Identity Implementation Guide

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@salesforcedocs

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CHAPTER 1 What is Salesforce Identity?

Salesforce Identity connects your Salesforce organization users with external applications and services, while providing administrative tools for monitoring, maintaining and reporting user applications and authorization.

Note: Salesforce Identity Demo (12:16 minutes)

Take a quick tour of Salesforce Identity features.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Salesforce Identity is an Identity and Access Management (IAM) service with the following features.

- Cloud-based user directories, so user accounts and information are stored and maintained in one place, while available to other services or applications.
- Authentication services to verify users and keep granular control over user access. You can select the apps specific users can use, require two-factor authentication, and set how often individual users need to log in to maintain their session.
- Access management and authorization for third-party apps, including UI integration, so a user's apps and services are readily available, as needed.
- Provisioning and de-provisioning of apps, so you keep the latest apps available to users, and remove apps that should not be available.
- An API for viewing and managing your deployment of Identity features.
- Reporting on the use of apps and services by your Identity users for better security.
- Salesforce Identity Connect: an on-premise Connector for Provisioning and single sign-on integration with directory services like Microsoft Active Directory.

To implement Salesforce Identity, use any of the following.

Security Assertion Markup Language (SAML)

Security Assertion Markup Language (SAML) is an XML-based standard that allows you to communicate authentication decisions between one service and another. It underlies many Web single sign-on solutions. Salesforce supports SAML for single sign-on into Salesforce from a corporate portal or identity provider.

OAuth

OAuth is an open protocol used for single sign-on to allow secure authorization between applications. OAuth "flows" describe different ways of implementing OAuth for Salesforce orgs. For more information on specific flows, see *Force.com REST API Developer Guide*.

OpenID Connect

Open ID Connect is authentication protocol, based on OAuth 2.0, for identity verification between services. OpenID Connect allows a Salesforce organization to verify the identity of a user based on the authentication performed by another service, such as Google.

My Domain

Use My Domain to define a custom Salesforce organization domain name (for example, `https://companyname.my.salesforce.com`). A custom domain name helps you better manage login and authentication for your organization, and allows you to customize the login page.

Connected Apps

A connected app integrates an application with Salesforce using APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide Single Sign-On, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow administrators to set various security policies and have explicit control over who may use the corresponding applications.

App Launcher

The App Launcher unifies the user experience of launching single sign-on apps from a Salesforce org. The App Launcher presents logos that link to your connected apps and standard apps, all from one tab in Salesforce. Users must be assigned a profile or permission set with "Use Identity Features" enabled and the App Launcher set to **Visible** to see it. Then, it appears as an app in the Force.com App Menu.

Identity License

Grants users access to Identity features such as the App Launcher. To view and use the App Launcher, a user must have the "Use Identity Features" permission.

Included with all paid user licenses in **Enterprise**, **Performance**, and **Unlimited** Editions. Ten free Identity user licenses are included with each new **Developer** Edition organization.

External Identity License

Grants Identity features such as the App Launcher and Single Sign-On to external users. These users are typically non-employees or community users from outside your organization who you still want to manage and provide some access to your organization.

Included with all paid user licenses in **Enterprise**, **Performance**, and **Unlimited** Editions. Five free Identity user licenses are included with each new **Developer** Edition organization.

Identity Provider and Service Provider integration

An *identity provider* is a trusted provider that lets you use single sign-on to access other websites. A *service provider* is a website that hosts applications. You can enable Salesforce as an identity provider and define one or more service providers. Your users can then access other applications directly from Salesforce using single sign-on. Single sign-on can be a great help to your users: instead of having to remember many passwords, they only have to remember one. Plus, the applications can be added as tabs to your Salesforce organization, which means users don't have to switch between programs.

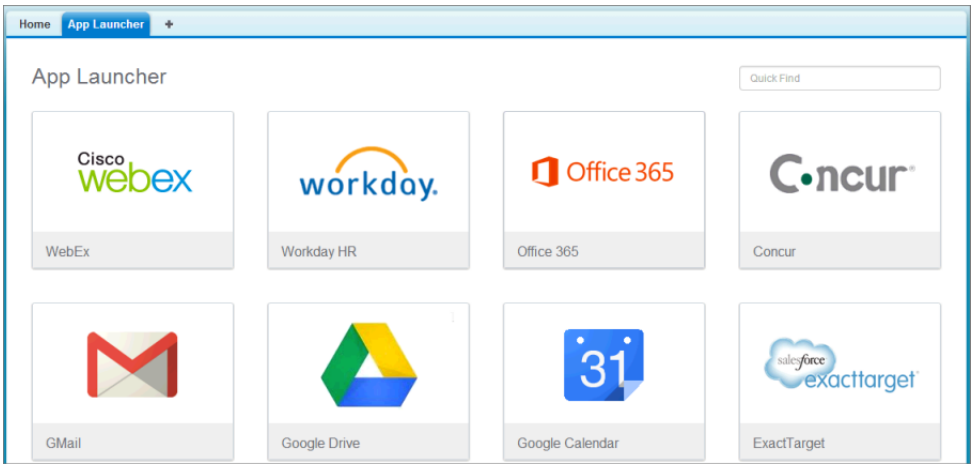
Salesforce Identity Connect

Identity Connect provides Active Directory integration with Salesforce via a service which runs on either Windows or Linux platforms. This integration includes syncing Active Directory users with either Salesforce or Identity Connect acting as the Identity Service Provider (IDP) for Single Sign On (SSO) Active Directory integration when logging into Salesforce.

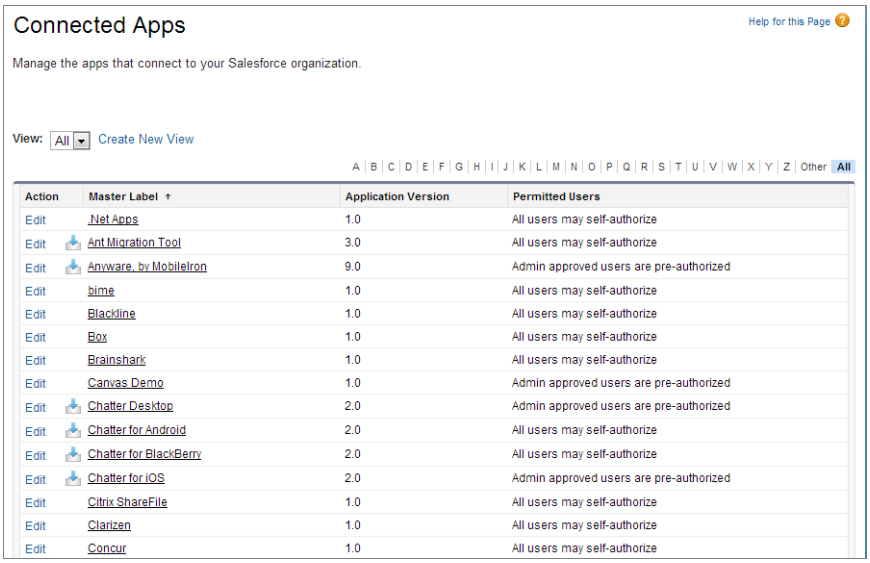
Two-Factor Authentication

With two-factor authentication enabled, users are required to log in with two pieces of information, such as a username and a one-time password (OTP). Salesforce supports user-defined OTPs and OTPs generated from software or hardware devices.

For example, here's a view of the App Launcher for a user within a Salesforce organization who has a profile or permission set enabled to open external apps and services without a separate login for each one.



Here's the administrator's connected apps page that allows user assignments based on profile and permission sets for each available app.



For more detailed usage information, the administrator can set up and run Identity Usage reports. For more information on reporting, see Monitor Applications and Run Reports.

CHAPTER 2 How to use Salesforce Identity

This is a quick narrative showing how a company can combine some of the Salesforce Identity features to improve the experience of their employees while providing administrative control over the use of various applications.

Salesforce Identity provides single sign-on (SSO) for employees to sign in to multiple applications to get their job done. Some of those applications are integrated into their Salesforce organization, and some might be third-party, external applications.

Here's an example of how a single company, Universal Containers, might use several Salesforce Identity features to meet their needs.

Example: Universal Containers has employees that need to sign-in to multiple applications to get their job done. It needs a single sign-on (SSO) solution, and decides to use Salesforce to do it. In order to set-up Salesforce as an SSO provider (also called the "identity provider"), Universal Containers must set up a custom domain using "My Domain" in their Salesforce organization. With their own domain, Universal Containers creates and manages their own authorization settings as employees log in to that domain.

Then, Universal Containers leverages Security Assertion Markup Language (SAML) to pass authentication and authorization information between their domain and other providers. Users logged into the Universal Containers custom domain are able to use external applications without having to log in again. And conversely, these users can also access the Universal Containers domain while using approved external applications, without having to log in again (in this case, the external application is the "identity provider"). Users can have single sign-on access between any application that supports SAML standards, such as Google Apps.

