

# How to Connect Salesforce CRM to Digioh

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## What You'll Learn in This Article

By following this guide, you'll gain the confidence and clarity to successfully connect your Salesforce CRM with Digioh using Digioh Connect. You'll learn how to create a Salesforce Connected App, securely link it to Digioh, and authenticate the integration—all essential steps for syncing and automating your CRM workflows.

Connecting Salesforce CRM to Digioh allows a variety of integration scenarios using our Digioh Connect platform. You can query Salesforce, update records, sync data with other systems, and many other use cases.

## Step 1: Create a New Salesforce Connected App

Create a Salesforce Sales Cloud Connected App using [the steps provided by Salesforce here](#).

Here are the primary steps from that page:

1. From **Setup**, enter "Apps" in the Quick Find campaign, and select **App Manager**.
2. Click **New Connected App**.
3. Fill out all of the required information.

Here is an example of how to fill in the information:

Save Cancel

Basic Information

Connected App Name: Digioh Connect 2  
API Name: Digioh\_Connect\_2  
Contact Email: connect@digioh.com  
Contact Phone:   
Logo Image URL:   
Icon URL:   
Info URL:   
Description:   
Required Information

API (Enable OAuth Settings)

Enable OAuth Settings:   
Enable for Device Flow:   
Callback URL: https://account.digioh.com/Integration/SalesforceOAuthCallback  
Use digital signatures:   
Selected OAuth Scopes: Available OAuth Scopes (Access Analytics REST API Charts Geodata resources (eclair\_api), Access Analytics REST API resources (wave\_api), Access Connect REST API resources (chatter\_api), Access Headless Forgot Password API (forgot\_password), Access Headless Registration API (user\_registration\_api), Access Interaction API resources (interaction\_api), Access Lightning applications (lightning), Access Visualforce applications (visualforce), Access all Data Cloud API resources (cdp\_api), Access chatbot services (chatbot\_api)), Selected OAuth Scopes (Manage user data via APIs (api), Perform requests at any time (refresh\_token, offline\_access))  
Require Secret for Web Server Flow:   
Require Secret for Refresh Token Flow:

For Connected App Name and API Name, just enter: Digioh

For Contact Email, use: [your company name]@digioh.com

Select the "Enable OAuth Settings" checkbox.

Select the "Enable for Device Flow" checkbox.

Select the "Require Secret for Web Server Flow" checkbox.

For a "Callback URL" use this: [https://account.digioh.com/ Integration/SalesforceOAuthCallback](https://account.digioh.com/Integration/SalesforceOAuthCallback)

For permissions/scopes, we would need: -api -refresh\_token, offline\_access

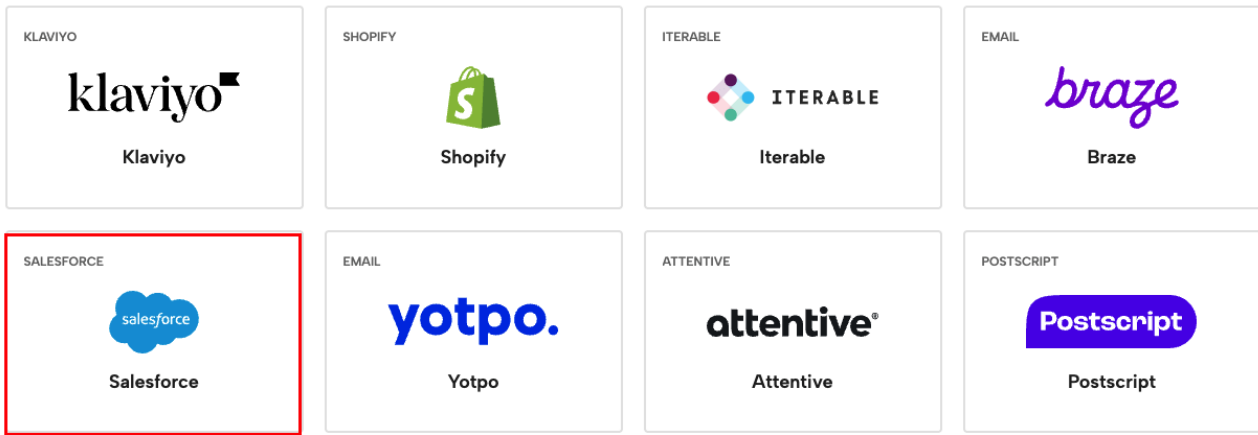
For this app, it doesn't matter what you select for "Introspect all Tokens" checkbox, and you can just leave the other checkboxes unchecked. It also doesn't matter what you enter in the other sections below the API section.

