### Installing the OnceHub connector for Salesforce [Classic]

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:

- Requirements
- Installing the OnceHub connector for Salesforce

#### 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  $\rightarrow$  **Profile settings**  $\rightarrow$  **CRM**.
- 2. In the **Salesforce** box, click the **Setup** button (Figure 1).

# **OnceHub** Help Article

CRM integratio	n	
	Connect to a Cu	istomer Relatior
	salesforce	• 7
<b>Connector status:</b> Setu	Connect Setup p not started	]
The connector is compa Don't have a Salesforce	tible with the Salesforce Professio account? Learn more about Sales	onal Edition and higher. force

*Figure 1: Set up API Connection in OnceHub* 

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

Exit setup Salesforce connector setup						
⚠️ The connector will not work until you complete the initial setup.						
API connection		Installation	Exit setup			
2 Installation	>	Step 1: Install the ScheduleOnce connector for Salesforce	?			
3 Field validation		Click the button to install the ScheduleOnce connector for Salesforce				
4 Field mapping		(Install connector				
5 Creation rules						

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).

Instal By OnceHu	Schedule	Once connector f	or Salesforce
Install for A	Admins Only	Install for All Users	Install for Specific Profiles
✓ Advanced Option	15		
Apex Compile Choose whether to c Compile all Apey Compile only the	ompile all Apex in the org k in the org (default) e Apex in the package	g, or compile only the Apex in the package,	during package installation or upgrade.
			Install
App Name Publisher		Version Name	Version Number
ScheduleOnce connector for OnceHub Salesforce		Summer 2020	10.0
Additional Details	liow 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						
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API connection	Installation					
2 Installation >	Step 1: Install the ScheduleOnce connector for Salesforce					
3 Field validation	Click the button to install the ScheduleOnce connector for Salesforce					
4 Field mapping	Install connector V Connector installed					
5 Creation rules						

# **OnceHub** Help Article

Figure 4: Connector installed

### i 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.