STEP-BY-STEP GUIDE

Upflow/Salesforce - Permissions Setup

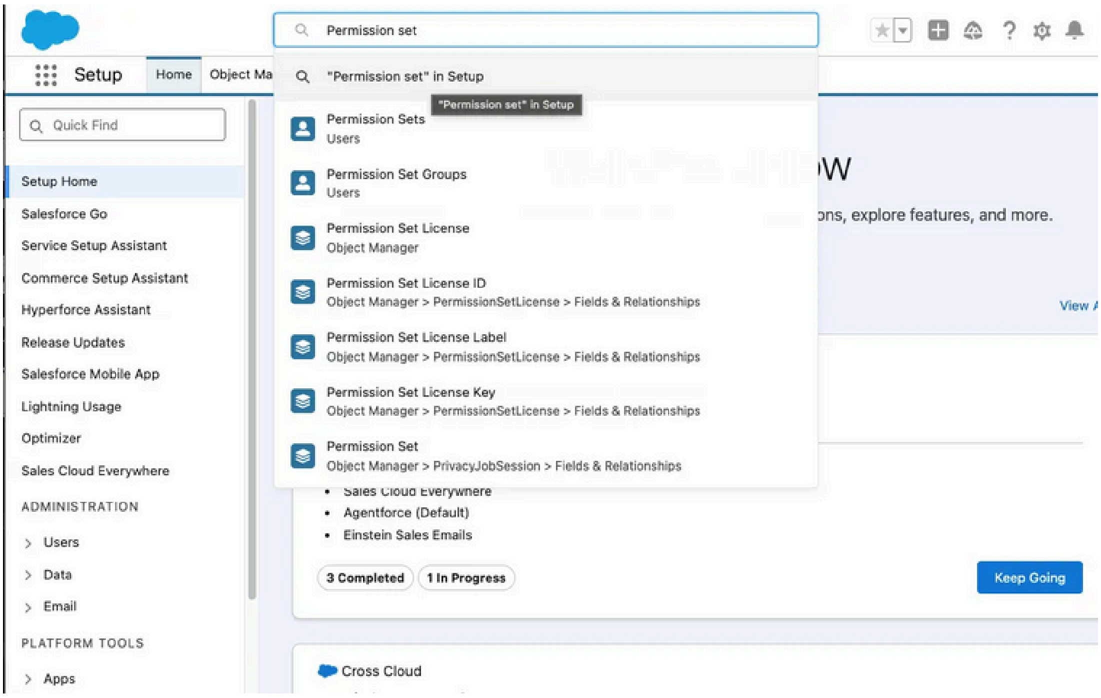
Upflow connects to Salesforce via an API user with the correct permissions. This setup ensures that Upflow can securely read the customer and account information needed for your organization, without giving full Admin access.

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.

