

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.

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).

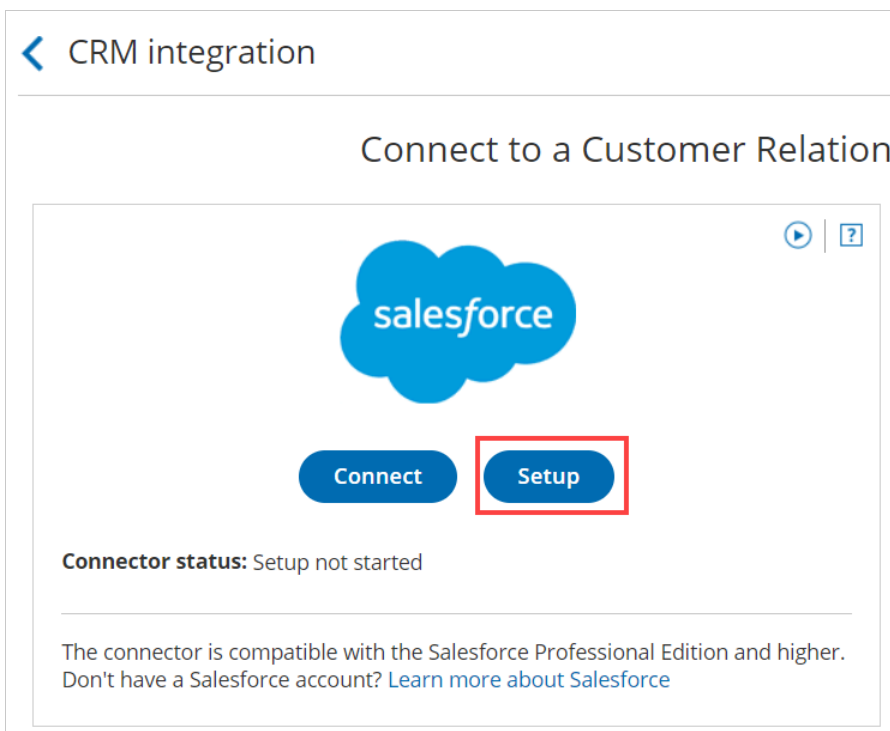


Figure 1: Set up API Connection in OnceHub

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

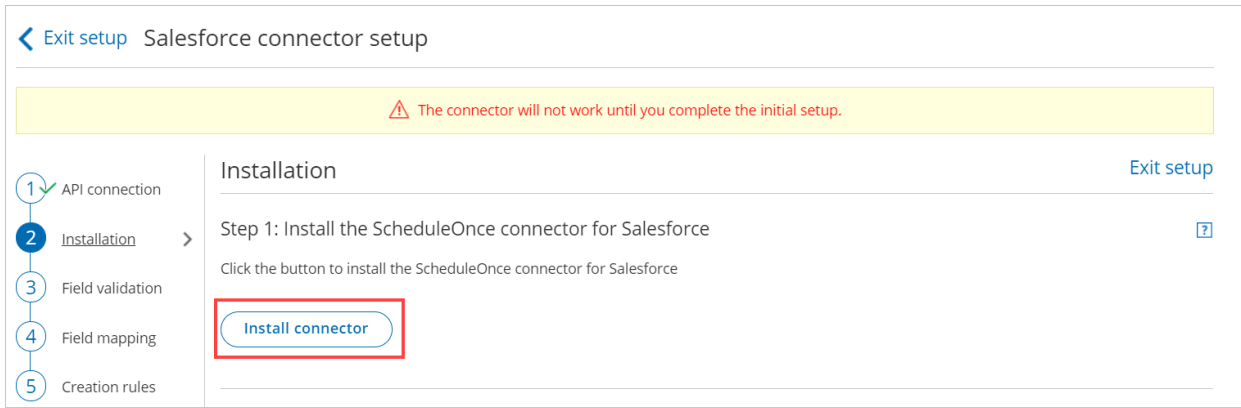


Figure 2: Install connector

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).

