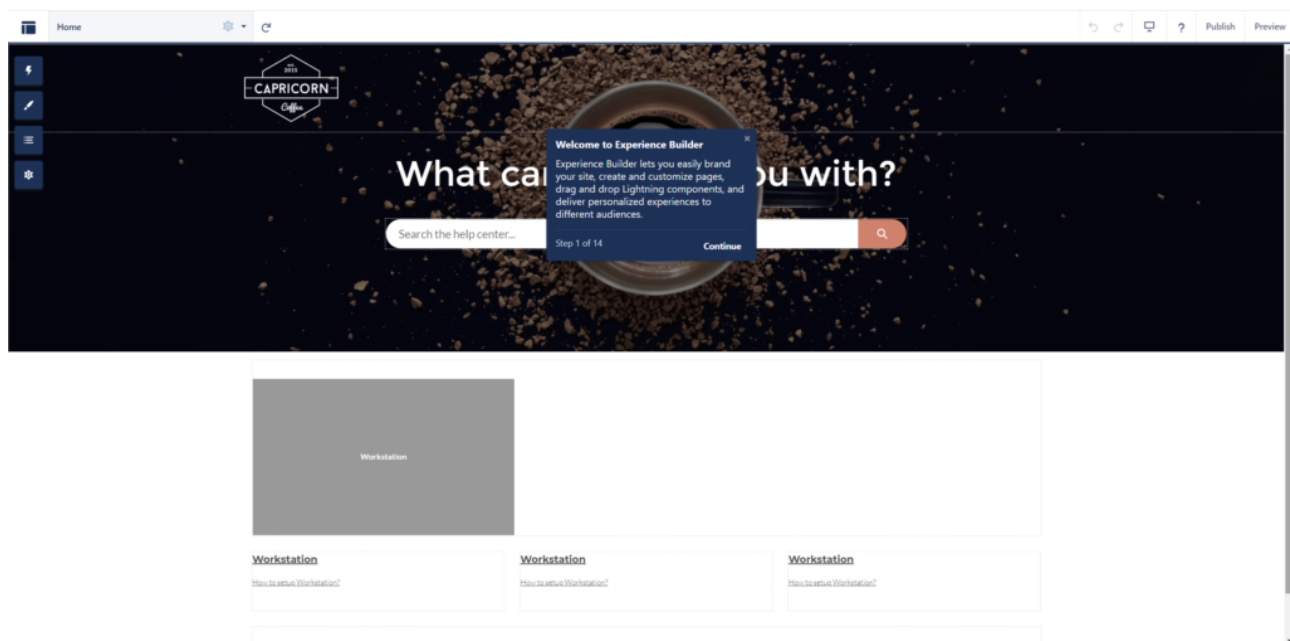


# Workstation – Salesforce Knowledge Integration

## Brief Overview

**Salesforce Knowledge** is built from knowledge articles that are created in Salesforce. The admin in Salesforce can create a site, and customize it in order to display articles to users.



These site are managed in Salesforce in Setup → All Sites.

We currently have an integration with Salesforce, for searching in Salesforce objects such as Leads, Accounts, Cases and more.

Read about the the [Salesforce integration setup](#).

In this **Salesforce Knowledge** integration, which is being managed separately from the Salesforce one, we are adding search capabilities to Knowledge Articles.

Salesforce Knowledge, allows the creation of articles. The access to them is usually done on an external site. Users with Company Communities permissions can access this site (but not to the regular Salesforce that other users use).

This integration will allow searching in Salesforce Knowledge articles, and will direct users to the external site by clicking on a search result.

## Get to Know

Search for Salesforce Knowledge articles. This is also known in Salesforce as Experience Cloud or Community Cloud.

Users will be directed to the external site (outside of Salesforce), in which the knowledge base is displayed.

