Configure Single Sign-On with Salesforce

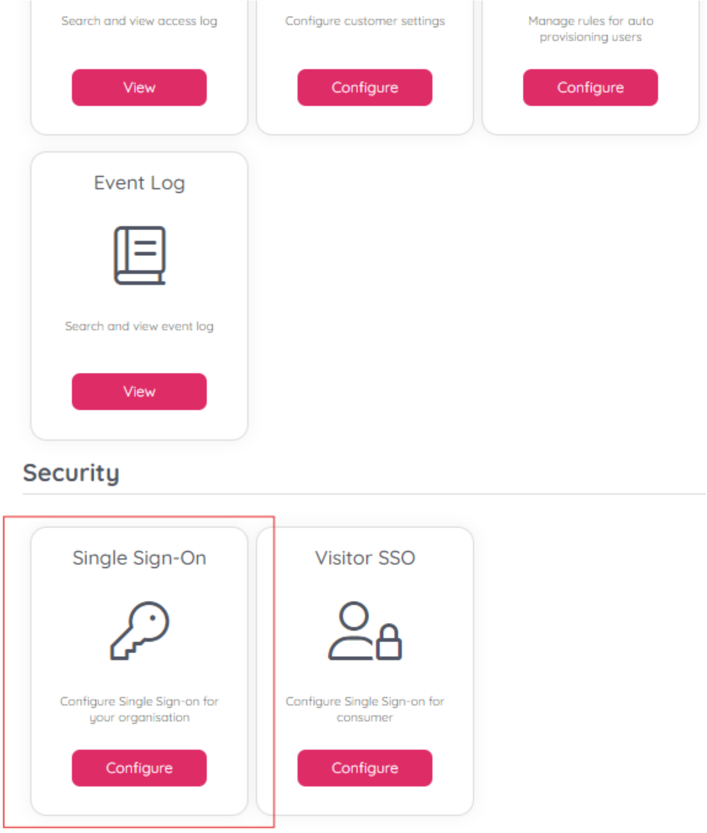
This article describes how to configure single sign-on (SSO) to Puzzel using Salesforce as an external provider.

This method utilizes Open IDConnect, see also:
Integrate Service Providers as Connected Apps with OpenID Connectfor more information.

Step 1 : Create a new SSO Connection in Organisation settings portal

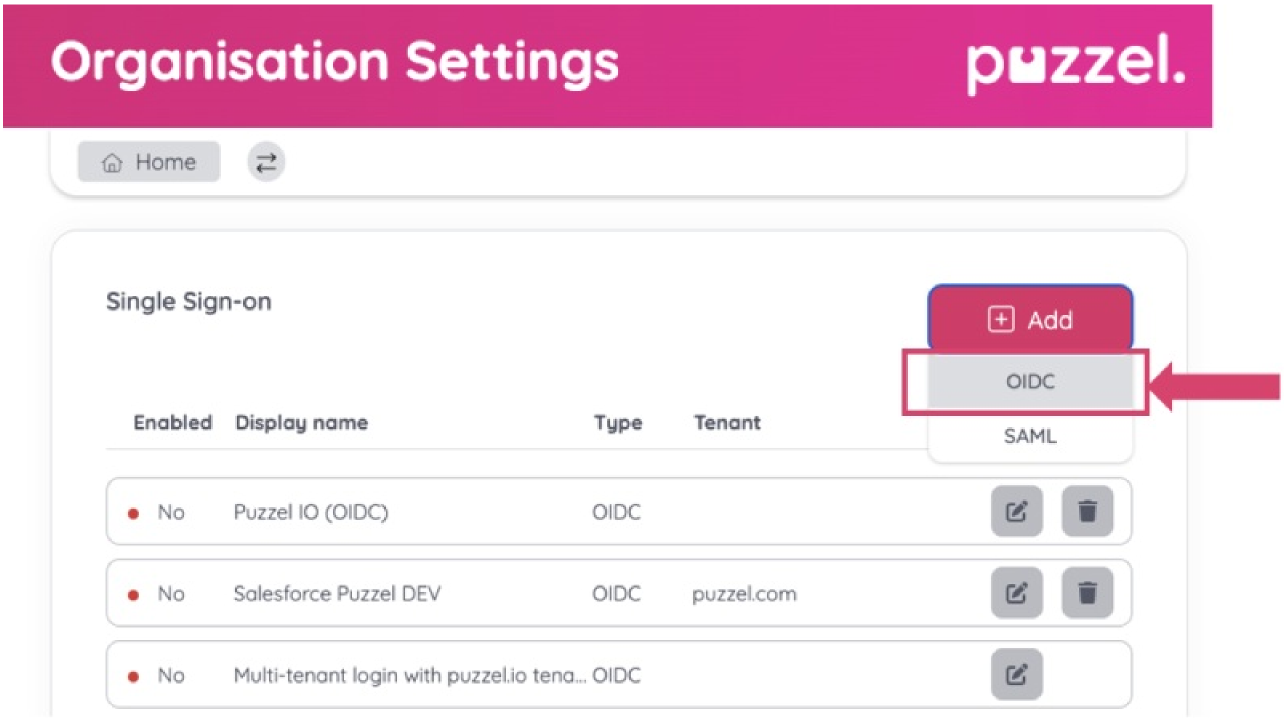
Start by creating a new Single Sign-on connection in the Organisation Settings portal to get the redirect URIs you need in the Connected App in Salesforce.