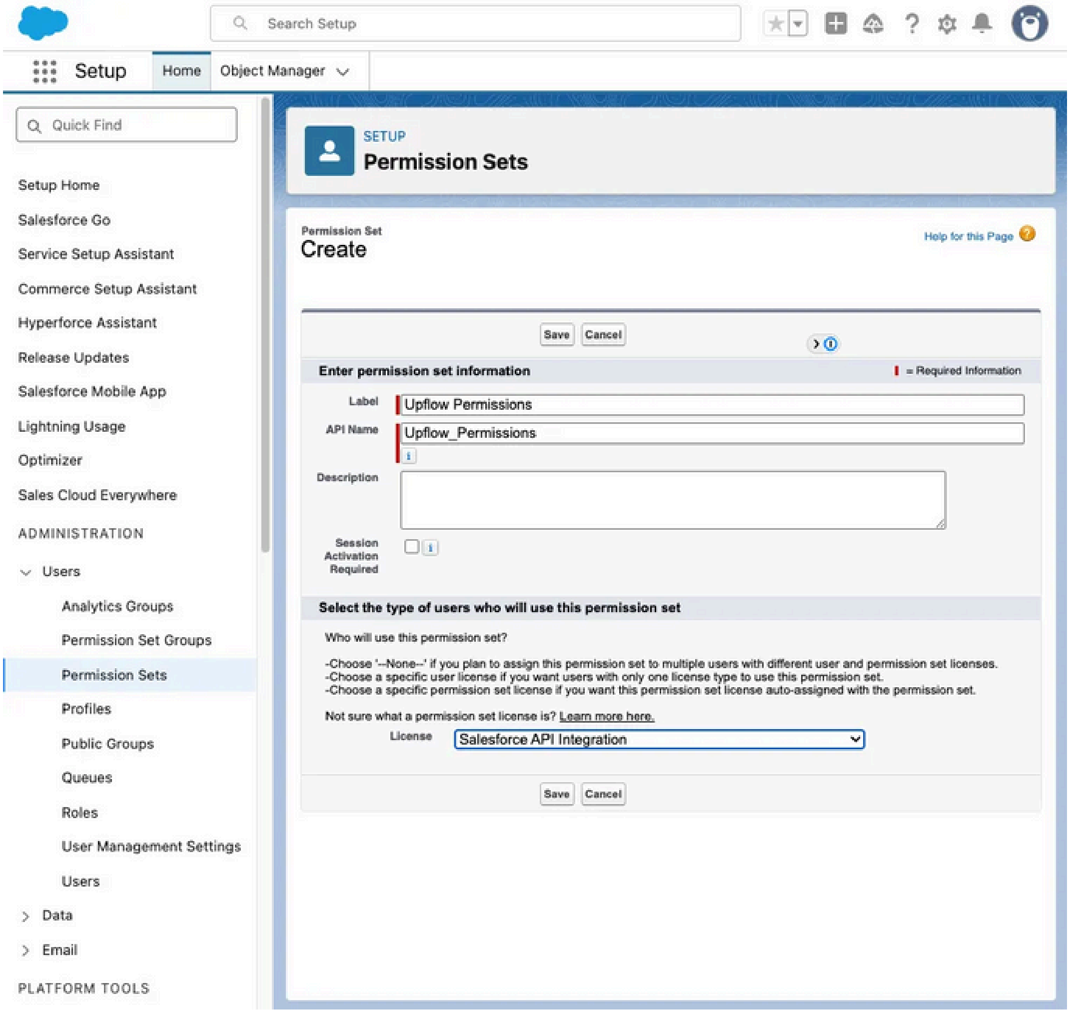


1.3 Click New to create a new Permission Set.

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

1.5 For User License, select Salesforce API Integration.

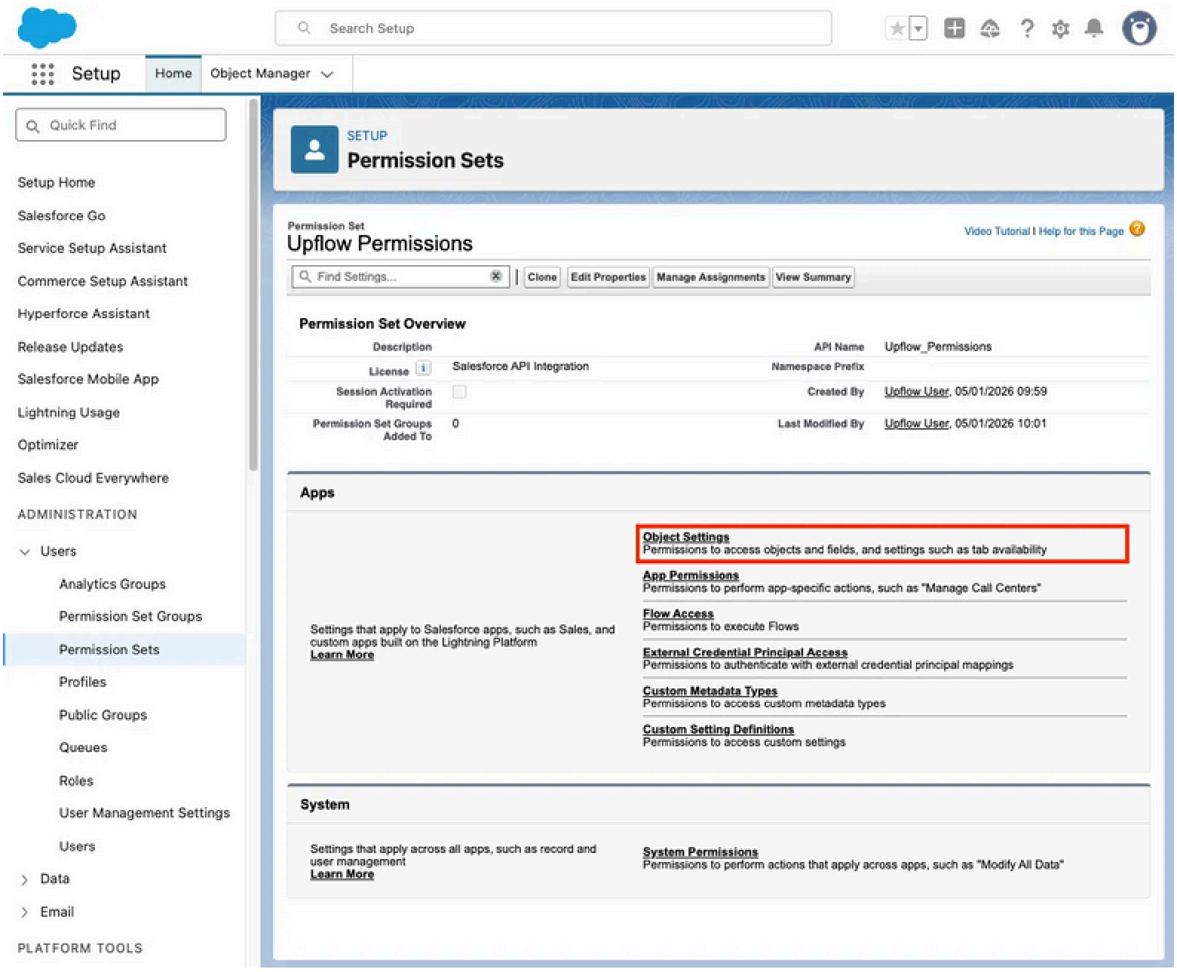
1.5 Click Save.



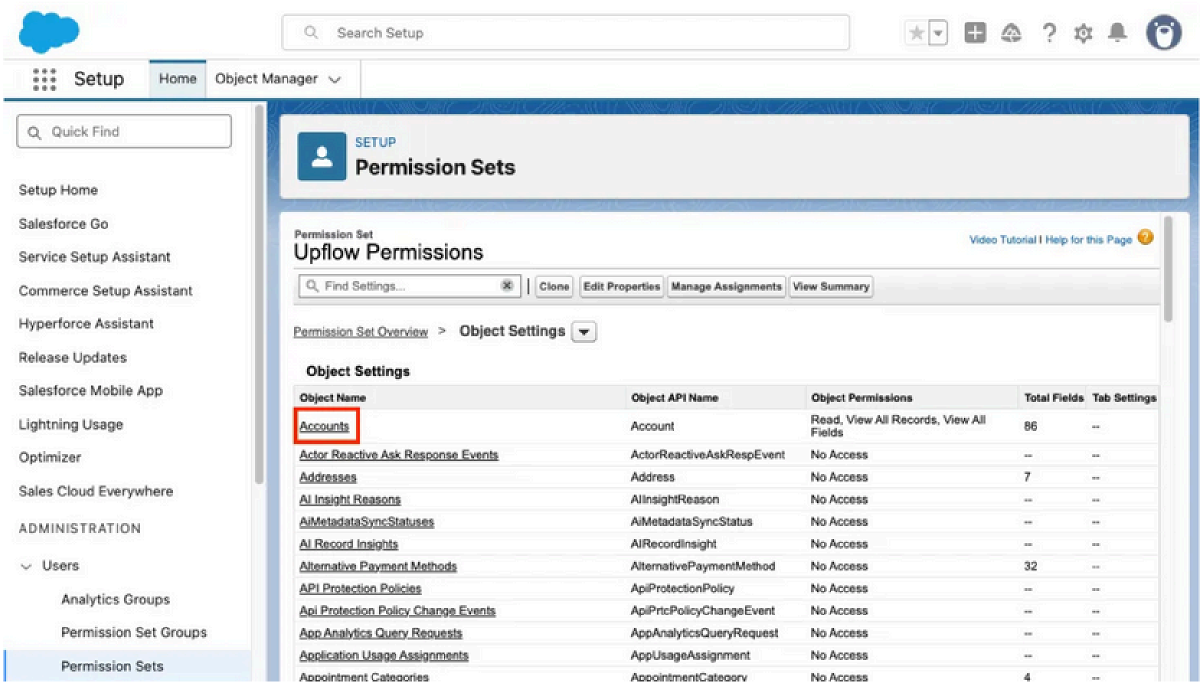
Step 2: Configure Object Settings for Accounts

