

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

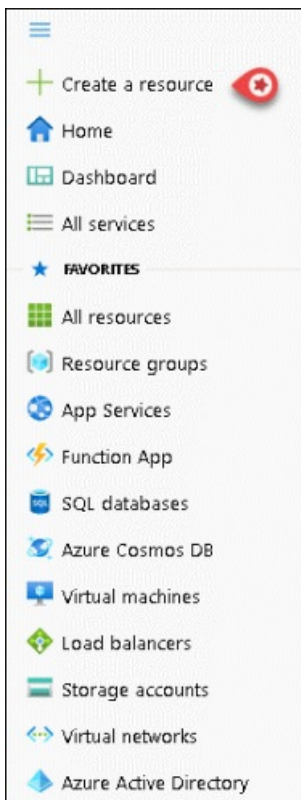
Prerequisites for creating Logic App for Salesforce connector are:

- Azure subscription
- Salesforce CRM

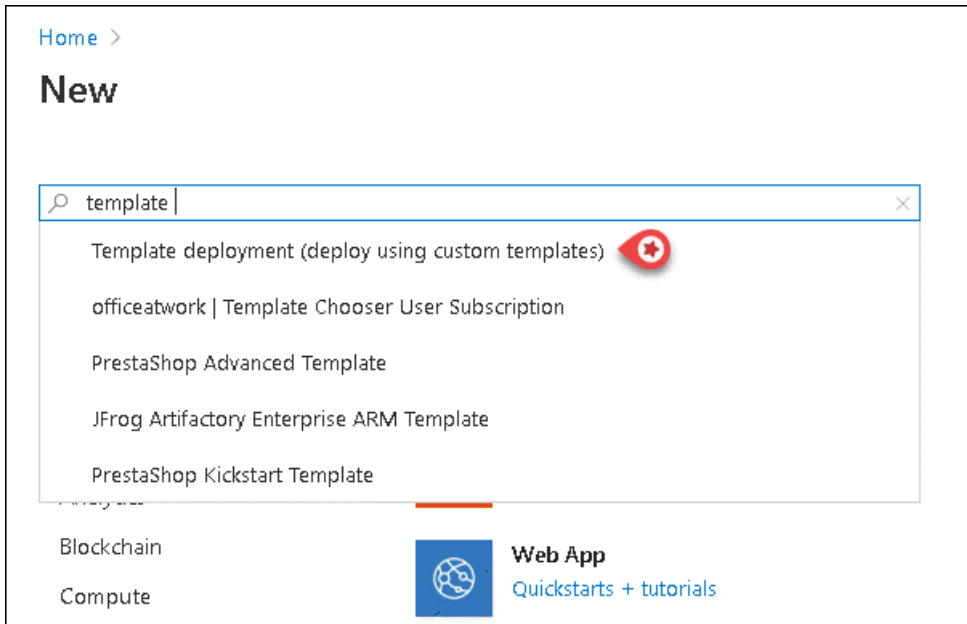
Create Salesforce Logic App

To create Salesforce Logic Apps, you need to:

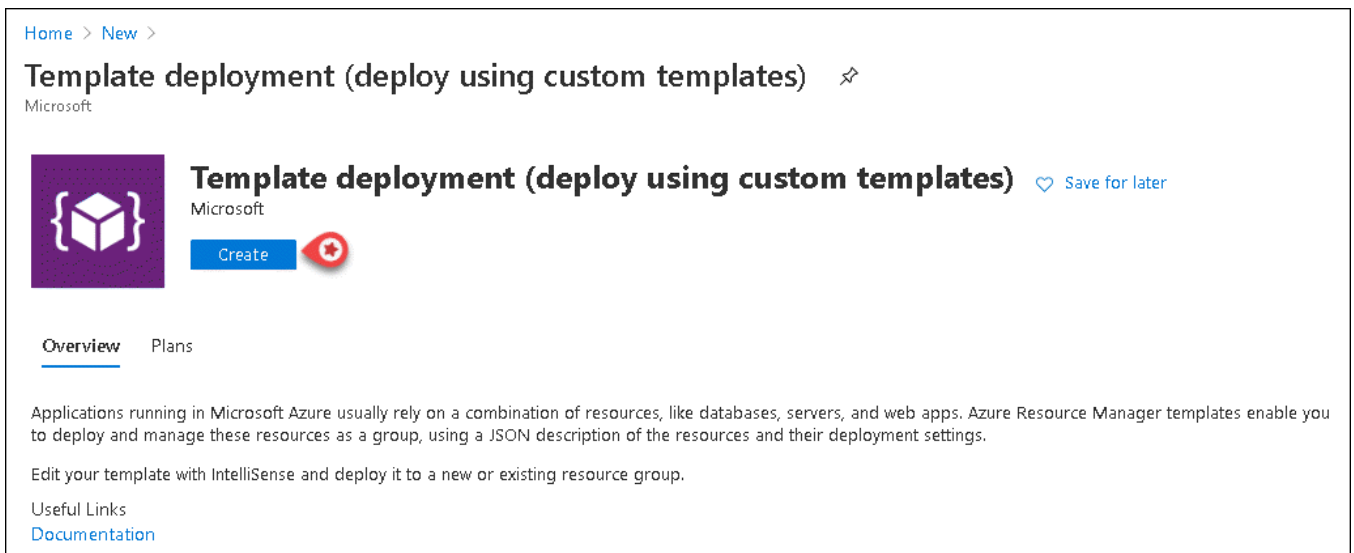
1. Click on the Hamburger sign on the top left corner and select **Create a resource** or select **Create a resource** icon in the Home page.



