salesforce

ADVIZORPRO

INTEGRATION INSTRUCTIONS

A comprehensive guide to integrating Salesforce with AdvizorPro

Prerequisites

Before starting the Salesforce integration:

- Ensure your Salesforce version is Enterprise, Unlimited, Developer, Performance or Professional with the API module.
- Verify you have administrator access / permissions

What to Expect

The Salesforce + AdvizorPro integration lets you sync and update data based on your saved searches, ensuring seamless data flow between systems and alignment between marketing and sales teams.

- Our integration team is here to guide you through each step, regardless of your Salesforce experience, to ensure a smooth connection.
- Expect an initial 30-minute setup call, followed by ongoing communication to finalize the integration.
- The integration, including custom field mapping from Salesforce to AdvizorPro, takes approximately 1-2 weeks.

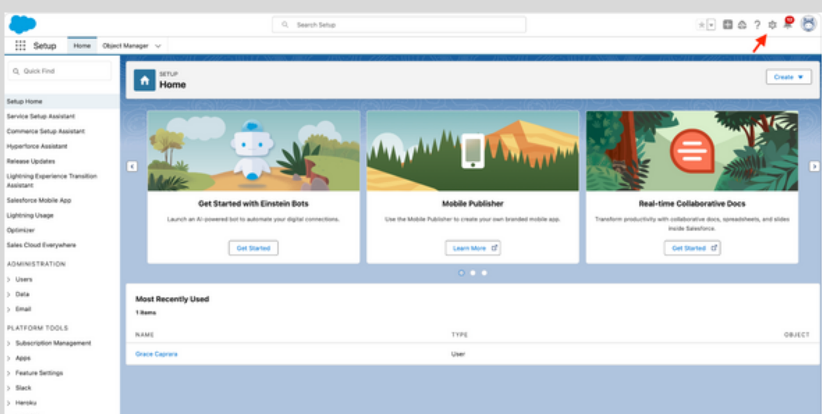
Integration Preview & Timeline

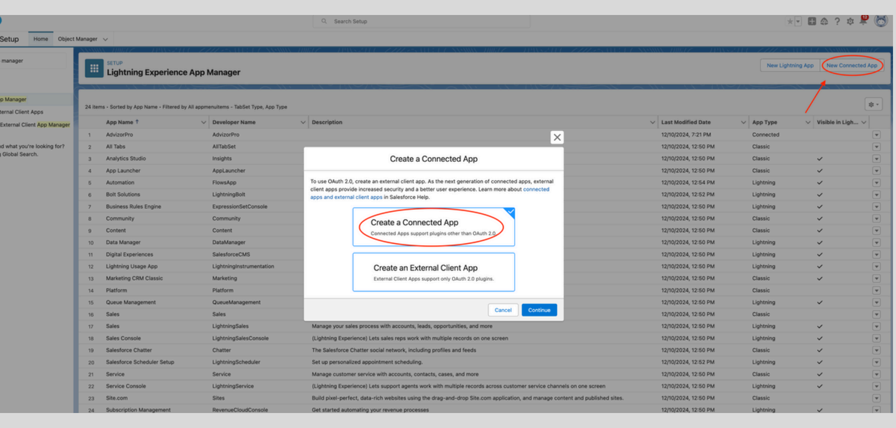
- Step 1, Connecting your Salesforce to AdvizorPro
- Step 2, Identifying & creating your custom fields in Salesforce
- Step 3, Mapping Salesforce to AdvizorPro
- Step 4, Create saved searches
- Step 5, Setting preferences for your integration

Step 1: Connecting your Salesforce to AdvizorPro

In order for fields you want used (i.e. CRD, Email, Phone, Assets, etc.), to populate in AdvizorPro UI, we first need to add AdvizorPro as an app in your Salesforce.

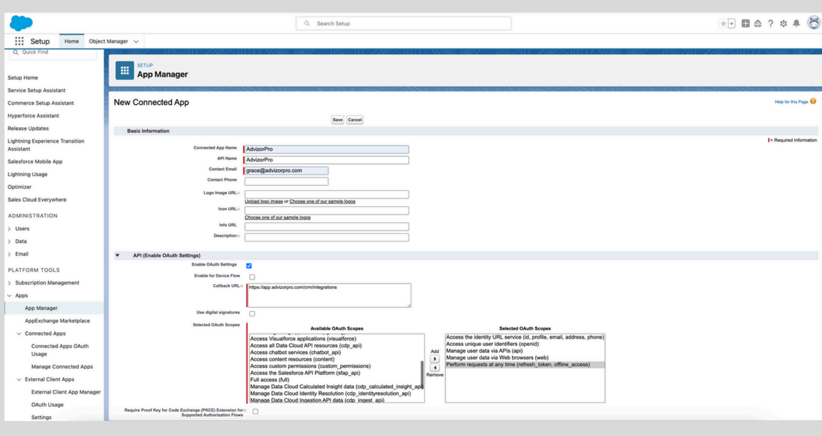
- Log in to Salesforce using your admin-provided credentials.
- Click the Settings icon (compass) in the top right corner.
- Select "Setup."
- In the Setup page, search for "App Manager" and select it.