2.1 Open the Permission Set you just created.

2.2 Go to Object Settings.

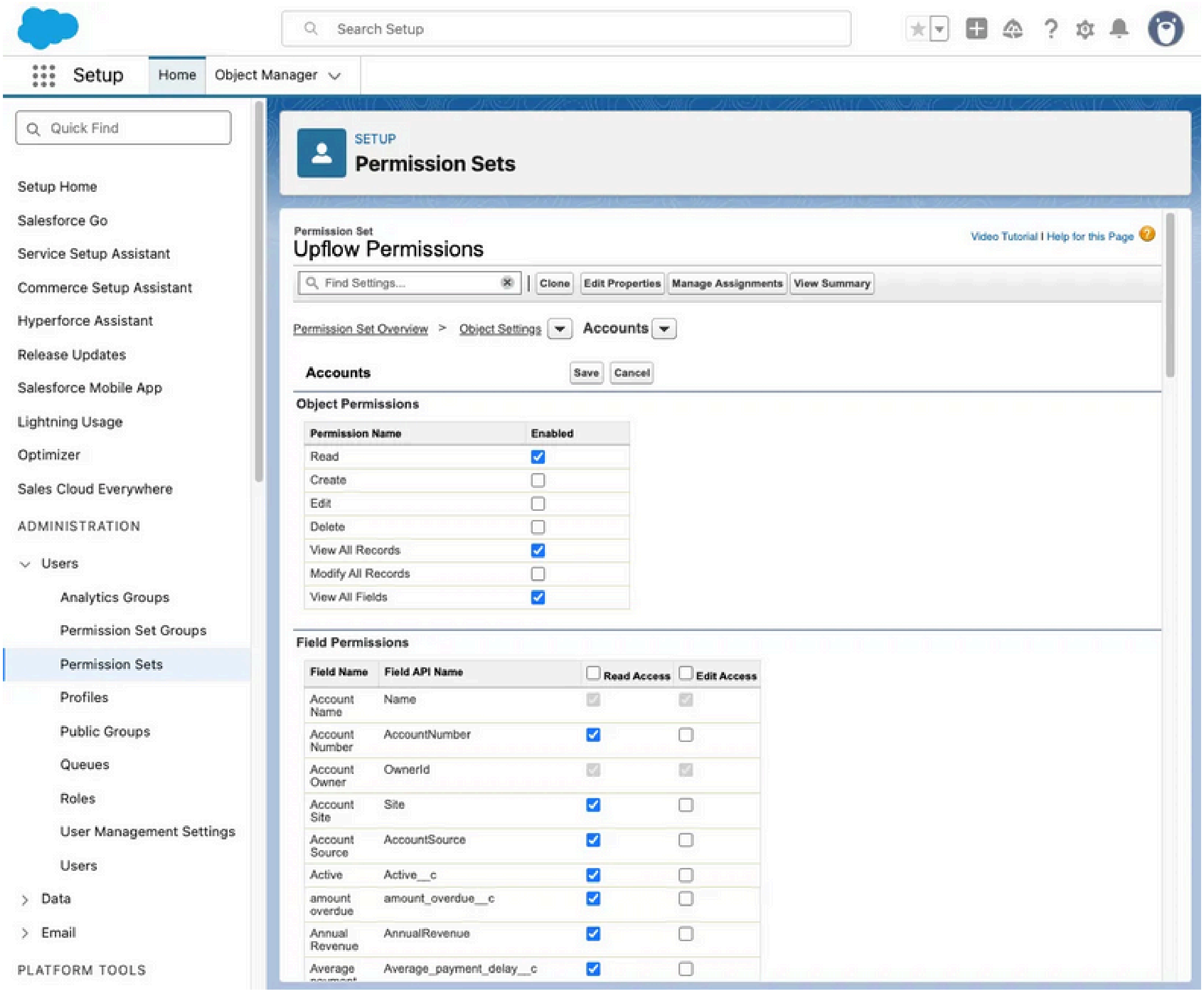


2.3 Find Accounts and click Edit.



2.4 Check the boxes for:

- Read
- View All Records
- View All Fields



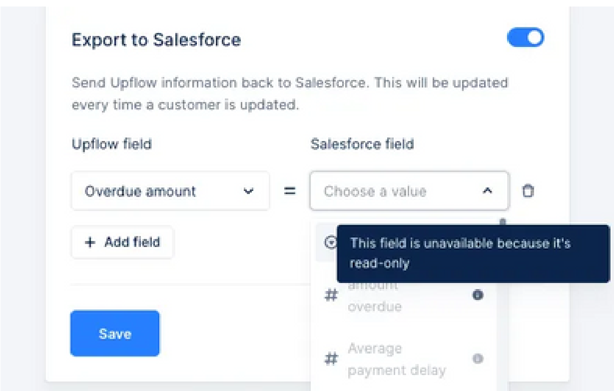
2.5 (Optional): If you also want to export Upflow customers' fields to the Salesforce accounts' fields, check the box for:

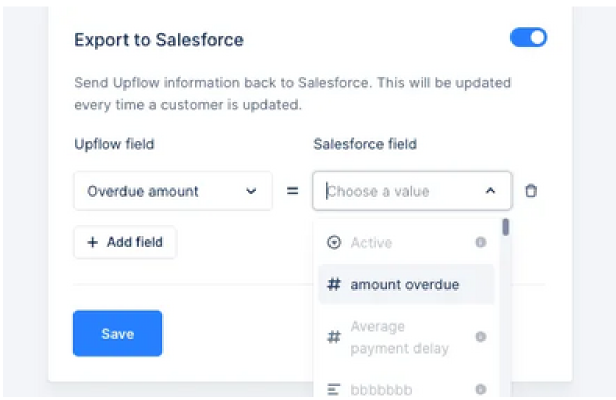
- Edit

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.



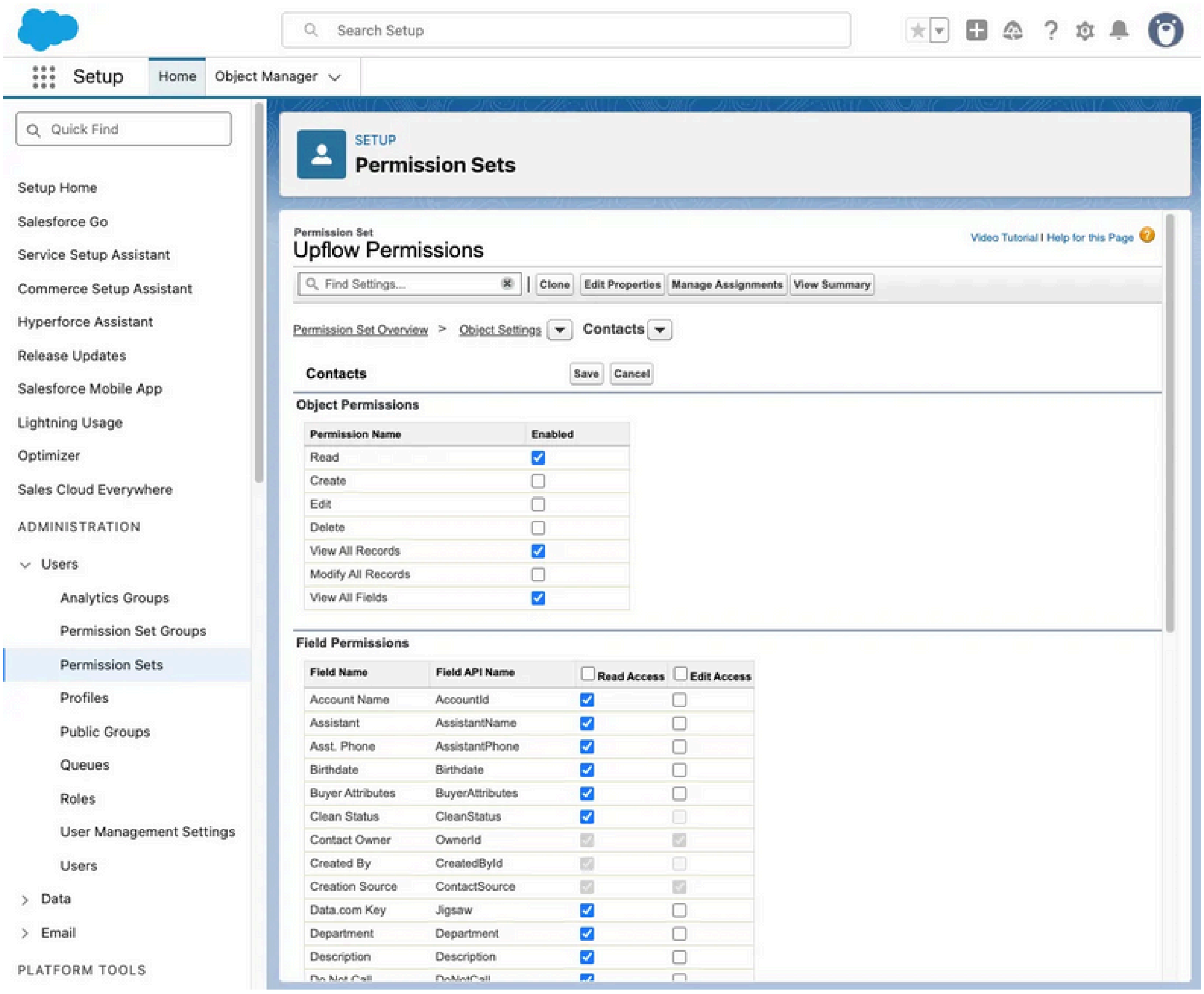


Step 3: Configure Object Settings for Contacts

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

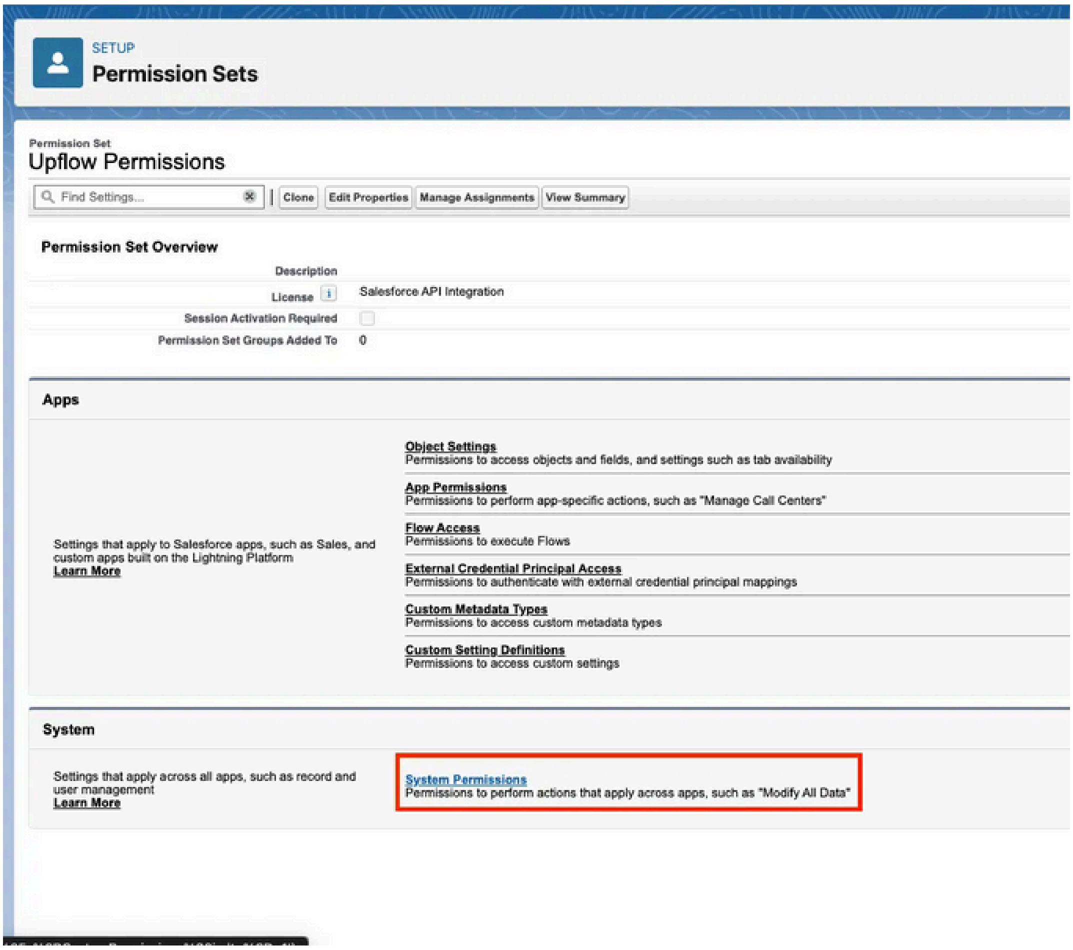
3.2 Check the boxes for:

- Read
