

Salesforce Authentication

Overview

The Alchemer Salesforce integration uses OAuth to authenticate.

Salesforce API Credentials

What You Need

- Salesforce login credentials
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Authenticate Salesforce in Alchemer

After connecting your Salesforce account, your credentials are securely stored in Alchemer and can be reused across all Salesforce integration actions.

How to Authenticate

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1. Start a New Authentication

- Inside any Salesforce integration action, select **New Authentication**.

2. Enter Your Salesforce Credentials

- A pop-out window will appear asking for your Salesforce login credentials. Enter them.
 - **Note:** If the pop-out appears, then disappears, and the authentication is made, that means you were already logged into Salesforce. There is no need to do anything else.

3. Save Your Authentication

- Select **Create**.
- Once created:
 - The authentication is saved and reused for all Salesforce actions
 - You only need to update it if your Salesforce credentials change or the OAuth session expires

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