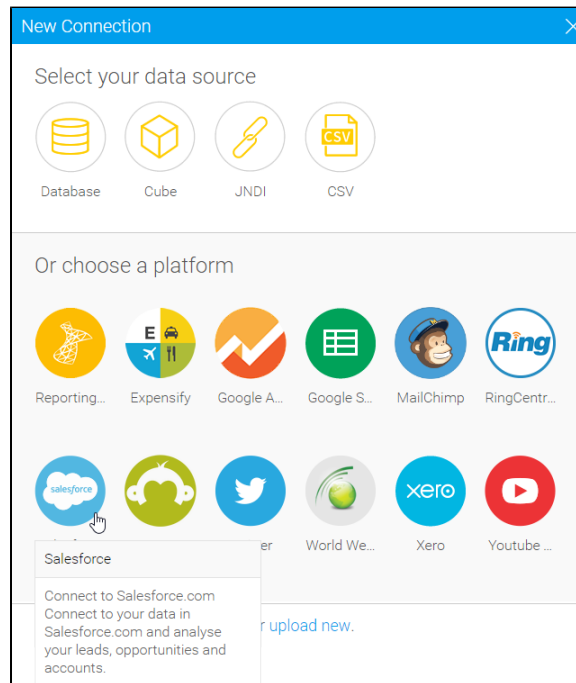
1. Create a new [Data Source](#) by using one of these methods:
- **Left Side Nav** - open the left side navigation panel, click on Create, select the Data Source option
  - **Top Right Button** - click on the create button, select the Data Source option.
  - **Toolbar** - click on the Create link in the toolbar, select the Data Source option.
  - **Admin Console** - navigate to the Admin Console, open the Data Sources section, click on the Add button.

Left Side Navigation	Top Right (with Left Side Nav en:
	
Toolbar	Admin Console

You will now see the New Connection lightbox.



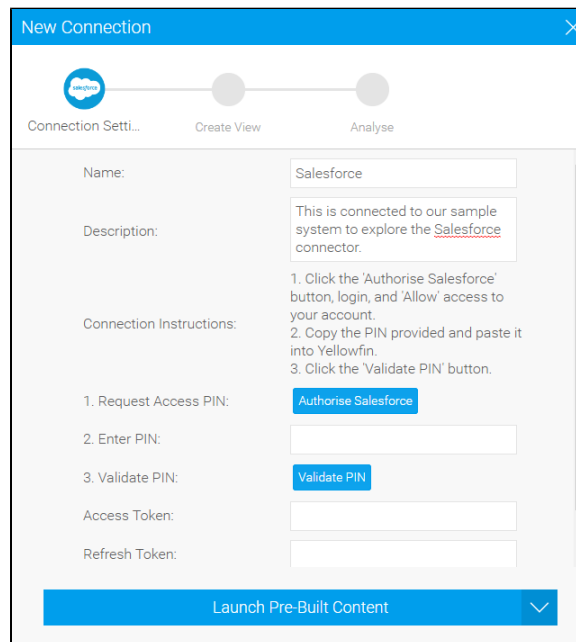
2. Select the **Salesforce** connector to set up your data source.



3. Fill in the details required by the connector. In this example, you will need to complete the **Name** and **Description**.

This should describe the specific connection, rather than the connector.

4. Complete the **Connection Instructions**. Each connector will have different requirements that will need to be completed in order to successfully access your data.



5. From here you will have to authorise the connector. Start by clicking on the **Authorise Salesforce** button.

New Connection

Connection Settings Create View Analyse

Name: Salesforce

Description: This is connected to our sample system to explore the Salesforce connector.

Connection Instructions:

1. Click the 'Authorise Salesforce' button, login, and 'Allow' access to your account.
2. Copy the PIN provided and paste it into Yellowfin.
3. Click the 'Validate PIN' button.