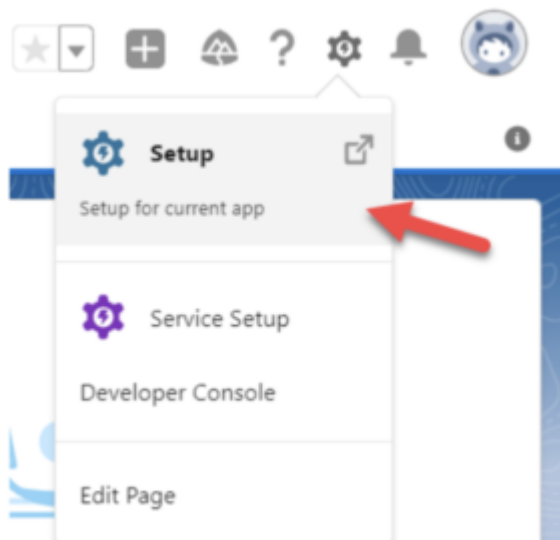
Admin on Console can customize the integration name and icon to be displayed in Workstation App (since users do not know it was created in Salesforce).

## Security Overview

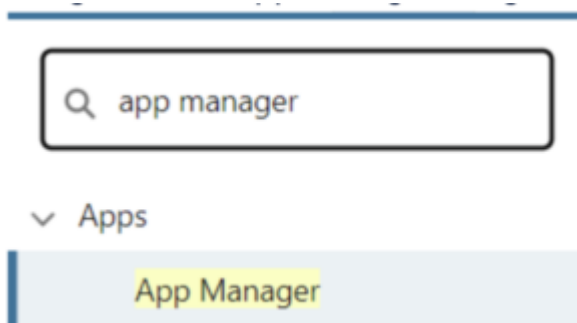
Read more about [Workstation's integration security](#) and [Workstation's Enterprise Search](#).

## Configure an App in Salesforce for Workstation Integration

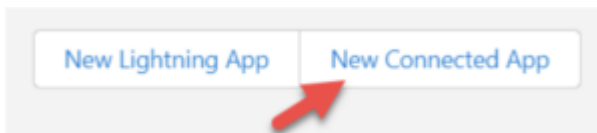
1. Sign in into Salesforce
2. Click on Setup for current app-



3. Navigate to the App Manager using the search-



4. Check if you have a connected app name called 'Workstation' as part of a previous integration to Salesforce. If you do, skip to step 10. If you don't, create a 'New Connected App'-

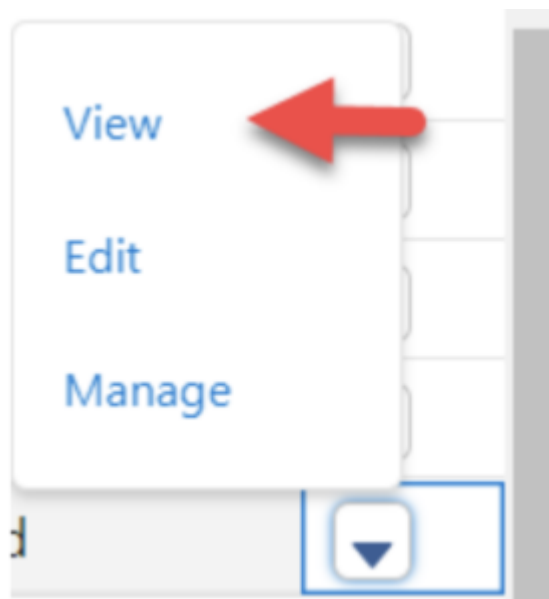


5. Fill in this data in the relevant fields-

1. Connected App Name- Workstation
2. API Name- Workstation
3. Contact Email- your email address
4. Enable OAuth Settings - mark as checked
5. Enable for Device Flow - mark as checked
6. Callback URL-
  - <https://workstation.walkme.com/salesforce-knowledge/connected>
  - <https://eu-workstation.walkme.com/salesforce-knowledge/connected>
  - <http://localhost:3002/app/dev/authenticator-app/salesforce/connected>
7. Enable the following OAuth Scopes-
  - Full access (full)
  - Manage user data via APIs (api)
  - Perform requests at any time (refresh\_token, offline\_access)
8. Require Secret for Web Server Flow - mark as checked
9. Require Secret for Refresh Token Flow - mark as checked

