



Upflow/Salesforce - Permissions Setup

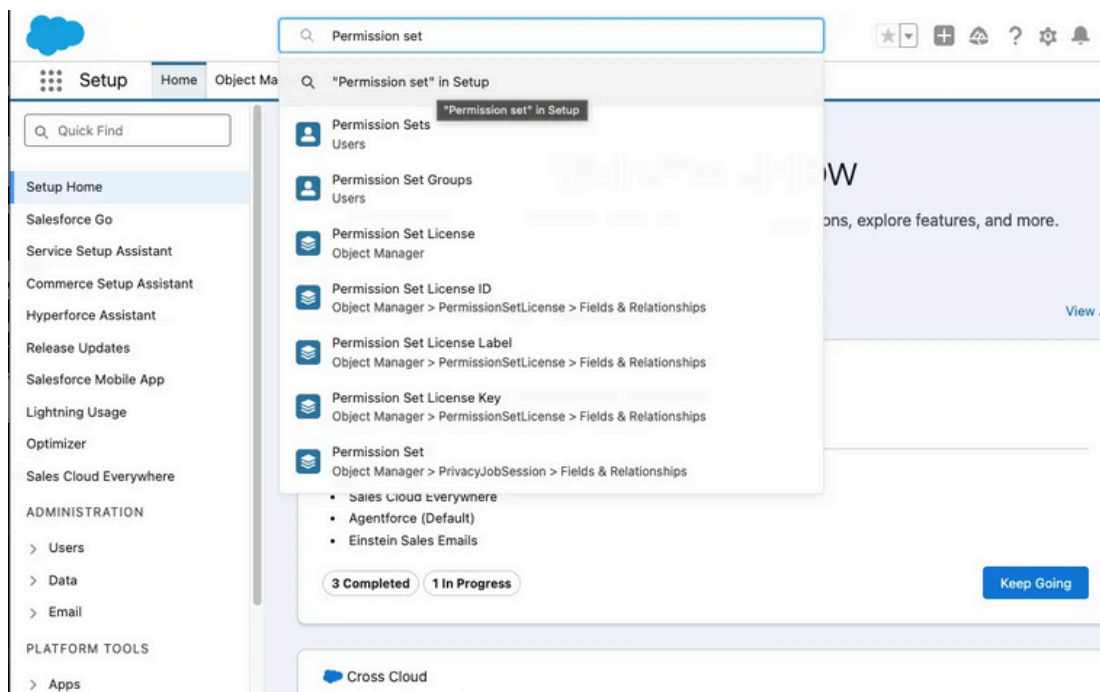
Upflow connects to Salesforce via an API user with the correct permissions. This setup ensures that Upflow can securely read the customer and account information needed for your organization, without giving full Admin access.

Follow the steps below to configure the integration, with the necessary permissions.

Step 1: Create a Permission Set

1.1 In Salesforce, log in as an Admin and go to Setup.

1.2 In the Quick Find search bar, type Permission Sets.



1.3 Click New to create a new Permission Set.

1.4 Enter a Label (e.g., Upflow Permissions).

1.5 For User License, select Salesforce API Integration.

1.5 Click Save.

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The main content area is titled "Permission Sets" and "Create". The form includes the following fields and sections:

- Enter permission set information** (Required Information):
 - Label:** Upflow Permissions
 - API Name:** Upflow_Permissions
 - Description:** (Empty text area)
 - Session Activation Required:**
- Select the type of users who will use this permission set**
 - Who will use this permission set?**
 - Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.
 - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
 - Not sure what a permission set license is? [Learn more here.](#)**
 - License:** Salesforce API Integration

The left sidebar shows the navigation menu with "Permission Sets" highlighted under the "Users" section.

Step 2: Configure Object Settings for Accounts

2.1 Open the Permission Set you just created.

2.2 Go to Object Settings.

The screenshot shows the Salesforce Setup interface for the 'Upflow Permissions' permission set. The left sidebar contains navigation options like 'Setup Home', 'Salesforce Go', and 'Users'. The main content area is titled 'Permission Sets' and 'Upflow Permissions'. It includes a search bar, action buttons (Clone, Edit Properties, Manage Assignments, View Summary), and a 'Permission Set Overview' section with details like Description, License, Session Activation Required, and API Name. Below this is an 'Apps' section with a list of settings: Object Settings (highlighted with a red box), App Permissions, Flow Access, External Credential Principal Access, Custom Metadata Types, and Custom Setting Definitions. A 'System' section at the bottom lists System Permissions.

