

How to create Salesforce Logic Apps

Salesforce Logic App can be created to keep track of any new case or lead registered within Salesforce CRM and trigger a workflow defined within it. You can design your workflow in the Logic Apps Designer for an email request to be sent to the relevant queue in the Puzzel Application so that it can be assigned to the right agent to be dealt with. Once the agent accepts the request, the case/lead details will be opened in Salesforce for him to take further actions.

Overview

In this document you will be able to create and deploy new Salesforce connector template to trigger a workflow when a new case/Lead is registered in Salesforce.

Prerequisites

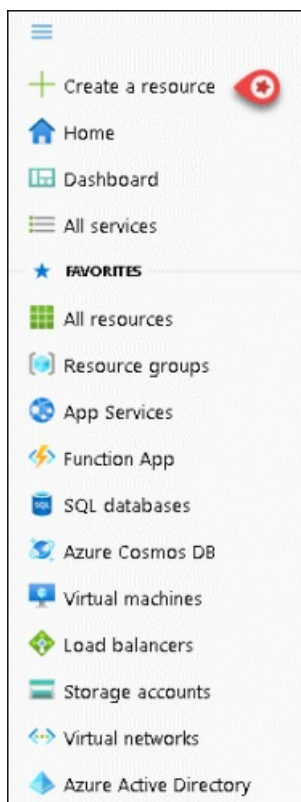
Prerequisites for creating Logic App for Salesforce connector are:

- Azure subscription
- Salesforce CRM

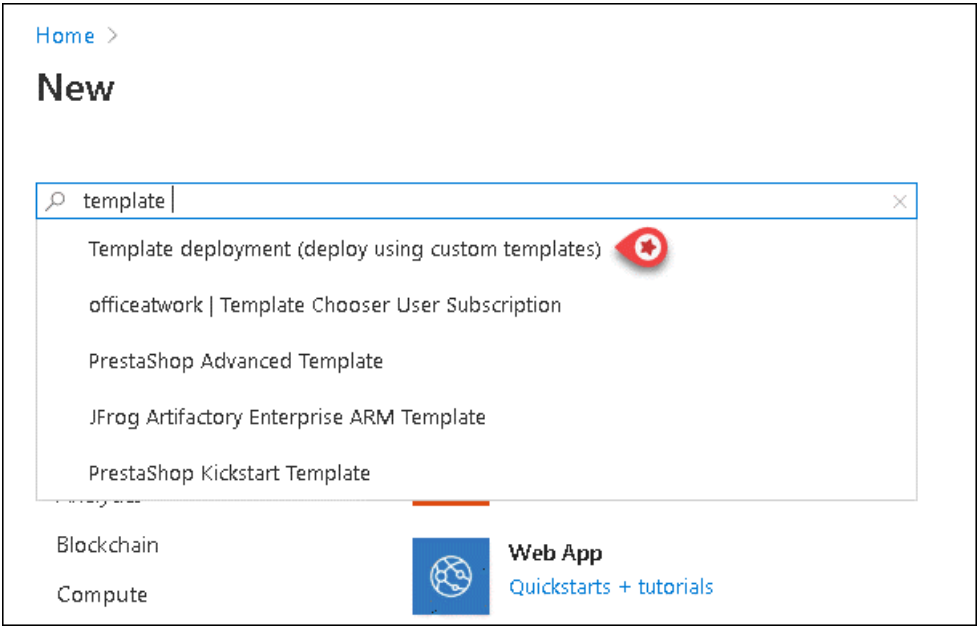
Create Salesforce Logic App

To create Salesforce Logic Apps, you need to:

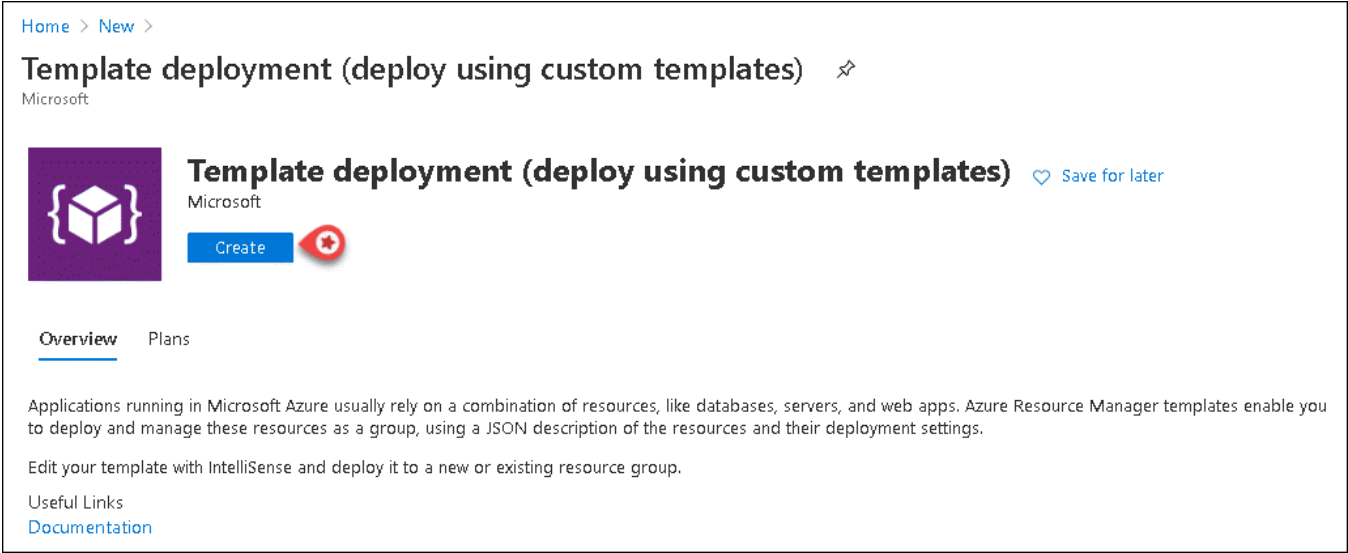
1. Click on the Hamburger sign on the top left corner and select **Create a resource** or select **Create a resource** icon in the Home page.



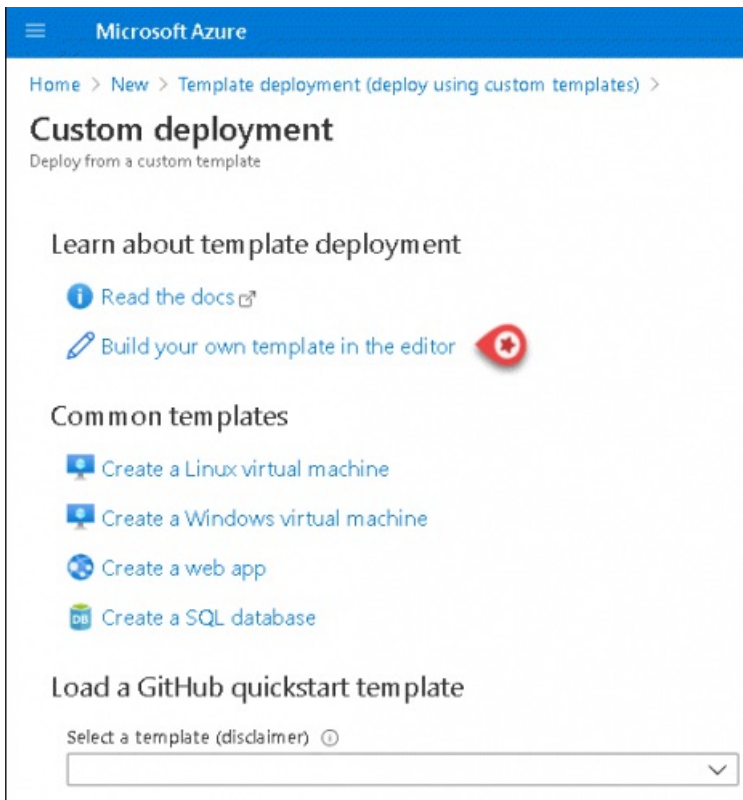
2. Create a new resource template of type Template deployment (deploy using custom templates)



