



## **Salesforce Opportunities Portlet Documentation v2**

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This document will describe how the Salesforce Opportunities portlet can be configured and used in your portal. The configuration consists of three steps:

1. Create and configure a **Connected App** in your Salesforce.com account
2. Configure the **Salesforce Configuration** portlet in the Control Panel of Liferay
3. Let your users change the appearance of their Salesforce portlet instance using **portlet preferences**.

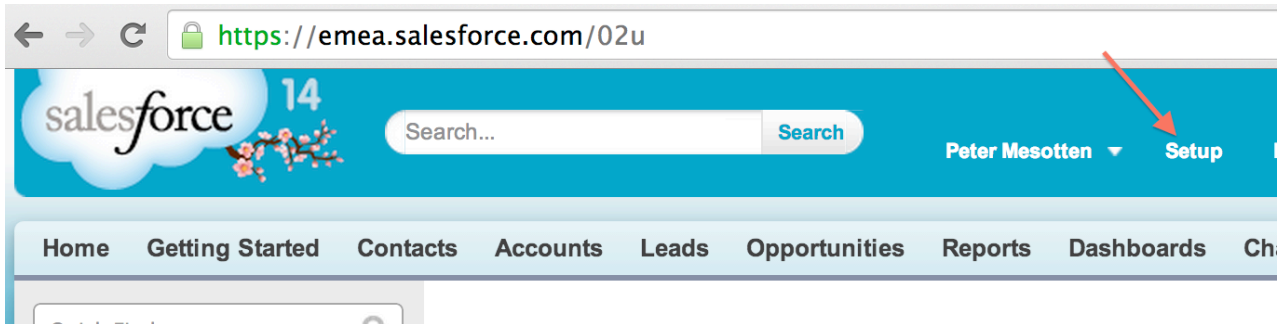
These steps are also carefully described in the instruction video available on <http://www.aca-it.be/portal/marketplace/salesforce-portlet>. However, some of the screens and settings in the video are outdated, so please use this document as the main reference for the actual configuration.



# 1. Salesforce.com setup

First, we need to set up a **Connected App** on Salesforce.com. Follow the steps below:

1. Sign in to <https://login.salesforce.com>.
2. Click on the **Setup** link next to your name in the header.



3. In the menu bar on the left under **Build**, select **Create > Apps**.
4. Under the **Connected Apps** section, click the **New** button.
5. Choose a **Connected App Name**, **API Name** and **Contact Email** (not that important).
6. Check the **Enable OAuth Settings** checkbox.
7. In **Callback URL**, enter the following URL: <http://localhost:8080/salesforce-portlet/oauth2callback>. Replace **localhost:8080** with the server name and port of your Liferay instance.
8. In **Selected OAuth Scopes**, move all scopes to the right column.

The screen should now look something like this:



## Basic Information

**I** = Required Information

Connected App Name	<input type="text" value="Salesforce Portlet App"/>
API Name	<input type="text" value="Salesforce_Portlet_App"/>
Contact Email	<input type="text" value="jan.janssen@aca-it.be"/>
Contact Phone	<input type="text"/>
Logo Image URL	<input type="text"/> <a href="#">Upload logo image</a> or <a href="#">Choose one of our sample logos</a>
Icon URL	<input type="text"/> <a href="#">Choose one of our sample logos</a>
Info URL	<input type="text"/>
Description	<input type="text"/>