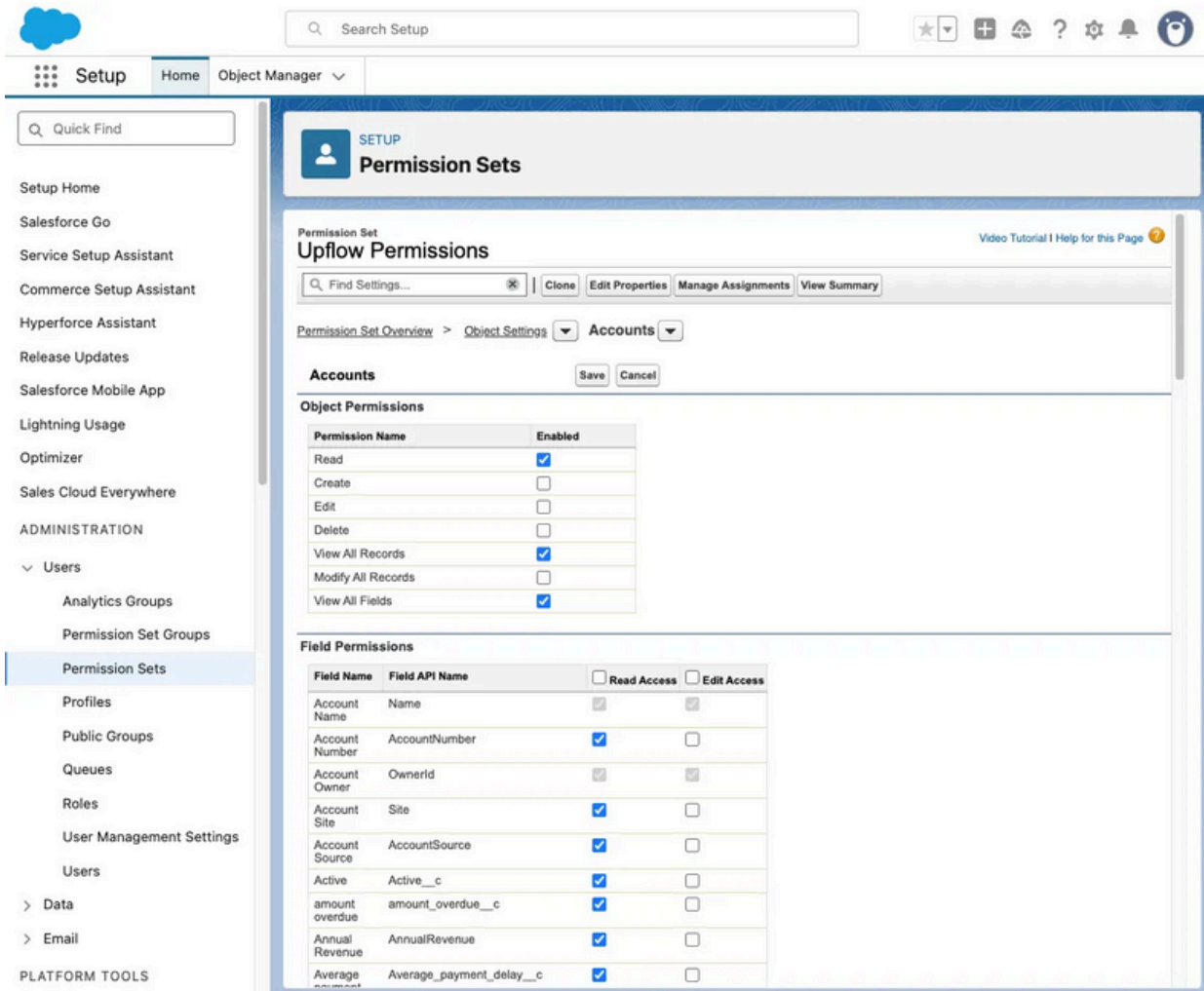
2.3 Find Accounts and click Edit.

