

Installing the OnceHub connector for Salesforce [Legacy]

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).

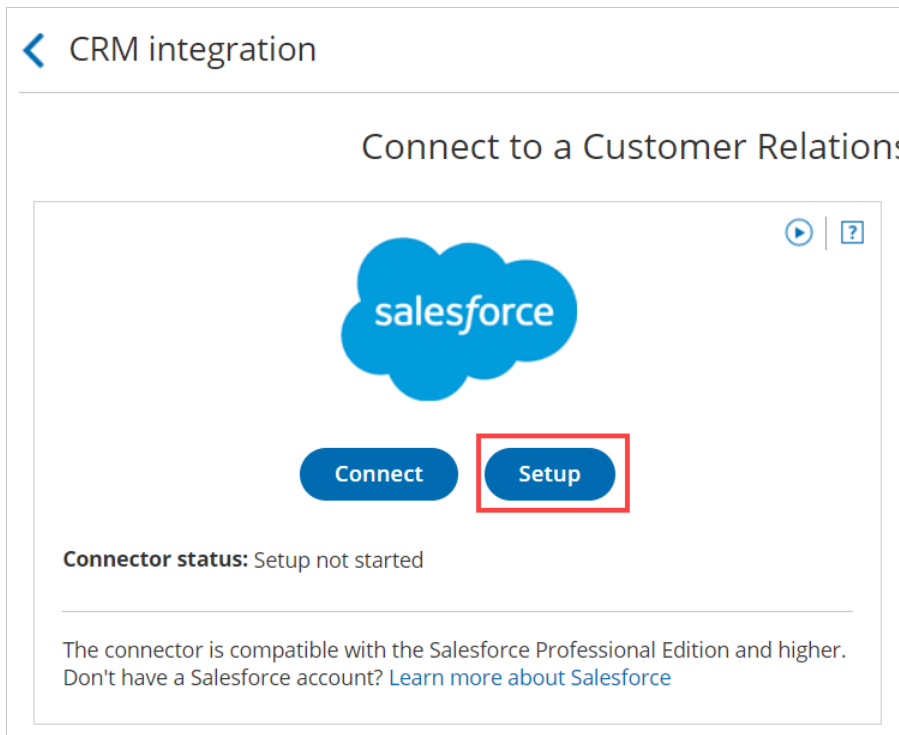


Figure 1: Set up API Connection in OnceHub

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

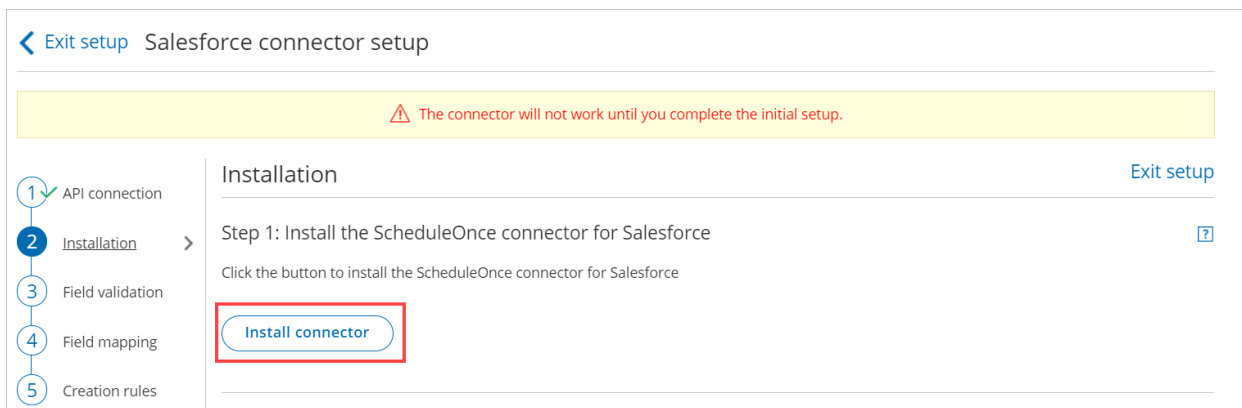


Figure 2: Install connector

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).

Install ScheduleOnce connector for Salesforce

By OnceHub

Install for Admins Only

Install for All Users

Install for Specific Profiles...

▼ Advanced Options

Apex Compile
Choose whether to compile all Apex in the org, or compile only the Apex in the package, during package installation or upgrade.

Compile all Apex in the org (default)

Compile only the Apex in the package

Install
Cancel

App Name	Publisher	Version Name	Version Number
ScheduleOnce connector for Salesforce	OnceHub	Summer 2020	10.0

Additional Details [View Components](#)

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).

←
Exit setup
Salesforce connector setup

⚠ The connector will not work until you complete the initial setup.

- 1 ✓ API connection
- 2
- Installation >
- 3 Field validation
- 4 Field mapping
- 5 Creation rules

Installation

Step 1: Install the ScheduleOnce connector for Salesforce

Click the button to install the ScheduleOnce connector for Salesforce

Install connector

✓
Connector installed

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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.