## API (Enable OAuth Settings)

Enable OAuth Settings	<input checked="" type="checkbox"/>				
Callback URL	<input type="text" value="http://localhost:8080/salesforce-portlet/oauth2callback"/>				
Use digital signatures	<input type="checkbox"/>				
Selected OAuth Scopes	<table><thead><tr><th>Available OAuth Scopes</th><th>Selected OAuth Scopes</th></tr></thead><tbody><tr><td><input type="text" value="--None--"/></td><td><ul style="list-style-type: none"><li>Access and manage your Chatter data (chatter_api)</li><li>Access and manage your data (api)</li><li>Access your basic information (id, profile, email, address, phone)</li><li>Allow access to your unique identifier (openid)</li><li>Full access (full)</li><li>Perform requests on your behalf at any time (refresh_token, offline_access)</li><li>Provide access to custom applications (visualforce)</li><li>Provide access to your data via the Web (web)</li></ul></td></tr></tbody></table>	Available OAuth Scopes	Selected OAuth Scopes	<input type="text" value="--None--"/>	<ul style="list-style-type: none"><li>Access and manage your Chatter data (chatter_api)</li><li>Access and manage your data (api)</li><li>Access your basic information (id, profile, email, address, phone)</li><li>Allow access to your unique identifier (openid)</li><li>Full access (full)</li><li>Perform requests on your behalf at any time (refresh_token, offline_access)</li><li>Provide access to custom applications (visualforce)</li><li>Provide access to your data via the Web (web)</li></ul>
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Save your changes to create the app.

On the resulting page, in the **API** section, you should see both a **Consumer Key** and a **Consumer Secret**. Leave this page open in your browser, so you can copy the values of these codes in the configuration portlet in Liferay (see next chapter).

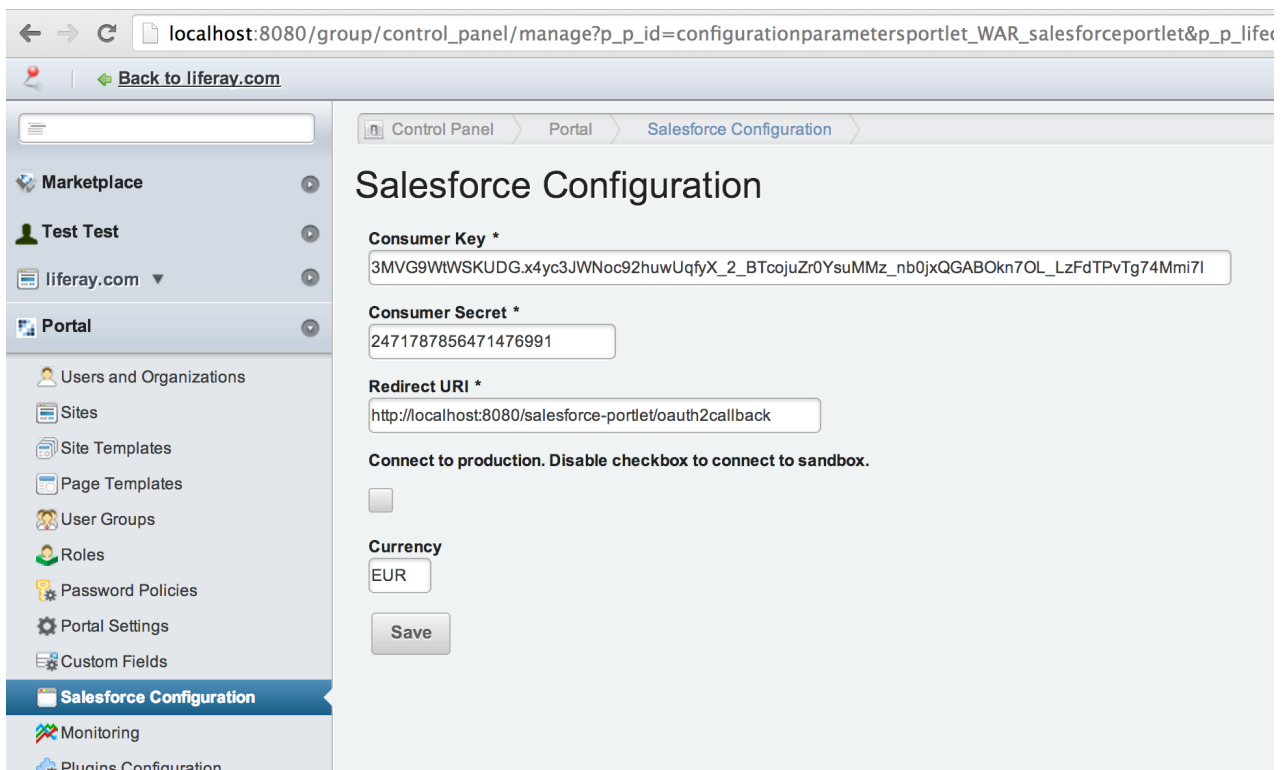
▼ API (Enable OAuth Settings)			
Consumer Key	3MVG9WWSKUDG.x5fKALZErCkJ6mWX_UQunvZJocrEDxOUNOXKbH8G6OmeUCdCcuHkVTAksqXCk5orZGuRdvu	Consumer Secret	964062249900673768
Selected OAuth Scopes	Access your basic information (id, profile, email, address, phone) Access and manage your data (api) Provide access to your data via the Web (web) Full access (full) Access and manage your Chatter data (chatter_api) Provide access to custom applications (visualforce) Perform requests on your behalf at any time (refresh_token, offline_access) Allow access to your unique identifier (openid)	Callback URL	http://localhost:8080/salesforce-portlet/oauth2callback



