How to Connect Salesforce CRM to Digioh

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Note: These steps apply whether you're connecting Salesforce to Digioh or to PushPlanet. The process only differs in the Connected App callback URL step, both options are callout below.

What You'll Learn in This Article

This guide walks you through connecting your Salesforce CRM to Digioh or PushPlanet. You'll create a Salesforce Connected App, link it to your account, and authenticate the integration so your CRM data stays in sync.

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.

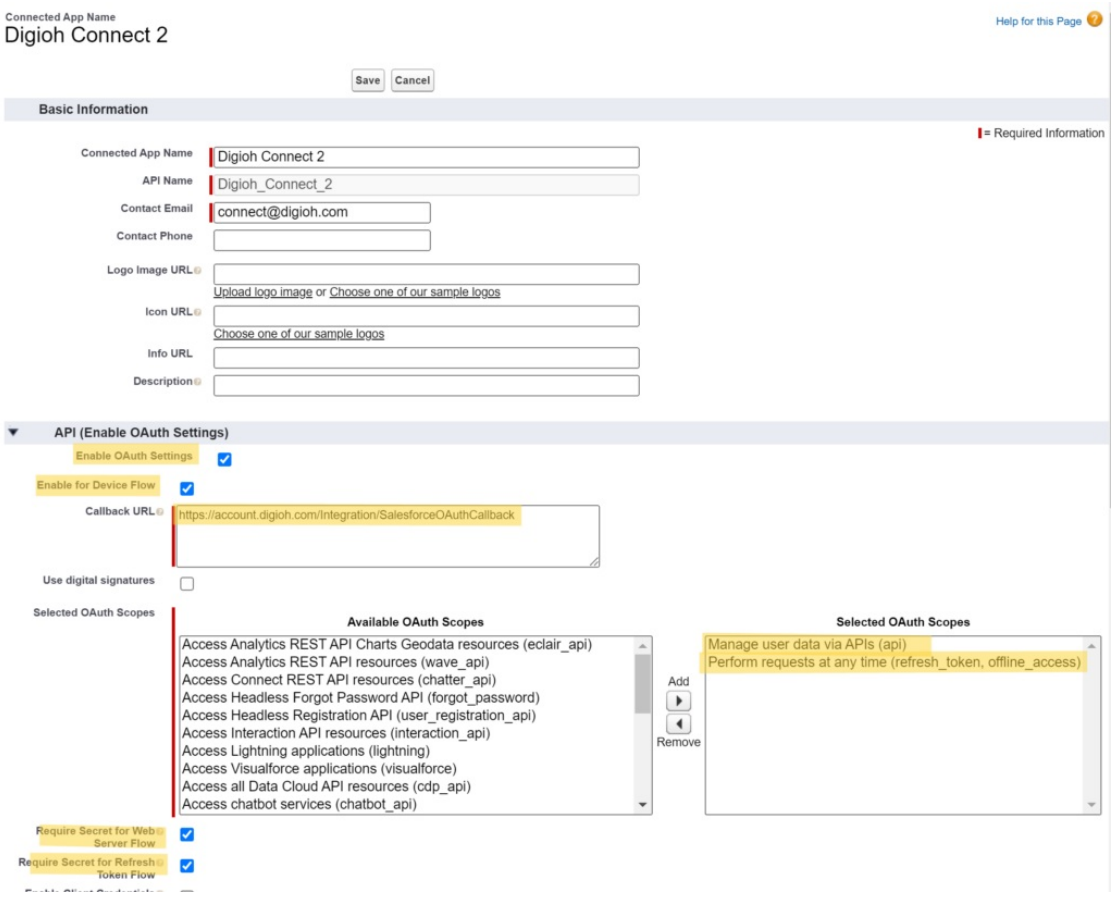
Step 1: Create a New Salesforce Connected App

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:



For Connected App Name and API Name, enter: Digioh (or PushPlanet, if that's the platform you're connecting)

For Contact Email, use: [your company name]@digioh.com, or [your company name]@pushplanet.com if you're connecting through PushPlanet

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 the one that matches your platform:

- **Digioh:** https://account.digioh.com/Integration/SalesforceOAuthCallback
- **PushPlanet:** https://account.pushplanet.com/Integration/SalesforceOAuthCallback