This screenshot shows the 'Object Settings' section of the 'Upflow Permissions' permission set. The 'Object Settings' dropdown is selected, displaying a table with columns for Object Name, Object API Name, Object Permissions, Total Fields, and Tab Settings. The 'Accounts' row is highlighted with a red box.

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings
Accounts	Account	Read, View All Records, View All Fields	86	--
Actor Reactive Ask Response Events	ActorReactiveAskRespEvent	No Access	--	--
Addresses	Address	No Access	7	--
AI Insight Reasons	AIInsightReason	No Access	--	--
AIMetadataSyncStatuses	AIMetadataSyncStatus	No Access	--	--
AI Record Insights	AIRecordInsight	No Access	--	--
Alternative Payment Methods	AlternativePaymentMethod	No Access	32	--
API Protection Policies	ApiProtectionPolicy	No Access	--	--
Api Protection Policy Change Events	ApiPrctPolicyChangeEvent	No Access	--	--
App Analytics Query Requests	AppAnalyticsQueryRequest	No Access	--	--
Application Usage Assignments	AppUsageAssignment	No Access	--	--
Appointment Categories	AppointmentCateorv	No Access	4	--

2.4 Check the boxes for:

- Read
- View All Records
- View All Fields



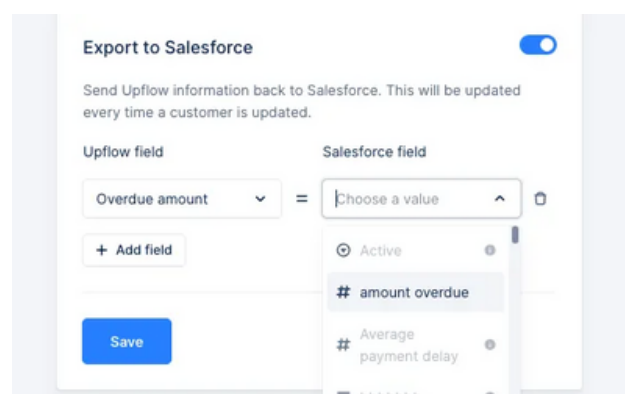
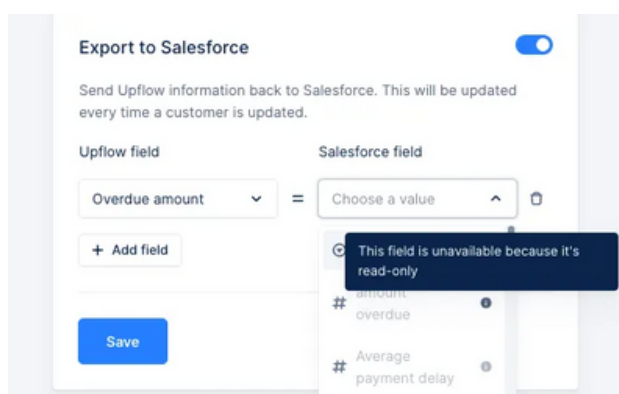
2.5 (Optional): If you also want to export Upflow customers' fields to the Salesforce accounts' fields, check the box for:

- Edit

Learn more: [Export Upflow data to Salesforce](#)

Export feature - Setup note

If you want to use the export feature, after you have already onboarded on Upflow, update the permission as specified above. Then return to the Upflow CRM settings, wait for 10 minutes, and refresh the page.



Step 3: Configure Object Settings for Contacts

3.1 From the same Object Settings screen (or using the dropdown next to Accounts), select Contacts and click Edit.

3.2 Check the boxes for:

- Read
- View All Records
- View All Fields

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like Setup Home, Salesforce Go, Service Setup Assistant, etc. The main content area is titled 'Permission Sets' and shows the configuration for 'Upflow Permissions'. The 'Object Permissions' table is as follows:

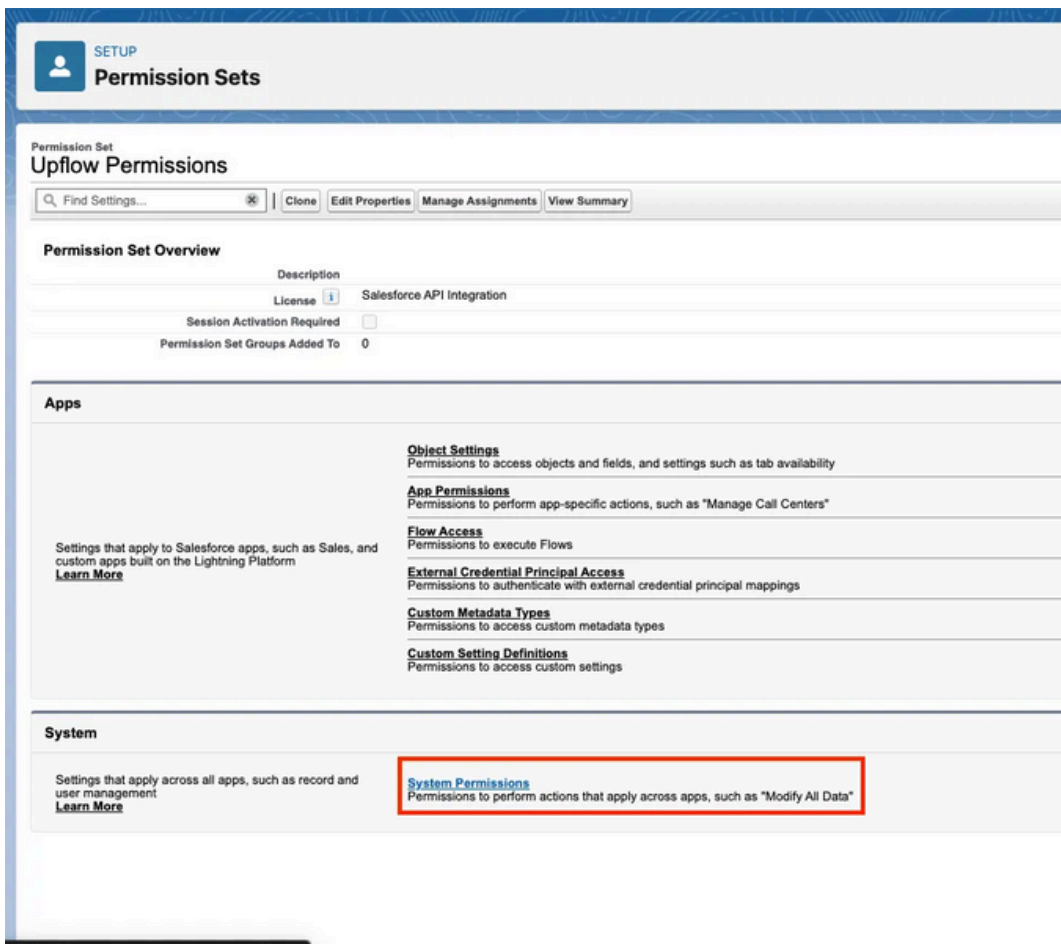
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input checked="" type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input checked="" type="checkbox"/>

The 'Field Permissions' table is as follows:

Field Name	Field API Name	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
Account Name	AccountId	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assistant	AssistantName	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asst. Phone	AssistantPhone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Birthdate	Birthdate	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Buyer Attributes	BuyerAttributes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clean Status	CleanStatus	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	CreatedById	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Creation Source	ContactSource	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data.com Key	Jigsaw	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do Not Call	DoNotCall	<input checked="" type="checkbox"/>	<input type="checkbox"/>

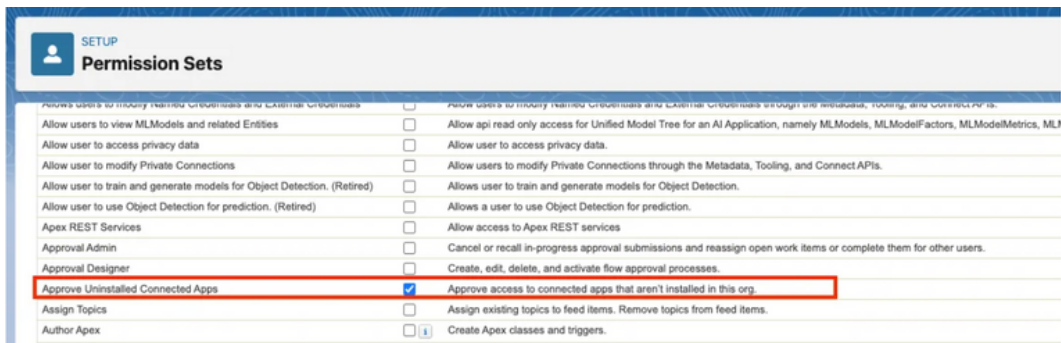
Step 4: Configure the “Approved Uninstalled Connected App” permission