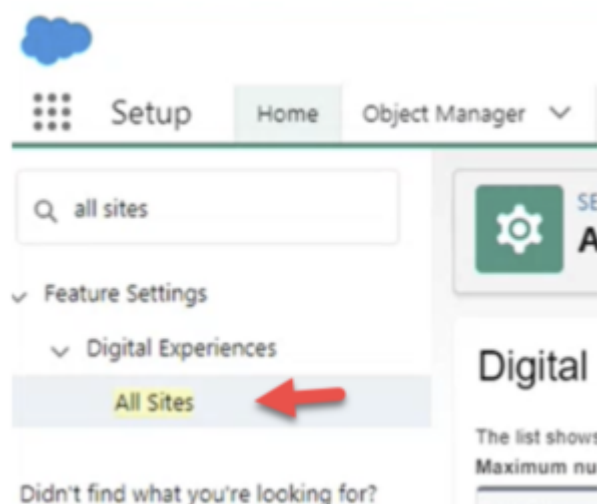
6. Press Save

7. Back in the App Manager screen, on the app's menu click on **View**



8. On this screen, please copy **“Consumer Key”** and **“Consumer Secret”**

9. Also copy your **Salesforce Knowledge “domain”** (URL)- the URL used to access the Experience site.



10. Go to Setup -> Object Manager

11. Click New to create a new custom field

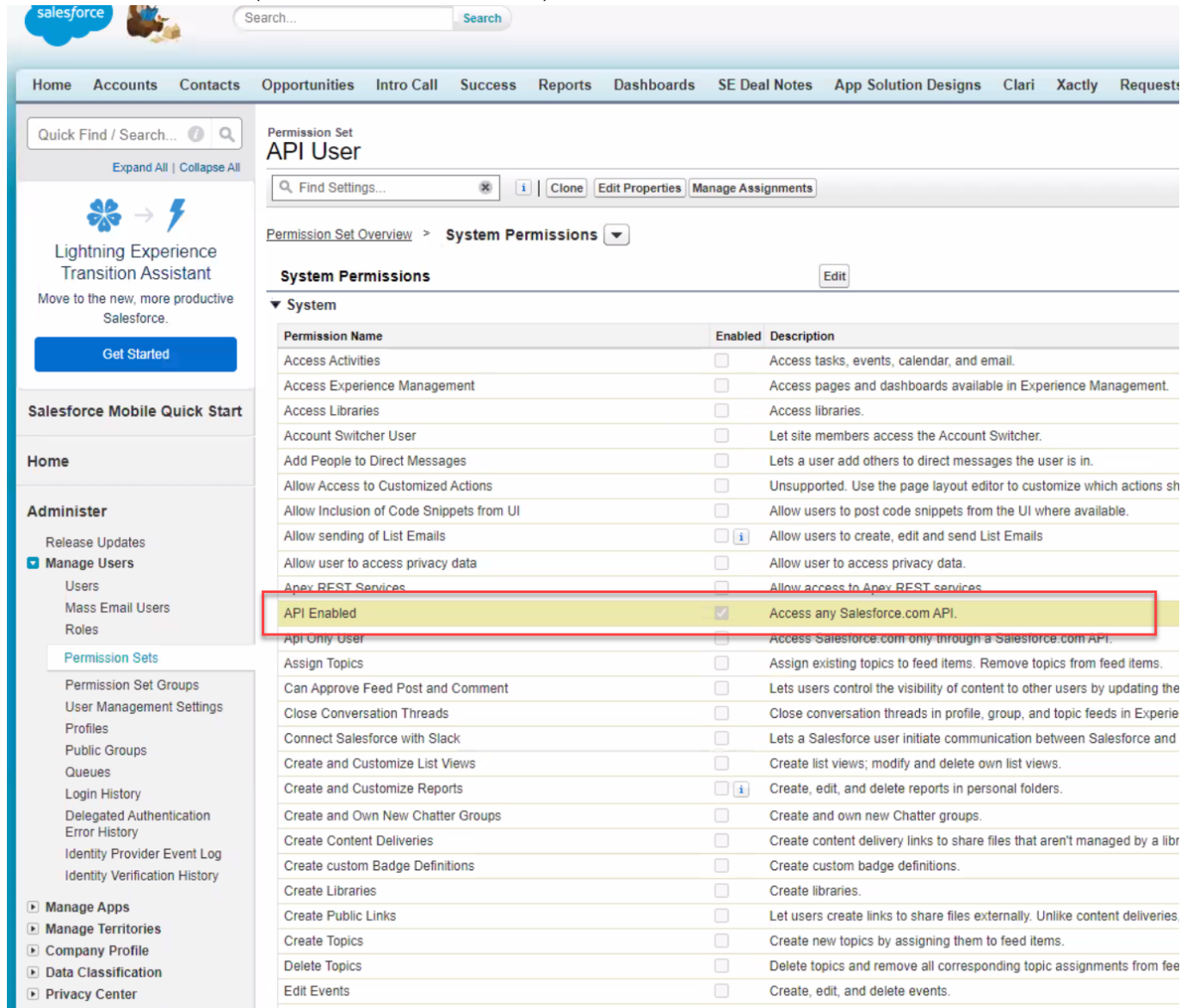
12. Name the custom field **External URL Name**

