Integrating Salesforce

https://campus.barracuda.com/doc/102888441/

To integrate Salesforce, follow the procedures below:

- To verify user permissions
- To get the Salesforce instance URL
- To create a client key and client secret
- To enable the Salesforce integration in the Barracuda XDR Dashboard

To verify user permissions

1. Log into **Salesforce** as an administrator
2. Find the user you want to associate with your new Client Key (created in the following step).
   Optionally, create a new user to associate.
3. Navigate to **Setup** > **Quick Find** > **Users**.
4. Click the profile link associated with the **User Account** used for data collection.
5. Search for API-enabled permission on the same page:
   If you don't see API-enabled permissions on the page, search under **System Permissions**.
6. If **API Enabled privilege** is not selected, enable it for data collection.

To get the Salesforce Instance URL

- Do one of the following:
  - In **Salesforce Classic**, copy the URL from the address bar of your browser. Remove the "/home/home.jsp" from the end of the address, for example if the URL was `https://AAA.salesforce.com/home/home.jsp`, it would become `https://AAA.salesforce.com`.
  - In **Salesforce Lightning**, click the **View Profile** tab. Copy the URL that can be found under the user name.

To create a client key and client secret

1. Log into **Salesforce** with the user you identified in the **To verify user permissions** procedure.
2. In the top right menu bar, click **Setup**.
3. In the Search Setup search box, search for **App Manager**, then select **App Manager**.
4. Click **New Connected App**.
5. Type a name for the connected application
   This will be displayed in the App Manager and on its App Launcher tile. For Example: "Barracuda XDR Collector".
6. Type the API name.
   The default is a version of the name without spaces. Only letters, numbers, and underscores are allowed. If the original app name contains any other characters, edit the

default name.

7. Type the contact email of an administrator responsible for the application.
8. In the **API (Enable OAuth Settings)** section, select **Enable OAuth Settings**.
9. If **Enable for Device Flow option** is not enabled, select it.
10. In **Callback URL**, type the Salesforce Instance URL. For example: `https://na9.salesforce.com/oauth2/callback`
11. Select the following OAuth scopes to apply to the connected app:
    - **Manage user data via APIs (api)**
    - **Perform requests at any time (refresh_token, offline_access)**
    - (Optional) In case of data collection, if any permission issues arise, add the **Full access (full) scope**.
    - Select **Require Secret for the Web Server Flow** to require the app's client secret in exchange for an access token.
    - Select **Require Secret for Refresh Token Flow** to require the app's client secret in the authorization request of a refresh token and hybrid refresh token flow.
    - Select **Enable Client Credential Flow**.
12. Click **Save**.

    It may take approximately 10 minutes for the changes to take effect.
13. Click **Edit Connected Apps policies**.
14. Navigate to **Setup** > **Quick Find** > **Manage Connected Apps**.
15. Click **Edit Policies**.
16. In the **IP Relaxation** menu, select **Relax IP restrictions**.
17. Click Continue
18. Under **API details**, click **Manage Consumer Details > Verify the user account using Verification Code**.
19. In the Consumer Details section, copy the **Consumer Key** and **Consumer Secret.**

    On the XDR Dashboard Salesforce configuration page in the next procedure, you use the **Consumer Key** as the **Client ID** and the **Consumer Secret** as the **Client Secret**.
20. Click **Save**.

To enable the Salesforce integration

1. In **Barracuda XDR Dashboard**, navigate to **Administration** > **Integrations**.
2. On the **Salesforce** card, click **Setup**.
3. Enter the following:
    - **Salesforce Instance URL** — The **Salesforce Instance URL** from the *To get the Salesforce Instance URL* procedure above
    - **Client ID** — The **Consumer Key** from the *To create a client key and client secret* above
    - **Client Secret** — The **Consumer Secret** from the *To create a client key and client secret* above
4. Optionally, click **Test** to verify the credentials.
5. Select the **Enable** check box.
6. Click Save.