## Step 2: Add Your Salesforce CRM Integration to Digioh

In a new Tab, open your Digioh Account, go to Integrations, select "Salesforce" and enter your API Endpoint URL, Domain, Consumer Key, Consumer Secret, and Scopes.

## All Integrations

🔍 Search integrations...



The Consumer Key and Consumer Secrets can be found by clicking "Manage Consumer Details" from your new connected app.

Here are the fields we need to enter in Digioh for the Sales Cloud integration:

### Salesforce Integration

**API Endpoint URL**

https://[your salesforce domain].my.salesforce.com

**Domain**

[your salesforce domain]

**Consumer Key**

Ex: 3MVG9LBJLApeX\_PBKH8fvI5jF1U3Pq5zzJKMLKGIFPtePw3LKvHO4e3NB0v9ehjHmLZ357W\_wjqRE5whezH2K

**Consumer Secret**

Ex: 7F0E387EB815C7313E21EFDEEA50EC2AB61B135FF64ECC3727F4421EE672A401

**Scopes**

Manage user data via APIs\* (api), Perform requests at any time\* (refresh\_token)

**Instance**

Production (login.salesforce.com)

**API Version**

v55.0

If you are connecting to a sandbox environment:

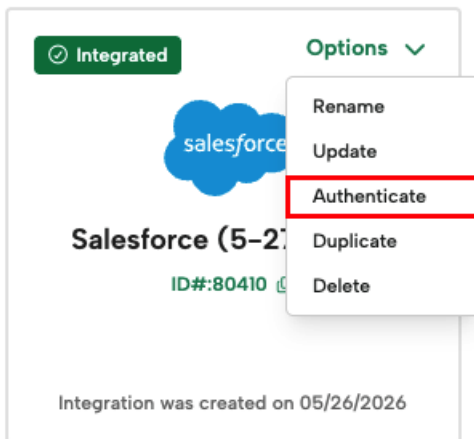
- The Salesforce the API Endpoint should be: **https://[your salesforce domain]--[the sandbox name].sandbox.my.salesforce.com**
- The Instance should be set to: **Sandbox (test.salesforce.com)**

## Step 3: Authenticate the Connection

After saving the connection information you will need to Authenticate the connection using a

Salesforce account with the appropriate permissions. We recommend a Salesforce user account that is not an individual so the integration isn't tied to an individual and the access is siloed within that account. An existing account used for API integrations or a new account named "Digioh" with permissions to access the API would be preferred.

From the Integration List click "Authenticate" on the integration you have just configured:



This will prompt you to login to salesforce if not already logged in. Then it will ask you to approve the app.



## Allow Access?

**Digioh Connect 2** is asking to:

- Access the identity URL service
- Manage user data via APIs
- Perform requests at any time

Do you want to allow access for `brian@digioh.com`?

(Not you?)

Deny

Allow

To revoke access at any time, go to your personal settings.

After clicking "Allow" your browser will redirect back to Digioh which will establish the access tokens needed for communication and you should receive a success message at the top of the screen.

If you need help integrating your Salesforce Sales Cloud instance with Digioh, please [contact us](#), and our team will be happy to help!

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