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Creating an External Client App in Salesforce

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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**.

ict Manager ▾

▽ Basic Information

* 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)

1. Under **API (Enable OAuth Settings)**, tick **Enable OAuth**.
2. In the **Callback URL** field, paste the URL provided in Deskpro's Salesforce CRM Sync setup.
3. 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)

▽ OAuth Settings Disable OAuth

App Settings
[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

4. 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

5. Leave all other checkboxes unticked.

4. Save and Retrieve Credentials

1. Click **Create** to save your new External Client App.
2. After the app is created, open it from the **External Client App Manager**.
3. In the **App Settings** section, locate **OAuth Settings**.
4. 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)

5. 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.

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- [Syncing to Salesforce](#)