13. In this field, under **Formula Options** create the formula that will set the URL according to your site in which the article should be displayed.

- Make sure that the Article ID is placed with a dynamic attribute in it.

14. Copy the Field Name as it is displayed in your Custom Field

15. Go to **Manage Users -> Permission Sets**, and make sure that the **system permission API Enabled is allowed** (the checkbox is checked)

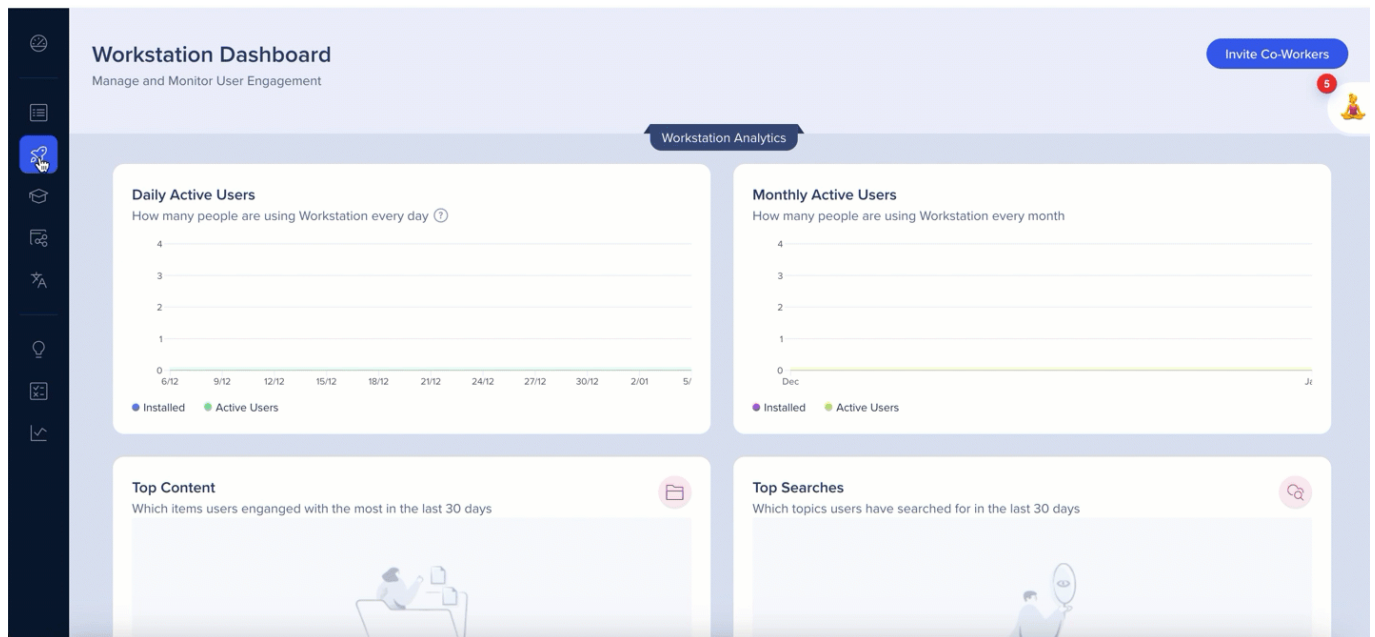


The screenshot shows the Salesforce interface for managing a Permission Set named 'API User'. The 'System Permissions' tab is selected, displaying a table of system permissions. The 'API Enabled' permission is highlighted with a red box, indicating it is checked.