## 2. Control Panel configuration

First, make sure the Salesforce Opportunities portlet is installed and deployed correctly on your Liferay instance. Check the server logs if there are no unexpected errors while deploying the portlet or while accessing the portlet's configuration. If you're having issues while deploying the portlet, please contact our support team at <http://www.aca-it.be/portal/marketplace/salesforce-portlet#gpl-support>.

If the portlet was deployed correctly, an entry named **Salesforce Configuration** should appear in the Control Panel. In Liferay < 6.2, the entry should appear under the **Portal** menu. In Liferay 6.2, the entry appears in the **Apps** menu.



The screenshot shows a web browser window with the URL `localhost:8080/group/control_panel/manage?p_p_id=configurationparametersportlet_WAR_salesforceportlet&p_p_liferay.com`. The page title is "Salesforce Configuration". The left sidebar contains a menu with "Salesforce Configuration" selected. The main content area has the following fields:

- Consumer Key \***: `3MVG9WtWSKUDG.x4yc3JWNoc92huwUqfyX_2_BTcojuZr0YsuMMz_nb0jxQGABOkn7OL_LzFdTPvTg74Mmi7I`
- Consumer Secret \***: `2471787856471476991`
- Redirect URI \***: `http://localhost:8080/salesforce-portlet/oauth2callback`
- Connect to production. Disable checkbox to connect to sandbox.**:
- Currency**: `EUR`
- Save** button

The following configuration parameters need to be filled out:

- **ConsumerKey** and **Consumer Secret**  
The Consumer Key and Secret of the Salesforce app. Check the Salesforce page you left open and copy over these values.
- **Redirect** **URI**  
The Callback URL of the Salesforce app. Again, replace host name and port with your Liferay server's settings.
- **Connect to production**  
Enable this option, unless you want to connect to the Sandbox environment of your Salesforce account. In that case, you need to repeat the Salesforce.com setup of the previous chapter in the Sandbox environment.



- **Currency**

Optional. All money amounts will be prefixed with this string value. This is necessary because the Salesforce API doesn't expose the currency to its clients.

Click **Save** to persist your changes.

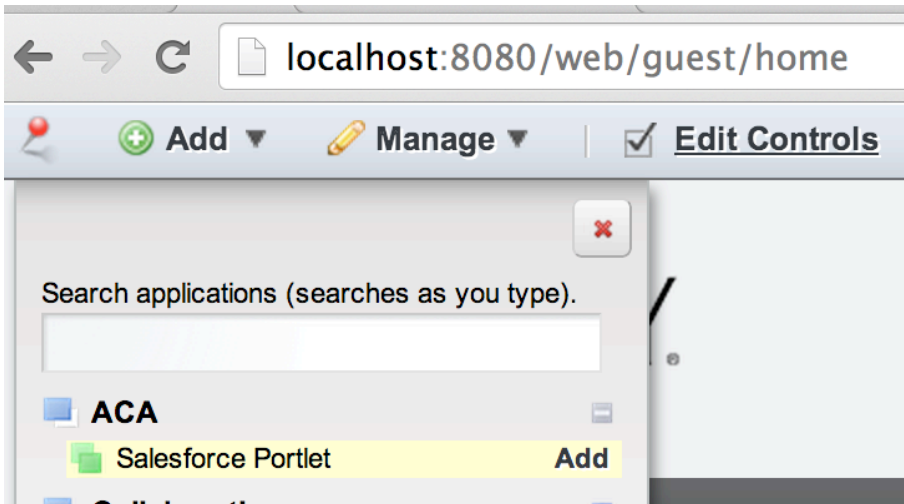


### 3. Salesforce portlet usage

Now the Salesforce portlet is ready to be used inside the pages of your portal.