- View All Records
- View All Fields



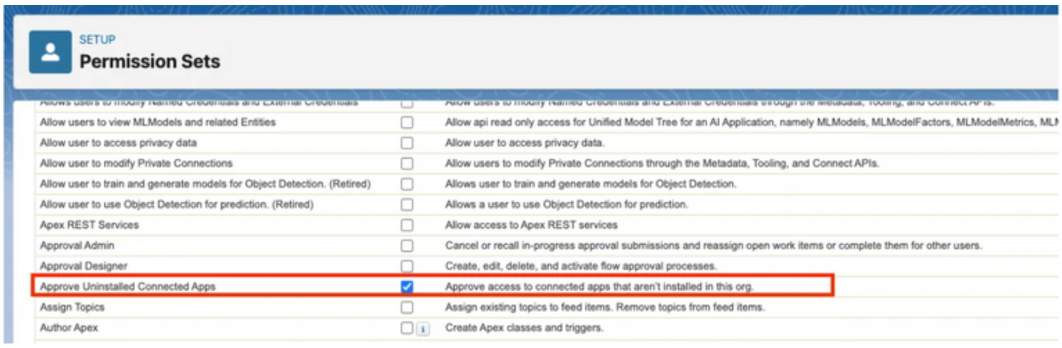
Step 4: Configure the “Approved Uninstalled Connected App” permission

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

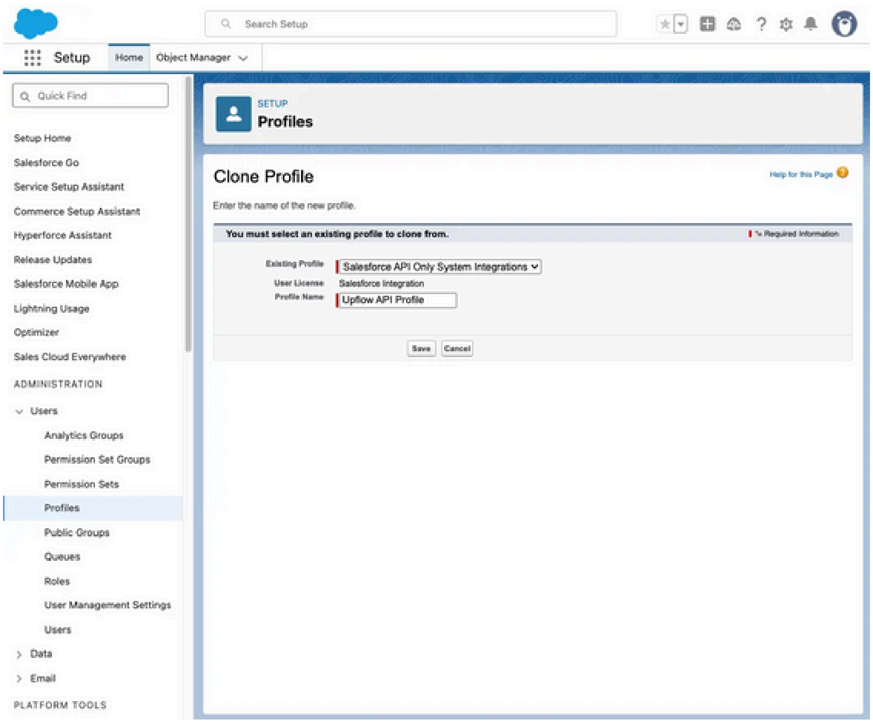
Step 5: Create a Profile

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.



