



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, ect.), to populate in AdvizorPro UI, we first need to add AdvizorPro as an app in your Salesforce.

- Log in to Salesforce using your adminprovided 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

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Lightning Experience Transition Assistant	Connected App Name	AdvizorPro		- Required Information
Salesforce Mobile App	AD1 Name	AdvizorPro		
Lightning Usage	Contact Email	grace@advizopro.com		
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Usage		Access cnatoct services (chatoc_ap) Access content resources (content)	Manage user data via Web browsers (web)	
Manage Connected Apps		Access custom permissions (custom_permissions) Access the Salesforce API Platform (sflap_spi)	Remove	
 External Client Apps 		Full access (full) Manage Data Cloud Calculated Insight data (odp_calculated_insight_ap	4	
External Client App Manager		Manage Data Cloud Identity Resolution (cdp_identityresolution_api) Manage Data Cloud Ingestion API data (cdp_ingest_api)		
ONUT Usage	Require Proof Key for Code Exchange (PKCE) Extension for Excessible Authorization Free			
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- 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 <u>UNCHECK</u> the "Require Proof Key for Code Exchange (PKCE) Extension"
- Click save & continue when prompted

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DMINISTRATION		Description
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Data	▼ API (Enable OAuth Settings)	
Email	Consumer Key and Secret	Manage Consumer Details
	Selected OAuth Scopes	Access the identity onc. service (id, profile, email, address, phone)
LATFORM TOOLS	1	Manage user data via APIs (api) Manage user data via Web browsers (web)
Subscription Management	1	Perform requests at any time (refresh_token, offline_access) Access unique user identifiers (openid)
Apps	Callback URL	https://app.advizorpro.com/crm/integrations
	Enable for Device Flow	
wpp manager	Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows	
AppExchange Marketplace	Require Secret for Web Server Flow	
Connected Apps	Require Secret for Refresh Token Flows	8
Connected Appen OA-sh	Enable Client Credentials Flow@	

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

Code Exchange (PKCE) Extension

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

Salesforce will have you verify your identity

at this point

Connected App Name AdvizorPro « Back to Manage Connected Apps							
Consumer Details							
Consumer Key	3MVG91oqviqJKoEH.DIZJ6Wqcxk2JxqdzV8MGfazgWNF1ucotr0lyIVuUYWpC6nsIY_a5EHOKAhDc6zGPc4mW Copy						
Consumer Secret	81DB51B414F629F3D627BA30CD98002F768DF782FD3B36AA1B90E7BE8197C7E8 Copy						
Staged Consumer Details							
Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.							
Staged Consumer Key	Not generated						
Staged Consumer Secret	Cenerated Generate Apply Cancel						



• When you've navigated to the next page, you'll see the "Consumer Details"

• At this point, open a new tab and go to: <u>https://app.advizorpro.com/crm/integrations</u>

- 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."

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3	Activity	Save Preferences		
		You must save your "Integration Preferences" before configuring "Field Mapping Preferences."		

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.



integrations@advizorpro.com