Next, Universal Containers decides they also want to enhance their own security while enabling single sign-on. They implement two-factor authentication to require users to enter a unique one-time code while logging in. Universal Containers also customizes the login page, making the page more consistent with their corporate identity and easier for users logging in to see where they are before entering authentication information.

Using the App Launcher, Universal Containers controls the apps that are available to individual users, and how frequently the user needs to log in. They also use the App Launcher to extend single sign-on to their mobile users through a mobile browser or the Chatter native mobile app.

For login and user management, they decide to integrate Active Directory with Salesforce using Identity Connect, so users in their corporate database are added to their Salesforce organization. Users with corporate accounts can easily log in to their Salesforce organization using their Active Directory credentials, or they can use single sign-on from their desktop.. Furthermore, changes to users in either Active Directory or Salesforce are integrated between the two environments.

After the system is up and running, Universal Containers builds reports and dashboards to track users' login history and application usage. With these reports, administrators can keep track of authorized usage, then adjust authorization as needed.

CHAPTER 3 Quick Start: Set up your own domain, add a Connected App and use the App Launcher

In this chapter ...

- Use My Domain to create your own domain name
- Create a new connected app
- Launch your connected app from the Salesforce App Launcher

This quick start provides a hands-on tutorial to familiarize yourself with combining several Salesforce Identity features.

Important: Use a *new* Developer Edition (DE) organization, Winter 14 or newer. Upgraded, legacy DE organizations may not have all the required features for this quick start.

All you need to start using Identity features is: a custom Salesforce domain created using My Domain, a connected app to launch from your Salesforce organization, and the App Launcher configured for the appropriate users of the allowed connected apps.

Use My Domain to create your own domain name

Experience personalizing your Salesforce organization domain.

While you're learning to use My Domain, do not perform these steps in your production organization. Use a Developer Edition organization (Winter '14 or newer). After you deploy your new domain name, you can't reverse it for that organization.

Note: Setting Up My Domain (5:11 minutes)

See how to use My Domain to customize your Salesforce organization URL and login.

A custom domain name helps you better manage login and authentication for your org in several key ways. You can

- Highlight your business identity with your unique domain URL
- Brand your login screen and customize right-frame content
- Block or redirect page requests that don't use the new domain name
- Work in multiple Salesforce orgs at the same time
- Set custom login policy to determine how users are authenticated
- Let users log in using a social account, like Google and Facebook, from the login page
- Allow users to log in once to access external services

The following steps use the company name "universal containers" as an example. However, each My Domain must be unique, so you need to pick a name of your own to use for this exercise.

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Enter the subdomain name you want to use within the sample URL. For example, a company called Universal Containers wants to use the subdomain `universalcontainers`. The company's login URL would be `https://universalcontainers.my.salesforce.com/`. Your name can include up to 40 letters, numbers, and hyphens.

   You can't use these reserved words for subdomains:

   - www
   - salesforce
   - heroku

   You can't start the domain name with:

   - root
   - status
   - a hyphen
3. Click **Check Availability**. If your name is already taken, choose a different one.
4. Click **Terms and Conditions** to review your agreement, then select the checkbox.
5. Click **Register Domain**.
6. You receive an email when your domain name is ready for testing. It can take up to 3 minutes.

Test your domain.

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Click **Click Here to login**.
3. See that you are redirected to your subdomain.

As you click through the UI, notice the pages all use the new subdomain.

Deploy your domain.

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Click **Deploy to Users**.

Now you can edit your login policies for the new domain in My Domain Settings, or customize your login page.

Create a new connected app

Create a Heroku app that shows up as a connected app in your Salesforce organization.

A connected app integrates an application with Salesforce using APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide Single Sign-On, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow administrators to set various security policies and have explicit control over who may use the corresponding applications.

In these steps, you'll use a special Heroku app designed for use with the Security Workbook to generate a connected app you can set up in your organization.

IN THIS SECTION:

1. Step 1: Create an OAuth Application
2. Step 2: Create a Connected Application
3. Step 3: Finish Your OAuth Application

Step 1: Create an OAuth Application

Before an application can use OAuth, you have to configure the environment.

1. In a new browser tab, go to the following website: https://securityworkbook.herokuapp.com/.
2. Click **Get Started with Spring MVC**.

   You might be prompted to allow access for the "AGI" app. If so, continue with this tutorial by clicking **Allow**.
3. Enter your Heroku credentials. If you don't have any, click **Sign Up** to create your Heroku account and then restart this procedure.
4. Note the name of your new Heroku application.
5. Click **Register**.

   A new tab will open to the Salesforce login screen.
6. Login to your Developer Edition organization using your administrator credentials.

   You might briefly see the Remote Access page, which then redirects you to the Apps page. Remote access apps have been replaced by connected apps and any existing Remote Access applications were automatically migrated to connected apps with the Summer '13 release.

Step 2: Create a Connected Application

Add the application from Heroku to your list of connected apps.

1. On the Apps page, scroll down to find the Connected Apps related list and click **New**.

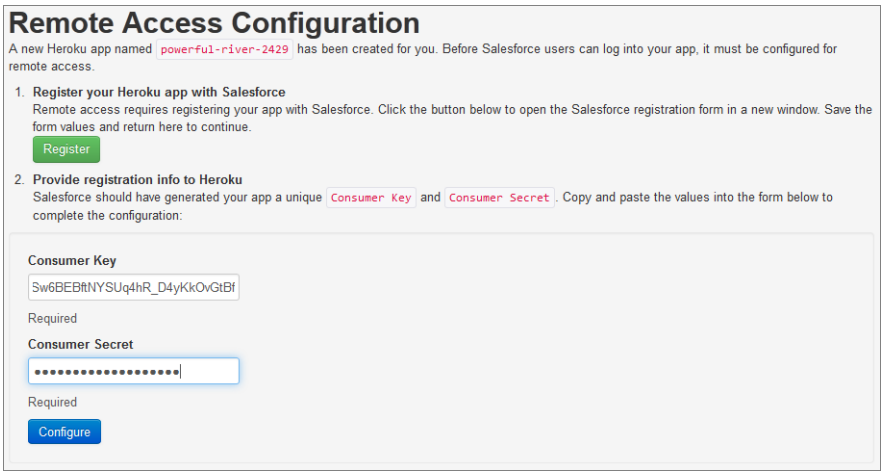
2. **Connected App Name** should be the name of your Heroku app.
3. **API Name** should be the name of your Heroku app, but *replace the dashes with underscore characters* or *remove the dashes*. Heroku requires dashes for the app name, but Salesforce doesn't allow dashes in API names.
4. **Contact Email** should be your administrator's email address.
5. Select **Enable OAuth Settings**.
6. **Callback URL** should be the URL to your Heroku app including `/_auth`.

   For example, `https://arcane-crag-2451.herokuapp.com/_auth`
7. For **Selected OAuth Scopes**, add the following.
   a. Full access
   b. Perform requests on your behalf at any time (refresh_token, offline_access)
8. Click **Save**.

Step 3: Finish Your OAuth Application

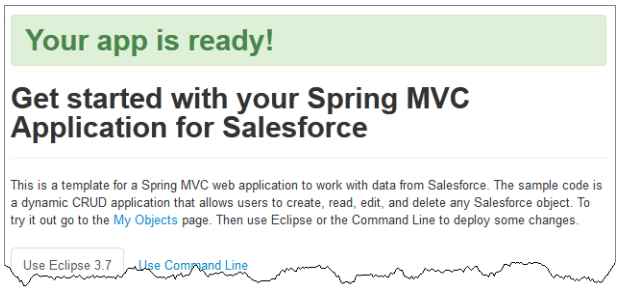
Now connect up the Heroku application with the Salesforce OAuth provider.

1. On the Connected App detail page, copy the **Consumer Key** value.
2. Go back to the Heroku tab in your browser and paste in the **Consumer Key**.
3. Go back to the Salesforce tab in your browser.
4. Click to reveal your **Consumer Secret**.
5. Copy your **Consumer Secret**.
6. Go back to the Heroku tab in your browser and paste in the **Consumer Secret**.



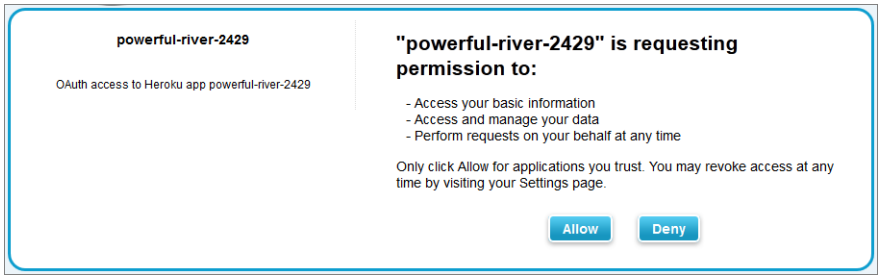
7. Click **Configure**.

   This may take several minutes.
8. Click on the **My Objects** link in the first paragraph of the page.



You're redirected to the Salesforce OAuth screen. Make sure you are logged in as your Developer Edition org administrator in the top right corner of the page.