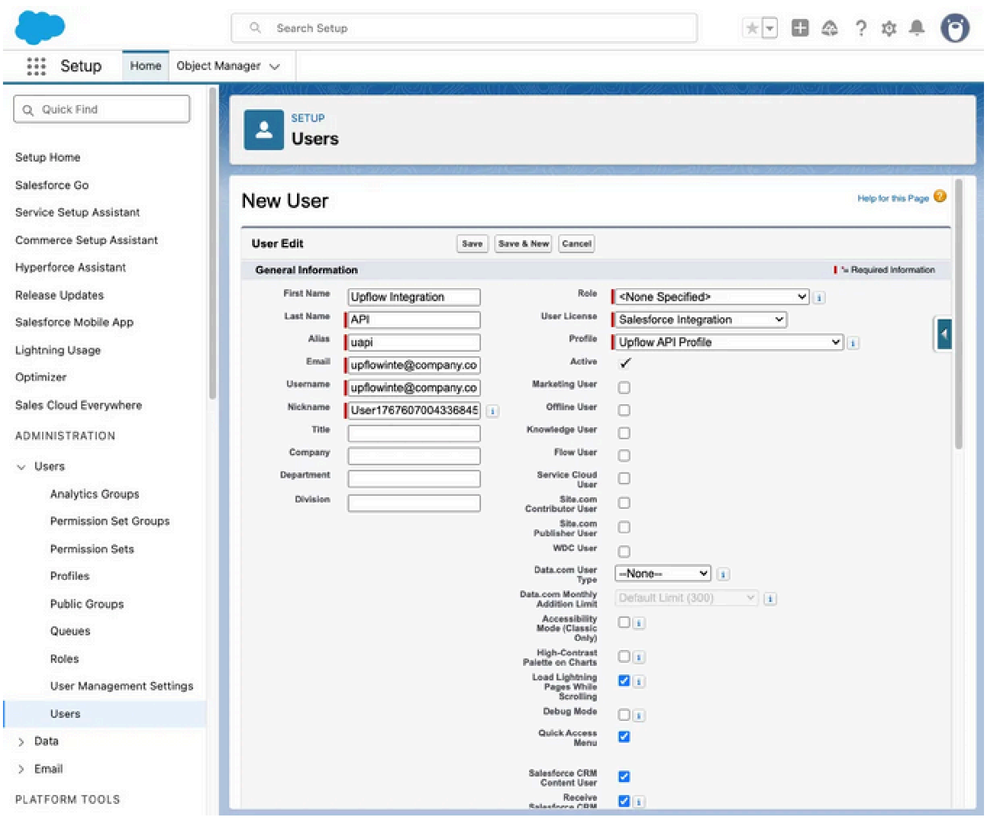
Step 6: Create an Integration User

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

6.2 Assign the Profile created in Step 4.

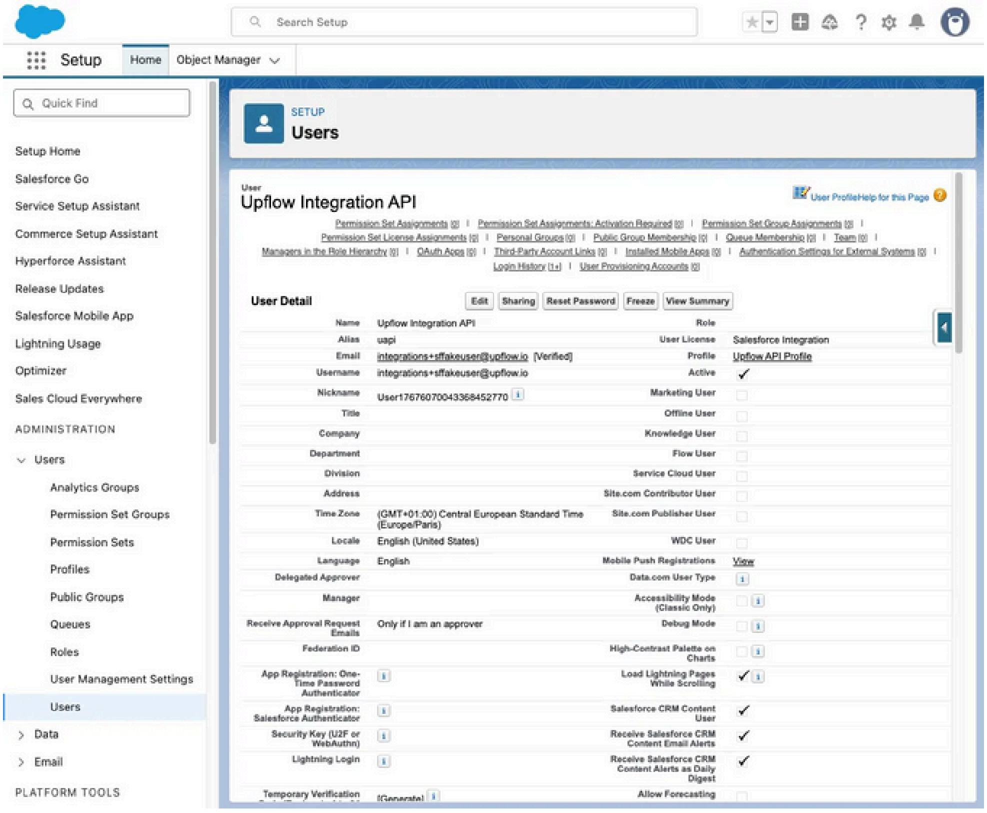
6.3 Enter a valid email address that you can access.