4.1 From the Permission Set created Step 1, click on System Permissions



4.2 Check the boxes for:

- Approved Uninstalled Connected App



4.3 Save the permissions

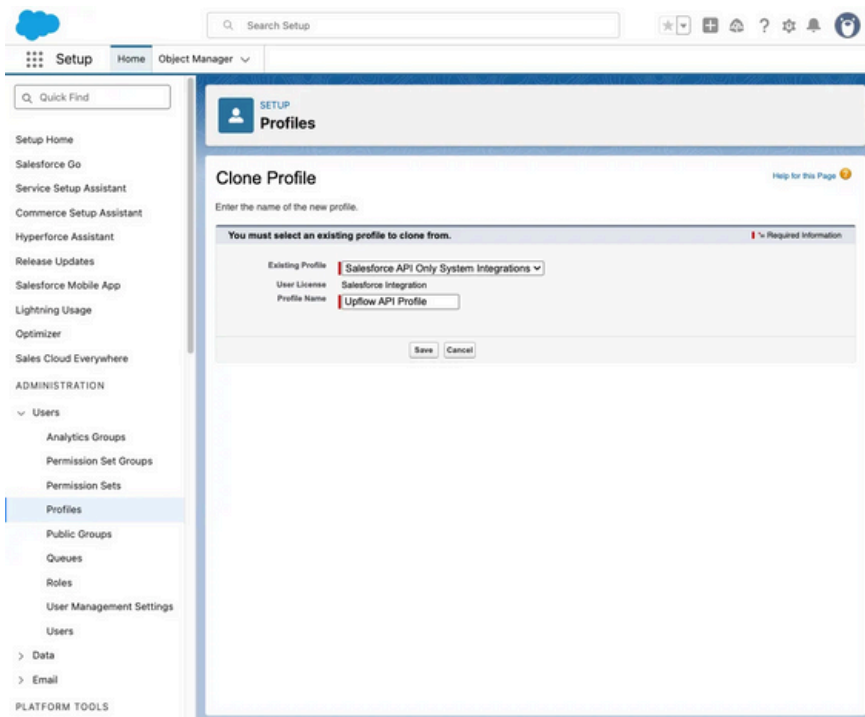
Step 5: Create a Profile

5.1 In Setup, search for Profiles.

5.2 Click New Profile.

5.3 Clone an existing profile, but assign it the license Salesforce Integration.

5.4 Save the profile.



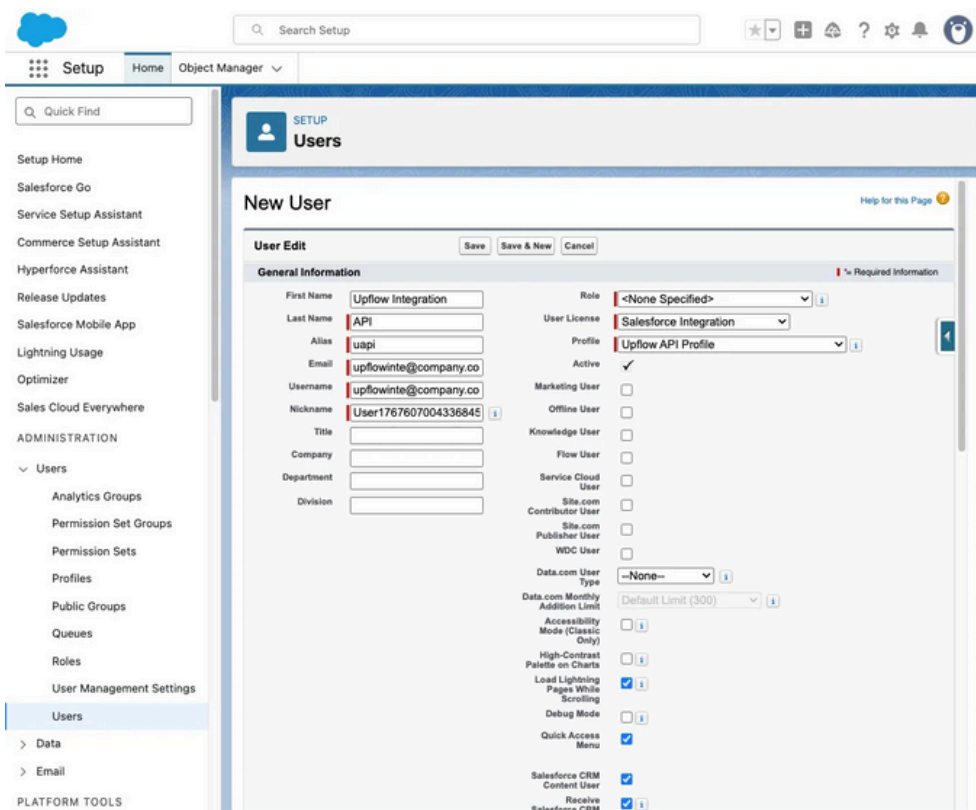
Step 6: Create an Integration User

6.1 In Setup, search for Users and click New User.

6.2 Assign the Profile created in Step 4.

6.3 Enter a valid email address that you can access.

6.4 Save the user.



6.5 After saving, click Reset Password to assign a password to the user.

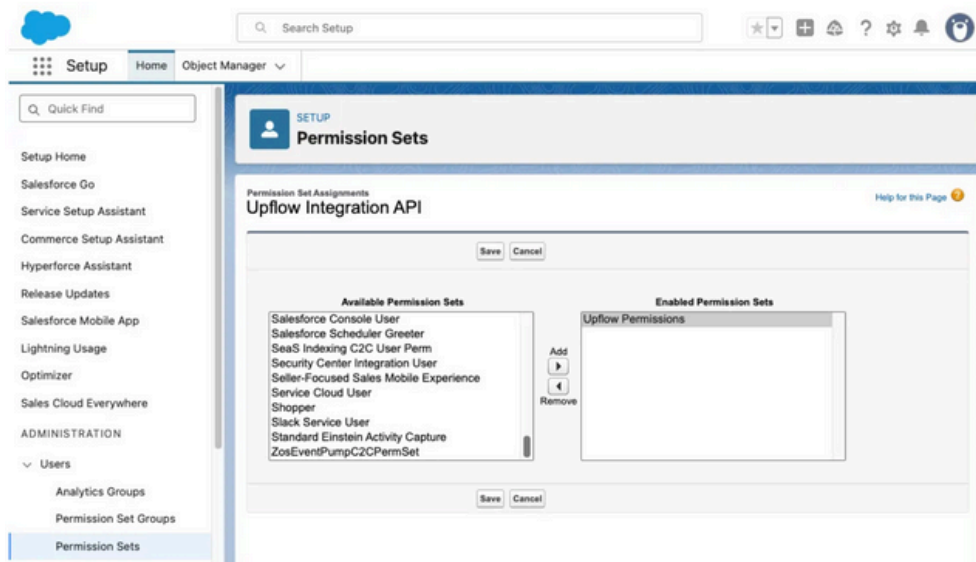
6.6 On the user info page, scroll down and assign the Permission Set created in Step 1.

The screenshot shows the Salesforce Setup interface for a user named 'Upflow Integration API'. The user is active and has the role of 'Salesforce Integration'. The user detail table includes the following information:

User Detail	
Name	Upflow Integration API
Alias	uspi
Email	integrations+sfakeuser@upflow.io [Verified]
Username	integrations+sfakeuser@upflow.io
Nickname	User17676070043368452770
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+01:00) Central European Standard Time (Europe/Paris)
Locale	English (United States)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	
Security Key (U2F or WebAuthn)	
Lightning Login	
Temporary Verification	
Role	Salesforce Integration
User License	Salesforce Integration
Profile	Upflow API Profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	i
Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Debug Mode	<input type="checkbox"/> i
High-Contrast Palette on Charts	<input type="checkbox"/> i
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
Salesforce CRM Content User	<input checked="" type="checkbox"/>
Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Allow Forecasting	<input type="checkbox"/>

