

**PingFederate<sup>®</sup>**

**Salesforce CRM Connector**

**Version 3.3**

**Release Notes**

**PingIdentity<sup>®</sup>**

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# Introduction

The PingFederate Salesforce CRM Connector extends PingFederate capabilities to allow enterprises to provide secure Internet single sign-on (SSO) to Salesforce, including support for Software-as-a-Service (SaaS) Provisioning for PingFederate 6.x and for the Salesforce “Connect for Microsoft Outlook” plug-in.

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**Documentation Note:** The former Salesforce Connector *User Guide* has been incorporated into the Salesforce *Quick Connection Guide* in the `docs` directory of this distribution.

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## SaaS Provisioning

If you are using PingFederate 6.x, the Salesforce Connector makes available support for SaaS Provisioning (enabled via separate licensing). SaaS Provisioning eliminates manual user provisioning and deprovisioning at Salesforce by synchronizing accounts with your existing network-user directory. With the Salesforce Connector you can configure provisioning behavior in the PingFederate administrative console. Then, when the system is deployed, the PingFederate runtime provisioner automatically creates new user accounts, updates existing accounts, and disables accounts at Salesforce for SSO, based on changes that occur in your user store during the normal course of business. (For more information about SaaS Provisioning, refer to the “Key Concepts” chapter of the PingFederate *Administrator’s Manual*.)

Also for PingFederate 6.x, the Salesforce Connector provides a quick-connection template that automatically configures many of the administrative-console settings required for Salesforce SSO.

## Authentication Web Service

With PingFederate, enterprise Identity Providers can use various existing authentication methods for SSO to Salesforce, including Integrated Windows Authentication (IWA), LDAP, or Identity Management systems. (Refer to the Ping Identity Web site for a listing of available authentication Integration Kits ([www.pingidentity.com/products/integration-kits.cfm](http://www.pingidentity.com/products/integration-kits.cfm).) Once a Salesforce user profile is SSO-enabled and users are added to it, Salesforce does not perform local authentication. Instead, Salesforce calls the Connector’s Authentication Web Service to perform the authentication. The PingFederate Salesforce Adapter then redirects the user’s browser to Salesforce, providing the user ID and a secure token as password. Salesforce contacts the Authentication Web Service to validate the credentials.

## Rich Client Proxy Service

To support the Salesforce Outlook plug-in, the Salesforce Connector includes a Rich Client Proxy Service that allows employees to use internal LDAP credentials for access to Salesforce. The Outlook plug-in communicates with the Rich Client Proxy Service and the Authentication Web Service in PingFederate to provide secure access to Salesforce using enterprise credentials, while keeping those credentials inside the enterprise’s security domain.

## Direct Logon

The Connector can also be configured for direct logon to Salesforce. In this case, the user enters an ID at Salesforce with a password maintained at your organization. Salesforce initiates a back-channel request to the Authentication Web Service, which validates the user against an LDAP data store configured in PingFederate.

## Change List by Version

### **Salesforce Connector 3.3 (Current) - May 2009**

- Added support for Salesforce “Connect for Microsoft Outlook” version 3.2.513
- Added an option to remove the email domain from the Salesforce Username for OpenToken authentication by the Authentication Web Service

### **Salesforce Connector 3.2 - January 2009**

- Added a quick-connection plug-in component for automated SSO configuration and SaaS Provisioning support for use with PingFederate 5.3
- Added support for Mutual Transport Layer Security (TLS) between Salesforce and the PingFederate Authentication Service
- Added an option to remove the email domain from the Salesforce User Name for authentication to a LDAP directory
- Added support for delegated authentication to Salesforce via Salesforce Mobile Clients
- Combined the former *Salesforce User Guide* into the *Salesforce Quick Connection Guide*

### **Salesforce Connector 3.1 - September 2008**

- Support for URL Deep Linking
- Obfuscated LDAP password in the configuration file
- Enabled Single Logout from Salesforce
- Included Salesforce Quick Connection Guide for PingFederate 5.2
- Changed the product name to Salesforce Connector

### **Salesforce.com Integration Kit 3.0 - May 2008**

- Support for Salesforce “Connect for Microsoft Outlook” plug-in through a new Desktop Proxy Service that allows the use of corporate credentials for access to Salesforce
- Uses OpenToken for the encrypted token format rather than PFTOKEN

### **Salesforce.com Integration Kit 2.0 - July 2007**

- Provisioning (new user creation on the Salesforce side)
- PingFederate v4 administrative console Salesforce configuration for optional provisioning and direct Salesforce login

- Salesforce Web Service user-validation changes
- Certification on Salesforce AppExchange

## **Salesforce.com Integration Kit 1.1 - November 2006**

Use of the PingFederate Standard Adapter, eliminating the Salesforce.com Adapter that was specific to this Integration Kit

## **Salesforce.com Integration Kit 1.0 - June 2006**

Initial release

## **Known Issues**

See the *Qualification Statement* in the `/docs` directory for information.

## **Notes**

For more information, including installation setup, refer to the Salesforce Connector *Quick Connection Guide* located in the `/docs` directory of this distribution.

If you have problems with deployment, installation, or configuration, please contact our support team at [support@pingidentity.com](mailto:support@pingidentity.com)