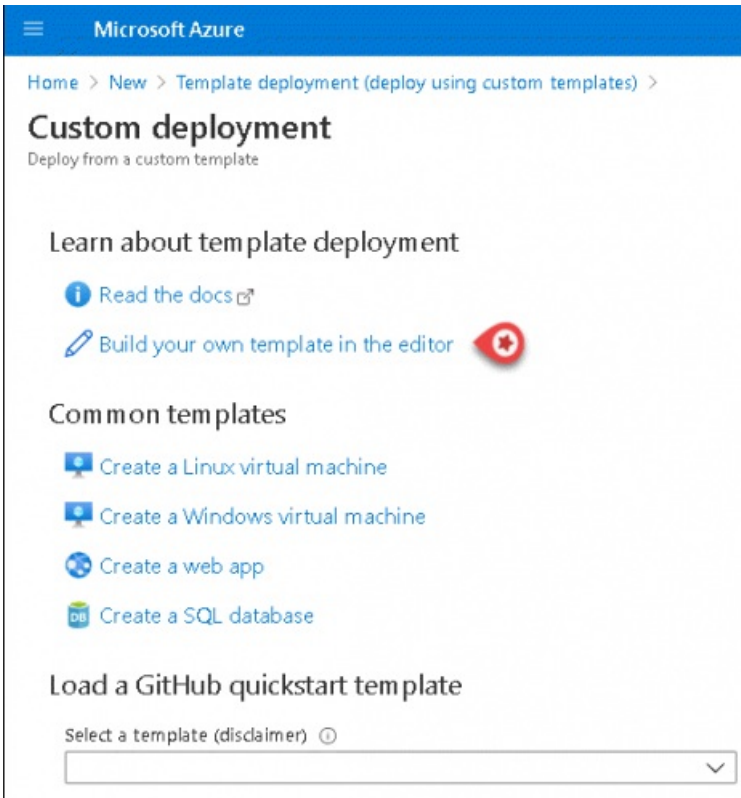
2. Create a new resource template of type Template deployment (deploy using custom templates)