From the Organisation Settings home page, click on the “Single Sign-On” icon as shown below:


Search and view access log
View
Configure customer settings
Configure
Manage rules for auto provisioning users
Configure
Event Log
Search and view event log
View
Security
Single Sign-On
Configure Single Sign-on for your organisation
Configure
Visitor SSO
Configure Single Sign-on for consumer
Configure

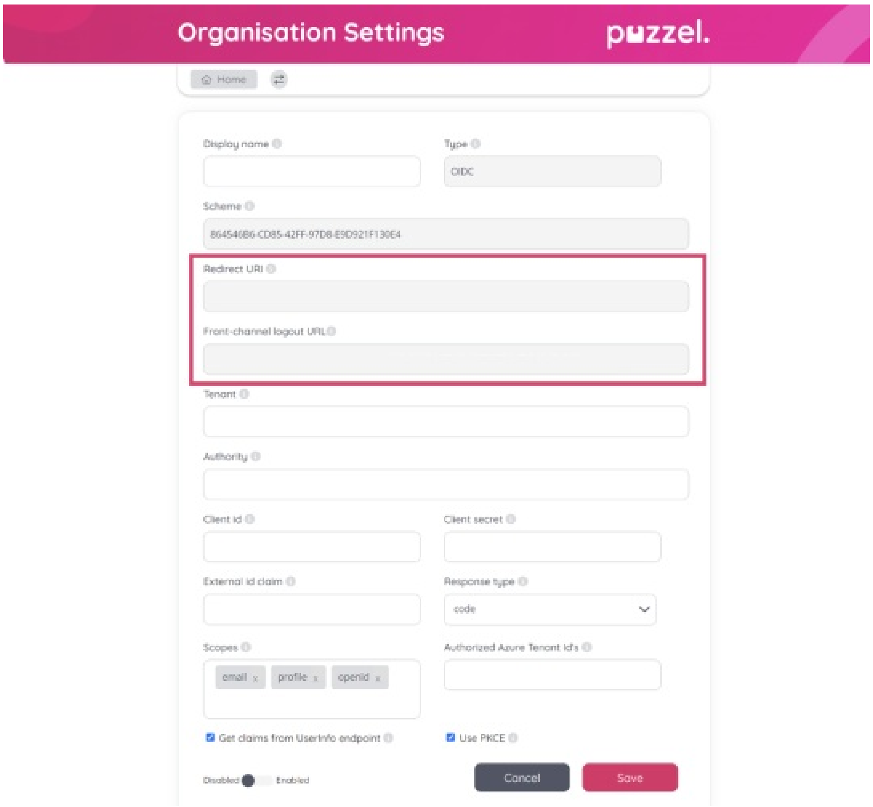
Depending on whether you have added SSO configurations previously or not you should either see a list of current configurations or just an empty list, either way you should also have the “Add” button displayed on the top right.

Click on the “Add” button and choose “OIDC” as illustrated below:



Enabled	Display name	Type	Tenant
● No	Puzzel IO (OIDC)	OIDC	
● No	Salesforce Puzzel DEV	OIDC	puzzel.com
● No	Multi-tenant login with puzzel.io tena...	OIDC	

On the next screen you will be presented with two fields which you need to add to your Salesforce configuration, “Redirect URI” and “Front-channel logout URL”. See screenshot below:



Display name:

Type: OIDC

Scheme: 864546B6-CD85-42FF-97D8-E9D921F130E4

Redirect URI:

Front-channel logout URL:

Tenant:

Authority:

Client id:

Client secret:

External id claim:

Response type: code

Scopes: email x, profile x, openid x

Authorized Azure Tenant Id's:

☑ Get claims from UserInfo endpoint

☑ Use PKCE

Disabled ● Enabled

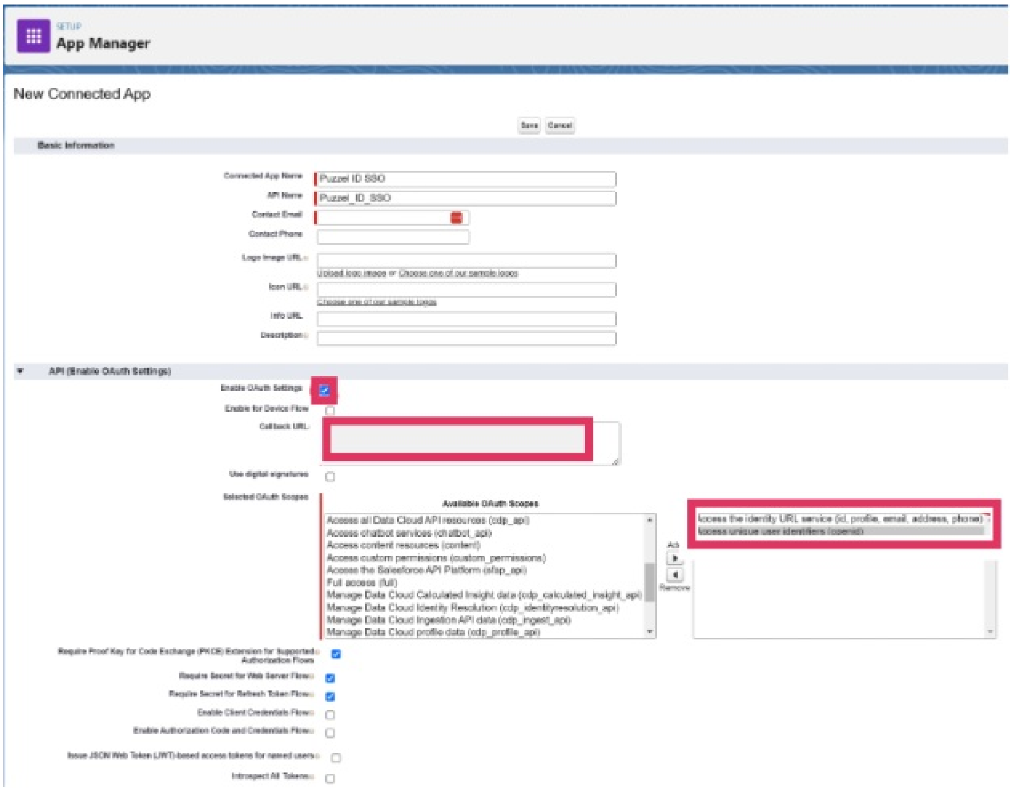
Step 2: Create a new Salesforce Connected App and add initial config

From Setup, enter Apps in the Quick Find box, and select App Manager.

Click “New Connected App”.

Enter the connected app’s name, which displays in the App Manager and on its App Launcher tile. The connected app name must be unique within your organisation.

Enter the API name used when referring to your app from a program. It defaults to a version of the name without spaces. Only letters, numbers, and underscores are allowed, so if the original app name contains any other characters, edit the default name.



Basic Information

Connected App Name: Puzzel ID SSO

API Name: Puzzel_ID_SSO

Contact Email:

Contact Phone:

Logo Image URL:

Upload logo image or Choose one of our sample logos

Icon URL:

Choose one of our sample logos

Info URL:

Description:

API (Enable OAuth Settings)

Enable OAuth Settings ☑

Enable for Device Flow □

Callback URL:

Use digital signatures □

Selected OAuth Scopes

Available OAuth Scopes:

- Access all Data Cloud API resources (cdp_api)
- Access chatbot services (chatbot_api)
- Access content resources (content)
- Access custom permissions (custom_permissions)
- Access the Salesforce API Platform (sfap_api)
- Full access (full)
- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)

Selected OAuth Scopes:

- Access the identity URL service (id, profile, email, address, phone)
- Access unique user identifiers (openid)