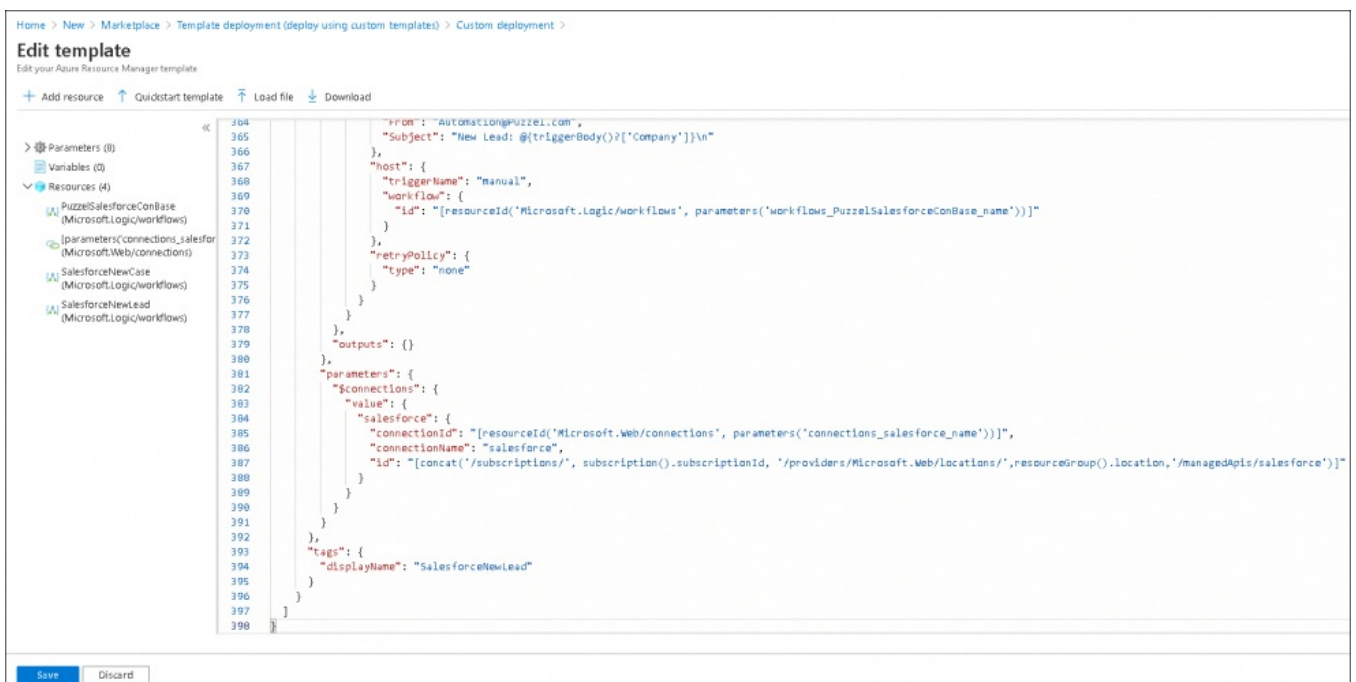
3. Click on **Create**



4. Select **Build your own template** in the editor to open the template editor



- Copy the content of the JSON file from the URL <https://puzzelconnected.azurewebsites.net/Salesforce/template.json> and paste it into the template. Save the changes to the template



- Select an existing resource group or create a new one. Enter all the mandatory fields in this screen, agree to the terms and conditions and click on **Purchase**