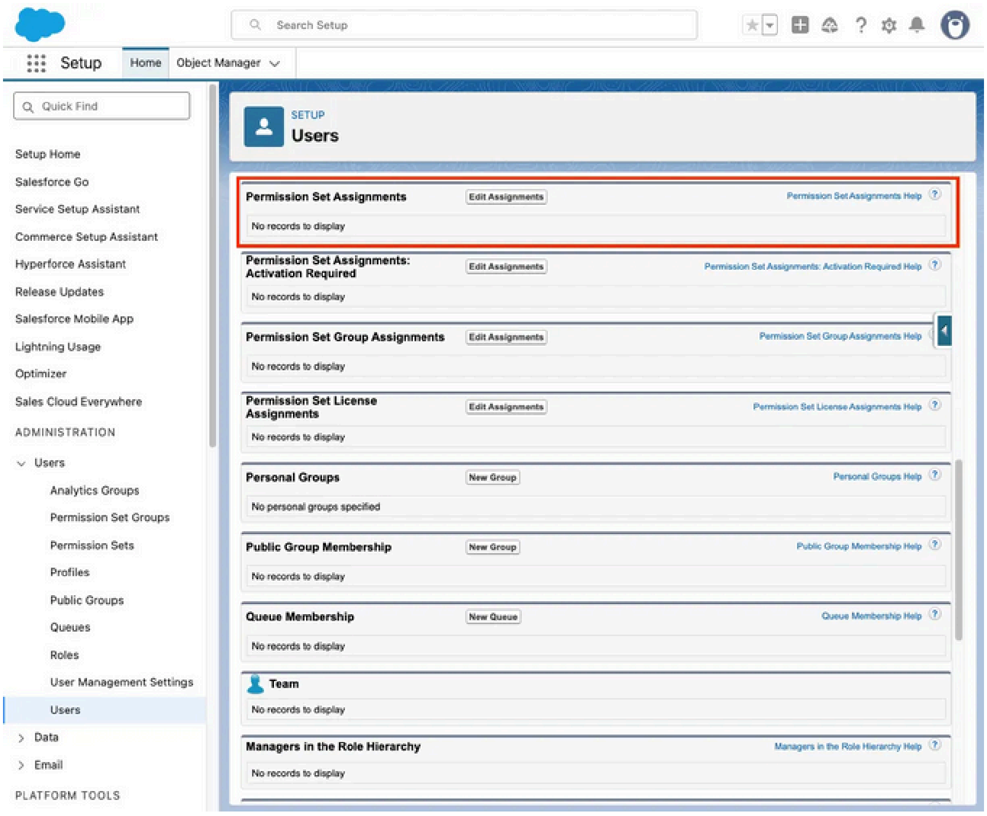
6.4 Save the user.