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows ☑

Require Secret for Web Server Flow ☑

Require Secret for Refresh Token Flow ☑

Enable Client Credentials Flow □

Enable Authorization Code and Credentials Flow □

Issue JSON Web Token (JWT)-based access tokens for named users □

Introspect All Tokens □

Check “Enable OAuth Settings“

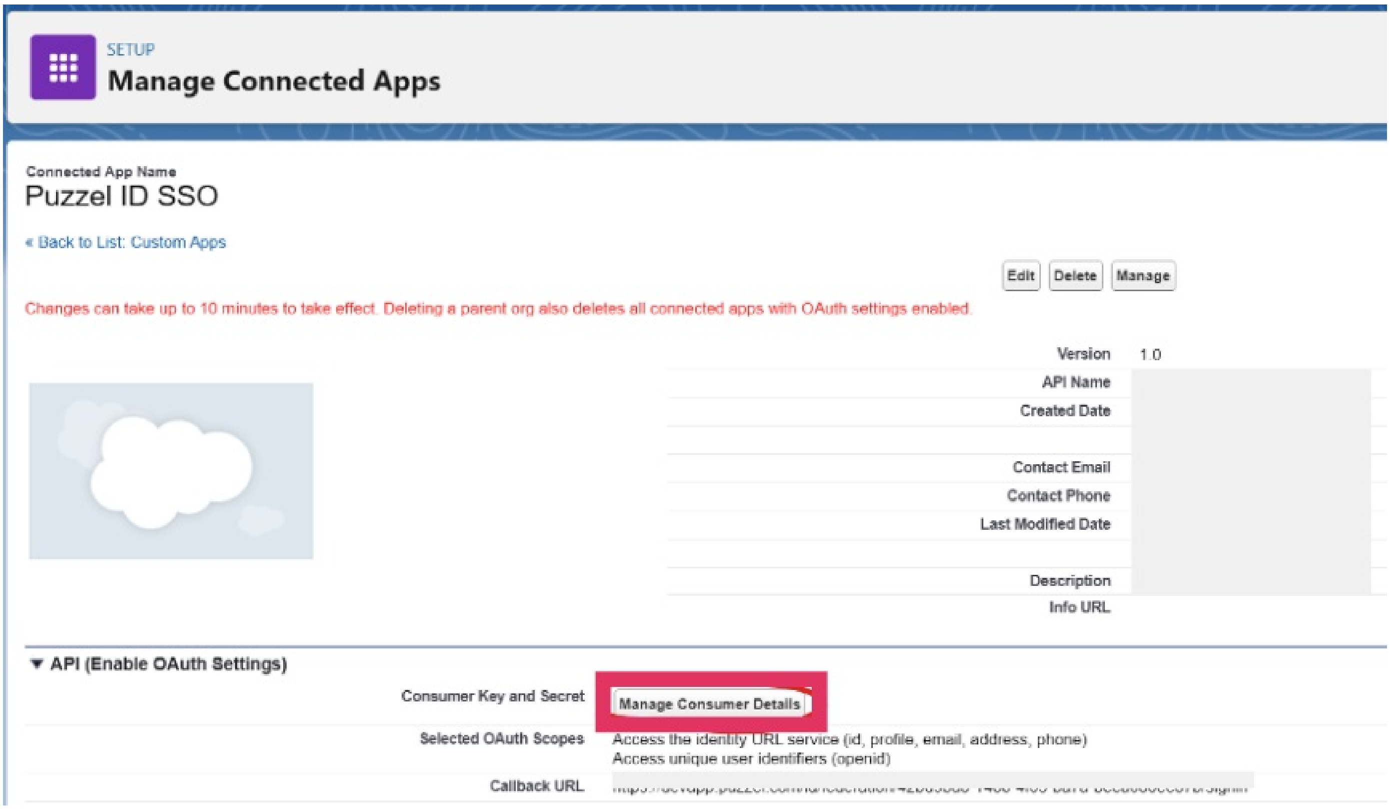
Add Redirect URI from Puzzel ID Organisation Settings (see step 1) to “Callback URL”

Add the two scopes shown in the screenshot above in “Selected OAuth Scopes”.
The scope “Access the identity URL service (id, profile, email, address, phone)” is for sending the e-mail to match the user in Puzzel ID. You could use other claims to match the user as well, like the “sub” claim, and then this scope would not be needed.

Click the “Save” button on top of the screen.

Step 3: Configure details in Puzzel ID

Once Saved, you need to fetch the consumer details to configure in Puzzel ID.



