Assigning the OnceHub permission set to the Salesforce API user [Legacy]

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 OnceHub 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 OnceHub connector for Salesforce, you must assign the appropriate Permission Set to your API User.

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

Requirements

To assign the OnceHub permission set, you will need:

- A Salesforce Administrator for your organization.
- An installed OnceHub connector for Salesforce.

Assigning the OnceHub 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).

OnceHub Help Article



Figure 1: Permission Sets in the Users menu

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

SETUP Permission Sets						
Permission Sets						
On this page you can create, view, and manage permission sets.						
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS /						
All Permission Sets Edit Delete Create New View						
New		A B C D E F G H I J K L M N O P Q				
Action	Permission Set Label 1	Description				
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.				
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.				
Clone	Salesforce Console User	Enable Salesforce Console User				
Clone	ScheduleOnce connector for Salesforce permission set	The Permission set enables automatic assignment of Activities, Leads,				

Figure 2: OnceHub connector for Salesforce permission set

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

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SETUP Permission Sets				
Permission Set ScheduleOnce connector for Salesforce permission set				
Q Find Settings	Clone Manage Assignments			
Permission Set Overview				
Description	The Permission set enables automatic assignment of Activities, Leads, Cases, Contacts, or Accounts via the ScheduleOnce connector for Salesforce.			
	The Modify All permission is assigned to the Contact, Lead, Account, Case, and Events objects.			

Figure 3: Manage Assignments

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

Letter Setup Users			
Assigned Users ScheduleOnce col « Back to: Permission Set	nnector for Sa	lesforce permiss	sion set
		Add Assignment	s Remove Assignments
Full Name ↑	Alias	Username	Last Login
No records to display.			
		Add Assignments	Remove Assignments



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

Assign Users All Users View: All Users Edit Create New View					
Assign Cancel					
	Action	Full Name 🛧	Alias	Username	
	🔲 Edit	Chatter Expert	<u>Chatter</u>	chatty.00d3i000000tgu0eae.zlzo6kf27dd9@chatter.salesforce.com	
	🗹 Edit	Fisher, Dana	DFish	dfisher@example.com	
	🔲 Edit	User, Integration	integ	integration@00d3i000000tgu0eae.com	
	🔲 Edit	<u>User, Security</u>	sec	insightssecurity@00d3i000000tgu0eae.com	
				Assign Cancel	

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Figure 5: Assign API user

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

! Important:

The API User must be connected to OnceHub 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.