9. Click **Allow**.



By clicking on any object, you can now view any records you have access to through your profile and role configurations. For example, clicking **Invoice Statement** shows you your invoice objects.

Launch your connected app from the Salesforce App Launcher

Configure the connected app for single sign-on from your Salesforce organization and add it to the App Launcher.

The App Launcher presents logos that link to your connected apps and standard apps, all from one tab in Salesforce. Users must be assigned a profile or permission set with "Use Identity Features" enabled and the App Launcher set to **Visible** to see it. Then, it appears as an app in the Force.com App Menu. As the administrator of your DE organization, you already have access to the App Launcher.

1. To launch your connected app from your Salesforce organization you need to give it a start URL.
2. In your Salesforce organization, from Setup, enter "Connected Apps" in the `Quick Find` box, then select the option for managing connected apps.

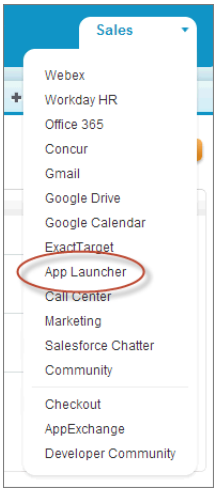
   You should see your new connected app listed.
3. Click **Edit** next to your connected app name.

4. In the **Basic Information** section, give your app a **Start URL**.

   For example, if your app is "glacial-temple-2472" the URL is `https://glacial-temple-2472.herokuapp.com/`

   Note: Include the `https://` prefix.

5. Click **Save**.
6. Click the App Launcher tab or select the App Launcher from the drop-down app menu.



You should see your connected app on the App Launcher tab. You can click it to launch the app.

You can give your connected app a custom logo, and customize the App Launcher appearance. Then, monitor connected app usage for all of your users with reports and adjust your security settings as needed.

CHAPTER 4 My Domain

In this chapter ...

- Set Up a Domain Name
- My Domain URL Changes
- Test and Deploy Your New Domain Name
- Guidelines and Best Practices for Implementing My Domain
- Get System Performance and Maintenance Information Using My Domain

Add a custom domain to your Salesforce org URL with the My Domain Salesforce feature. Having a custom domain lets you highlight your brand and makes your org more secure. A custom domain is convenient and allows you to personalize your login page.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

Using My Domain, you define a custom domain that's part of your Salesforce domain. A custom domain is actually a subdomain of a primary domain. For example, `developer` is a subdomain of the `salesforce.com` domain. With a custom domain, you can replace the URL that Salesforce assigned you, like `https://yourInstance.salesforce.com/`, with your chosen name, like `https://somethingcool.my.salesforce.com`.

A custom domain name helps you better manage login and authentication for your org in several key ways. You can

- Highlight your business identity with your unique domain URL
- Brand your login screen and customize right-frame content
- Block or redirect page requests that don't use the new domain name
- Work in multiple Salesforce orgs at the same time
- Set custom login policy to determine how users are authenticated
- Let users log in using a social account, like Google and Facebook, from the login page
- Allow users to log in once to access external services

My Domain is required before you can use these Salesforce features:

- Single sign-on (SSO) with external identity providers
- Social sign-on with authentication providers, such as Google and Facebook
- Lightning components in Lightning component tabs, Lightning Pages, the Lightning App Builder, or standalone apps

Watch a Demo (5:11 minutes)

My Domain is also available for sandbox environments.

Note: My Domain is subject to additional Terms of Use.

Your domain name uses standard URL format, including:

- Protocol: https://
- Subdomain prefix: your brand or term
- Domain: my.salesforce.com

Your name can include up to 40 letters, numbers, and hyphens. You can't start the domain name with root, status, or a hyphen.

You have the chance to try out names and check availability before you commit to your domain name.

Salesforce is enabled as an identity provider when a domain is created. After your domain is deployed, you can add or change identity providers and increase security for your organization by customizing your domain's login policy.

Important: After you deploy your domain, it's activated immediately and requests with the original URL are redirected to your new domain. Only Salesforce Customer Support can disable or change your domain name after it's deployed.

Set Up a Domain Name

Implementing your custom domain name is quick and easy.

1. Find a domain name that's available and sign up for it.
2. Customize the logo, background color, and right-frame content on your login page.
3. Add or change the identity providers available on your login page.
4. Test your domain name and deploy it to your entire org.
5. Set the login policy for users accessing your pages.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To set up a domain name:
- "Customize Application"

Define Your Domain Name

Sign up for your organization's custom domain name. You can try out names and check availability before registering the name.

Start setting up your custom domain name by finding a domain name unique to your org and signing up for it. Choose your name carefully. When you register, Salesforce updates its domain name registries with your domain name. After it's registered, only Salesforce Customer Support can disable or change your domain name.

1. From Setup, enter *My Domain* in the `Quick Find` box, then select **My Domain**.
2. Enter the subdomain name you want to use within the sample URL. For example, a company called Universal Containers wants to use the subdomain `universalcontainers`. The company's login URL would be `https://universalcontainers.my.salesforce.com/`. Your name can include up to 40 letters, numbers, and hyphens.

   You can't use these reserved words for subdomains:

   - www
   - salesforce
   - heroku

   You can't start the domain name with:

   - root
   - status
   - a hyphen
3. Click **Check Availability**. If your name is already taken, choose a different one.
4. Click **Terms and Conditions** to review your agreement, then select the checkbox.
5. Click **Register Domain**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To define a domain name:
- "Customize Application"

6. You receive an email when your domain name is ready for testing. It can take up to 3 minutes.

Your users can use your new domain name after you test and deploy it.

Customize Your Login Page Branding

Customize the look and feel of your login page by adding a background color, logo, and right-side content. Customizing your login page helps users recognize your page by tying it to your company's branding.

Setting Up a My Domain (5:10 minutes. Login page branding starts at 2:43.)

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Under Authentication Configuration, click **Edit**.
3. To customize your logo, upload an image.

   Images can be .jpg, .gif, or .png files up to 100 KB. Maximum image size is 250px by 125px.
4. To customize your login page background, click the or enter a valid hexadecimal color code.
5. To support advanced authentication methods for iOS users, select **Use the native browser for user authentication on iOS**.

   This option enables support of authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of Salesforce1 and Mobile SDK applications on iOS devices. When you select this option, users on iOS devices are redirected to their native browser when using single sign-on authentication into your custom domain. For other operating systems, Salesforce1 and applications using Mobile SDK version 3.1 or later can support certificate-based authentication when the applications are integrated with Mobile Device Management (MDM) software.
6. Enter the URL of the file to be included in the right-side iFrame on the login page.

   The content in the right-side iFrame can resize to fill about 50% of the page. Your content must be hosted at a URL that uses SSL encryption and the https:// prefix. To build your own custom right-side iFrame content page using responsive web design, use the My Domain Sample template.

   Example: `https://c.salesforce.com/login-messages/promos.html`
7. Optionally, select authentication services as identity providers on the login page, such as social sign-on providers like Google and Facebook. Users can then log in with their social account credentials. Configure authentication services as Auth. Providers in Setup.
8. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To customize a login page:
- "Customize Application"

Add Identity Providers on a Login Page

Allow users to authenticate using alternate identity provider options right from your login page. If you've enabled single sign-on and configured SAML, or set up external authentication providers as Auth. Providers in Setup, you can provide links to these identity providers on your domain's login page. Users are sent to the identity provider's login screen to authenticate and then are redirected back to Salesforce.

Note: Available authentication services include all providers configured as SAML single sign-on identify providers or external authentication providers, except Janrain. Janrain can't be used for authentication from the login page.

1. From Setup, enter *My Domain* in the `Quick Find` box, then select **My Domain**.
2. Under Authentication Configuration, click **Edit**.
3. Select one or more already configured authentication services as an identity provider.
4. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To add identity providers on a login page:
- "Customize Application"

Set the My Domain Login Policy

Secure your login by customizing the login policy for your domain.

Customize your login policy to add a layer of security for your org. By default, users log in from a generic Salesforce login page, bypassing the login page specific to your domain. Users are also allowed to make page requests without your domain name, such as when using old bookmarks.

1. From Setup, enter *My Domain* in the `Quick Find` box, then select **My Domain**.
2. Under My Domain Settings, click **Edit**.
3. To turn off authentication for users who don't use your domain-specific login page, select the login policy. For example, selecting the policy prevents users from logging in at the generic `https://<instance>.salesforce.com/` login page, and then being redirected to your pages after login. This option enhances security by preventing login attempts by anyone who doesn't know your domain name.
4. Choose a redirect policy.
   a. Choose `Redirect to the same page within the domain` to allow users to continue using URLs that do not include your domain name. Choosing this option does not enhance security for your org.