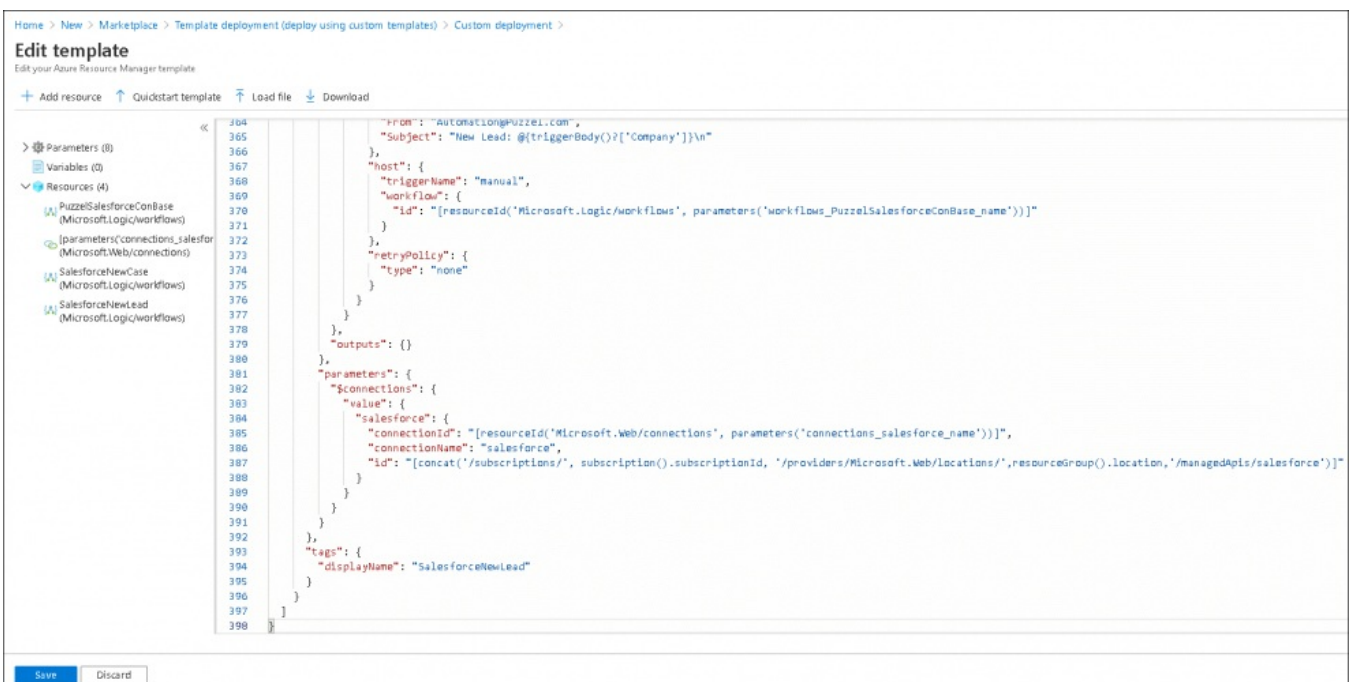
3. Click on **Create**



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 *

Resource group *
[Create new](#)

Location

SETTINGS

Connections_salesforce_name

Workflows_Salesforce New Case_name

Workflows_Salesforce New Lead_name

Workflows_Puzzel Salesforce Con Base_name

Puzzel Customer Key * ✓

Puzzel Password * ✓

Puzzel User * ✓

Puzzel Access Point * ✓

TERMS AND CONDITIONS

[Azure Marketplace Terms](#) | [Azure Marketplace](#)

By clicking "Purchase," I (a) 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+) << + Add Edit columns Delete resource group Refresh → Move ↓ Export to CSV Assign tags Delete ↓ Export template Feedback

Overview

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

<input type="checkbox"/>	Name ↑↓	Type ↑↓
<input type="checkbox"/>	Salesforce	API Connection
<input type="checkbox"/>	SalesforceNewCase	Logic app
<input type="checkbox"/>	SalesforceNewLead	Logic app
<input type="checkbox"/>	Secondary_email	Logic app

Activity log

Access control (IAM)

