

Salesforce Ticket Sync

To connect to SFDC for ticket synchronization, you will need to configure your SFDC tenant to support a REST interface. Details on this can be found here:

https://developer.salesforce.com/docs/atlas.en-us.api_rest.meta/api_rest/intro_rest_resources.htm

The following settings will be required to match in Service Manager:

The screenshot shows the 'Ticket Sharing and Synchronization' configuration page. At the top, there are three dropdown menus: 'Integration Name' set to 'Sale force Connector', 'Business Object Name' set to 'Incident', and 'Status' set to 'Enabled'. Below these is a horizontal tab bar with the following tabs: 'Credentials' (selected), 'Filters (1)', 'Field Mapping (7)', 'Data Mapping (2)', 'Data Rules (0)', 'Additional Operations', and 'Comment Field Mapping (2)'. The 'Credentials' tab is active, displaying a form with the following fields: 'Service Name' (Salesforce), 'Service URL' (https://na3.salesforce.com), 'Username' (judyj@na3.salesforce.com), 'Password' (masked with dots), 'On Premise' (unchecked), 'Client ID' (21V9G0Vn_0fUhc_PzeT8r_Qyab_M9n1f0n5mR4HEDK), 'Client Secret Key' (5076445492740791071), and 'Security Token' (empty).

- 1) Configure the Service url for your salesforce.com tenant:

<https://yourInstance.salesforce.com>

yourInstance will be the specific host that you see when you log in to salesforce.com. For example, na3.salesforce.com

- 2) Enter a valid username / password that can access the SFDC tenant and create cases.
- 3) Set up OAuth in SFDC so defect sync can connect:

https://developer.salesforce.com/docs/atlas.en-us.api_streaming.meta/api_streaming/code_sample_auth_oauth.htm

Provide the ClientID (shows as Consumer Key) and Client Secret Key (shows as Consumer Secret) in the Credentials dialog.