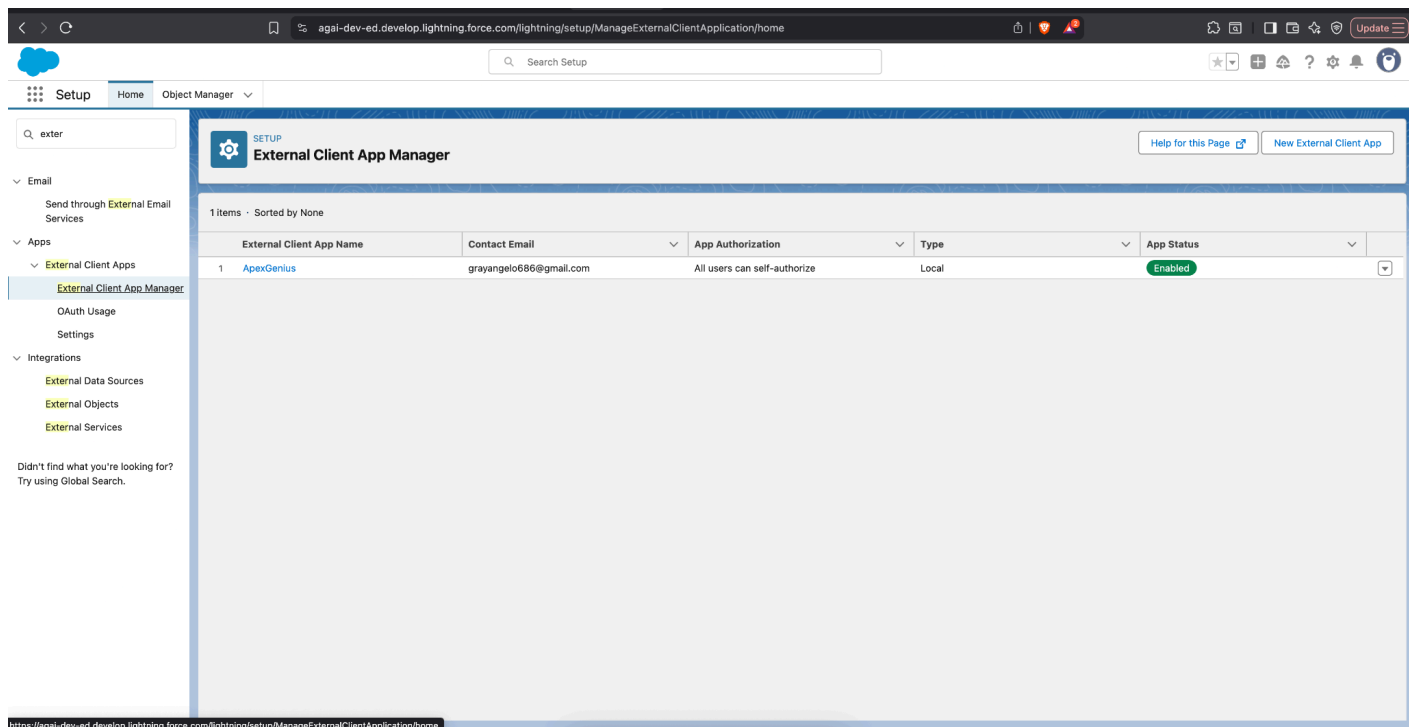


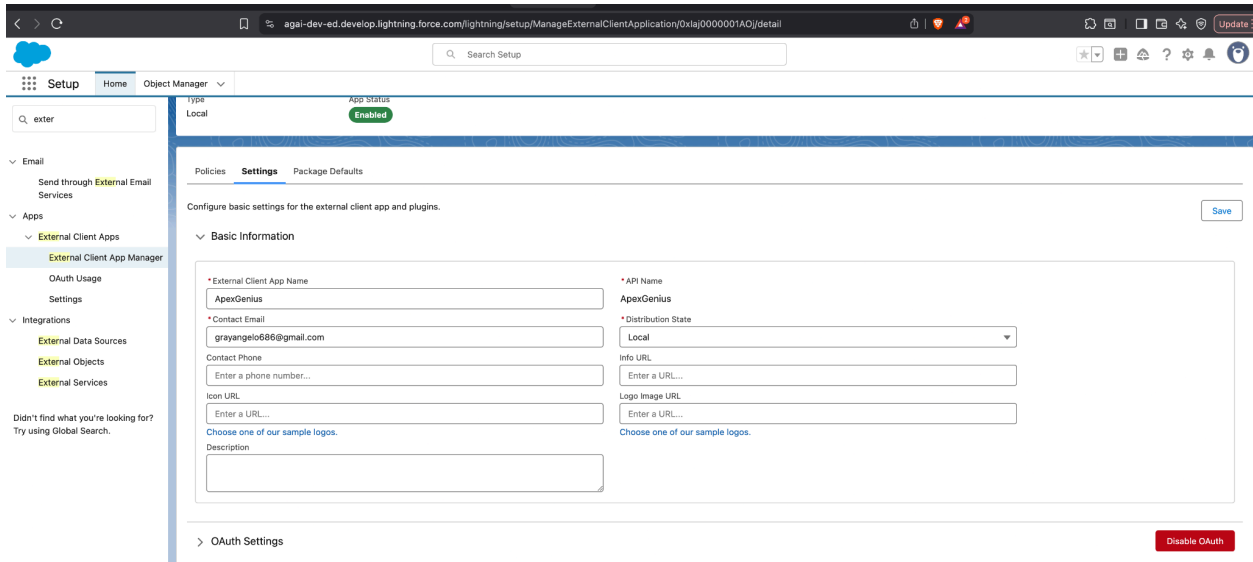
# Salesforce to ApexGenius Integration Guide