Tags

Events

Settings

Quickstart

Deployments

Policies

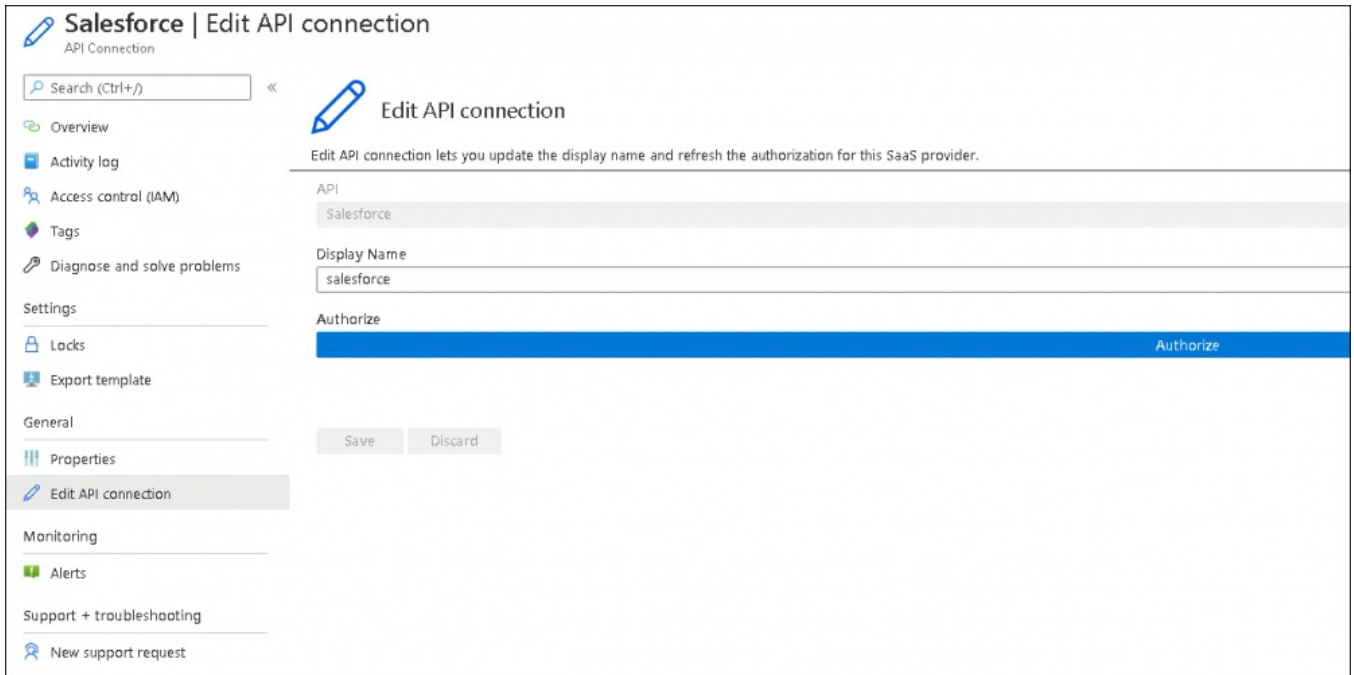
Properties

Locks

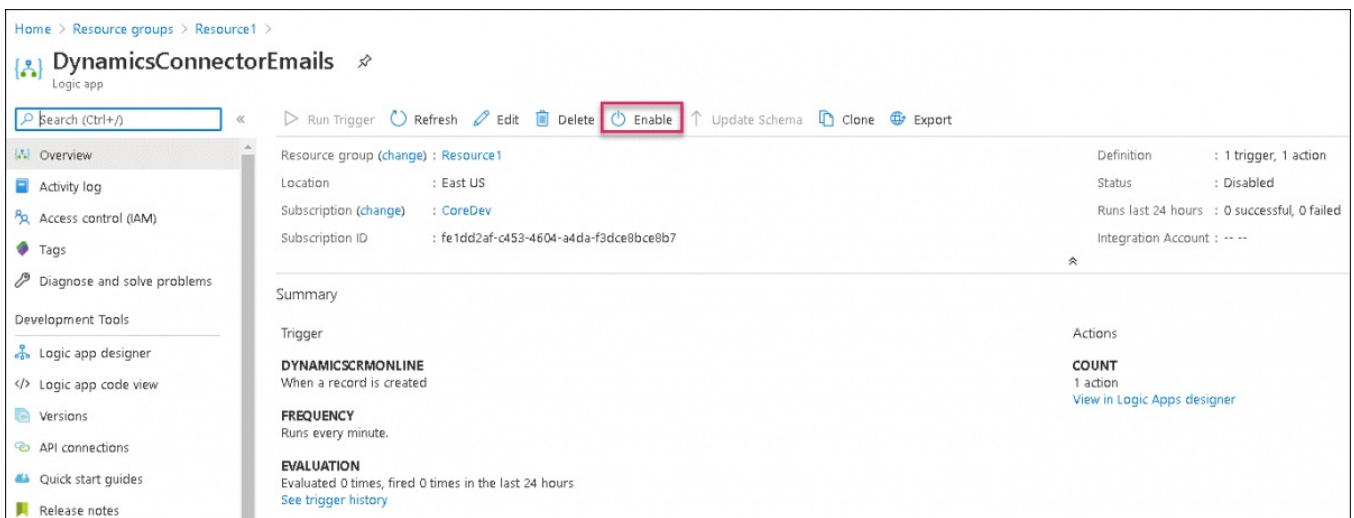
Export template

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.