      Note: Bookmarks don't work when the `Redirect to the same page within the domain` option is selected for partner portals. Manually change the existing bookmarks to point to the new domain URL by replacing the Salesforce instance name with your custom domain name. For example, replace *`https://yourInstance.salesforce.com/`* with *`https://yourDomain.my.salesforce.com/`* in the bookmark's URL.

   b. Choose `Redirected with a warning to the same page within the domain` to remind users to use your domain name. After reading the warning, users are allowed to view the page. Selecting this option for a few days or weeks can help users transition to a new domain name, but does not enhance security for your org.

   c. Choose `Not redirected` to require users to use your domain name when viewing your pages. This option provides the greatest level of security.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To set login policy for a domain:
- "Customize Application"

5. Click **Save**.

My Domain URL Changes

When you set up a domain name for your org, all your application URLs, including Visualforce pages, change too. Make sure that you update all application URLs before you deploy a domain name. For example, the `Email Notification URL` field in Chatter Answers continues to send notifications with the old URLs to internal users unless you update it. This table shows you the differences.

URL Type	Old URL	New URL
Login	`https://login.salesforce.com`	`https://<subdomain>.my.salesforce.com`
Application page or tab	*https://yourInstance.salesforce.com/<pageID>*	`https://<subdomain>.my.salesforce.com/<pageID>`
Visualforce page with no namespace	*https://c.visual.force.com/apex/<pagename>*	`https://<subdomain>--c.visual.force.com/apex/<pagename>`
Visualforce page *with* namespace	`https://<yournamespace101>.visual.force.com/apex/<pagename>`	`https://<subdomain>--<yournamespace>.visual.force.com/apex/<pagename>`

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

Note: If you implement My Domain in a sandbox environment, the URL format is `https://<subdomain>--<sandboxname>.<instance>.my.salesforce.com`. Since you can't have namespaces in a sandbox environment, the format of all Visualforce page URLs in a sandbox is `https://<subdomain>--<sandboxname>.<instance>.my.salesforce.com/apex/<pagename>`.

Test and Deploy Your New Domain Name

After you set up your domain name, test it and then roll it out to your users. Testing gives you the chance to explore your domain name. It also helps you verify addresses for pages before rolling out your domain to your users.

Important: After you deploy your domain, it's activated immediately and requests with the original URL are redirected to your new domain. Only Salesforce Customer Support can disable or change your domain name after it's deployed.

1. Test your domain login. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**, then **Click here to login**. Or, log out of your DE org and log in to Salesforce using your custom domain name. You can click the login link in the activation email you received.

   You can customize your domain login page and add authentication services (like social sign-on) before you deploy the domain to your users. You can also test the domain in a sandbox environment.

2. Test the new domain name by clicking tabs and links. All pages now show your new domain name.

   If you've customized your Salesforce UI with features such as custom buttons or Visualforce pages, make sure that you test custom elements thoroughly before deploying your domain name. Look for hard-coded references and instance-based URLs in your customizations. Use your custom domain URLs instead.

3. To roll out the new domain name to your organization, from Setup, enter *My Domain* in the Quick Find box, then select **My Domain** and then click **Deploy to Users** and **OK**.

When you deploy your domain, it's activated immediately, and all users are redirected to pages with new domain addresses. You can now set login policies in the Domain Settings section that appears after you deploy your domain. For example, you can prevent users from logging in from login.salesforce.com.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To set up a domain name:
- "Customize Application"

Guidelines and Best Practices for Implementing My Domain

These tips help smooth the transition to a new domain name.

- Communicate the upcoming change to your users before deploying it.
- Deploy your new domain when your org receives minimal traffic, like during a weekend, so you can troubleshoot while traffic is low.
- Before deploying, first test the login policy customizations, custom UI features, Visualforce pages, and application URL changes in an sandbox environment.
- If you've customized your Salesforce UI with features such as custom buttons or Visualforce pages, make sure that you test custom elements thoroughly before deploying your domain name. Look for hard-coded references and instance-based URLs in your customizations. Use your custom domain URLs instead.
- Make sure that you update all application URLs before you deploy a domain name. For example, the Email Notification URL field in Chatter Answers continues to send notifications with the old URLs to internal users unless you update it.
- If your domain is registered but has not yet been deployed, URLs contain your custom domain name when you log in from the My Domain login page. However, links that originate from merge fields that are embedded in emails sent asynchronously, such as workflow emails, still use the old URLs. *After* your domain is deployed, those links show the new My Domain URLs.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

- Help your users get started using your new domain name by providing links to pages they use frequently, such as your login page. Let your users know if you changed the login policy, and encourage them to update their bookmarks the first time they're redirected.
- Choose the Redirect Policy option **Redirected with a warning to the same page within the domain** to give users time to update their bookmarks with the new domain name. After a few days or weeks, change the policy to **Not redirected**. This option requires users to use your domain name when viewing your pages. It provides the greatest level of security.
- Only use `Prevent login from https://login.salesforce.com` if you're concerned that users who aren't aware of your custom domain try to use it. Otherwise, leave the option available to your users while they get used to the new domain name.
- Bookmarks don't work when the `Redirect to the same page within the domain` option is selected for partner portals. Manually change the existing bookmarks to point to the new domain URL by replacing the Salesforce instance name with your custom domain name. For example, replace *`https://yourInstance.salesforce.com/`* with *`https://yourDomain.my.salesforce.com/`* in the bookmark's URL.
- If you block application page requests that don't use the new Salesforce domain name URLs, let your users know that they must either update old bookmarks or create new ones for the login page. They must also update any tabs or links within the application. Users are required to use the new URLs immediately if you change your login redirect policy to `Not Redirected`.
- If you are using My Domain, you can identify which users are logging in with the new login URL and when. From Setup, enter *`Login History`* in the `Quick Find` box, then select **Login History** and view the Username and Login URL columns.
- On the `login.salesforce.com` page, users can click **Log in to a custom domain** to enter your custom domain name and log in. In this case, they must know the domain name. As a safeguard, give them a direct link to your custom domain's login page as well.

If you have the following.	Do the following.
API integrations into your org	Check to see if the API client is directly referencing the server endpoint. The API client should use the LoginResult.serverURL value returned by the login request, instead of using a hard-coded server URL. After your custom domain is deployed, Salesforce returns the server URL containing your domain. Redirect policy settings have no effect on API calls. That is, old calls to instance URLs continue to work. However, the best practice is to use the value returned by Salesforce.
Email templates	Replace references to the org's instance URL with your custom domain.
Custom Visualforce pages or custom Force.com apps	Replace references to the org's instance URL with your custom domain. See How to find hard-coded references with the Force.com IDE.
Chatter	Tell your users to update any bookmarks in the left navigation of their Chatter groups.
Zones for Communities (Ideas/Answers/Chatter Answers)	Manually update the `Email Notification URL`. To update the URL, clear the existing URL so that the field is blank and save the page. Then the system populates the field with your new My Domain URL.

Get System Performance and Maintenance Information Using My Domain

Salesforce customers get system performance and maintenance information from `trust.salesforce.com`.

Here's how to get that information using your new domain name.

1. Go to trust.salesforce.com where you can check the System Status.
2. To find the instance for your domain, click **What instance am I using?**
3. In the System Status table, look for the entry for your instance.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

USER PERMISSIONS

To set up a domain name:

- "Customize Application"

CHAPTER 5 Configure and Use the App Launcher

In this chapter ...

- Enable the App Launcher with a Profile in Salesforce Classic
- Enable the App Launcher with a Permission Set in Salesforce Classic
- Reorder Apps

The App Launcher presents users with logos that link to their on-premise applications, connected apps, and Salesforce apps, all from a unified user interface. Administrators can set the default app order for their organizations.

All Lightning Experience users get the App Launcher.

Salesforce Classic users need the "Use Identity Features" permission, and the App Launcher option in their profile set to **Visible**. Users see only the apps they are authorized to see.

In Salesforce Classic, administrators using the System Administrator profile automatically have access to the App Launcher. Administrators using profiles cloned from the System Administrator profile don't.

Note: Setting up the App Launcher (5:39 minutes)

See how to set up, use, and manage the App Launcher.

The App Launcher is particularly useful for managing access to connected apps, as shown in Quick Start: Set up your own domain, add a Connected App and use the App Launcher. And, you can use the AppMenuItem API for programmatic control over the apps in the App Launcher.

Enable the App Launcher with a Profile in Salesforce Classic

Create a profile and assign it to users, so they can access the App Launcher.

Note: These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

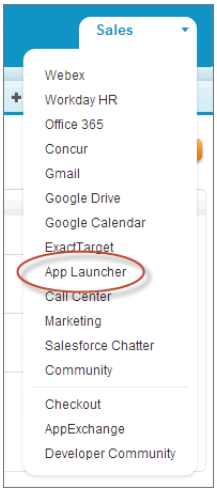
In Salesforce Classic, administrators using the System Administrator profile automatically have access to the App Launcher. Administrators using profiles cloned from the System Administrator profile don't.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click **New Profile**.
3. Select an Existing Profile as a basis for the new profile.
   For example, select **Standard User**.
4. Enter the name of the new profile.
   For example, *Standard User Identity*.
5. Click **Save**.
6. In the detail page for the new profile, click **Edit**.
7. In Custom App Settings, set the App Launcher to **Visible**, if it isn't already.
   Under Tab Settings, verify that the App Launcher tab is set to Default On.
8. Under Administrative Permissions, select **Use Identity Features**.
9. Click **Save**.
10. From Setup, enter *Users* in the Quick Find box, then select **Users**.
11. Click **Edit** next to each user you want to access the App Launcher.
12. In the user's Profile field, select the new profile that has "Use Identity Features" enabled.
    For example, you might use the *Standard User Identity* profile.
13. Click **Save**.
    When you log in as the selected user, the App Launcher appears in the drop-down app menu.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Enable the App Launcher with a Permission Set in Salesforce Classic

Create a permission set and assign it to users, so they can access the App Launcher.

