

Setting Up a Connection to Salesforce

Introduction

This guide will help you set up a connection between JIRA Service Desk and Salesforce.

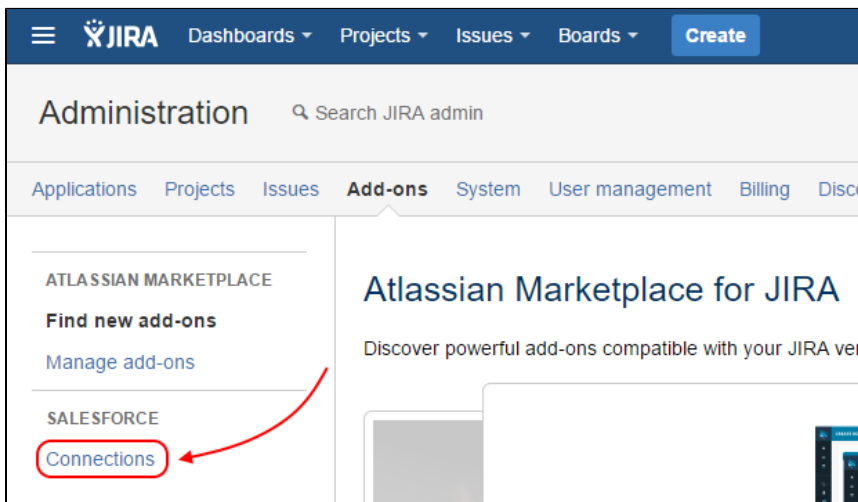
Accessing the Salesforce Connections Screen

This guide assumes you have already installed the Connector beforehand.

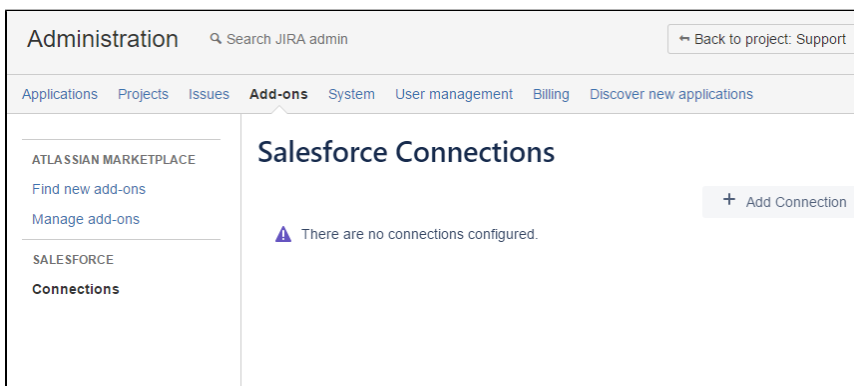
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1. Go to the **Cog Icon**  > **Add-ons**.
2. In the sidebar, under **Salesforce**, click **Connections**:

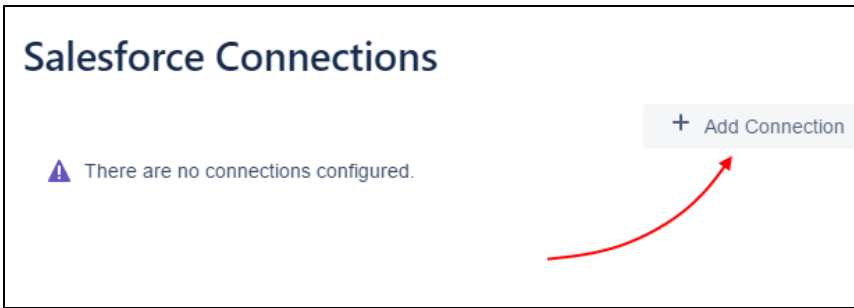


3. You will be taken to the **Salesforce Connections** screen:

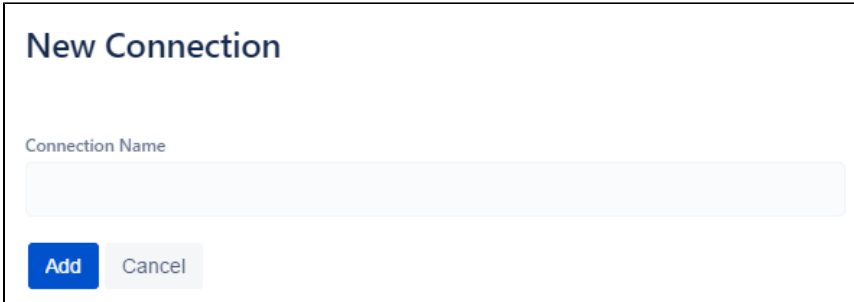


Adding a Connection

1. On the Salesforce Connections screen, click **+ Add Connection**:

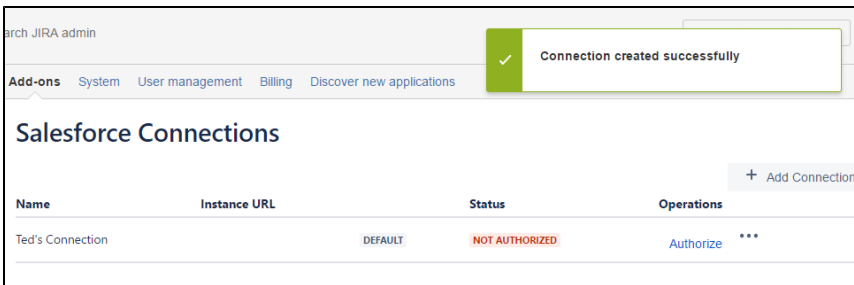


2. The **New Connection** dialog box will appear.

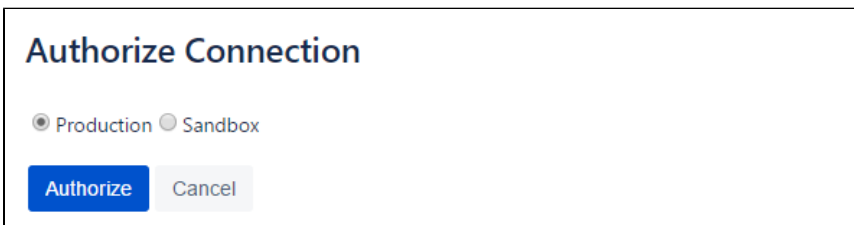


Type in a suitable name for your **New Connection**, then click **Add**.

3. You will now see your **New Connection** listed on the **Salesforce Connections** page.



4. You'll notice that the Status is **NOT AUTHORIZED** so let's go ahead and click **Authorize**.
5. The **Authorize Connection** dialog box will appear.



Choose either **Production** or **Sandbox**, then click **Authorize**.

6. You will be asked to log in to Salesforce.
Provide your credentials and log in.
7. Once successful, you will see that the status will be set to **AUTHORIZED** on the **Salesforce Connections** screen.

arch JIRA admin

Add-ons System User management Billing Discover new applications

✓ Connection Ted's Connection successfully authorized.

Salesforce Connections

+ Add Connection

Name	Instance URL	Status	Operations
Ted's Connection	https://ap1.salesforce.com	DEFAULT AUTHORIZED	Revoke Access ...

Congratulations! You have successfully connected Salesforce to JIRA Service Desk.