OnceHub Support

How to install the OnceHub connector for Salesforce

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The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

Installation is a three step process. In this article, you will learn about the first step: installing the OnceHub connector package in Salesforce. The OnceHub connector for Salesforce is installed directly from OnceHub.

In this article:

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Requirements

To install the connector from OnceHub, you must:

- Be a OnceHub Administrator.
- Be a Salesforce Administrator in your organization.
- Have an active connection to your Salesforce API User.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

Installing the OnceHub connector for Salesforce

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
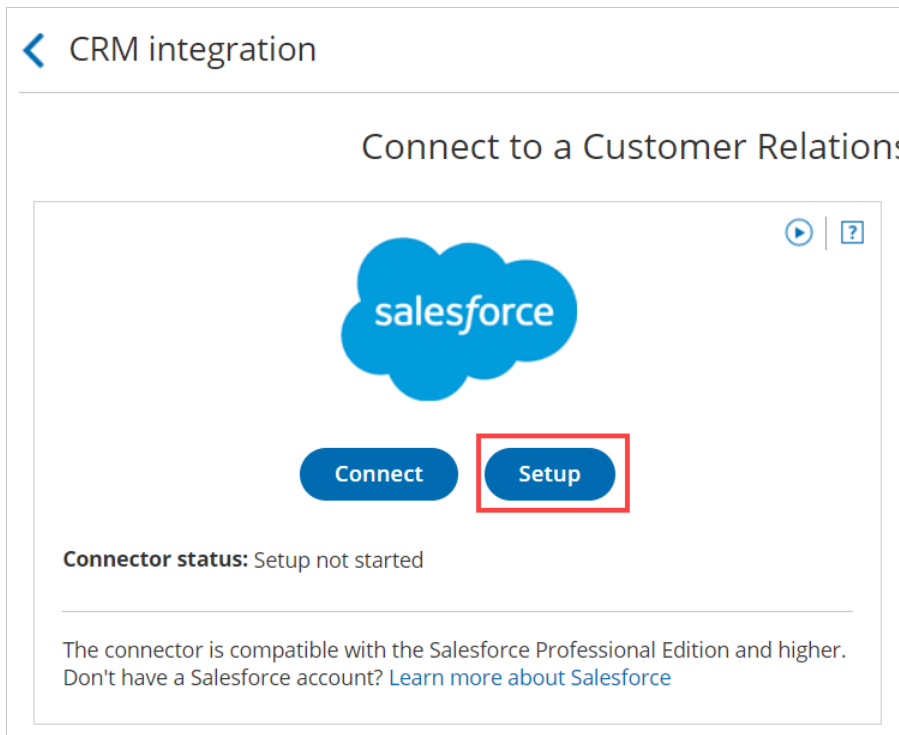2. In the **Salesforce** box, click the **Setup** button (Figure 1).

Figure 1: Set up API Connection in OnceHub

3. On the **Installation** tab, click the **Install connector** button (Figure 2).
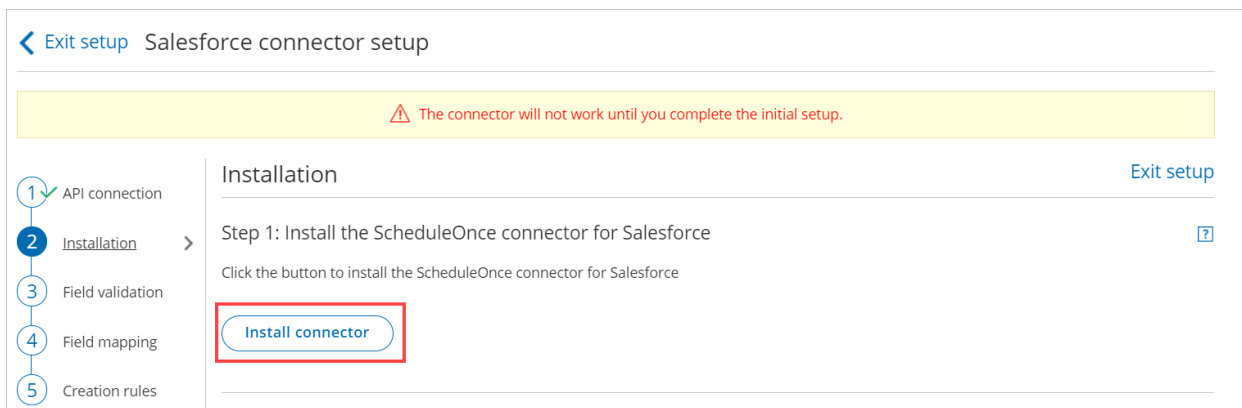

Figure 2: Install connector

4. Sign in to Salesforce.
5. On the **Salesforce** Install Package landing page, select **Install for All Users** and then click the **Install** button (Figure 3).

Figure 3: Install for All Users

6. Once installation is complete, click the **Done** button.

7. Return to OnceHub and reload the page, then go back to the **Installation** tab. You will see that the connector is now installed (Figure 4).

Figure 4: Connector installed

> ⓘ **Note:**
>
> After the connector is installed, it can take up to 10 minutes before **Connector installed** is shown on the **Installation** tab.

That's it! You've completed **Step 1** of the Installation process. Now you can proceed to **Step 2**, which is described in the How to assign the OnceHub permission set to the Salesforce API User article.