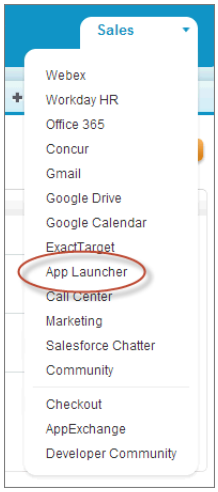
Note: These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter a Label for the new permission set.
   For example, *Identity Features*.
4. Optionally, restrict the use of this permission set to a specific User License.
5. Click **Save**.
6. Click **System Permissions**.
7. Click **Edit**.
8. Select **Use Identity Features**.
9. Click **Save**.
10. From Setup, enter *Users* in the Quick Find box, then select **Users**.
11. Click the name of an existing user to whom you want to give access to the App Launcher.
12. In the **Permission Set Assignments** related list, click **Edit Assignments**.
13. Add the new permission set you created for identity features to Enabled Permission Sets.
14. Click **Save**.
    When you log in as the selected user, the App Launcher appears in the drop-down app menu.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Note: Still not seeing the App Launcher? In the profile associated with the user, select **Visible** for the App Launcher setting.

Reorder Apps

Arrange the default sort order for Salesforce, custom, and connected apps in your organization. You can also hide apps from the App Launcher.

As an administrator, you control the default sort order of the apps your users see in the organization. These apps include Salesforce standard apps, such as the Salesforce Marketing app, the Call Center app, and any custom apps for your organization. Your organization may also use connected apps. Connected apps include productivity apps such as Gmail™ and Microsoft Office 365™, or other apps to help your users get work done.

The sort order you set for the organization is the default view for your users. Starting with the organization's default view, users can rearrange their apps to help them quickly get to the ones they use most.

EDITIONS

Available in: both Lightning Experience and Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Reordering the Force.com App Menu and App Launcher in Salesforce Classic
You can change the order in which apps appear in the Force.com app menu.

Reorder the App Launcher Apps in Salesforce Lightning Experience
You can change the organization's default visibility and order in which apps appear in the App Launcher.

Reordering the Force.com App Menu and App Launcher in Salesforce Classic

You can change the order in which apps appear in the Force.com app menu.

The Force.com app menu is a drop-down list that displays at the top of every application page. The App Launcher, if enabled, presents users with logos that link to their on-premise applications, connected apps, and Salesforce apps.

1. From Setup, do one of the following:
   a. Enter *Apps* in the `Quick Find` box, then select **Apps** and then click **Reorder**.
   b. Enter *App Menu* in the `Quick Find` box, then select **App Menu**.
2. Drag the apps in the list, as desired, to change the app order. The changes take effect immediately.
3. Optionally, click **Visible** or **Hidden** to show or hide individual apps from the App Launcher for all users of the organization.

All the apps installed in the organization are shown for sorting. However, the apps that a user sees in the Force.com app menu, and the App Launcher, varies depending on each app's visibility settings and the user's permissions. For example, an administrator can typically see more apps than a standard user. You can see all of the apps you have permission for, and that are visible to your profile. In the App Launcher, connected apps and service providers must have a Start URL to be listed.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view apps:
- "View Setup and Configuration"

To manage apps:
- "Customize Application"

Reorder the App Launcher Apps in Salesforce Lightning Experience

You can change the organization's default visibility and order in which apps appear in the App Launcher.

The App Launcher displays all a user's available Salesforce apps, and any connected apps an administrator installs for the organization. As an administrator, you can use the App Launcher to set the default sort order and visibility for the apps in your organization. Then, users can reorder their own view within the App Launcher.

1. From Setup, do one of the following:
   a. Enter *Apps* in the `Quick Find` box, then select **Apps**, and then click **Reorder**.
   b. Enter *App Menu* in the `Quick Find` box, then select **App Menu**.
2. Drag the apps in the list, as desired, to change the app order. The changes take effect immediately.

EDITIONS

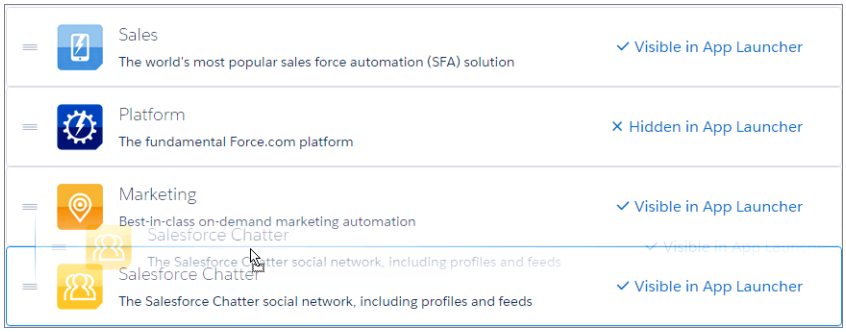
Available in: Lightning Experience

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view apps:
- "View Setup and Configuration"

To manage apps:
- "Customize Application"



3. Click **Visible** or **Hidden** to show or hide individual apps from the App Launcher for all users of the organization.

All the apps installed in the organization are shown for sorting. However, the apps that a user sees in the App Launcher varies depending on each app's visibility settings and the user's permissions. For example, an administrator can typically see more apps than a standard user. You can see all the apps you have permission for, and that are visible to your profile. Connected apps and service providers must have a Start URL to be listed.

CHAPTER 6 Set up Single Sign-on to Google Apps

In this chapter ...

- Get a Salesforce Identity Provider Certificate
- Set Google Administrator Single Sign-On Options
- Create a Connected App for GMail

Give your Salesforce organization users single sign-on access to Google Apps, such as Google Drive, GMail, and GCal.

Since Google Apps uses SAML for single sign-on, you can set up your organization to launch Google Apps from your Salesforce App Launcher without having to log in, separately, to Google. This process is similar to the one in the quick start, and can give your Salesforce organization users single sign-on access to Google apps like Google Drive, GMail, and GCal. To set up Google Apps in your organization, you need:

1. A custom domain (My Domain).
2. Google Apps administrator account with access to your Google Admin console.
3. A profile or permission set with "Use Identity Features" enabled.

For steps to set up your own custom domain, see Quick Start: Set up your own domain, add a Connected App and use the App Launcher. For steps to set up a profile or permission set with "Use Identity Features" enabled, see Configure and Use the App Launcher.

Note: Salesforce as a SSO provider (4:14 minutes)

Learn how to use SAML and single sign-on to launch Google Apps from your Salesforce App Launcher.

Get a Salesforce Identity Provider Certificate

Download and save an identity provider certificate.

Follow these steps in your Salesforce organization.

1. From Setup, enter *Identity Provider* in the Quick Find box, then select **Identity Provider**.

   You get the certificate for signing SAML assertions in the Identity Provider Setup section. Optionally, you can change the self-signed certificate to a production certificate issued by a signing authority. For more information about certificates, see "Creating Certificates and Key Pairs" in the online help.

2. Click **Download Certificate**.

   The certificate validates signatures, and you need to upload it to your Google Administrator account. Remember where you save it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer**, **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

Set Google Administrator Single Sign-On Options

In your Google Administrator account, set the values for single sign-on.

You need to sign in as an Administrator to the Google Apps account at https://admin.google.com.

1. In your Google Administrator account, click **More Controls** > **Security** > **Advanced Settings** > **Set up single sign-on (SSO)**
2. Enter the following values.
   a. Sign-in page URL: *https://yourdomain.my.salesforce.com/idp/endpoint/HttpRedirect*

      Replace *yourdomain* with your custom domain name.

   b. Sign-out page URL: *https://yourdomain.my.salesforce.com*

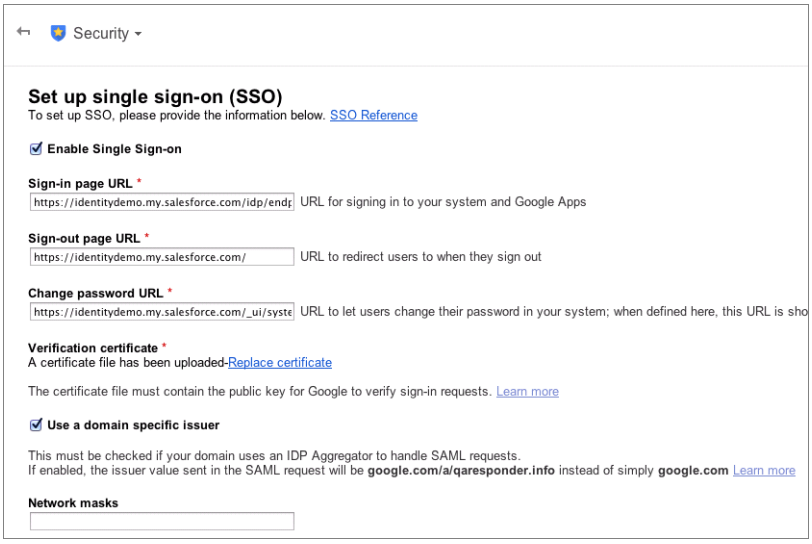
      Replace *yourdomain* with your custom domain name.

   c. Change password URL: *https://yourdomain.my.salesforce.com/_ui/system/security/ChangePassword*

      Replace *yourdomain* with your custom domain name.

   d. Verification certificate: upload the identity provider certificate file you saved in Get a Salesforce Identity Provider Certificate.

   e. Select **Use a domain specific issuer**.