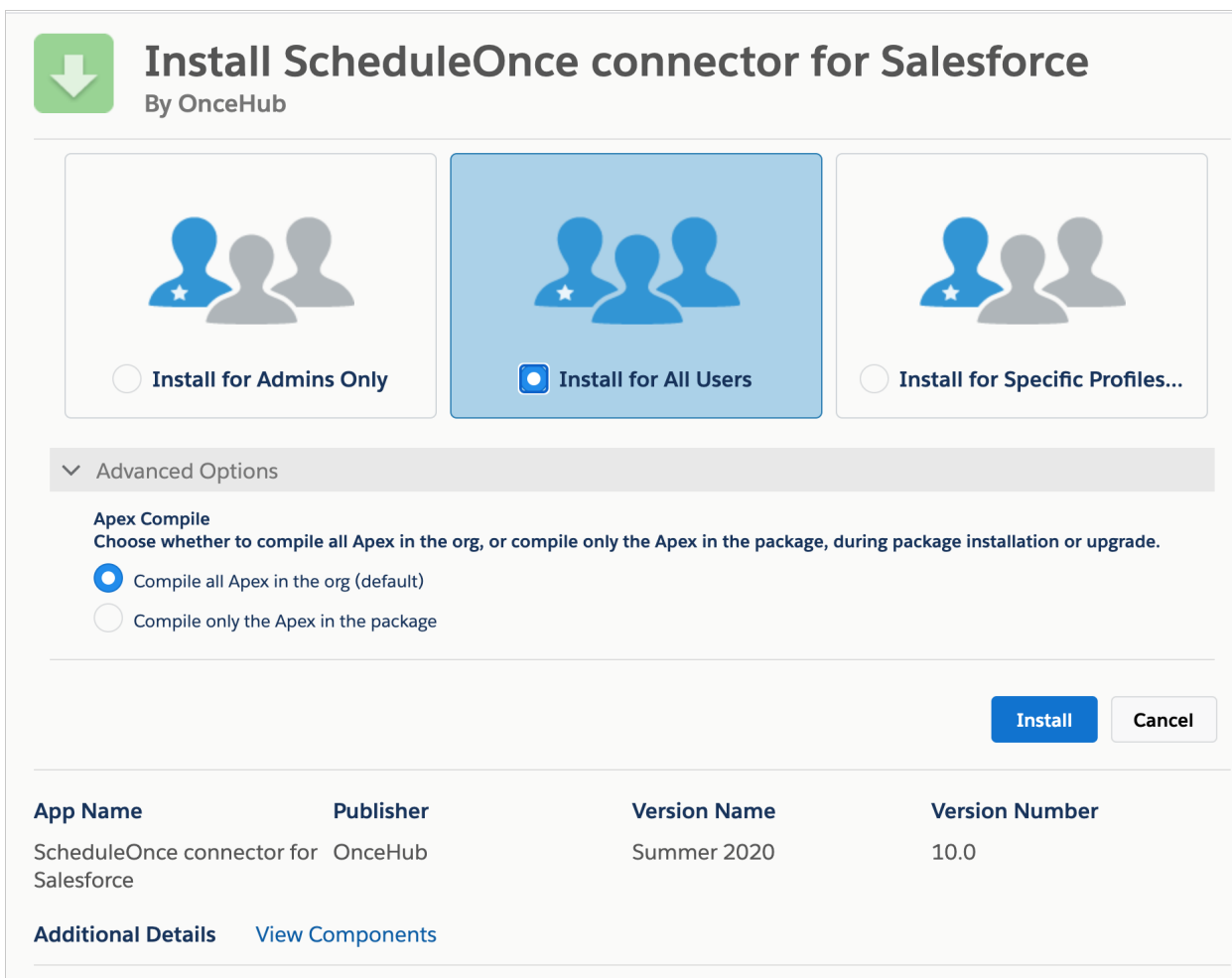


Figure 3: Install for All Users

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).

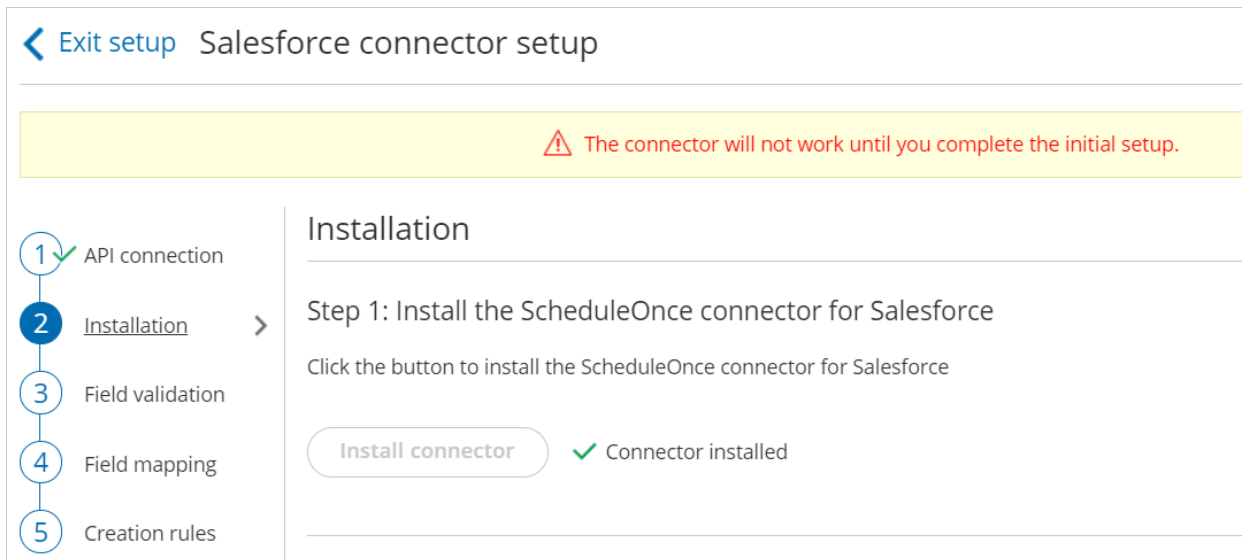


Figure 4: Connector installed

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.