

How to assign the ScheduleOnce permission set to the Salesforce API user

Last Modified on Apr 28, 2021

The Salesforce setup process includes 5 phases: [API connection](#), [Installation](#), [Field validation](#), [Field mapping](#), and [Creation rules](#).

In this article, you'll learn how to assign the ScheduleOnce Permission Set to the [API User](#) in Salesforce.

Permission sets

Permission Sets in Salesforce define what functions and features your Users have access to in Salesforce. To use the ScheduleOnce connector for Salesforce, you must assign the appropriate Permission Set to your API User.

The ScheduleOnce Permission Set assigns permissions to work with Lead, Contact, Case, Account, and Activity records. This will allow the ScheduleOnce connector to create and update records through the API User.

Requirements

To assign the ScheduleOnce permission set, you will need:

- A Salesforce Administrator for your organization.
- [An installed ScheduleOnce connector for Salesforce](#).

Assigning the ScheduleOnce permission Set

1. Sign in to Salesforce as your API User.
2. Go to the **Setup** page.
3. In the **Administration** section, go to **Users -> Permission Sets** (Figure 1).

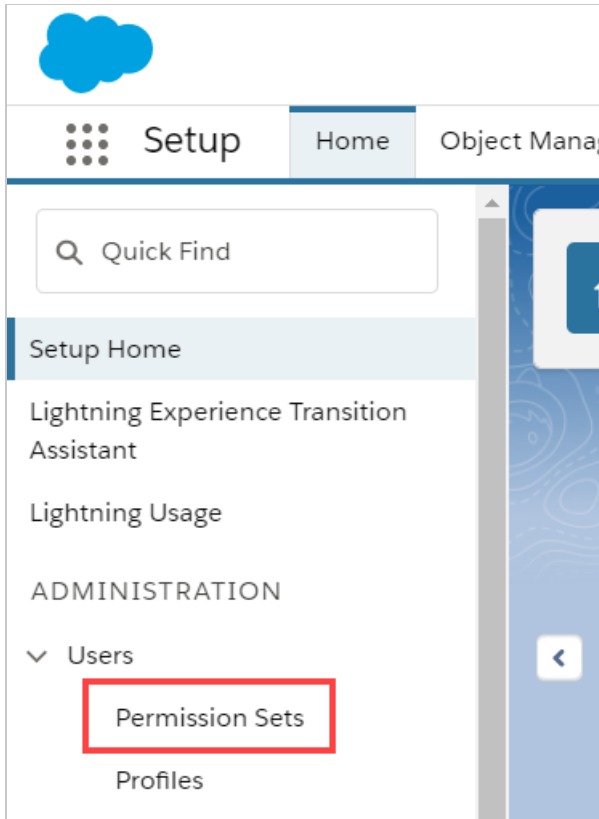


Figure 1: Permission Sets in the Users menu

4. In the **Permission Sets** pane, click **ScheduleOnce connector for Salesforce permission set** (Figure 2).

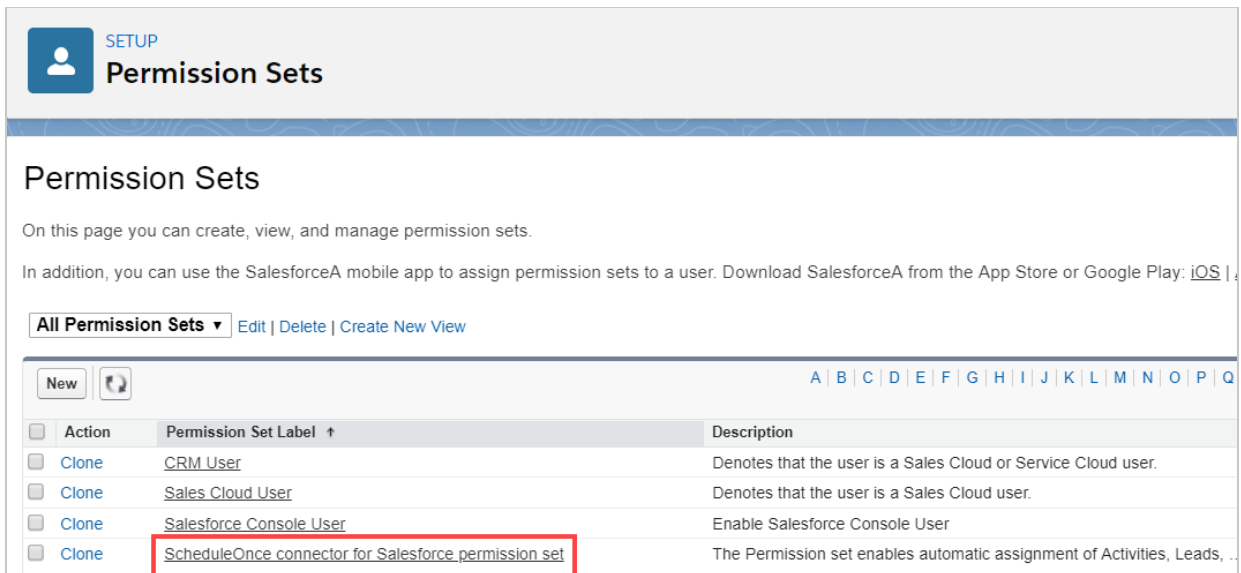


Figure 2: ScheduleOnce connector for Salesforce permission set

5. On the **ScheduleOnce connector for Salesforce** permission set page, click the **Manage Assignments** button (Figure 3).

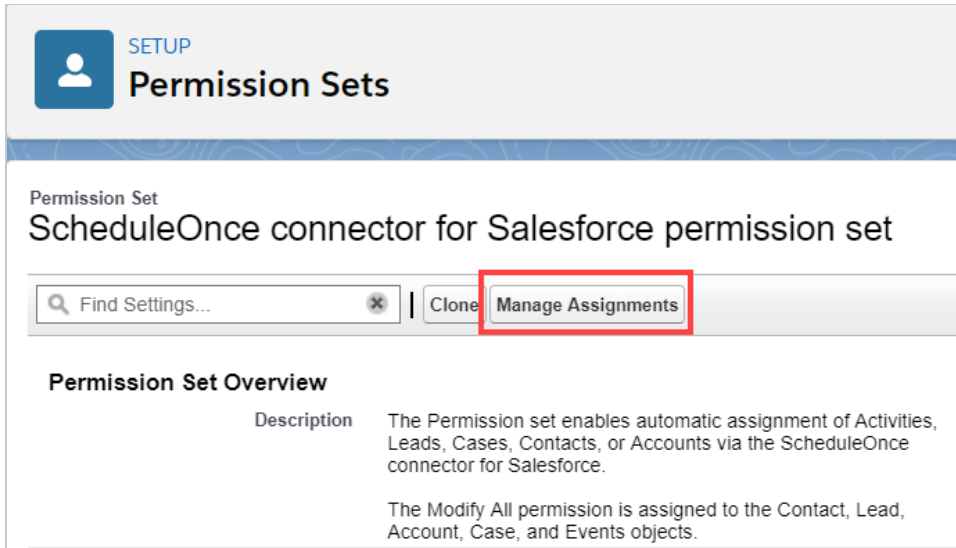


Figure 3: Manage Assignments

- On the **Assigned Users** page, click the **Add Assignments** button (Figure 4).

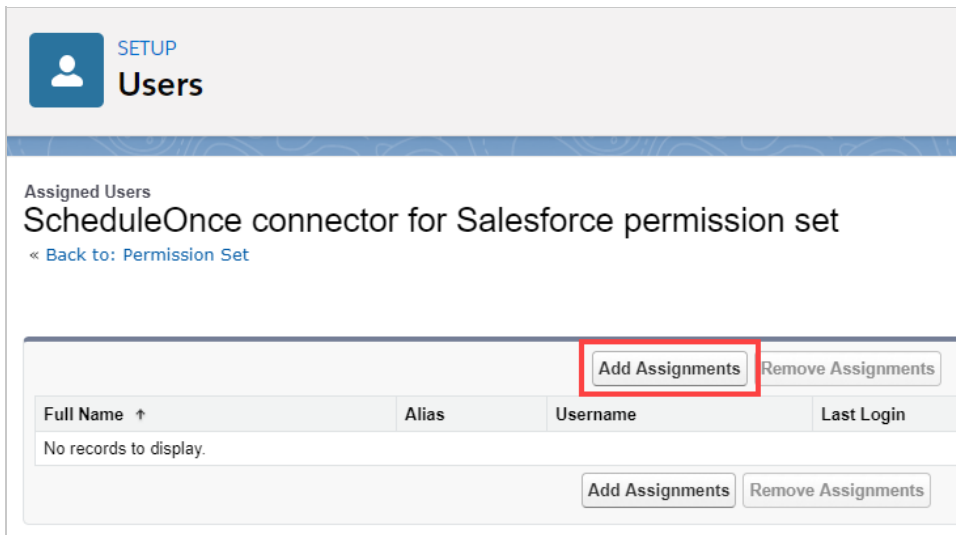


Figure 4: Add Assignments

- In the **All Users** list, check the box next to your API User and click **Assign** (Figure 5).