3. Click **Save changes**.

Create a Connected App for GMail

These steps show you how to set up a GMail connected app.

Follow these steps in your Salesforce organization.

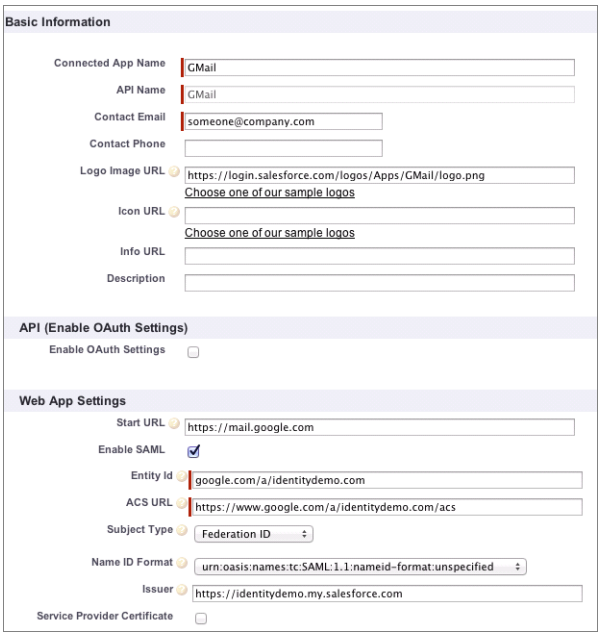
1. From Setup, enter *Apps* in the `Quick Find` box, then select **Apps**.
2. In the **Connected Apps** section, click **New**.
3. In the **Basic Information** section, enter the following values.
   a. Connected App Name: *GMail*.
   b. Contact Email: your administrator Email address.
   c. Logo Image URL: Select **Choose one of our sample logos**, find the logo you want, and click on it. Then, copy the Logo URL. Paste the value back in the Logo Image URL field. Or, enter your own URL.
4. In the **Web App Settings** section, enter the following values.
   a. Start URL: *https://gmail.google.com*.
   b. Select **Enable SAML**.
   c. Entity Id: Enter *google.com/a/yourGoogleAppDomainName*.
      Replace *yourGoogleAppDomainName* with your actual Google domain name.
   d. ACS URL: The same as Entity Id with the "https" prefix and the "acs" suffix, such as *https://google.com/a/yourGoogleAppDomainName/acs*
   e. Subject Type: Select how the user is identified.
      This field should contain the Google Apps Email address for the user.

   Leave the other fields as is, unless you know you need to change the configuration.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer**, **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions



5. Click **Save**.
6. From Setup, enter "Connected Apps" in the `Quick Find` box, then select the option for managing connected apps.
7. Click on the name of the connected app, which is "GMail" in this case.
8. Copy the **IdP-Initiated Login URL** value.
9. Click **Edit**.
10. In the Start URL field, paste the the following string the value from the **IdP-Initiated Login URL** field, and add the following:

    The value copied from **IdP-Initiated Login URL** field + *`&RelayState=http%3A%2F%2Fmail.google.com%2Fa%2FyourGoogleAppDomainName`*

    Replace *`yourGoogleAppDomainName`* with your actual Google domain. You should have a value similar to this one:

    ```
    https://identitydemo.my.salesforce.com/idp/login?app=0sp30000000000k
    &RelayState=http%3A%2F%2Fmail.google.com%2Fa%2Fidentitydemo.com
    ```

11. Click **Save**.

    Now you can add this connected app to a profile or permission set. When that profile or permission set is applied to a user, the user will be able to use the GMail connected app. You can follow the same basic process to install other Google Apps.

CHAPTER 7 Set Two-Factor Authentication Login Requirements

As a Salesforce admin, you can require your users to use a second factor of authentication when they log in.

You can require two-factor authentication each time a user logs in with a username and password to Salesforce, including orgs with custom domains created using My Domain. To set the requirement, select the "Two-Factor Authentication for User Interface Logins" permission in the user profile (for cloned profiles only) or permission set.

See how to set up a two-factor authentication requirement for your org and how your users can use the Salesforce Authenticator app. Salesforce Authenticator: Set Up a Two-Factor Authentication Requirement

Walk Through It: Secure Logins with Two-Factor Authentication

Users with the "Two-Factor Authentication for User Interface Logins" permission have to use a mobile authenticator app each time they log in to Salesforce.

You can also use a profile-based policy to set a two-factor authentication requirement for users assigned to a particular profile. Use the profile policy when you want to require two-factor authentication for users of the following authentication methods:

- SAML for single sign-on
- Social sign-on in to Salesforce orgs or Communities
- Username and password authentication into Communities

All Salesforce user interface authentication methods, including username and password, delegated authentication, SAML single sign-on, and social sign-on through an authentication provider, are supported. In the user profile, set the `Session security level required at login` field to **High Assurance**. Then set session security levels in your org's session settings to apply the policy for particular login methods. Also in your org's session settings, check the session security levels to make sure that Two-Factor Authentication is in the High Assurance column.

Warning: If Two-Factor Authentication is in the Standard column, users get an error when they log in with a method that grants standard-level security.

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit profiles and permission sets:

- "Manage Profiles and Permission Sets"

IN THIS SECTION:

Connect a One-Time Password Generator App or Device for Identity Verification

You can connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to your account. Use a verification code generated by the app, sometimes called a "time-based one-time password," whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in, access connected apps, or access reports or dashboards, use a code from the app. If you're required to use two-factor authentication before you have an app connected, you're prompted to connect one the next time you log in to Salesforce. If you don't yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

Connect a One-Time Password Generator App or Device for Identity Verification

You can connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to your account. Use a verification code generated by the app, sometimes called a "time-based one-time password," whenever Salesforce has to verify your identity. If your administrator requires two-factor authentication for increased security when you log in, access connected apps, or access reports or dashboards, use a code from the app. If you're required to use two-factor authentication before you have an app connected, you're prompted to connect one the next time you log in to Salesforce. If you don't yet have the two-factor authentication requirement, you can still connect the app to your account through your personal settings.

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in all editions

1. Download the supported authenticator app for your device type. You can use any authenticator app that supports the time-based one-time password (TOTP) algorithm (IETF RFC 6238), such as Salesforce Authenticator for iOS, Salesforce Authenticator for Android, or Google Authenticator.
2. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.
3. Find **App Registration: One-Time Password Generator** and click **Connect**.
4. For security purposes, you're prompted to log in to your account.
5. Using the authenticator app on your mobile device, scan the QR code.

   Alternatively, you can click **I Can't Scan the QR Code** in your browser. The browser displays a security key. In the authenticator app, enter your username and the key displayed.
6. In Salesforce, enter the code generated by the authenticator app in the **Verification Code** field.

   The authenticator app generates a new verification code periodically. Enter the current code.
7. Click **Connect**.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

SEE ALSO:

Salesforce Help: Personalize Your Salesforce Experience

CHAPTER 8 Customize Your Login Page with Your Own Branding

Change the look and feel of your custom domain login page by adding a background color, logo, and right-side iFrame content.

Before you can change the appearance of your login page, you must set up a domain using My Domain. For more information, see Quick Start: Set up your own domain, add a Connected App and use the App Launcher on page 5.

A custom login page can match your company's branding, give users extra information, and identify your organization.

Note: Setting Up a My Domain (5:10 minutes. Login page branding starts at 2:43.)

See how to use My Domain to customize your users' login experience.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance**, **Unlimited**, **Enterprise**, **Developer**, **Professional**, and **Group** Editions.

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Under Authentication Configuration, click **Edit**.
3. To customize your logo, upload an image.

   Images can be .jpg, .gif, or .png files up to 100 KB. Maximum image size is 250px by 125px.
4. To customize your login page background, click the or enter a valid hexadecimal color code.
5. To support advanced authentication methods for iOS users, select **Use the native browser for user authentication on iOS**.

   This option enables support of authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of Salesforce1 and Mobile SDK applications on iOS devices. When you select this option, users on iOS devices are redirected to their native browser when using single sign-on authentication into your custom domain. For other operating systems, Salesforce1 and applications using Mobile SDK version 3.1 or later can support certificate-based authentication when the applications are integrated with Mobile Device Management (MDM) software.
6. Enter the URL of the file to be included in the right-side iFrame on the login page.