SETUP

Manage Connected Apps

Connected App Name

Puzzel ID SSO

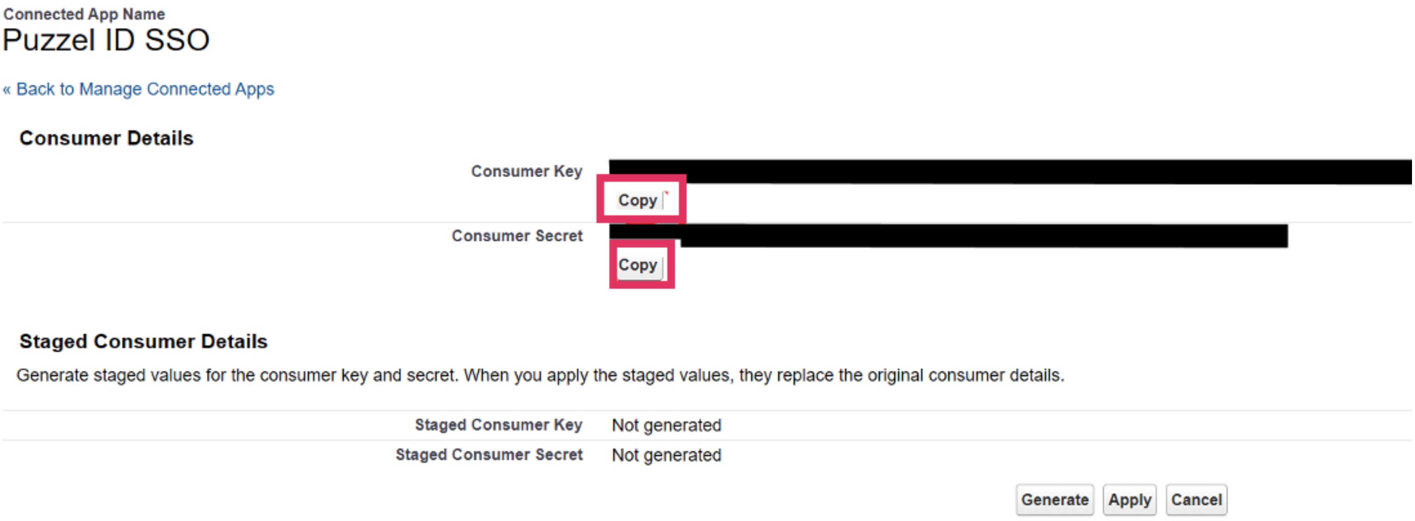
« Back to List: Custom Apps

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

Version	1.0
API Name	
Created Date	
Contact Email	
Contact Phone	
Last Modified Date	
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key and Secret	Manage Consumer Details
Selected OAuth Scopes	Access the identity URL service (id, profile, email, address, phone) Access unique user identifiers (openid)
Callback URL	[illegible]



Connected App Name

Puzzel ID SSO

« Back to Manage Connected Apps

Consumer Details

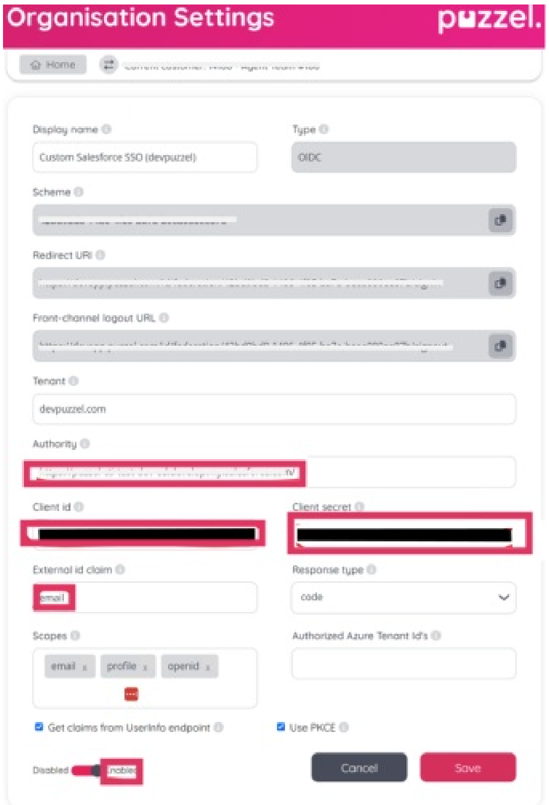
Consumer Key	[redacted] Copy
Consumer Secret	[redacted] Copy

Staged Consumer Details

Generate staged values for the consumer key and secret. When you apply the staged values, they replace the original consumer details.

Staged Consumer Key	Not generated
Staged Consumer Secret	Not generated

Configure the Single Sign-on client in Puzzel ID Organisation Settings with values from Salesforce:



Organisation Settings

Display name: Custom Salesforce SSO (devpuzzel)

Type: OIDC

Scheme: [redacted]

Redirect URI: [redacted]

Front-channel logout URL: [redacted]

Tenant: devpuzzel.com

Authority: [redacted]

Client id: [redacted]

Client secret: [redacted]

External id claim: email

Response type: code

Scopes: email x profile x openid x

Authorized Azure Tenant Id's:

☑ Get claims from UserInfo endpoint

☑ Use PKCE

Disabled Enabled

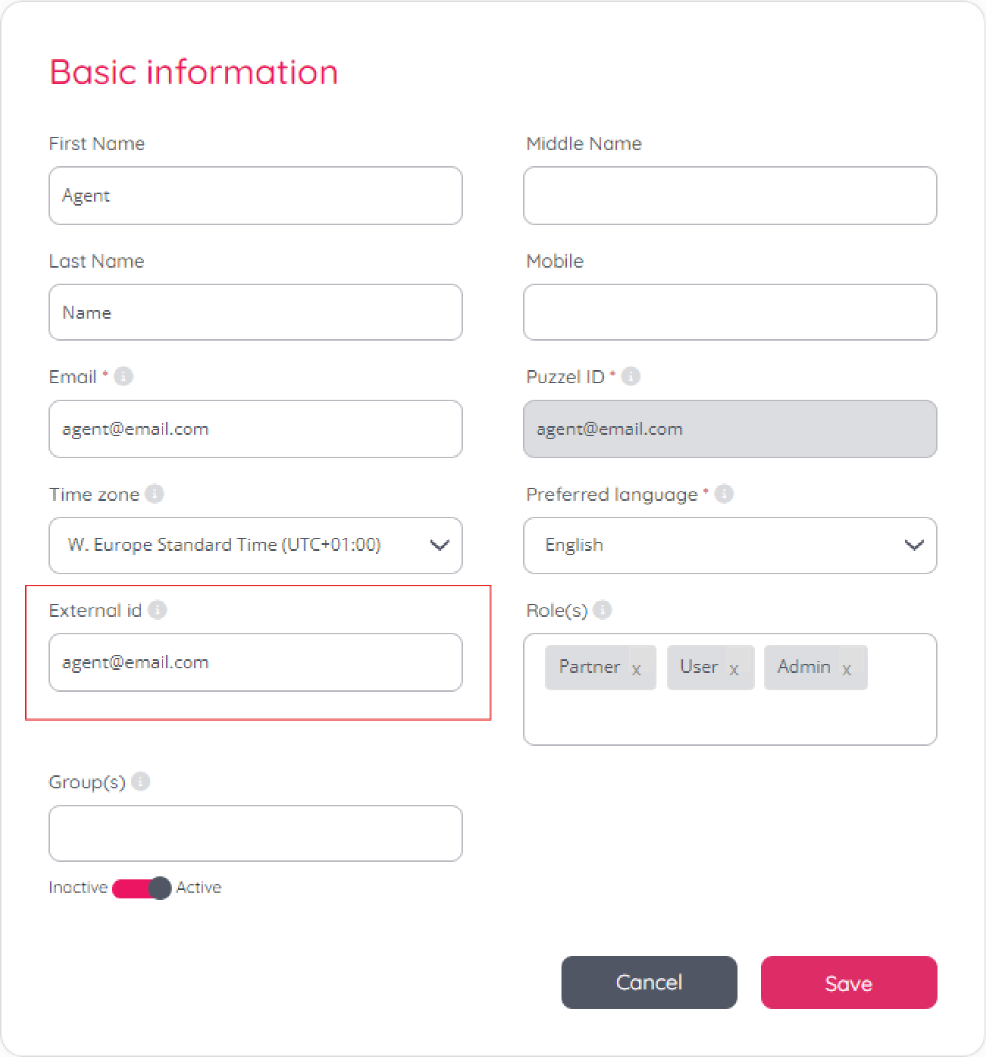
- In the field “Authority” enter the URL to your Salesforce tenant
- Copy the “Consumer Key” in Salesforce to “Client id”
- Copy the “Consumer Secret” in Salesforce to “Client secret”

Continuing in same form as in the previous step, the field “External id claim” requires special attention. Here you need to provide a valid Salesforce claim that will be used to map the user to Puzzel ID.

The easiest path is to set the External id claim to "email" (can also be i.e. “sub”).

Note

When using the “email” claim here all users that are to use this SSO configuration needs to set email in their externalid field as shown below:



Basic information

First Name: Agent

Middle Name:

Last Name: Name

Mobile:

Email *: agent@email.com

Puzzel ID *: agent@email.com

Time zone: W. Europe Standard Time (UTC+01:00)

Preferred language *: English

External id: agent@email.com

Role(s): Partner x, User x, Admin x

Group(s):

Inactive ● Active

For more information about external id see:**Validate users using external id**.

Step 5 - Save and enable the configuration

Still in the same form as in the previous step, make sure to toggle the configuration to “Enabled” if you wish to start using the configuration right away.

Click “Save” to store your configuration.

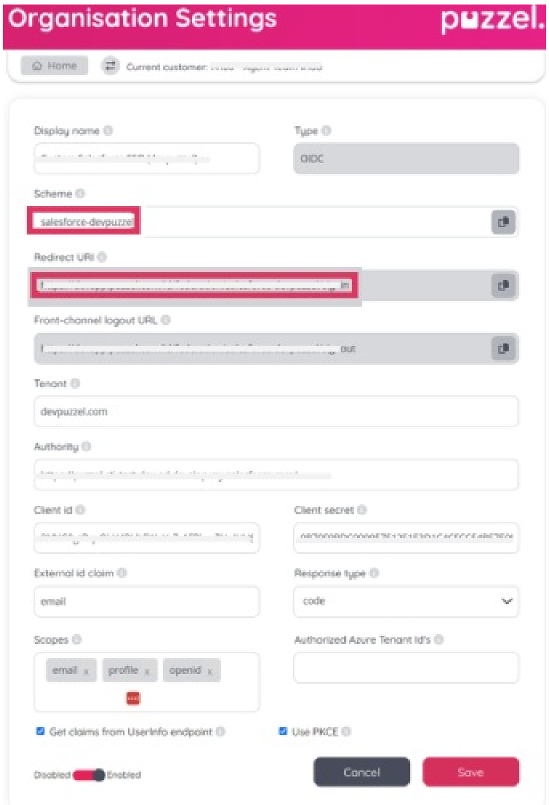
Step 6 - Optional - Change scheme name

This is an optional step to improve readability when referring to a SSO configuration. It can be skipped if you just want to use the default GUID based scheme value or don't want to use the "idp=" query parameter at all.