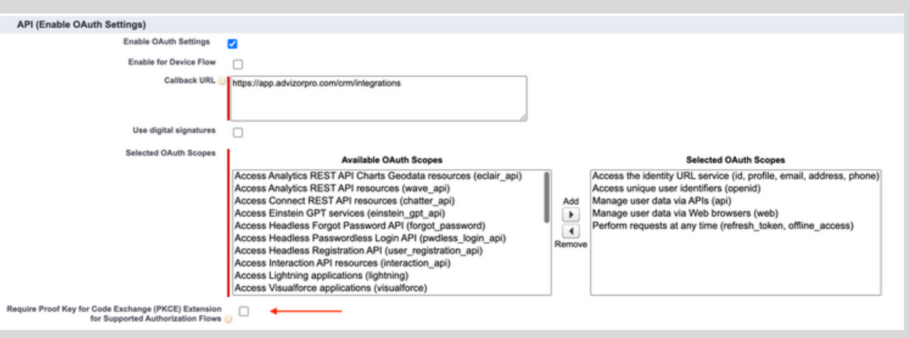




- Click "New Connected App" in the top right corner
- Select "Create a Connected App"

- In the New Connected App tab, under "Basic Information" enter,
  - Connected App Name : **AdvizorPro**
  - API Name: **AdvizorPro**
  - Contact Email: **Your email address**
- Under "API (Enable OAuth Settings)" ✓ the "Enable OAuth Settings" box.
- In the "Callback URL" field, paste: https://app.advizorpro.com/crm/integrations



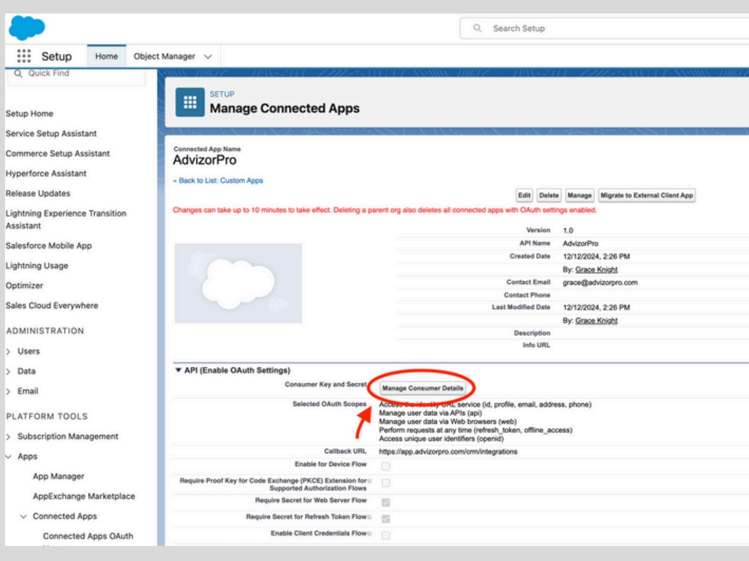


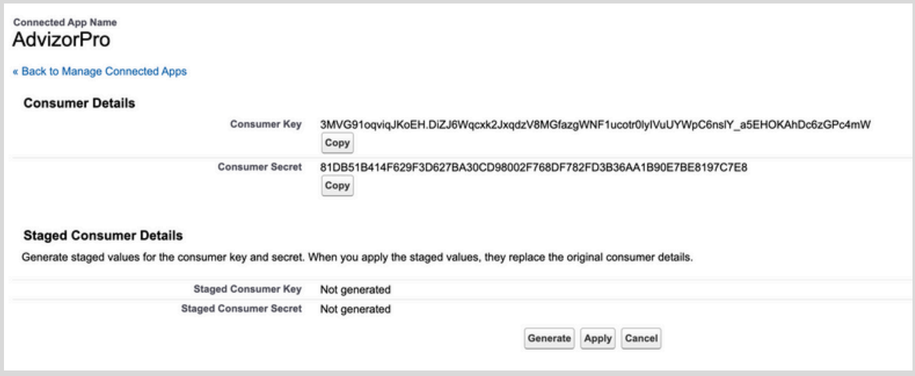
- In the "Selected OAuth Scopes" tab, add these five "Available OAuth Scopes" to "Selected OAuth Scopes"
  - **Access the identity URL service (id, profile, email, address, phone)**
  - **Access unique user identifiers (openid)**
  - **Manage user data via APIs (api)**
  - **Manage user data via Web browsers (web)**
  - **Perform requests at any time (refresh_token, offline_access)**
- Make sure to **UNCHECK** the "Require Proof Key for Code Exchange (PKCE) Extension"
- Click save & continue when prompted