Go to External Client App Manager in Setup

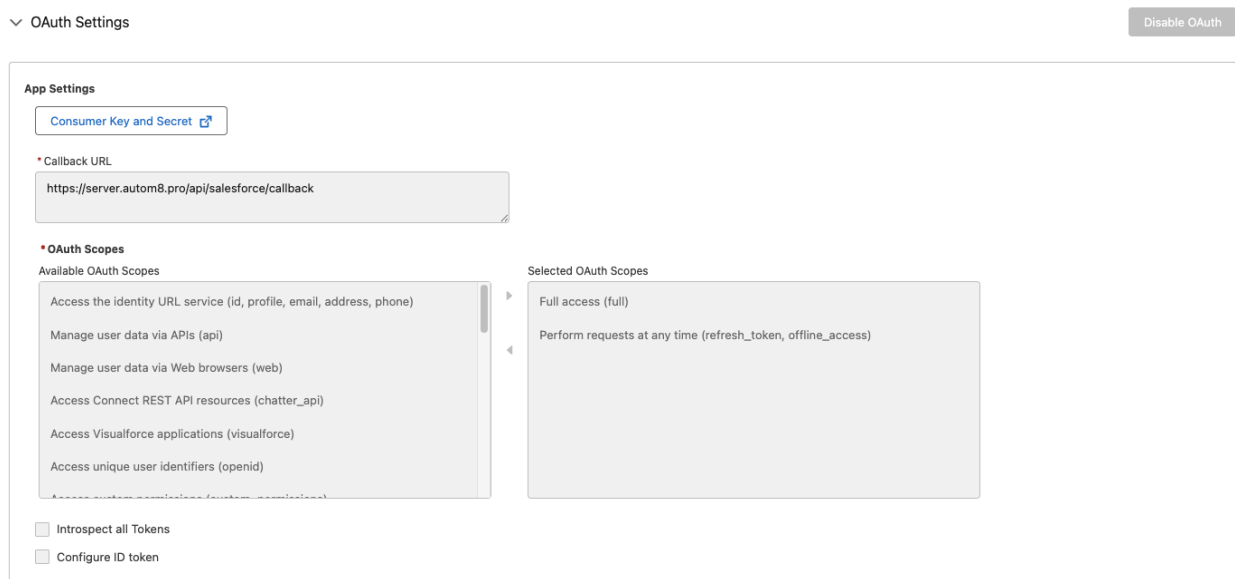


Create new External Client app named: 'ApexGenius'

Fill Out Basic Information



Under API (Enable OAuth Settings) check the enable oauth



Add: <https://server.autom8.pro/api/salesforce/callback> as the Callback URL

OAuth Scopes:

- Full access (full)
- Perform requests at any time (refresh\_token, offline\_access)

Flow Enablement

- Enable Authorization Code and Credentials Flow
  - Require user credentials in the POST body for Supported Authorization Flows

Security

- Require secret for Web Server Flow
- Require secret for Refresh Token Flow

#### Flow Enablement

- Enable Client Credentials Flow
- Enable Authorization Code and Credentials Flow
- Require user credentials in the POST body for Authorization Code and Credentials Flow
- Enable Device Flow
- Enable JWT Bearer Flow
- Enable Token Exchange Flow

#### Security

- Require secret for Web Server Flow
- Require secret for Refresh Token Flow
- Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- Enable Refresh Token Rotation
- Issue JSON Web Token (JWT)-based access tokens for named users