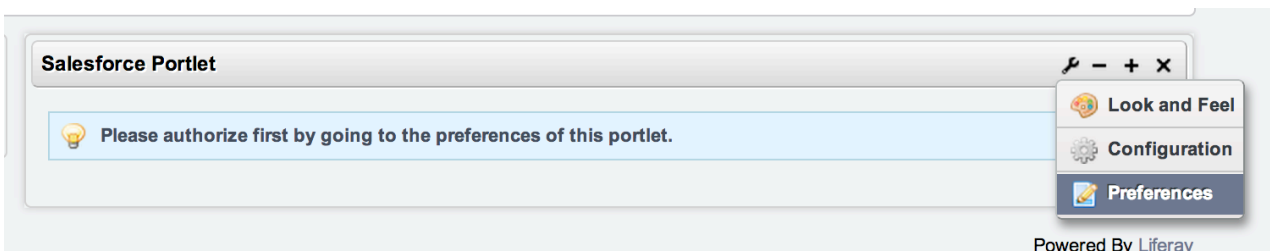
#### 3.1. Add to portlet to a page

To add the Salesforce portlet to the current page, select **Add > More...** in the Dockbar, open the **ACA** category and drag the **Salesforce Portlet** to an available column on the page.

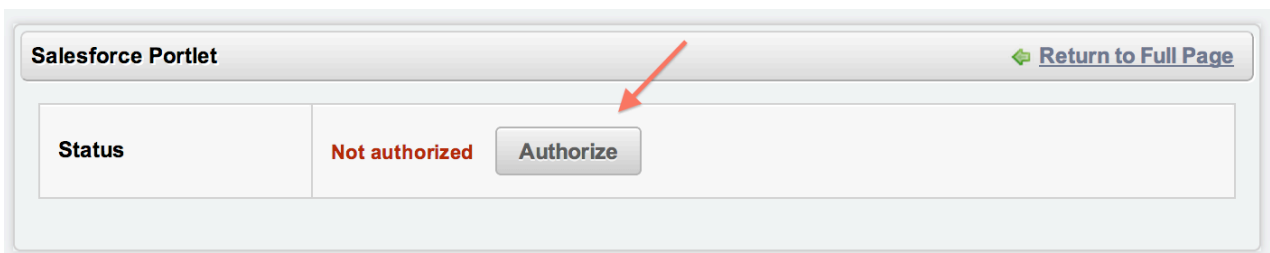


#### 3.2. Portlet preferences

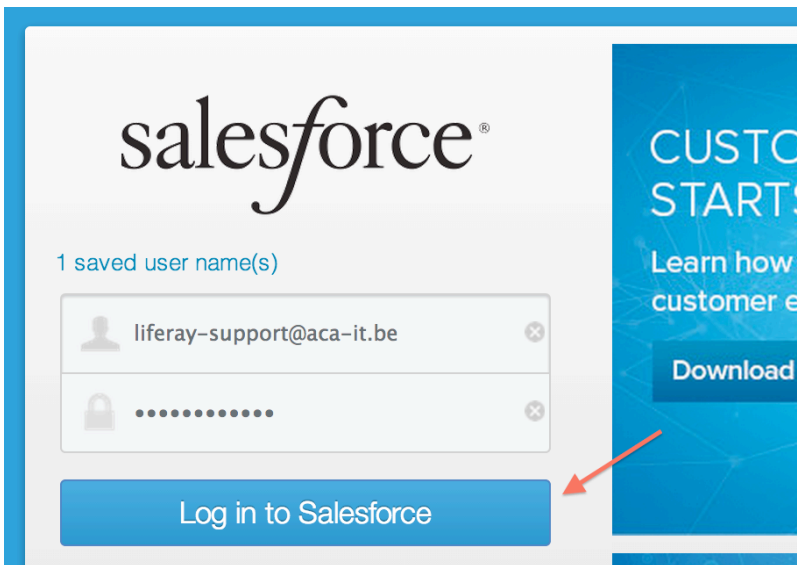
Authentication to your Salesforce account and changes to the visualisation of the portlet are managed through portlet preferences.