Home > New > Marketplace > Template deployment (deploy using custom templates) >

Custom deployment

Deploy from a custom template

BASICS

Subscription *

CoreDev

Resource group *

Resource1

Create new

Location

(US) East US

SETTINGS

Connections_salesforce_name

Salesforce

Workflows_Salesforce New Case_name

SalesforceNewCase

Workflows_Salesforce New Lead_name

SalesforceNewLead

Workflows_Puzzel Salesforce Con Base_name

PuzzelSalesforceConBase

Puzzel Customer Key *

10009

Puzzel Password *

Puzzel User *

Tom Hanks

Puzzel Access Point *

user@domain.com

TERMS AND CONDITIONS

Azure Marketplace Terms | Azure Marketplace

By clicking "Purchase," I agree to the applicable legal terms associated with the offering: (b) authorize Microsoft

Purchase

| Parameter | Value |
|---------------------|---|
| Puzzel Customer key | Customer number of your Puzzel solution |
| Puzzel Password | Password to your Puzzel solution |
| Puzzel User | Username to your Puzzel solution |
| Puzzel Access Point | Email id configured as Access point in Puzzel |

7. Select **Resource groups** icon from the Home screen choose your Resource group and click on Salesforce API connection

Home >

Resource1

Resource group

Search (Ctrl+J)

+ Add

Edit columns

Delete resource group

Refresh

Move

Export to CSV

Assign tags

Delete

Export template

Feedback

Overview

Activity log

Access control (IAM)

Tags

Events

Settings

Quickstart

Deployments

Policies

Properties

Locks

Export template

Subscription (change) : CoreDev

Deployments : 2 Succeeded

Subscription ID : fe1dd2af-c453-4604-a4da-f3dce8bce8b7

Tags (change) : [Click here to add tags](#)

Filter by name...

Type == all

Location == all

Add filter

Showing 1 to 14 of 14 records.

