


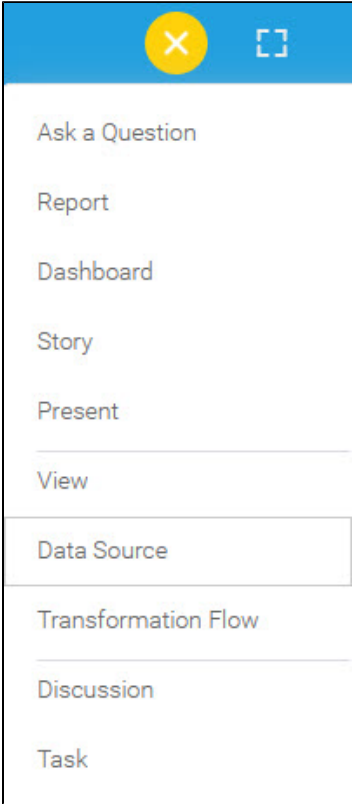
# SalesForce.com

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](#) or [Creating a Basic Data Source Connection](#).

1. Click on the **Create** button and choose the data source option.



2. Select **SalesForce.com** from the databases list.

Add a Data Source

FEATURED

Amazon Redshift
Google BigQuery
Microsoft SQL Server
MySQL
Oracle
PostgreSQL
Snowflake

Please, select the kind of data source you want to add.

Q

Search

Rocket U2/UniVerse

Add Driver

SalesForce.com

SAP HANA

Add Driver

SAS

Add Driver

Simba

Add Driver

Snowflake

Add Driver

Spectrum Model Store

Add Driver

SQLite

Add Driver

Sybase ASE

Sybase IQ

Add Driver

Sybase SQL Anywhere

Add Driver

Cancel

3. When the New Connection popup appears, provide a name and description for your database.

4. **Connection String:** when selecting Connection String you have the same functionality as in [Generic JDBC Data Source](#).

How To Connect

Details

Connection String

5. **SalesForce.com** configuration fields:

Authentication Adapter

Standard Authentication

Include Schema in SQL

Access Token

User Name

Password

6. **Authentication Adapter:** Specify an authentication method for the database adapter. More details [Advanced Connection Editor](#).

7. **Include Schema in SQL:** Select this checkbox to add the schema name when addressing database tables in SQL queries.

8. **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.)

9. **Username:** Enter the username of your Salesforce database account.

10. **Password:** Provide the password of the above account.

11. Toggle Advanced Settings to see more settings.

Advanced Settings

12. Once you have completed your connection information, you will have several options:

Back

Save

Test Connection

Cancel

a. **Back:** This will navigate to the database selection.

b. **Cancel:** This will close the New Connection popup.

- c. **Test Connection:** This will test the connection parameters you provided to ensure it can connect to your database. If the connection is successful, an indicator will appear and you will be able to save the connection.

← Back

Save

✓ Test Connection

Cancel

- d. **Save:** This will allow you to save your connection and navigate to the Success page:

Add a Data Source

×

✓ Data Source Saved

You successfully made your data connection.

Close