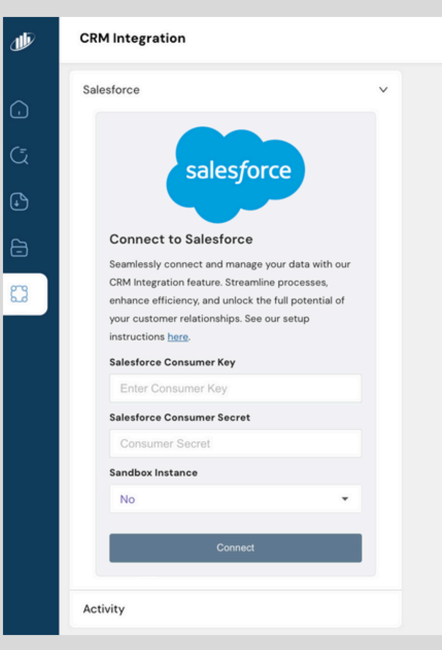
There is typically a 5-10 minute wait before the next step, but when ready:

- Under the "API (Enable OAuth Settings)" section, click "Manage Consumer Details"

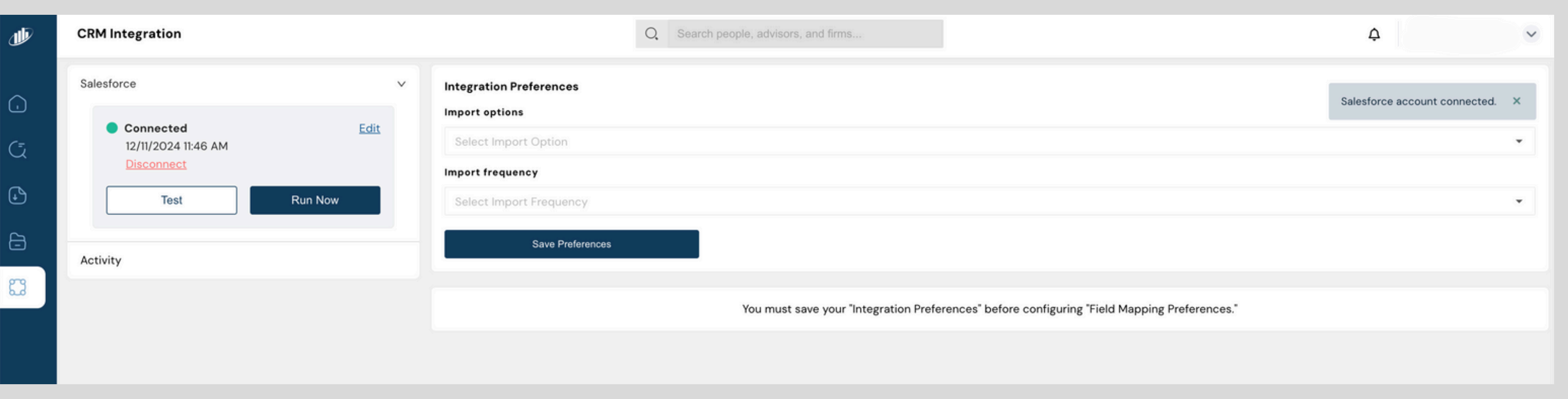
Salesforce will have you verify your identity at this point







- When you've navigated to the next page, you'll see the "Consumer Details"
- At this point, open a new tab and go to: https://app.advizorpro.com/crm/integrations
- Go back to your Salesforce tab and copy and paste the Key and Secret and click "Connect"
- This will initiate a new browser window from Salesforce, asking you to give permission to connect. Click "Allow."



Step 2: Identifying & creating your custom fields in Salesforce

Our integrations team has sent you a copy of our mapping template via email.
The next step is to schedule a call with an AdvizorPro integrations specialist to discuss your current CRM and workflows in place to ensure a smooth transition. Please email: grace@advizorpro.com if you do not have a scheduled meeting.