Show hidden types

☐

Name

↑↓

☐

Type

↑↓

☐

Salesforce

API Connection

☐

SalesforceNewCase

Logic app

☐

SalesforceNewLead

Logic app

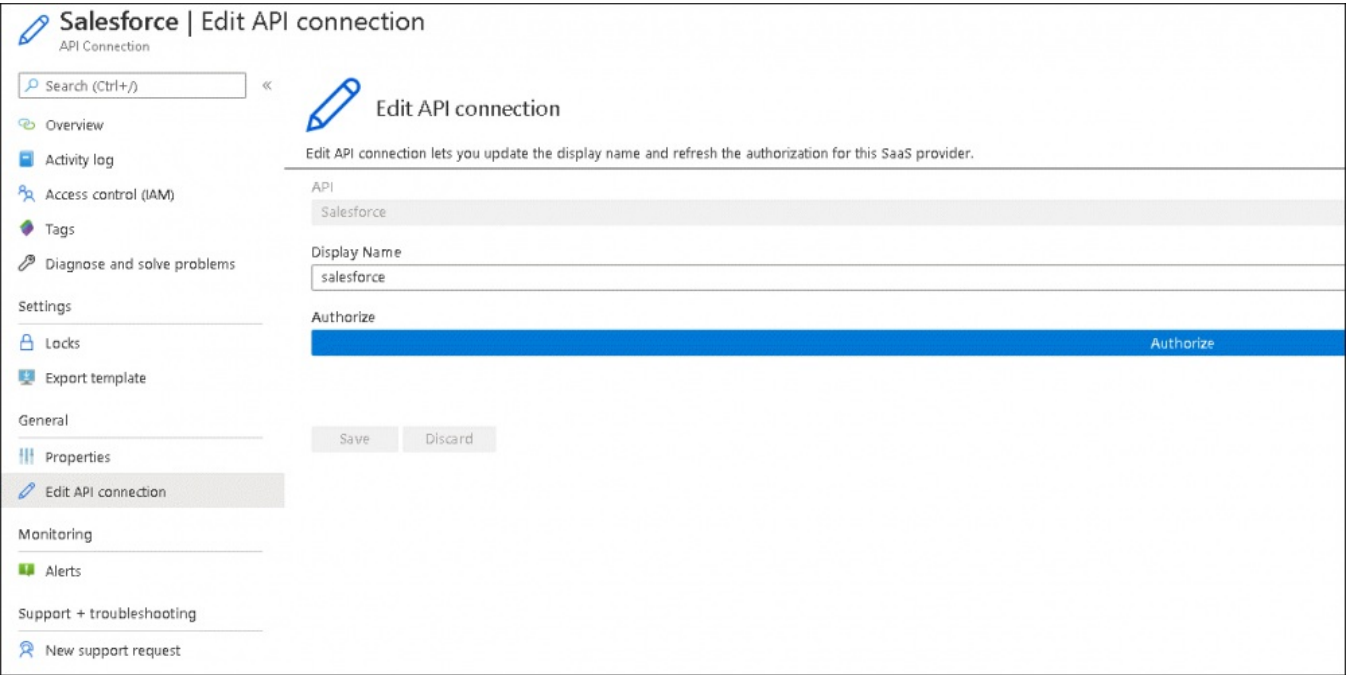
☐

Secondary_email

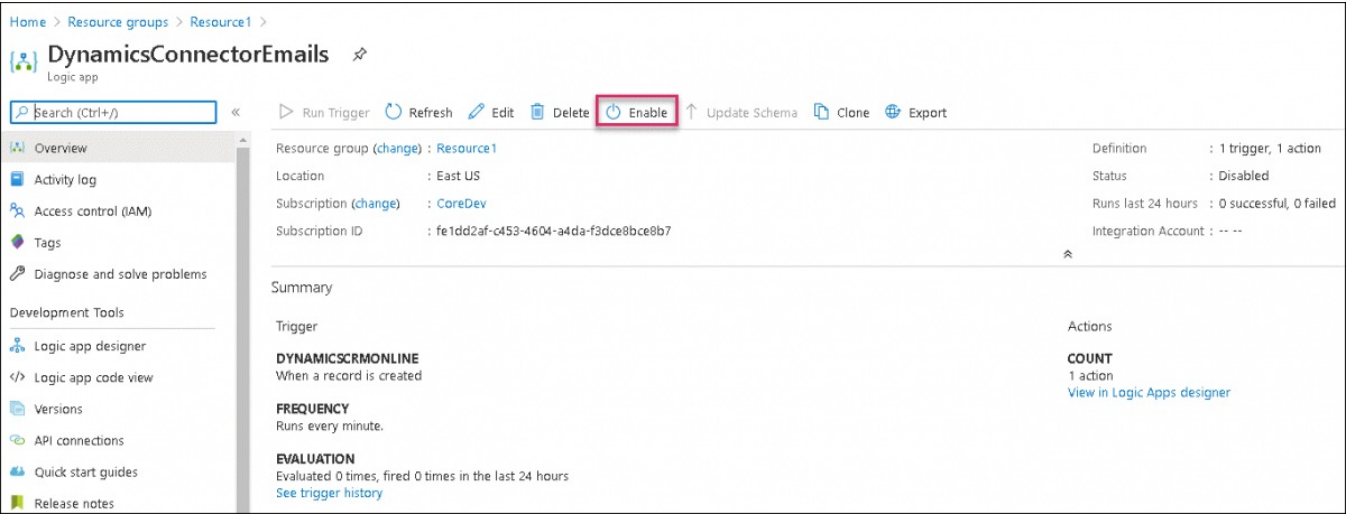
Logic app

8. Select **Edit API connection** from the left menu and click on**Authorize**. In the sign-in popup screen, login with

Salesforce credentials and click **Save**



9. Navigate to your Resource group screen and select**SalesforceNewCase** Logic App and **Enable** it



To enable the **SalesforceNewLead** Logic App, select **SalesforceNewLead** in your resource folder and enable it.