| Permission Name                          | Enabled                             | Description   |
|--|-------------------------------------|---|
| Access Activities                        | <input type="checkbox"/>            | Access tasks, events, calendar, and email.                                  |
| Access Experience Management             | <input type="checkbox"/>            | Access pages and dashboards available in Experience Management.             |
| Access Libraries                         | <input type="checkbox"/>            | Access libraries.   |
| Account Switcher User                    | <input type="checkbox"/>            | Let site members access the Account Switcher.                               |
| Add People to Direct Messages            | <input type="checkbox"/>            | Lets a user add others to direct messages the user is in.                   |
| Allow Access to Customized Actions       | <input type="checkbox"/>            | Unsupported. Use the page layout editor to customize which actions sh       |
| Allow Inclusion of Code Snippets from UI | <input type="checkbox"/>            | Allow users to post code snippets from the UI where available.              |
| Allow sending of List Emails             | <input checked="" type="checkbox"/> | Allow users to create, edit and send List Emails                            |
| Allow user to access privacy data        | <input type="checkbox"/>            | Allow user to access privacy data.  |
| Apex REST Services                       | <input type="checkbox"/>            | Allow access to Apex REST services.   |
| <b>API Enabled</b>                       | <input checked="" type="checkbox"/> | <b>Access any Salesforce.com API.</b>                                       |
| Api Only User                            | <input type="checkbox"/>            | Access Salesforce.com only through a Salesforce.com API.                    |
| Assign Topics                            | <input type="checkbox"/>            | Assign existing topics to feed items. Remove topics from feed items.        |
| Can Approve Feed Post and Comment        | <input type="checkbox"/>            | Lets users control the visibility of content to other users by updating the |
| Close Conversation Threads               | <input type="checkbox"/>            | Close conversation threads in profile, group, and topic feeds in Experie    |
| Connect Salesforce with Slack            | <input type="checkbox"/>            | Lets a Salesforce user initiate communication between Salesforce and        |
| Create and Customize List Views          | <input type="checkbox"/>            | Create list views; modify and delete own list views.                        |
| Create and Customize Reports             | <input checked="" type="checkbox"/> | Create, edit, and delete reports in personal folders.                       |
| Create and Own New Chatter Groups        | <input type="checkbox"/>            | Create and own new Chatter groups.  |
| Create Content Deliveries                | <input type="checkbox"/>            | Create content delivery links to share files that aren't managed by a libr  |
| Create custom Badge Definitions          | <input type="checkbox"/>            | Create custom badge definitions.  |
| Create Libraries                         | <input type="checkbox"/>            | Create libraries.   |
| Create Public Links                      | <input type="checkbox"/>            | Let users create links to share files externally. Unlike content deliveries |
| Create Topics                            | <input type="checkbox"/>            | Create new topics by assigning them to feed items.                          |
| Delete Topics                            | <input type="checkbox"/>            | Delete topics and remove all corresponding topic assignments from fee       |
| Edit Events                              | <input type="checkbox"/>            | Create, edit, and delete events.  |