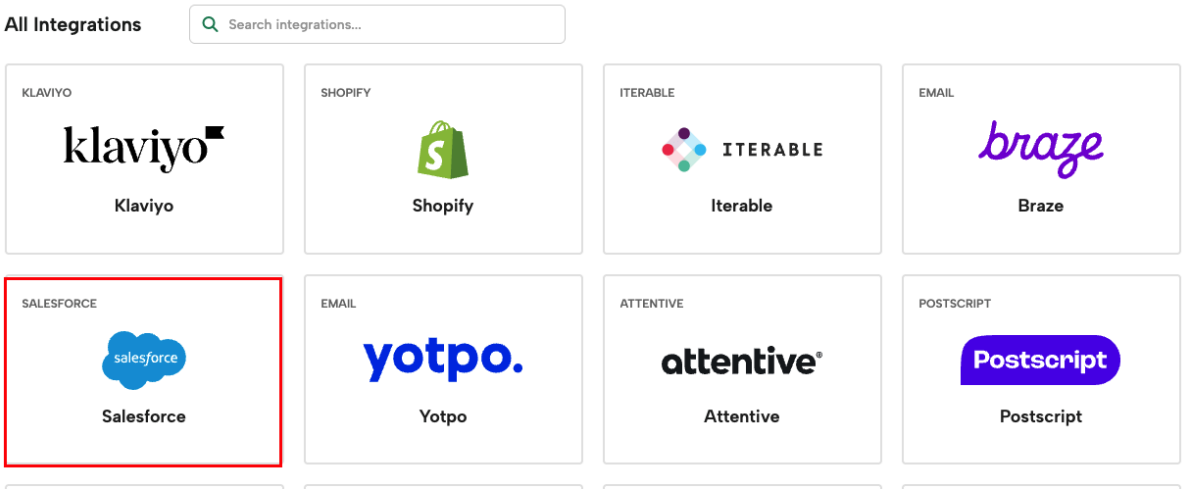
For permissions/scopes, we would need: -api -refresh_token, offline_access

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

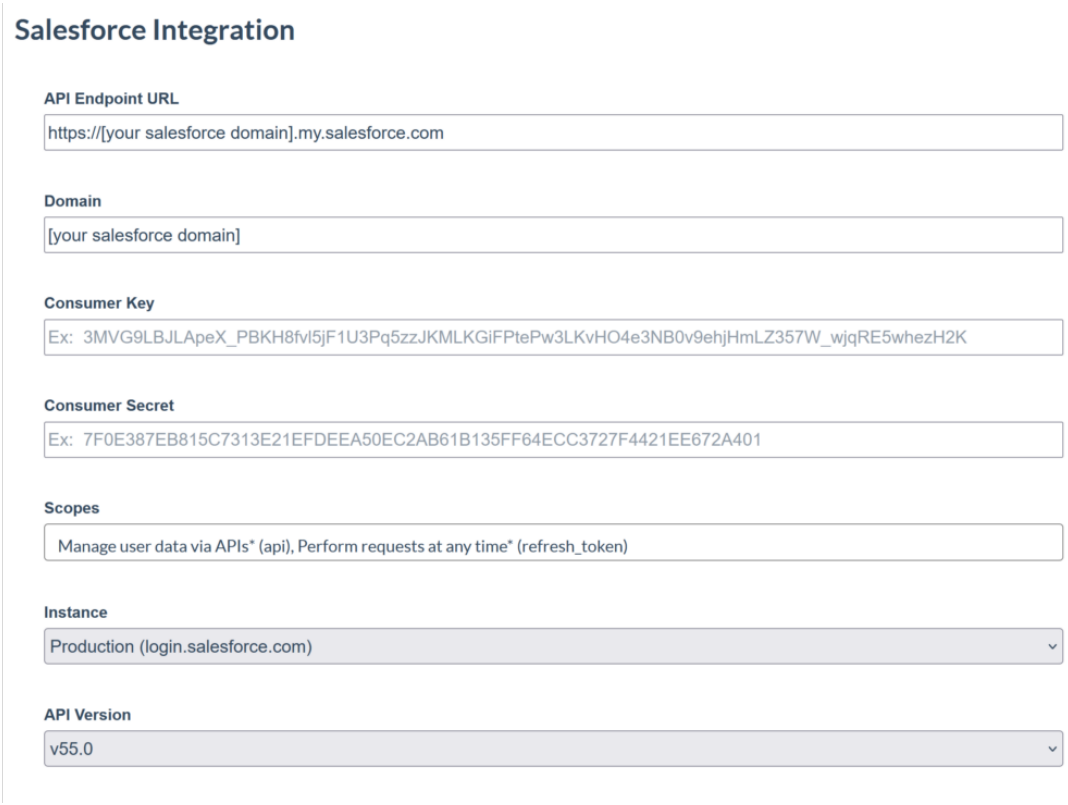
In a new tab, open your Digioh or PushPlanet account, go to **Integrations**, select **Salesforce**, and

enter your API Endpoint URL, Domain, Consumer Key, Consumer Secret, and Scopes.