Hit Save

Go to the **Settings** tab

- Click 'Oauth Settings'
  - Under **App Settings** click 'Consumer Key and Secret'

Description

▼ OAuth Settings Disable OAuth

**App Settings**

[Consumer Key and Secret](#)

• Callback URL

`https://server.autom8.pro/api/salesforce/callback`

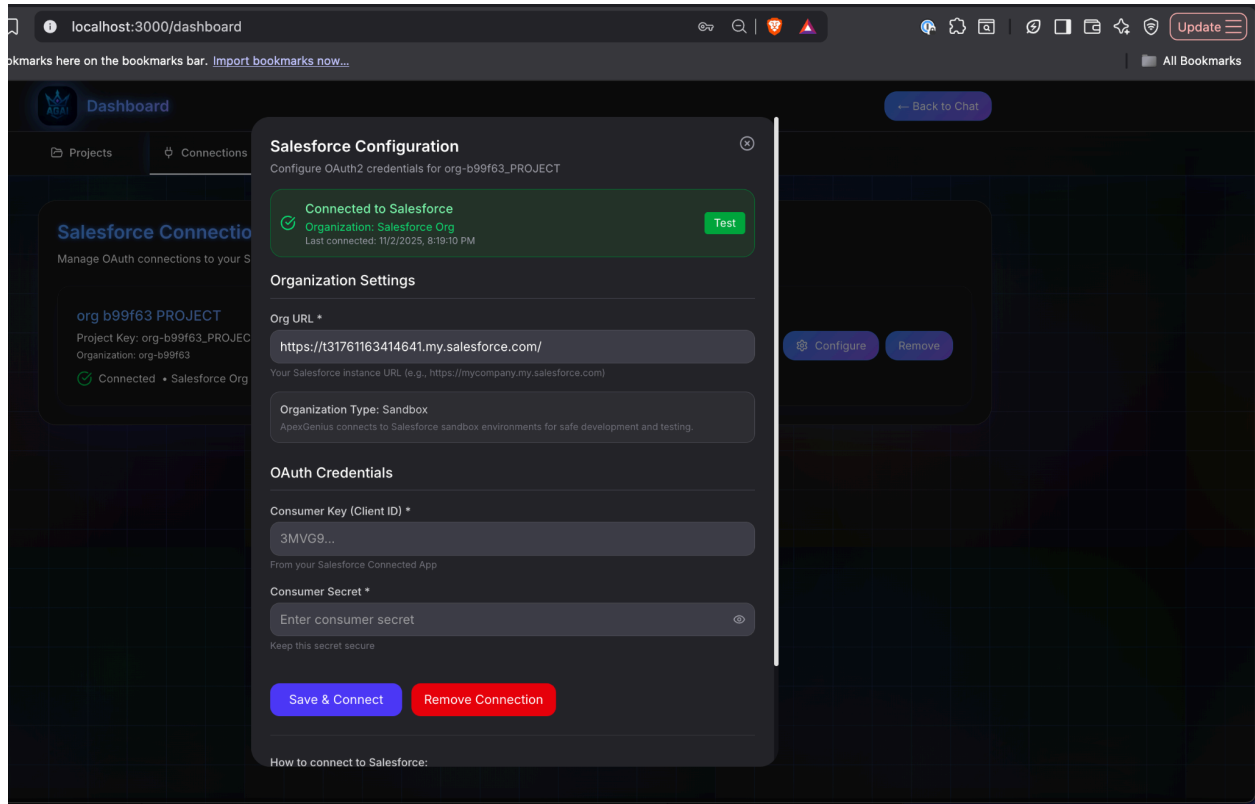
• OAuth Scopes

Available OAuth Scopes	Selected OAuth Scopes
<input type="checkbox"/> Manage user data via Web browsers (web)	<input checked="" type="checkbox"/> Manage user data via APIs (api)
<input type="checkbox"/> Full access (full)	<input type="checkbox"/> Perform requests at any time (refresh_token, offline_access)
<input type="checkbox"/> Access Connect REST API resources (chatter_api)	
<input type="checkbox"/> Access Visualforce applications (visualforce)	
<input type="checkbox"/> Access unique user identifiers (openid)	
<input type="checkbox"/> Access custom permissions (custom_permissions)	
<input type="checkbox"/> Access Analytics DFRY API resources (wave_api)	

Introspect all Tokens

Configure ID token

Copy the base URL from the 'Consumer Key and Secret' Page into Org URL and fill in credentials



After hitting 'Save & Connect' you will be directed to the Salesforce login page, use your credentials to log into the org and authenticate