



# INTEGRATION MODULE FOR SALESFORCE

*For Keverion Runbook Studio and Azure Automation*

## Release Notes

Version 1.1

March 2021



# Introduction

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The Keverion Integration Module for Salesforce is an Integration Module for Keverion Runbook Studio and Azure Automation that provides integration and automation capabilities for Salesforce. The Keverion Integration Module for Salesforce is Microsoft Azure Certified.

*The integration module includes the following activities:*

<b>Get-SalesforceLimits</b>	Retrieves Salesforce API limits.
<b>Get-SalesforceRecord</b>	Retrieves and filters Salesforce records.
<b>New-SalesforceRecord</b>	Creates a new record.
<b>Remove-SalesforceRecord</b>	Remove an existing record.
<b>Set-SalesforceRecord</b>	Update an existing record

## System Requirements

The Integration Module for Salesforce requires the following software to be installed and configured prior to implementing the integration. For more information about installing and configuring Salesforce, refer to the respective product documentation.

- Keverion Runbook Studio 4.2
- Microsoft .NET Framework 4.7.2
- Salesforce Force.com based application with Salesforce API access

**Important:** The Integration Module for Salesforce requires Salesforce API access, which is not available by to all Salesforce editions. Programmatic access is available to the Enterprise, Unlimited, Developer and Performance editions. If you are using the Professional edition, API access must be purchased and can be arranged by contacting your Salesforce account executive.

**Important:** The integration module uses the Force.com REST API with OAuth 2.0 authentication. You must set up a Salesforce **connected app** as part of your environment. For details, see **Connecting to Salesforce** in the Keverion Integration Module for Salesforce User Guide.

## Installing the Integration Module

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The easiest way to install and deploy the Integration Module for Salesforce is from the PowerShell Gallery, but you can also download the module from Keverion and perform the steps manually.

You must install and deploy the integration module to each Azure Automation Account and Hybrid Worker host system that you plan to use to run your runbooks. You must also install the Integration Module on any Runbook Studio host systems that you will be using to build and manage your runbooks.

## Using the PowerShell Gallery

Using the commands in the **PowerShellGet** module you can download the Integration Module for Salesforce from the PowerShell Gallery and install it on your local computer. You can also deploy the module directly from the PowerShell Gallery to any of your Azure Automation accounts.

### *Install the Integration Module on your local computer or Hybrid Worker:*

1. Confirm that the latest **PowerShellGet** module is installed.
2. Start a PowerShell window as an Administrator and run the command:

```
Install-Module -Name Keverion.Salesforce -Scope AllUsers
```

### *Upload the Integration Module to an Azure Automation account:*

1. Go to the [PowerShell Gallery](#).
2. Click the **Azure Automation** tab.
3. Click **Deploy to Azure Automation**. You will be directed to Microsoft Azure.
4. Select the **Automation Account** that you want to deploy the module to.
5. Click **OK**.

## Manual Installation

Alternatively, you can download the integration module package from Keverion and deploy it manually to your local computer, hybrid workers and Azure Automation accounts.

The download package from Keverion includes a **.zip** file containing the integration module as well as the User Guide and Release Notes. The following instructions assume that you have unzipped the download package and have access to the **.zip** file containing the integration module.

### *Install the Integration Module on your local computer or Hybrid Worker:*

1. Copy the **Keverion.Salesforcel.zip** file to your local computer.
2. Right-click on the file and select **Properties**.
3. Click the **General** tab. If necessary, click **Unblock**, and then click **OK**.
4. Unzip the **Keverion.Salesforcel.zip** file.
5. Copy the **Keverion.Salesforce** folder to a location in the `%PsModulePath%` path.

**Important:** When installing the integration module on a hybrid worker, you must use a location that is accessible to all users of the computer.

### *Upload the Integration Module to an Azure Automation account:*

1. Sign into [Microsoft Azure](#).
2. Open the Automation account that you want to upload the module to.
3. Click **Modules** under Shared Resources. The list of installed modules is displayed.