   The content in the right-side iFrame can resize to fill about 50% of the page. Your content must be hosted at a URL that uses SSL encryption and the https:// prefix. To build your own custom right-side iFrame content page using responsive web design, use the My Domain Sample template.

   Example: `https://c.salesforce.com/login-messages/promos.html`
7. Optionally, select authentication services as identity providers on the login page, such as social sign-on providers like Google and Facebook. Users can then log in with their social account credentials. Configure authentication services as Auth. Providers in Setup.
8. Click **Save**.

Example: For example, you can add *https://sfdclogin.herokuapp.com/news.jsp* as the **Right Frame URL**.

CHAPTER 9 Synchronize your Salesforce and Active Directory Users with Identity Connect

In this chapter ...

- About Identity Connect
- Installing Identity Connect

Use Identity Connect to upload and synchronize user data from Active Directory to your Salesforce organization.

Once installed and set up, Identity Connect provides an administration console for managing and synchronizing users. You can set up single sign-on using Integrated Windows Authentication (IWA) and Kerberos so users who sign into their desktop environment can use Salesforce without having to log in, separately.

To test Identity Connect, sign up for a Force.com trial organization. For information on the differences between a Developer Edition organization and the Force.com trial organization, see this FAQ.

Example:

Note: Integrating Active Directory with Salesforce using Identity Connect (6:43 minutes)

Learn how to download and install Identity Connect to synchronize your Active Directory users with your Salesforce users.

About Identity Connect

Identity Connect provides Active Directory integration.

Identity Connect provides Active Directory integration with Salesforce via a service which runs on either Windows or Linux platforms. This integration includes syncing Active Directory users with either Salesforce or Identity Connect acting as the Identity Service Provider (IDP) for Single Sign On (SSO) Active Directory integration when logging into Salesforce.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions. **Developer** Edition includes 10 Identity Connect permission set licenses.

Installing Identity Connect

Your organization must have at least one Identity Connect license. To obtain Identity Connect, contact Salesforce.

The Identity Connect software will typically be installed on a server by your IT department. Each user does not need to install Identity Connect individually.

1. From Setup, enter *Identity Connect* in the Quick Find box, then select **Identity Connect**.

   Note: **Identity Connect** doesn't appear in Setup until Salesforce adds the feature to your organization.

2. Click the download link that corresponds to your operating system.
3. Install the software according to the Salesforce Identity Connect Implementation Guide.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available for an additional cost in: **Enterprise**, **Performance**, and **Unlimited** Editions. **Developer** Edition includes 10 Identity Connect permission set licenses.

USER PERMISSIONS

To install Identity Connect:

- "Manage Users"

CHAPTER 10 Tutorial: Test Single Sign-On from an External Identity Provider

In this chapter ...

- Establish a Federation ID
- Set up your identity provider
- Generate SAML
- Troubleshoot SAML assertions

This tutorial introduces single sign-on (SSO) implementation from a third-party identity provider and shows you how to troubleshoot SAML assertions from that provider.

Salesforce supports SSO from third-party identity providers. For SSO to work, you need an identity provider and a service provider to coordinate authentication and authorization information using SAML assertions. Follow these steps to test setting up SSO from an external identity provider and troubleshooting SAML assertions. At the end of this tutorial, you'll able to log in to your Salesforce org from an external app.

Note: Setting Up Single Sign-On (23:31 minutes)

See how to authenticate users using an external service.

Establish a Federation ID

For this single sign-on implementation, we'll set a user attribute that links the user between their Salesforce organization and an external application.

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. Click **Edit** next to your current user.
3. In the **Single Sign On Information** section, enter the **Federation ID**: *admin@universalcontainers.com*.

   For this example, we arbitrarily made up a Federation ID. The Federation ID is a unique username for each user that can be shared across multiple applications. Sometimes this is the employee ID for that user. The important part of the Federation ID is that it is not duplicated for more than one user within a single Salesforce organization (you can have the same Federation ID for the same user in more than one Salesforce organization).
4. Click **Save**.

Set up your identity provider

You'll use Axiom, a single sign-on testing app hosted on Heroku, to go through the steps of setting up an identity provider.

Get an identity provider certificate from the Axiom app and set it up in your Salesforce organization.

Tip: Keep the Axiom app open in one browser window, and your DE organization open in another browser window so you can cut-and-paste between the two, easily.

1. In a new browser window, go to http://axiomsso.herokuapp.com.
2. Click **SAML Identity Provider & Tester**.
3. Click **Download the Identity Provider Certificate**.

   The certificate validates signatures, and you need to upload it to your Salesforce organization. Remember where you save it.
4. In your Salesforce organization, from Setup, enter *Single Sign-On Settings* in the Quick Find box, then select **Single Sign-On Settings**.
5. Click **Edit**.
6. Select **SAML Enabled**.
7. Click **Save**.
8. In **SAML Single Sign-On Settings**, click **New**.
9. Enter the following values.
   a. Name: *Axiom Test App*
   b. Issuer: *http://axiomsso.herokuapp.com*
   c. Identity Provider Certificate: Choose the file you downloaded in step 3.
   d. Request Signing Certificate: Leave as the Default Certificate.
   e. SAML Identity Type: Select **Assertion contains the Federation ID from the User object**.
   f. SAML Identity Location: Select **Identity is in the NameIdentifier element of the Subject statement**.
   g. Service Provider Initiated Request Binding: Select **HTTP Redirect**.
   h. Entity Id: Enter your My Domain name including "https", such as *https://universalcontainers.my.salesforce.com*

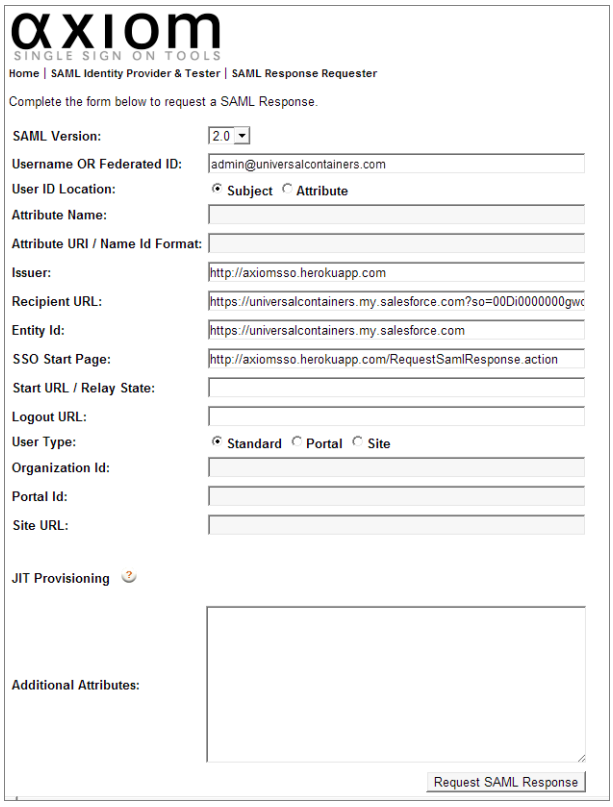
10. Click **Save** and leave the browser page open.

Generate SAML

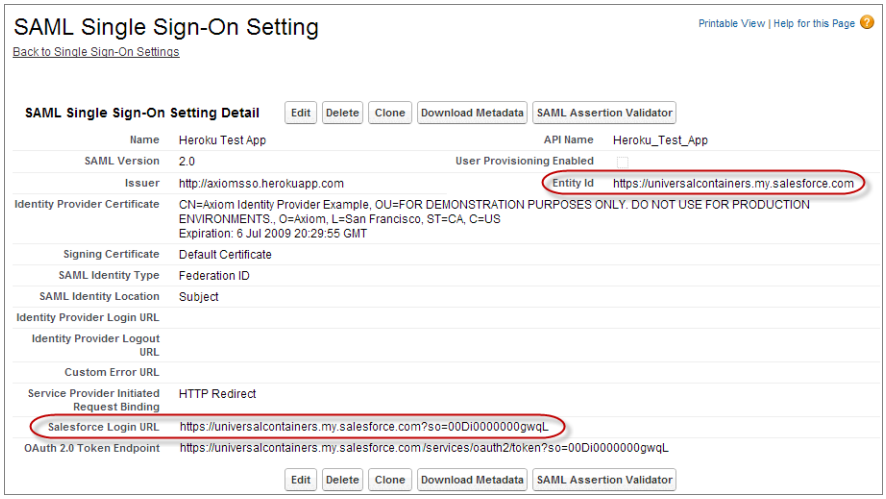
Axiom generates a SAML assertion to log in to your Salesforce organization with the assigned Federation ID.

Tip: Keep the Axiom app open in one browser window, and your DE organization open in another browser window so you can cut-and-paste between the two, easily.