16. Go to Console -> Workstation -> Integrations

17. Click on **Setup** of the Salesforce Knowledge integration



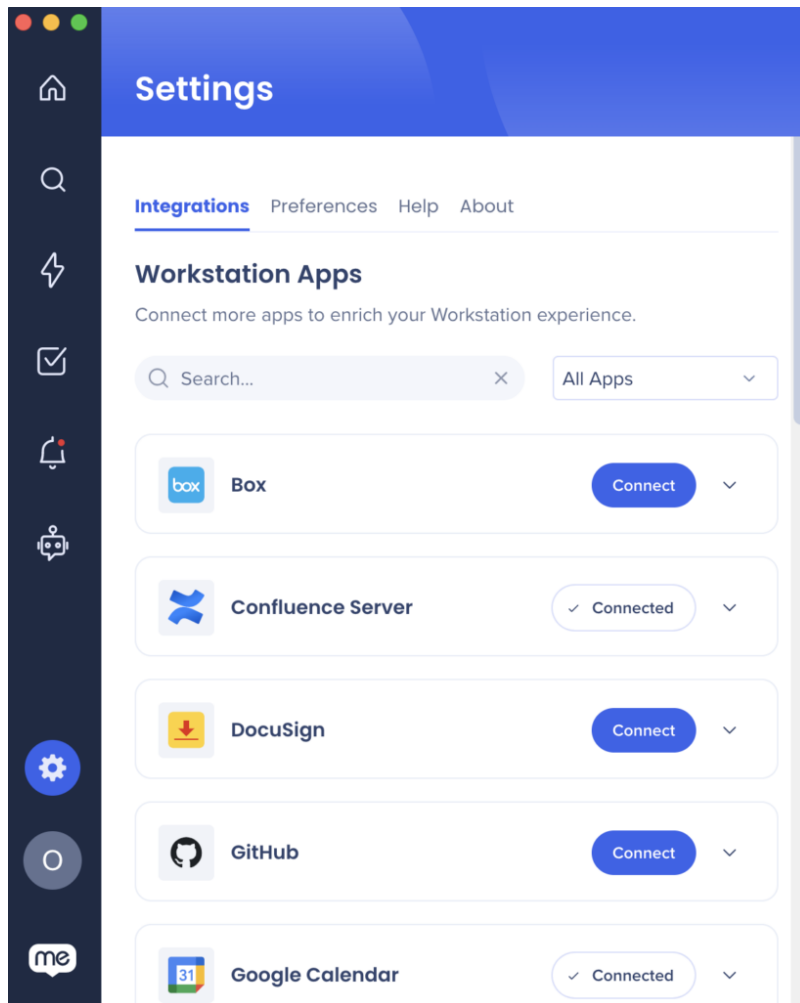
## 18. Configure the following fields-

1. OAuth Client ID (Consumer Key)
2. OAuth Client Secret (Consumer Secret)
3. Site URL

Notice that the Site URL should contain only the domain with .com in the end, without the slash characters in the beginning or end of the expression. For example, if the entire URL is <https://organizationsupport.ext.org.com/> The Site URL to be populated in Console is- [organizationsupport.ext.org.com](https://organizationsupport.ext.org.com)

4. Display Name (optional)- if the name of the integration in the Workstation App should be different than "Salesforce Knowledge"
5. Logo URL (optional)- if the icon of the integration in the Workstation App should be different than the Salesforce icon
6. Custom Article URL field (optional) - fill in the Field Name of the custom field, if the URL of the article is different than the following format -  
`{{domain}}/s/article/{{ArticleURLname}}`
7. Custom Salesforce Knowledge Object Key (optional) - articles object key default value is "Knowledge\_\_kav". If the name is different in your Salesforce, fill in the custom Salesforce Knowledge object key

## 19. The integration will appear in the Integrations tab of the app's Settings



## Segmentation

Integrations can be segmented to a sub-set of users and audiences, rather than being enabled for all end-users. This feature streamlines the integration process and helps to ensure that users are only using the integrations that are relevant to their work.

To segment a Workstation integration:

1. Navigate to the [Workstation Integrations page](#) in the console
2. Click the **All** button on the integration you would like to segment
3. Click **Select specific recipients** in the Manage Access popup
4. Select the audiences or individual users from the dropdowns to handpick who can use the integration
5. Click **Apply**



<

Manage access

×

Select who can use this integration


☐

All recipients

☒

Select specific recipients...


Audiences



Select audiences

▼

Individual recipients



Select user

▼

Cancel

Apply