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:



If you are connecting to a sandbox environment:

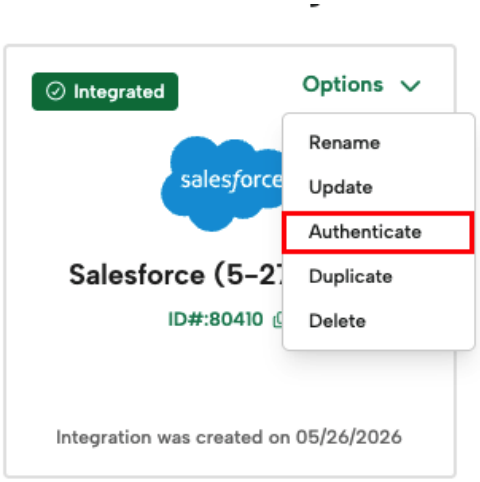
- The Salesforce the API Endpoint should be: **https://[your salesforce domain]--[the sandbox name].sandbox.my.salesforce.com**
- The Instance should be set to: **Sandbox (test.salesforce.com)**

Step 3: Authenticate the Connection

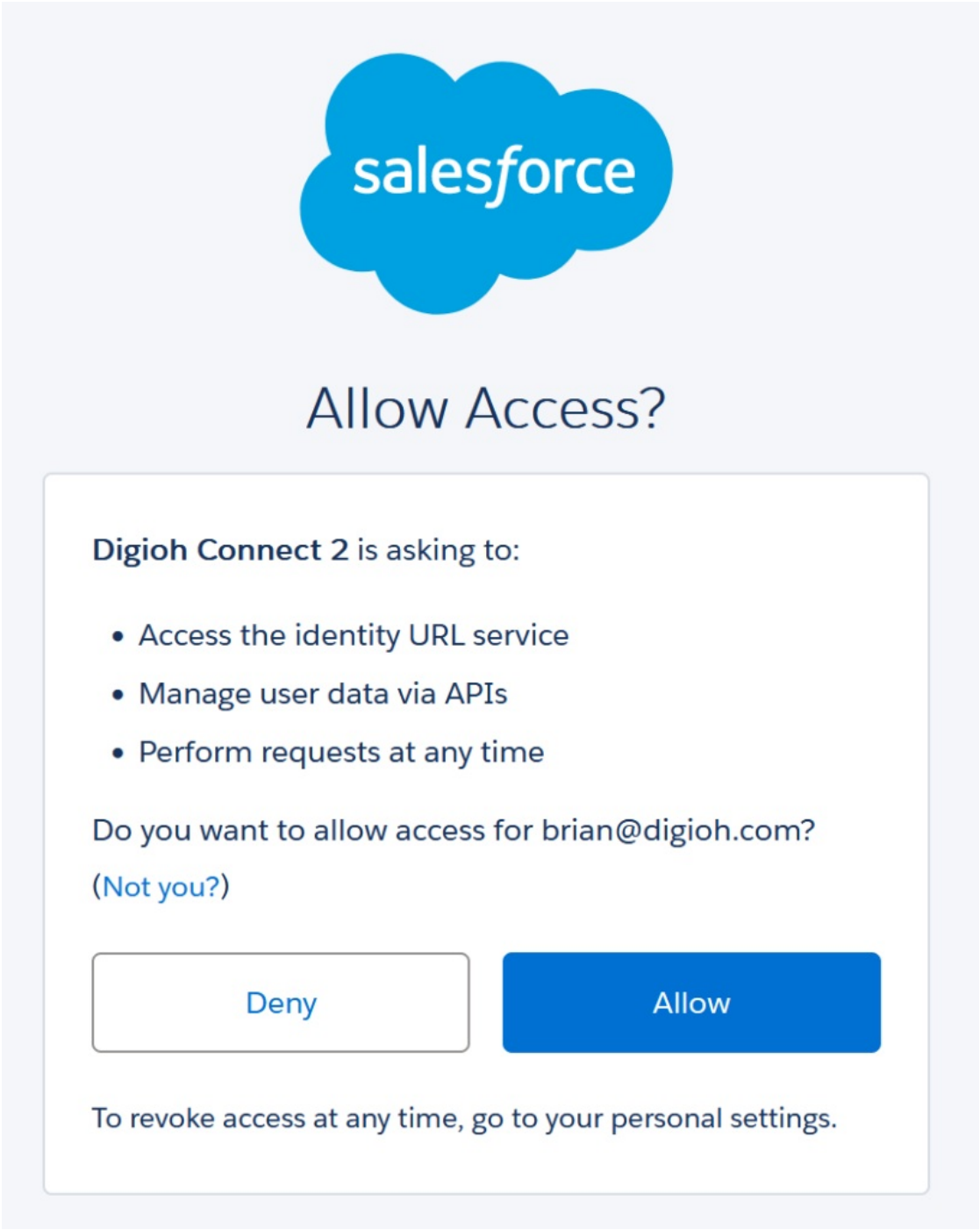
After saving the connection information you will need to Authenticate the connection using a

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.



After clicking **Allow**, your browser redirects back to Digioh or PushPlanet, which establishes the access tokens needed for communication. You'll see a success message at the top of the screen.

Need a hand along the way? Reach out to support@digioh.com.