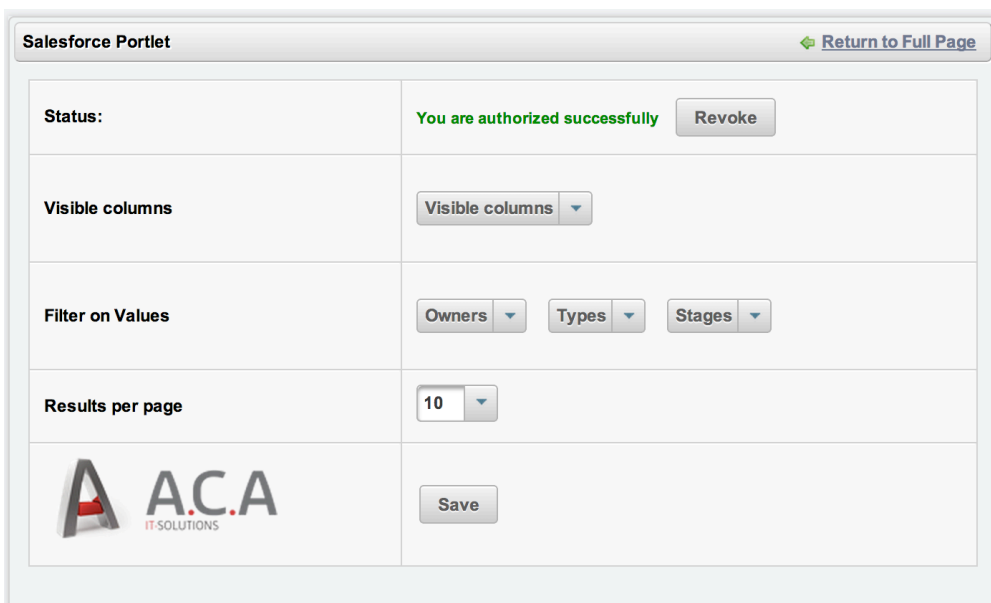
Click the **Authorize** button to start the OAuth authentication process.



You will be redirected to the Salesforce login page. If the portlet was configured to connect to the Sandbox environment, you will be redirected to the Sandbox authentication page instead. Fill out your credentials and click **Login to Salesforce**.



You will now be redirected back to the portlet's preferences page where you can do some further configuration.



Change the portlet's behaviour by setting the following properties:

- **Visible columns**  
Select the columns that should be present in the opportunities overview.
- **Filter on values**  
Pre-filter opportunity owners, types and/or stages. This way, the overview will only show opportunities that match these values.



- **Results per page**

Sets the amount of opportunities per page. If there are more opportunities, pagination will be visible.

Don't forget to press **Save** to persist your changes.

To terminate the connection between the Salesforce portlet and Salesforce.com, click the **Revoke** button. This will revoke the necessary tokens.

### 3.3. Portlet view

Click **Return to Full Page** to go to the base view of the portlet. The portlet consists of a sortable, filterable and pageable data table:

- Click on a column to **sort** on that column in ascending order. Click again to sort on the column in descending order.
- Start entering a value into the filter box of a column to **filter** that column. The filter mode is always a "contains" or "like" filter, so the entered string can appear anywhere in the value for that column.
- Click on an opportunity to go to the **detail** of that opportunity in Salesforce. This detail will open in a new tab of your browser.
- Use the **pagination** to browse through the list. If there is only one page, no pagination is visible.



## 4. Conclusion

This document explained how to configure and use the Salesforce Opportunities portlet. If you have further questions, don't hesitate to contact our support team at <http://www.aca-it.be/portal/marketplace/salesforce-portlet#gpl-support>.

Thanks again for using the Salesforce Opportunities portlet. If you like the portlet, please leave a comment at <https://www.liferay.com/marketplace/-/mp/application/35395988>.



## Contact

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