The screenshot shows the 'Permission Set Assignments' section for the user 'Upflow Integration API'. The section is highlighted with a red box and contains the following information:

Permission Set Assignments	Edit Assignments	Permission Set Assignments Help
No records to display		
Permission Set Assignments: Activation Required	Edit Assignments	Permission Set Assignments: Activation Required Help
No records to display		
Permission Set Group Assignments	Edit Assignments	Permission Set Group Assignments Help
No records to display		
Permission Set License Assignments	Edit Assignments	Permission Set License Assignments Help
No records to display		
Personal Groups	New Group	Personal Groups Help
No personal groups specified		
Public Group Membership	New Group	Public Group Membership Help
No records to display		
Queue Membership	New Queue	Queue Membership Help
No records to display		
Team		
No records to display		
Managers in the Role Hierarchy		Managers in the Role Hierarchy Help
No records to display		



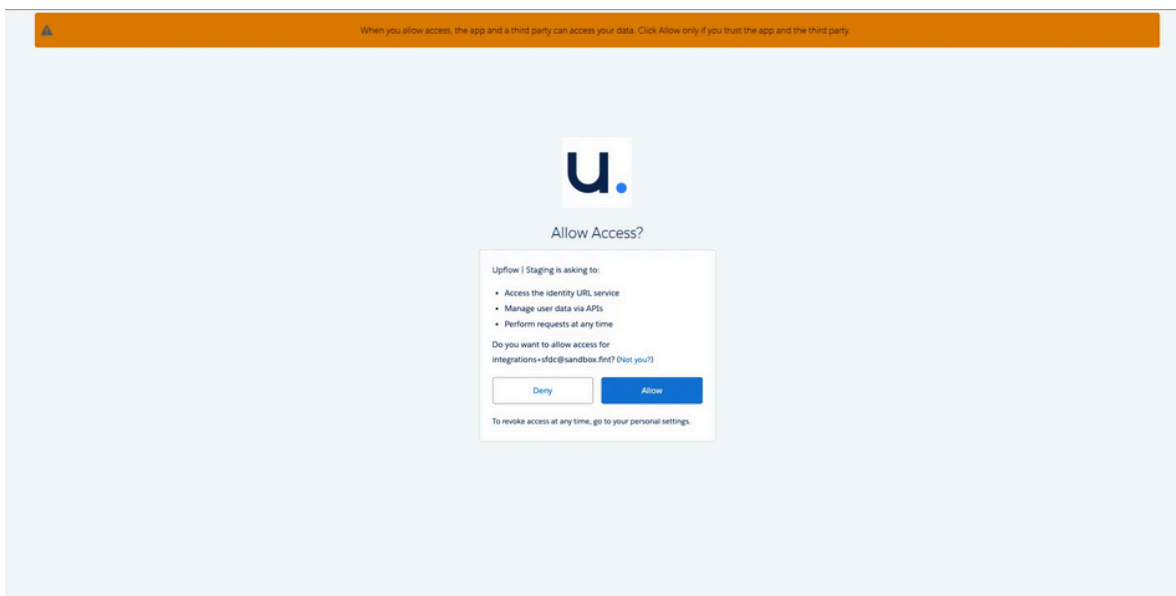
Step 7: Connect Upflow to Salesforce

7.1 On Upflow, in Settings > CRM, click on connect.

7.2 Fill your Salesforce domain name

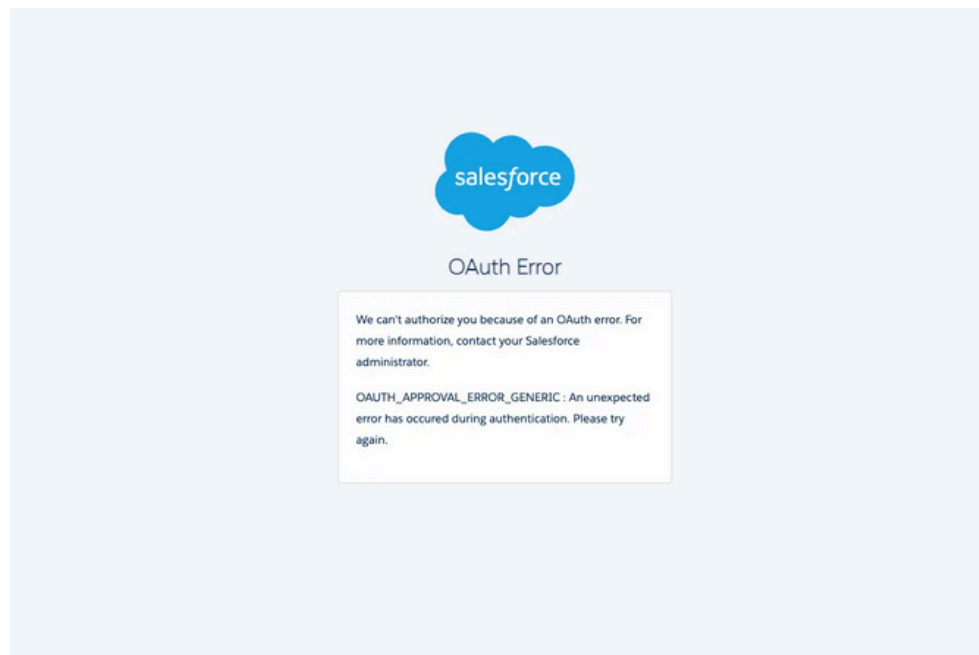
7.3 Login using the user you just created

7.4 Accept the permission asked by the Upflow App



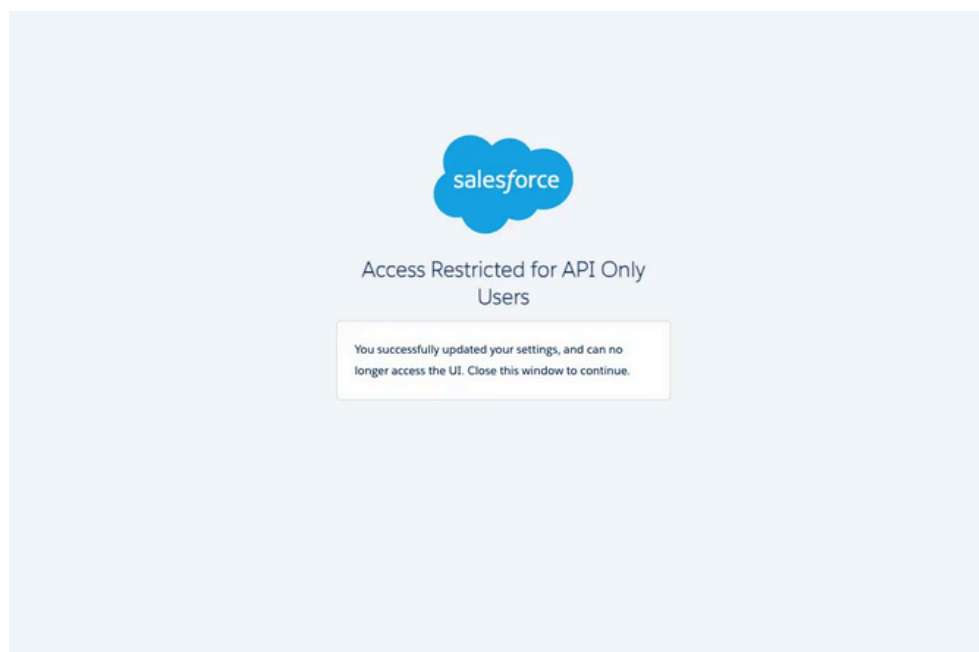
Potential Errors

OAUTH_APPROVAL_ERROR_GENERIC



Solution: You should go to the “Connected Apps OAuth Usage” page of your Salesforce account. Then install the connected app. This is not suppose to happen, except if you skipped Step 4 above.

Access Restricted for API Only Users



It can happen if you go back to your Salesforce account, after login the **Upflow Integration API** during the Upflow onboarding. You must then logout from Salesforce, and re-login again with the proper credentials.

Useful documentation:

<https://help.salesforce.com/s/articleView?id=005132365&type=1>