1. Request Access PIN: Authorise Salesforce

2. Enter PIN:

3. Validate PIN: Validate PIN

Access Token:

Refresh Token:

Launch Pre-Built Content

6. Enter your login credentials for Salesforce, and click **Log In**.

Login | Salesforce - Google Chrome

https://login.salesforce.com/?ec=302&startURL=%2Fsetup%2Fsecur%2FRemot

salesforce

Username

Password

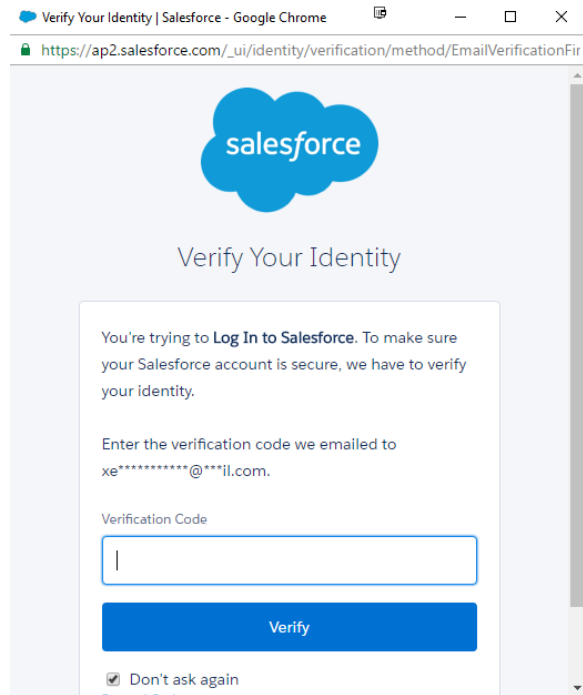
Log In

☐ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

[Not a customer?](#) [Try for Free](#)

7. You *may* now have to confirm your account details. Follow the steps provided.

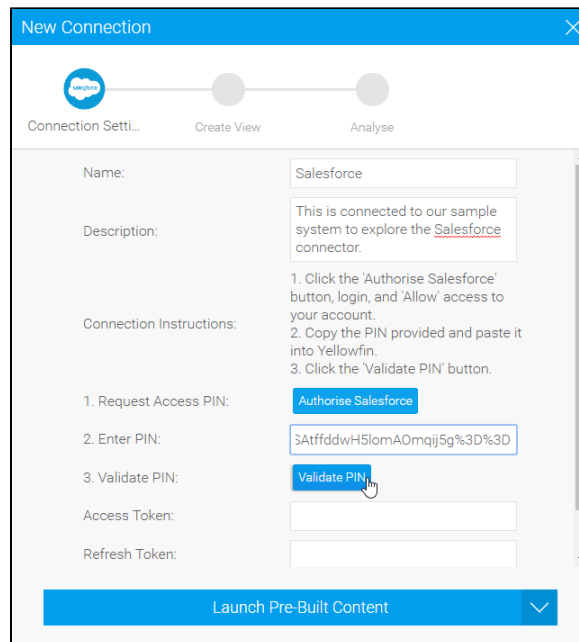


8. Once confirmed, you will be provided with a **Code** that needs to be copied.

**Code** `aPrxqJ8A8kLOza.kvgMolBJ4TrJAnFEiagaxC`

9. Return to the **New Connection** window and paste your **Code** into the box displayed here.

10. Click **Validate PIN** to continue.



11. From here you have a range of options available to you:

- **Advanced Connection Editor** - this will take you to the Data Source page in the Admin Console and allow you to edit all the advanced options available for your data source.
- **Test Connection** - this will allow

Yellowfin to test the connection parameters you provided to ensure it can connect to your data source.

- **Launch Pre-Built Content** - this will allow you to install any pre-built content that may come with the connector.
- **Save & Close** - this will allow you to save your connection and close the New Connection lightbox, returning you to the page you were on previously.
- **Cancel** - this closes the New Connection lightbox without saving your connection, returning you to the page you were on previously.

The screenshot shows a 'New Connection' lightbox with a blue header and a close button. A progress bar at the top has three steps: 'Connection Setti...' (active), 'Create View', and 'Analyse'. The main content area is divided into sections: 'Name' (Salesforce), 'Description' (This is connected to our sample system to explore the Salesforce connector.), 'Connection Instructions' (1. Click the 'Authorise Salesforce' button, login, and 'Allow' access to your account. 2. Copy the PIN provided and paste it into Yellowfin. 3. Click the 'Validate PIN' button.), '1. Request Access PIN:' (with an 'Authorise' button and a dropdown menu showing 'Advanced Connection Editor'), '2. Enter PIN:' (with a text input containing 'aPrxqJ8A' and a dropdown menu showing 'Test Connection'), '3. Validate PIN:' (with a 'Validate PIN' button and a dropdown menu showing 'Create View'), 'Access Token:' (with a masked input), and 'Refresh Token:' (with a masked input). At the bottom, there is a 'Launch Pre-Built Content' button and a 'Save & Close' button.

Your connection is now complete.