

---

## Integrating Salesforce and SFX

- **Product:** SFX
  - **Product Version:** 4
  - **Relevant for Installation Type:** Dedicated-Direct, Direct, Local
- 

### Description

Desired Outcome Goal:

Using the "**Send to Ex Libris**" form in KBManager or the 'KnowledgeBase Change Requests' section with Salesforce.

### Resolution

- Log on to the SFX server as an instance user, for example: sfxlcl41.
- Edit the CRM configuration file:

```
cn
vi sfx_crm.config
```

- Copy/paste the encrypted username into the "contacts" section of sfx\_crm.config:

```
#contact_name "email" "crm_user_name" "crm_encrypted_pass"
Customer_Lastname "email" "SalesForce username" ""
```

- Enter values for **contact\_name**, **"email"** and **"crm\_user\_name"** in the "contacts" section.
  - **contact\_name** - your name or name of your institution
  - **"email"** - your contact email displayed in Support Portal / Salesforce
  - **"crm\_user\_name"** - the very same value as "email"
  - **"crm\_encrypted\_pass"** is not required any more, it remains empty or "" can be removed.

Make sure all values (except the contact\_name) are quoted and separated by **TAB**.

#### EXAMPLE:

```
#contact_name "email" "crm_user_name" "crm_encrypted_pass"
John "john@mylibrary.com" "john@mylibrary.com" ""
```

- Enter the Salesforce URL in server\_url value of the "crm\_info" section:

```
server_url "https://exlibris.secure.force.com/antwoord/services/apexrest/xmlservice/"
```

- Save and exit the sfx\_crm.config file:

```
:wq
```

- 
- **Article last edited:** 01-Feb-2021