

## Before you begin

Make sure you have the following:

1. Salesforce Account - URL, Username, Password, Security Token (optional)
2. UiPath RPA Platform (2018.4 or above)

## Developer Account Setup

If you do not have a Salesforce User, you can sign up for a free developer account [here](#) [Try for Free].

Once you have created your developer account, Reset your Security Token.

1. Login to Salesforce.
2. Click the User in the top right corner, and under your username select Settings.

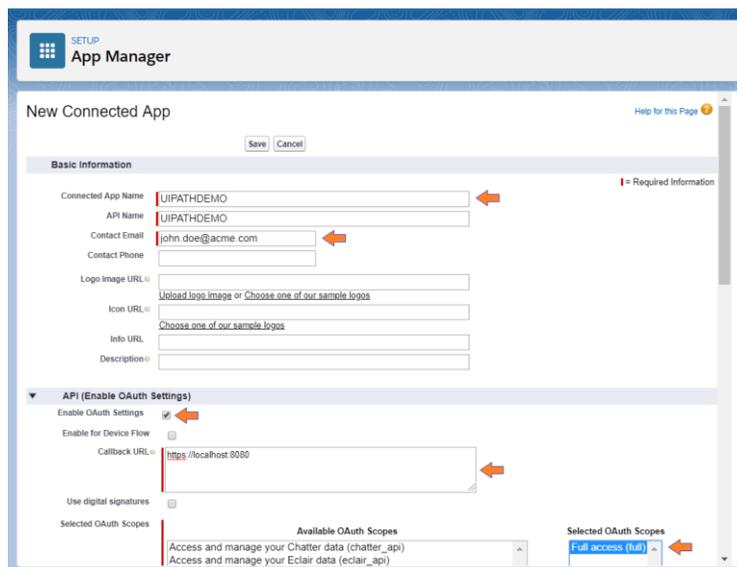


3. In **Quick Find** in the left pane, type **Reset My Security Token**.
4. Click **Reset Security Token**.
5. You will receive an email with the new security token.

**Note:** If a Salesforce user's profile is configured such that there is a restriction on the IP ranges that can access Salesforce, then that user will not have a security token. The UiPath Studio and UiPath Robot machines will need to be in the IP ranges. In order to give access to security token, either remove the user from the profile that contains the IP range restriction, or update the user's profile by removing the IP range restriction.

## Setup a Salesforce Connected App

Follow the Salesforce documentation [here](#). Following is a sample setup of the Connected App. Check with your System Administrator for any restrictions and policies specific to your organization.



**SETUP**  
App Manager

New Connected App Help for this Page

**Basic Information**

Connected App Name:  ←

API Name:  ←

Contact Email:  ←

Contact Phone:

Logo Image URL:   
Upload logo image or Choose one of our sample logos

Icon URL:   
Choose one of our sample logos

Info URL:

Description:

**API (Enable OAuth Settings)**

Enable OAuth Settings:  ←

Enable for Device Flow:

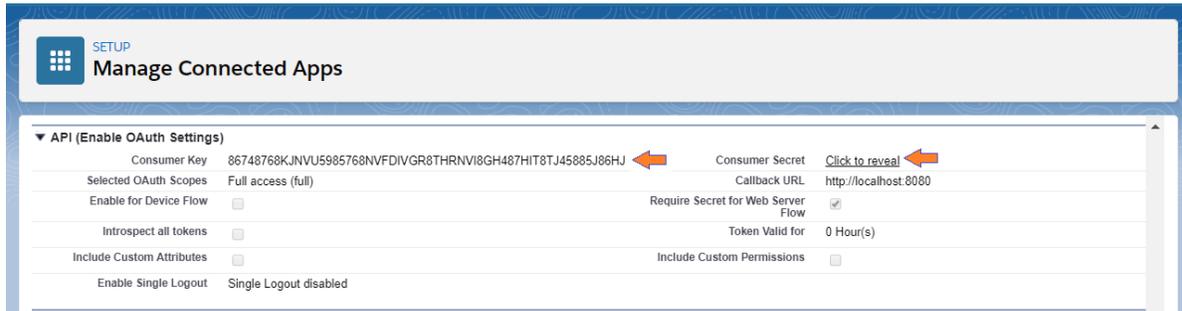
Callback URL:  ←

Use digital signatures:

Selected OAuth Scopes:  ←

Available OAuth Scopes:

Once the Connected App is setup (it can take a few minutes), note down the **Consumer Key** and **Consumer Secret**.



## Install the Salesforce Activity Pack

In UiPath Studio, Install the latest version of the UiPath.Salesforce.Activities from the Official Feed.

## Create your first Workflow

### Configure Salesforce Application Scope activity

1. Search for Salesforce in the Activities pane.
2. Add a **Salesforce Application Scope** activity.
3. Click **Configure**. These parameters are used by UiPath Studio at design time to configure activities.
4. Enter the parameters, and click **Test Connection**.

**Connection Parameters**  
Input your connection parameters below.

Server	Username
Live	john.doe@acme.com
Consumer Key	Password
X005CL_cWFHw9C07ArW2yf2o7Wy44pHfAKc	*****
Consumer Secret	Security Token - Optional
*****	*****

Test Connection

5. You will see a Connection Successful or error message.
6. If successful, Click **Close**. If an error message is displayed, review the error and fix the parameters and **Test Connection** again.
7. In the Properties pane, enter values for the connection parameters in **New Connection**. These properties are used for the run-time by the robot. Note that some of the properties are **SecureStrings**, and these can be set as Orchestrator Assets (Credentials) and retrieved.

## Configure Insert Record activity

1. Add a Insert Record activity inside the Salesforce Application Scope.
2. Click **Configure**.

Field	Display Name	Data Type	Value	Sample Value	
Name	Account Name	string	str_Name	Edge Communications	🗑️
NumberOfLocations__c	Number of Locations	double	int_NumLoc.ToString	2	🗑️
Active__c	Active	picklist	"Yes"	Yes	🗑️
Website	Website	url	str_Website	http://edgecomm.com	🗑️
AccountNumber	Account Number	string	str_AccountNum	CD451796	🗑️

3. Select **Account** in the **Salesforce Object**. Depending on your configuration, some fields may get added to the field list. A Sample record will show sample values.
4. Change values for some fields in the **Sample Value** column, and click **Test with sample values**.
5. If you see a **Valid Command** message, then proceed to the next step. If you see **Invalid Command** message, then review the message and fix it. Typically, the command fails because some specified values are not correct, or some required fields are not specified (these fields are listed in the error message). Add those fields using the **Add Single Field** or **Add Multiple Fields**, and test again.
6. Once the test is successful, specify values for the fields in the **Value** column. These values will be used by the robot at run-time.
7. Click **Done**.
8. Assign variables to the **Id** and **SalesforceStatus** properties in the Property pane of the activity.
9. Add a Message Box activity to display the **Id** variable and optionally the **ErrorCode** or **Message** from the **SalesforceStatus** variable.

```
"Id: " + str_AccountId + "[" + objStatus.ErrorCode + "]"
```

## Execute

Execute the workflow. On successful execution, **Id** should display. If not successful, the **ErrorCode** will indicate the error.