You can use the “Scheme” value for a SSO configuration as the “idp” parameter for the agent. This is described in the section **"Accessing external providers directly"** in this article.

If you do not change the Scheme name it will use the default GUID for the scheme, as an example: https://devapp.puzzel.com/agent/?idp=42bd9bd8-1486-4f05-ba7a-xxxxxxxxxxxxxxxx.

To change the “Scheme” from the generated id to a readable name, you can edit the “Scheme” field as shown below and click save:



Organisation Settings

Home | Current customer: [redacted]

Display name: [redacted]

Type: OIDC

Scheme: salesforce-devpuzzel

Redirect URI: [redacted]

Front-channel logout URL: [redacted]

Tenant: devpuzzel.com

Authority: [redacted]

Client id: [redacted]

Client secret: [redacted]

External id claim: email

Response type: code

Scopes: email x | profile x | openid x

Authorized Azure Tenant Id's:

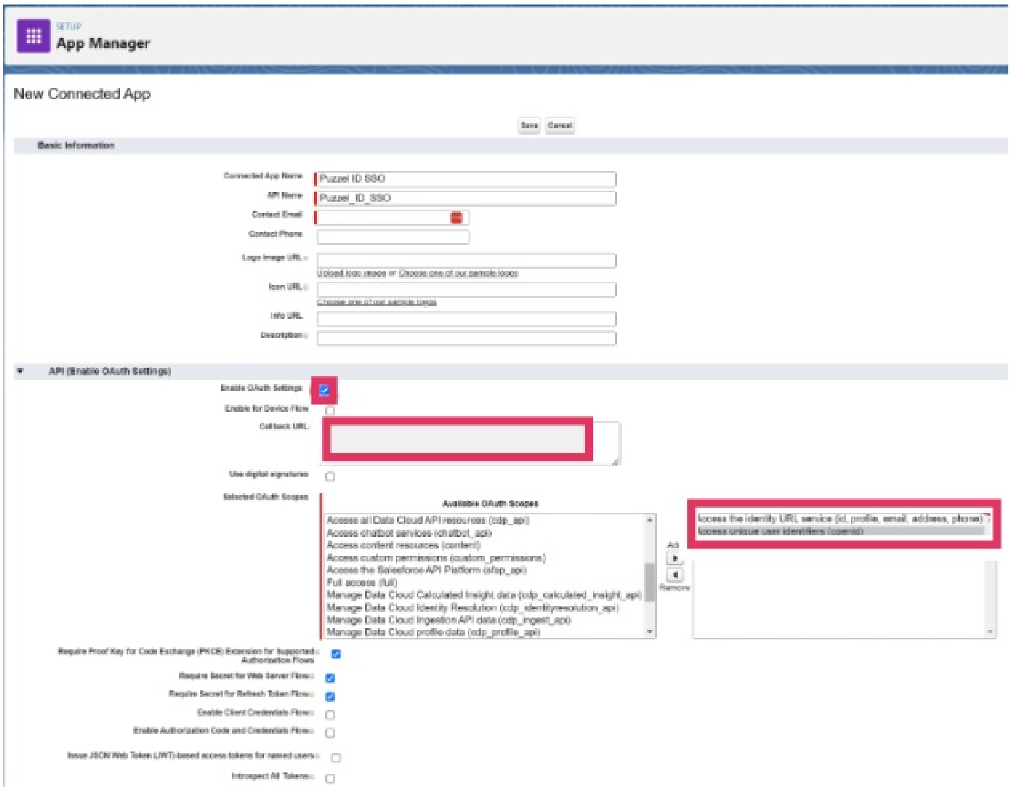
☑ Get claims from UserInfo endpoint

☑ Use PKCE

Disabled / Enabled

Note

After you have saved the new scheme name, reopen the SSO configuration and note that the “Redirect URI” has now changed, and must be updated in the Connected App in Salesforce:



SETUP
App Manager

New Connected App

Basic Information

Connected App Name	Puzzel ID SSO
API Name	Puzzel_ID_SSO
Contact Email	
Contact Phone	
Logo Image URL	Upload logo image or Choose one of our sample logos
Icon URL	Choose one of our sample logos
Info URL	
Description	

API (Enable OAuth Settings)

Enable OAuth Settings	☑
Enable for Device Flow	□
Callback URL	
Use digital signatures	□

