



# Creating an External Client App in Salesforce

Kim - 2025-10-30 - [\(0\) megjegyzés](#) - [Using Deskpro](#)

## Overview

Before you can connect Deskpro to Salesforce using the CRM Sync feature, you need to create an **External Client App** in Salesforce. This app allows Deskpro to communicate securely with Salesforce using OAuth authentication.

Once the app is created, you will return to Deskpro to finish setting up the Salesforce CRM Sync.

## Prerequisites

- You must have **Salesforce administrator** access.
- You will need the **Callback URL** from the **Salesforce CRM Sync** setup page in Deskpro.

## Steps to Create an External Client App in Salesforce

### 1. Open the External Client App Manager

1. Log in to your Salesforce instance.
2. In the left-hand navigation menu, go to **Setup > Platform Tools > Apps > External Client Apps > External Client App Manager**.
3. Click **New External Client App** at the top-right corner.

### 2. Complete Basic Information

Under **Basic Information**, enter the following details:

- **External Client App Name:** A recognizable name, for example *Deskpro CRM Sync*.
- **Email Address:** Enter your admin contact email.
- **Distribution State:** Select **Local**.

External Client App Name  
My Salesforce App

Contact Email  
john.smith@company.com

Contact Phone  
Enter a phone number...

Icon URL  
Enter a URL...

Description

API Name  
My\_Salesforce\_App

Distribution State  
Local

Info URL  
Enter a URL...

Logo Image URL  
Enter a URL...

### 3. Configure API (Enable OAuth Settings)

- Under **API (Enable OAuth Settings)**, tick **Enable OAuth**.
- In the **Callback URL** field, paste the URL provided in Deskpro's Salesforce CRM Sync setup.
- Under **OAuth Scopes**, add the following scopes:
  - Manage user data via APIs (api)
  - Manage user data via Web browsers (web)
  - Perform requests at any time (refresh\_token, offline\_access)

Consumer Key and Secret

Callback URL  
https://deskpro.local/admin-api/salesforce/auth

OAuth Scopes

Available OAuth Scopes

- Access Interaction API resources (interaction\_api)
- Access all Data Cloud API resources (cdp\_api)
- Access Einstein GPT services (einstein\_gpt\_api)
- Access Headless Passwordless Login API (pwdless\_login\_api)
- Access Headless Forgot Password API (forgot\_password)
- Access Headless Registration API (user\_registration\_api)

Selected OAuth Scopes

- Manage user data via APIs (api)
- Manage user data via Web browsers (web)
- Perform requests at any time (refresh\_token, offline\_access)

Introspect all Tokens

Configure ID token

- Enable the following options:
  - Enable Token Exchange Flow**
  - Require Proof Key for Code Exchange (PKCE)**

Configure ID token

**Flow Enablement**

- Enable Client Credentials Flow
- Enable Authorization Code and Credentials Flow
- Enable Device Flow
- Enable JWT Bearer Flow
- Enable Token Exchange Flow
- Require secret for Token Exchange Flow

**Security**

- Require secret for Web Server Flow
- Require secret for Refresh Token Flow
- Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows
- Enable Refresh Token Rotation
- Issue JSON Web Token (JWT)-based access tokens for named users

- Leave all other checkboxes unticked.

#### 4. Save and Retrieve Credentials

- Click **Create** to save your new External Client App.
- After the app is created, open it from the **External Client App Manager**.
- In the **App Settings** section, locate **OAuth Settings**.
- Under **App Settings**, click the **Consumer Key and Secret** link to view your credentials.

##### OAuth Settings

###### App Settings

[Consumer Key and Secret](#)

###### \* Callback URL

https://[REDACTED]/admin-api/salesforce/auth

###### \* OAuth Scopes

###### Available OAuth Scopes

Access the identity URL service (id, profile, email, address, phone)

- Copy the **Consumer Key**. This is your **Client ID** in Deskpro.

## Next Steps

After you have created your Salesforce External Client App and copied your **Client ID**, return to Deskpro to complete the configuration.

See [Syncing to Salesforce](#) for the next part of the setup process.

## Kapcsolódó tartalom

- [Syncing to Salesforce](#)