4. Click **Add a module** at the top of the list.
5. In the **Upload File** box, select the **Kelverion.Salesforce.zip** file that you downloaded.
6. Click **OK**. Importing the module may take several minutes.

## Licensing the Integration Module

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Licenses for Kelverion integration modules are managed and deployed using the Kelverion Runbook Studio and Azure Automation connection assets.

### *Register an Integration Module license with Runbook Studio:*

1. Open **Kelverion Runbook Studio**.
2. On the **File** tab, click **About**.
3. Click **License Information**.
4. Click the **Integration Modules** tab, and then click **Add License**.
5. Select the integration module license file (.kaml) and click **Open**.
6. You should see your entitlements displayed in the list.
7. Click **OK**.

**Important:** Entitlements will not display until after the integration module has been installed on the Runbook Studio computer.

### *Create a Connection Asset with a license key and upload it to Azure:*

1. On the **Home** tab, click **Sign In**. The Sign In dialog appears.
2. Sign into your account.
3. In the **Active Azure Automation Account** box, select the account that you want to add the connection asset to.
4. Click **New Asset** and then click **Connection**. The New Connection dialog appears.
5. In the **Name** field, enter a name to identify the connection.
6. In the **Connection Type** field, select the desired connection type.
7. Enter the appropriate connection information in the provided fields.
8. Click **OK**.

### *Update all Connection Asset license keys and upload them to Azure:*

1. On the **Home** tab, click **Sign In**. The Sign In dialog appears.
2. Sign into your account.

3. In the Explorer panel, click the **Azure (Online)** group.
4. Right-click the Azure Automation Account that contains the connection assets you want to update, and then click **Update License Keys**. A summary is displayed.

## Changes History

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### Version 1.1

- Removed support for TLS 1.0 and 1.1. TLS 1.2 will be used.
- Removed connection property Skip Certificate Validation. Certificate Validation is always performed.
- Removed connection property Security Token.
- Fixed sorting issue with filter browser lists.

**Important:** The connection type fields for this version of the integration module are different from previous versions and unfortunately, Azure Automation does not support upgrading an integration module when the connection type has changed. If you are upgrading from a previous version of the integration module, you must first remove the Salesforce connection type from the Automation Account. For more information, see [Removing an Azure Automation Connection Type](#).

### Version 1.0

- The Keverion Integration Module for Salesforce is a new Integration Module for Runbook Studio and Azure Automation that lets you integrate your runbooks with Salesforce.

## Removing an Azure Automation Connection Type

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Azure Automation does not support making changes to the fields that are associated with an integration modules connection type. Before you can import an integration module that has connection type field changes, you must first delete all connections that reference the module and delete the connection type itself.

The instructions for removing connection types from Azure automation, depends on whether you are using AzureRm or AzureAz.

### *To remove a connection type using AzureRm:*

1. Sign into [Microsoft Azure](#).
2. Open the Automation account that you want to update.
3. Click **Connections** under Shared Resources.
4. Select each Salesforce connection, click **Delete** and then click **Yes**.
5. Open a PowerShell ISE Window and sign into Microsoft Azure.

**Login-AzureRmAccount**

6. Remove the Salesforce connection type:

```
Remove-AzureRmAutomationConnectionType
-Name Keverion.Salesforce
-AutomationAccountName <automation account name>
-ResourceGroupName <resource group name>
-Force\
```

*To remove a connection type using AzureAz:*

1. Sign into [Microsoft Azure](#).
2. Open the Automation account that you want to update.
3. Click **Connections** under Shared Resources.
4. Select each Salesforce connection, click **Delete** and then click **Yes**.
5. Open a PowerShell ISE Window and sign into Microsoft Azure.

```
Connect-AzAccount
```

6. Remove the Salesforce connection type:

```
Remove-AzAutomationConnectionType
-Name Keverion.Salesforce
-AutomationAccountName <automation account name>
-ResourceGroupName <resource group name>
-Force
```

After you remove the connections and connection type for the integration module, you should be able to successfully import the updated version and re-create the connection resources for your runbooks.