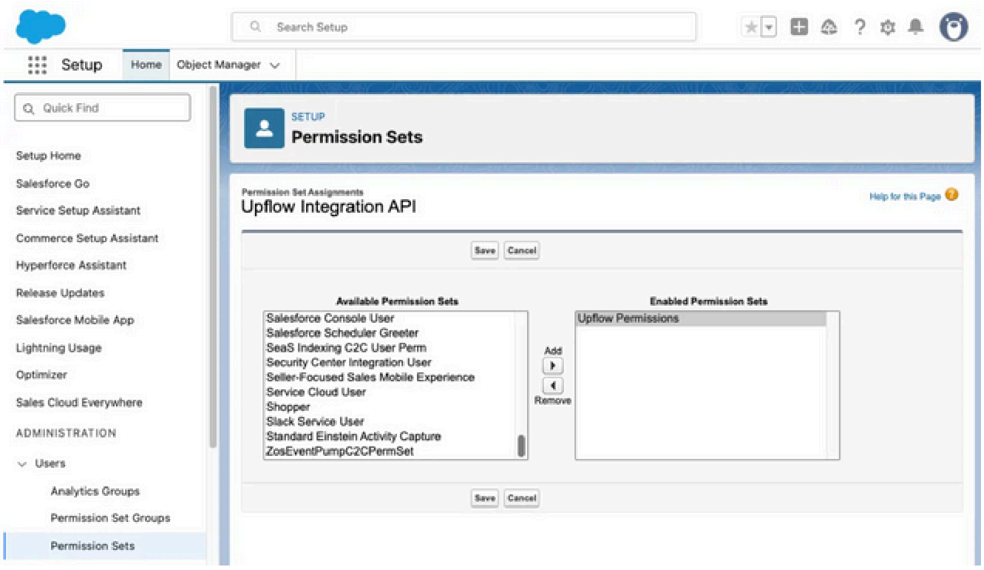


6.5 After saving, click Reset Password to assign a password to the user.

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







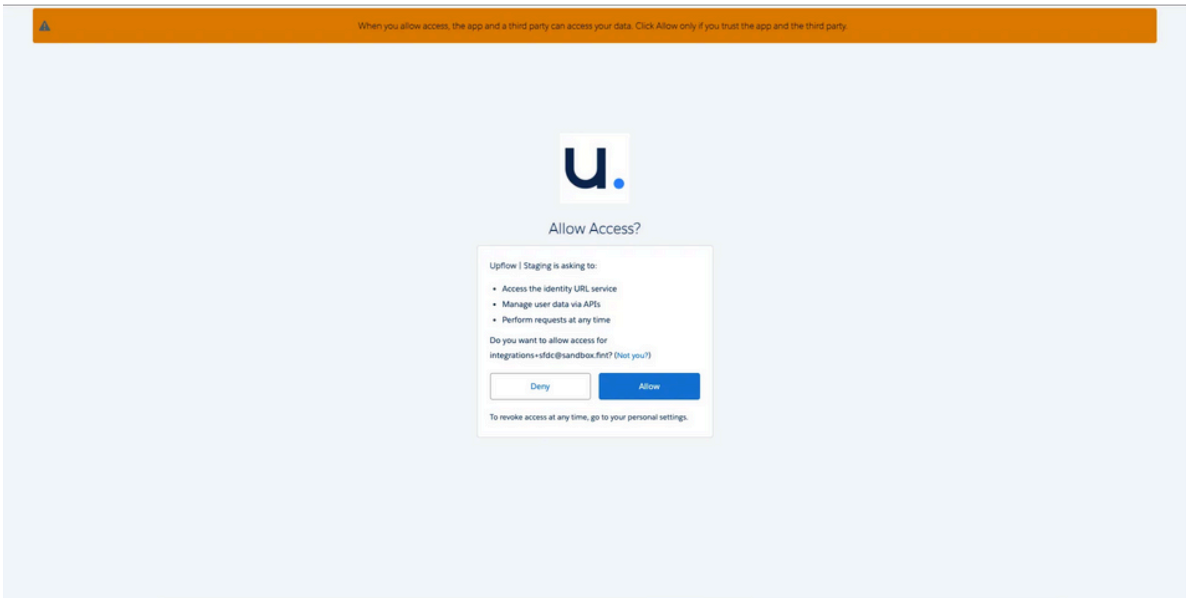
Step 7: Connect Upflow to Salesforce

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

7.2 Fill your Salesforce domain name

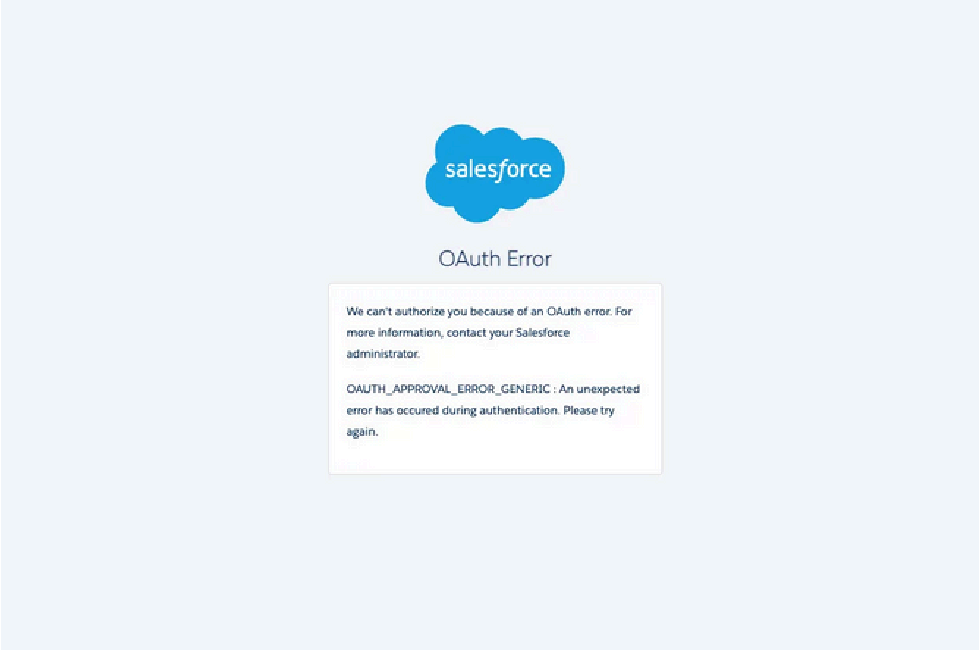
7.3 Login using the user you just created

7.4 Accept the permission asked by the Upflow App



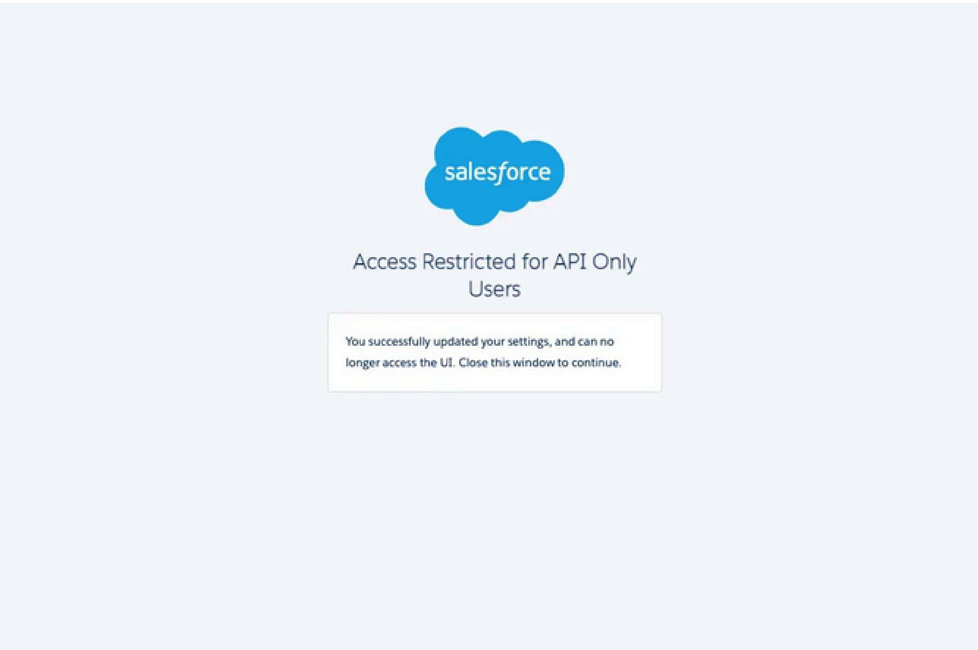
Potential Errors

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