

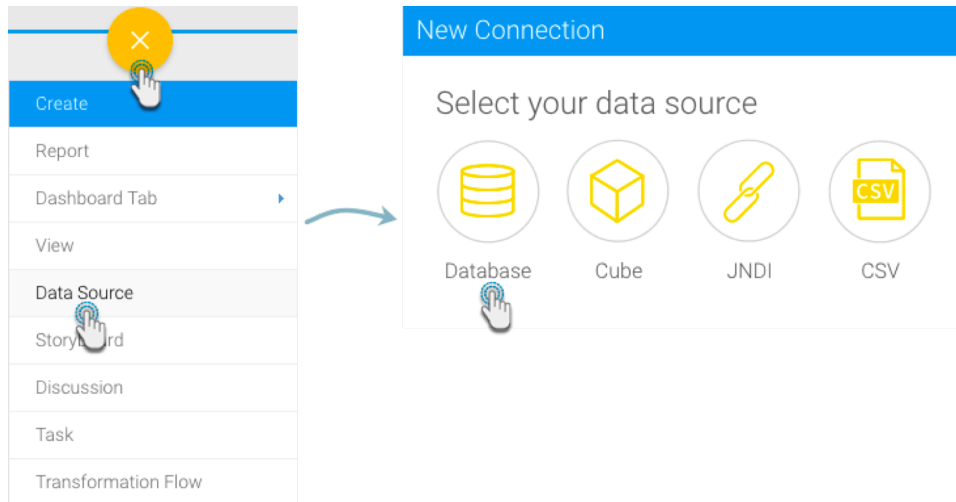
# SalesForce.com

Follow the instructions below to connect Yellowfin to a SalesForce data source. You can install either of the two type of driver for SalesForce: PROGRESS or RSSBUS.



Yellowfin does not ship with the driver required for this connection due to licensing/paywall reasons. You will need to manually upload the driver through the [Plugin Manager](#).

1. Click on the Create button and choose the data source option.
2. Then select the database option.



3. When the New Connection popup appears, provide a name and description for your database.
4. Choose **SalesForce.com** from the list of available database options. New configuration fields will appear on doing so.

5. **Include Schema in SQL:** Select this checkbox to add the schema name when addressing database tables in SQL queries.
6. **Access Token:** Enter the access token to authenticate your SalesForce connection. (This is an extra security measure for when you access SalesForce from an outside IP address.)
7. **Username:** Enter the username of your Salesforce database account.
8. **Password:** Provide the password of the above account.
9. Once you have completed your connection information, you will have several options:
  - a. **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 database.
  - b. **Test Connection:** This will validate the connection parameters you provided to ensure it can connect to your database. If the connection was successful, a message will appear.
  - c. **Create View:** This will save your connection and get you started on creating a view based on it.
  - d. **Save & Close:** This will allow you to save your connection and close the New Connection popup, returning you to the page you were on previously.
  - e. **Cancel:** This closes the New Connection popup without saving your connection, returning you to the page you were on previously.
10. We recommend testing the connection, and then saving it by using the Save & Close button.