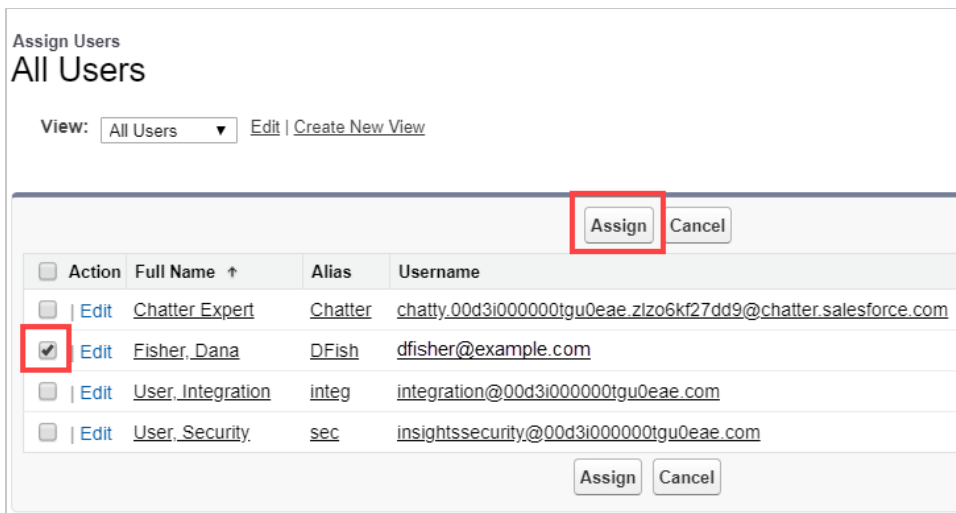


Figure 5: Assign API user

8. Click **Done**.
9. Go back to the Salesforce setup page in ScheduleOnce.
10. After you refresh the page, the **Installation** tab will now be updated to show that you have completed **Step 2: Assign ScheduleOnce Permission set** (Figure 6).

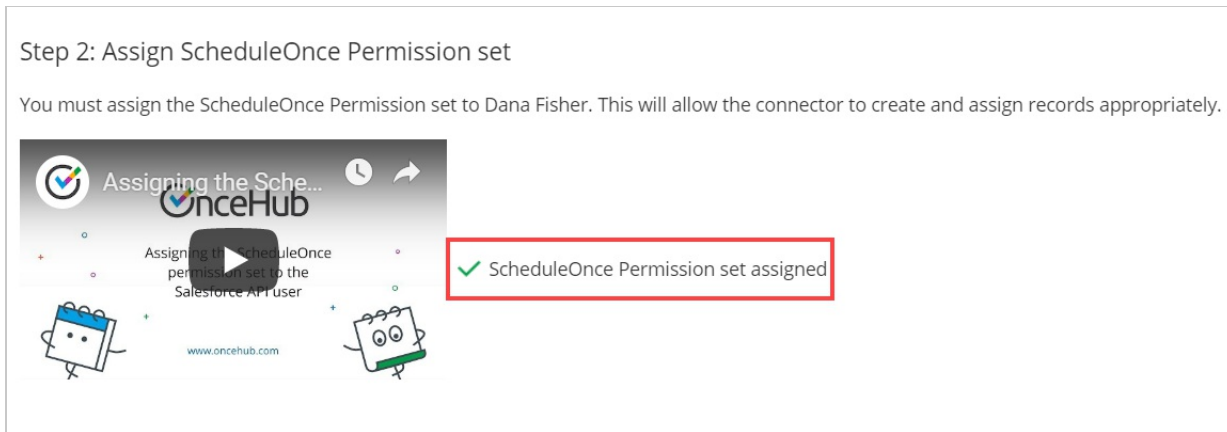


Figure 6: ScheduleOnce Permission set assigned



Important:

The API User must be connected to ScheduleOnce for the page to update correctly. [Learn more about connecting the Salesforce API User](#)

That's it! You've completed **Step 2** of the **Installation** process. You can now proceed to **Step 3**, which is described in the [Adding Custom fields to the Salesforce Activity Event layout](#) article.