



# INTEGRATION PACK FOR SALESFORCE

*For Microsoft System Center Orchestrator*

For System Center 2016 and 2019, you must use the 32-bit version of the integration pack, which has the name **Keverion\_Integration\_Pack\_for\_Salesforce\_2.0**

For System Center 2022 and later, you must use the 64-bit version of the integration pack, which has the name **Keverion\_IP\_Salesforce\_x64\_2.0**

## Release Notes

Version 2.0

December 2023

# Introduction

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The Integration Pack for Salesforce is an add-on for System Center Orchestrator that enables integration with the Salesforce Force.com applications.

*The integration pack provides the following activities:*

- Create Record
- Delete Record
- Get Limits
- Get Record
- Monitor Record
- Update Record

## System Requirements

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

### *Kelverion\_Integration\_Pack\_for\_Salesforce (32-bit)*

- Microsoft System Center Orchestrator 2016, 2019
- Microsoft .NET Framework 4.7.2
- Salesforce.com subscription with REST API access

### *Kelverion\_IP\_for\_Salesforce\_x64 (64-bit)*

- Microsoft System Center Orchestrator 2022
- Microsoft .NET Framework 4.7.2
- Salesforce.com subscription with REST API access

**Important:** The Integration Pack for Salesforce requires Salesforce REST API access, which is not available to all Salesforce editions. API access is available to the Enterprise, Unlimited, Developer and Performance editions. If you are using the Professional edition, API access must be purchased from Salesforce.

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

# Registering and Deploying the Integration Pack

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After you download the integration pack, you register the integration pack file with the Orchestrator management server, and then deploy it to runbook servers and computers that have the Runbook Designer installed.

**IMPORTANT:** Ensure that you are deploying the correct version of the Integration Pack.

- For System Center 2016 and 2019, you must use the 32-bit version of the integration pack, which has the name **Kelverion\_Integration\_Pack\_for\_Salesforce**
- For System Center 2022 and later, you must use the 64-bit version of the integration pack, which has the name **Kelverion\_IP\_Salesforce\_x64**

## *To register the integration pack:*

1. On the management server, copy the **.OIP** file for the integration pack to a local hard drive or network share.
2. Confirm that the file is not set to **Read Only** to prevent unregistering the integration pack later.
3. Start the **Deployment Manager**.
4. In the navigation pane of the Deployment Manager, expand **Orchestrator Management Server**, right-click **Integration Packs** to select **Register IP with the Orchestrator Management Server**. The **Integration Pack Registration Wizard** opens.
5. Click **Next**.
6. In the **Select Integration Packs or Hotfixes** dialog box, click **Add**.
7. Locate the **.OIP** file that you copied locally from step 1, click **Open** and then click **Next**.
8. In the **Completing the Integration Pack Wizard** dialog box, click **Finish**.
9. On the **End User Agreement** dialog box, read the Kelverion License Terms, and then click **Accept**.
10. The **Log Entries** pane displays a confirmation message when the integration pack is successfully registered.

## *To deploy the integration pack:*

1. In the navigation pane of the **Deployment Manager**, right-click **Integration Packs**, click **Deploy IP to Runbook Server or Runbook Designer**.
2. Select the integration pack that you want to deploy, and then click **Next**.
3. Enter the name of the runbook server or computers with the Runbook Designer installed, on which you want to deploy the integration pack, click **Add**, and then click **Next**.
4. Continue to add additional runbook servers and computers running the Runbook Designer, on which you want to deploy the integration pack. Click **Next**.

5. In the **Installation Options** dialog box, configure the following settings.
6. To choose a time to deploy the integration pack, select the **Schedule installation** check box, and then select the time and date from the **Perform installation** list.
7. Click one of the following:
  - a. **Stop all running runbooks before installing the integration pack** to stop all running runbooks before deploying the integration pack.
  - b. **Install the Integration Packs without stopping the running Runbooks** to install the integration pack without stopping any running runbooks.
8. Click **Next**.
9. In the **Completing Integration Pack Deployment Wizard** dialog box, Click **Finish**.
10. When the integration pack is deployed, the **Log Entries** pane displays a confirmation message.

## Known Issues and Limitations

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- The Keverion Integration Pack for Salesforce is subject to API call limits imposed by the Salesforce Platform. For more information, please see **Salesforce API Limits** in the Keverion Integration Pack for Salesforce User Guide.

## Change History

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### Version 2.0

- Added new 64-bit product version with support for System Center Orchestrator 2022.
- The integration pack is now using the Client Credentials flow, instead of the Password flow, when authenticating with Salesforce. For more information, please refer to the **Configuring the Integration Pack** and **Connecting to Salesforce** sections in the Integration Pack User Guide.

### Version 1.2

- Removed support for TLS 1.0 and 1.1. TLS 1.2 will be used.
- Removed configuration property Security Token.
- Fixed sorting issue with filter browser lists.

### Version 1.1

- Fixed a filtering issue for values with special characters.
- The Update Record activity can now be used to reset field values using the keyword **\$null**.

### Version 1.0

- Initial release.