Selected OAuth Scopes

Available OAuth Scopes:

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- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)

Selected OAuth Scopes:

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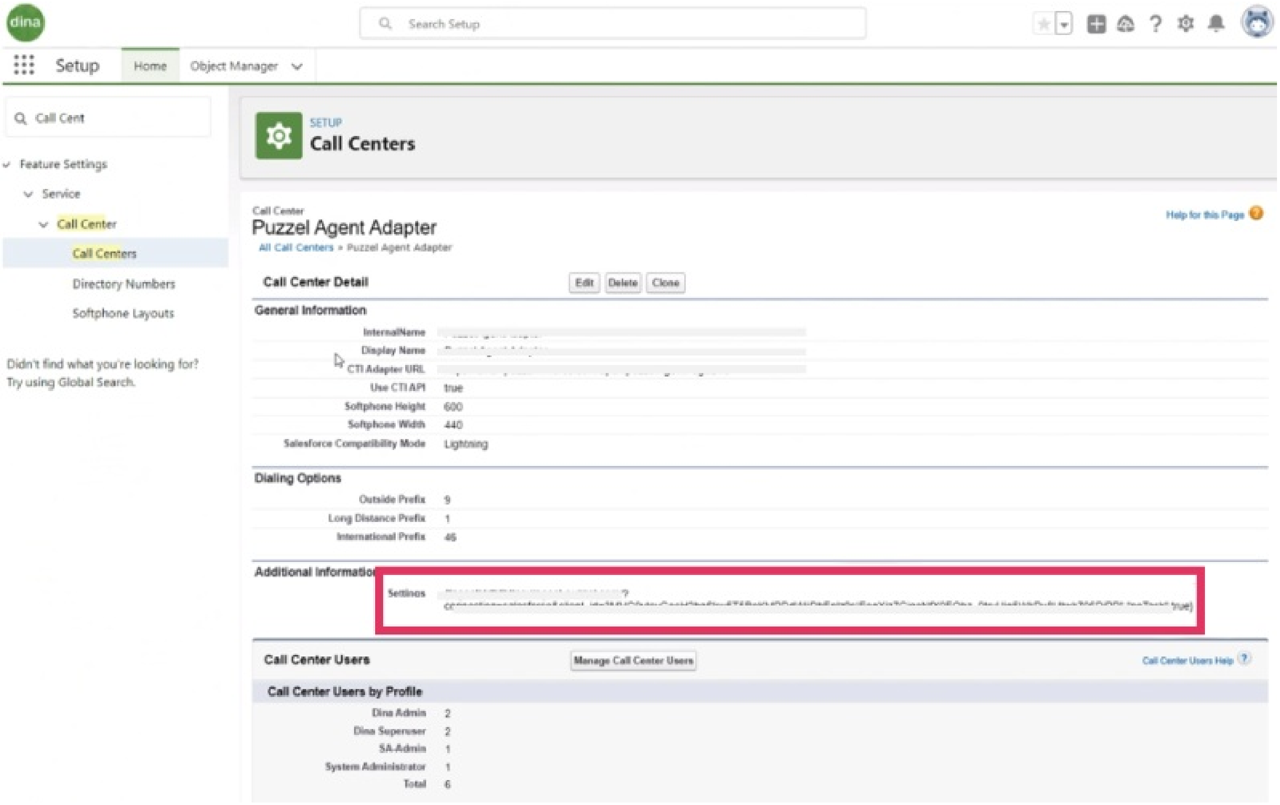
Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows	☑
Require Secret for Web Server Flow	☑
Require Secret for Refresh Token Flow	☑
Enable Client Credentials Flow	□
Enable Authorization Code and Credentials Flow	□
Issue JSON Web Token (JWT)-based access tokens for named users	□
Introspect All Tokens	□

The new “idp” parameter for the agent is now:https://devapp.puzzel.com/agent/?idp=salesforce-devpuzzel

Step 7: Changing agentUrl setting

Finally you will have to change the “agentUrl” setting under “Additional Information” in SETUP.

The “agentUrl” value needs to be changed referring to a SSO connection within Puzzel ID using the “idp” parameter as explained in the previous step.



Call Center

Puzzel Agent Adapter

All Call Centers » Puzzel Agent Adapter

Call Center Detail

General Information

InternalName [redacted]

Display Name [redacted]

CTI Adapter URL [redacted]

Use CTI API true

Softphone Height 600

Softphone Width 440

Salesforce Compatibility Mode Lightning

Dialing Options

Outside Prefix 9

Long Distance Prefix 1

International Prefix 45

Additional Information

Settings [redacted]

Call Center Users

Call Center Users by Profile

Dina Admin	2
Dina Superuser	2
SA-Admin	1
System Administrator	1
Total	6