1. Return to Axiom at http://axiomsso.herokuapp.com.
2. Click **generate a SAML response**.
3. Enter the following values (other fields can be left blank).



   a. SAML 2.0
   b. Username or Federated ID: `admin@universalcontainers.com`
   c. Issuer: `http://axiomsso.herokuapp.com`
   d. Recipient URL: Get that from the Salesforce SAML Single Sign-On Setting page. (If you didn't keep that page open, from Setup, enter `Single Sign-On Settings` in the `Quick Find` box, then select **Single Sign-On Settings**, and then click **Axiom Test App**.) Use the **Salesforce Login URL** value.



e. Entity ID: Get that from the Salesforce **SAML Single Sign on Setting page**, too.

4. Back in Axiom, click **Request SAMLResponse**.

   Axiom generates the SAML assertion.

5. Click **Login**.

   The Axiom application logs in to your Salesforce organization as the user with the assigned Federation ID.

Troubleshoot SAML assertions

Use the Salesforce SAML Validator to test and fix a SAML assertion.

If you follow the quick start steps, and do not log in to your organization through the Axiom app, you can use the Salesforce SAML Validator to troubleshoot the SAML assertion. Keep the Axiom app open in a browser window while you troubleshoot the SAML assertion. If you need to reopen Axiom, go to http://axiomsso.herokuapp.com.

1. In your Salesforce organization, from Setup, enter *`Single Sign-On Settings`* in the `Quick Find` box, then select **Single Sign-On Settings**.
2. Click **SAML Assertion Validator**.

   The SAML Validator shows the last recorded SAML login failure with some details as to why it failed.

3. To test the SAML assertion from the Axiom app, copy the **Formatted SAML Response** from the Axiom app.
4. In the Salesforce SAML Validator, paste the SAML assertion in the **SAML Response** box at the bottom of the page.
5. Click **Validate**.

   The page displays some results to help you troubleshoot the assertion. For example, if the assertion was generated a while before it was used to log in, the timestamp expires and the login isn't valid. In that case, regenerate the SAML assertion and try again.

CHAPTER 11 Monitor Applications and Run Reports

In this chapter ...

- Monitor Usage for Connected Apps
- Create an Identity Users Report

Monitor connected apps and set up reports to keep track of app usage by user, app, time, or other values.

Once you've set up connected apps for your Identity users, you can monitor the usage of connected apps throughout your organization, find out how often the apps are used, drill-down into the app details to make changes to the connected app settings, and block or unblock specific apps as your security needs change.

Monitor Usage for Connected Apps

Administrators can monitor installed connected app usage in the **Connected Apps OAuth Usage** page of their organization.

To view information on the usage of any connected apps in the organization, from Setup, enter *Connected Apps OAuth Usage* in the Quick Find box, then select **Connected Apps OAuth Usage**. A list of connected apps and information about each appears.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Connected App

The name of the app. Connected apps that are installed but haven't been used by anyone don't appear in the list.

View App Info

Click **View App Info** to go to the detail page of the connected app. Alternatively, if the connected app isn't yet installed, click **Install**.

User Count

The number of users who have run the app. Click a User Count value to see information about each user, including:

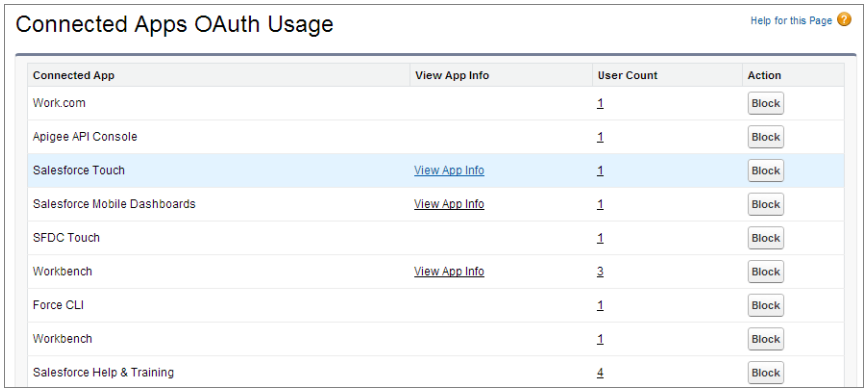
- When they first used the app
- The most recent time they used the app
- The total number of times they used the app

On the Connected App User's Usage page, you can end a user's access to their current session by clicking the **Revoke** action on that person's row. Or, click the **Revoke All** button at the top of the page to log out everyone currently using the connected app.

Action

Click **Block** to end all current user sessions with the connected app and block all new sessions. Blocking an app is not permanent. You can click **Unblock** to allow users to log in and access the app at another time.

Example:



Create an Identity Users Report

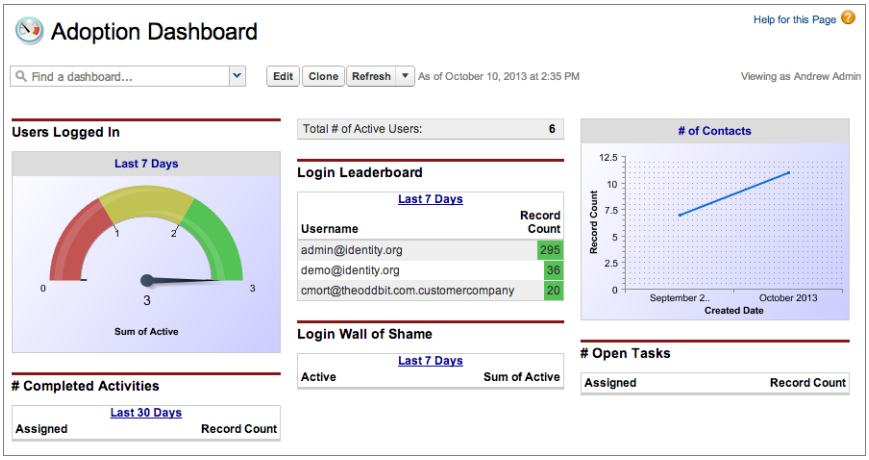
Salesforce maintains Identity Event Logs administrators can use to create reports and dashboards that drill-down into specific information about single sign-on and connected app usage.

The following steps set up a report for Identity users. Use the same steps to set up more than one variation of the same report type, or even create a dashboard for the report.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions



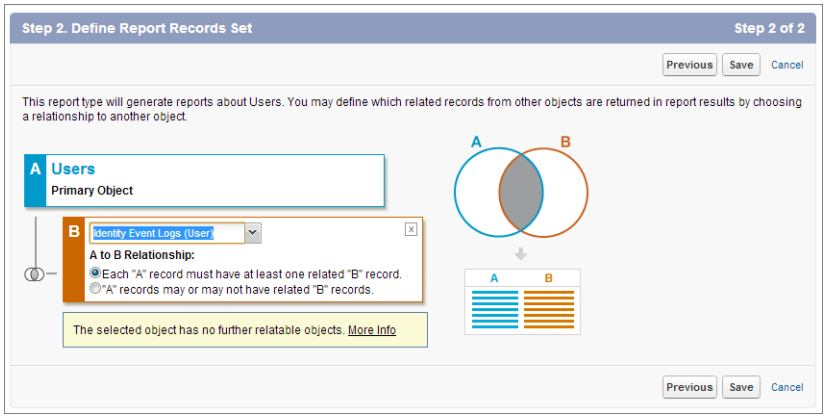
For more information on dashboards, see "Get Started with Dashboards" in the Salesforce online help.

Note: Single Sign-On and Access Management for Mobile Applications (13:17 minutes)

Learn how to create reports for monitoring mobile Identity users and usage. First, this video covers creating and deploying mobile connected apps. Then, it shows how to set up reporting for connected apps usage.

Establish a new report type

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types**.
2. Click **New Custom Report Type**.
3. Enter the following values.
   a. Primary Object: **Users**
   b. Report Type Label: A unique label, such as *Identity Users*
   c. Report Type Name: This field automatically uses the label; change it if you want a different name.
   d. Description: Give it a useful description others might see.
   e. Store in Category: Pick a category for this report, such as **Administrative Reports**.
   f. Deployment Status: Keep as **In Development** until you're ready to deploy this report for other users to see.
4. Click **Next**.
5. Select **Click to relate to another object**.
6. Select **Identity Event Logs (Users)**.



7. Click **Save**.

Create the report

1. Click the **Reports** tab.
2. Click **New Report...**.
3. In **Administrative Reports**, select **Identity Users**.
4. Click **Create**.
5. Drag-and-drop fields onto the report, as desired.

   For example, some useful fields for this report are *`Username`*, *`User ID`*, *`App: Connected App Name`*, *`Timestamp`* and *`Usage Type`*.

6. Click **Save**.
7. Give the report a name, such as *`Identity Connected App Usage`*.
8. Click **Save** (or **Save and Run Report** to see the results, immediately).

CHAPTER 12 Use External Identities to Extend Your Organization to New Users

External Identity is a type of Salesforce license that provides Identity and Access Management service for customers and partners. This license can be upgraded to Customer Community or Partner Community licenses.

The External Identity license gives you the flexibility to add users to your community site without using Customer Community licenses. The External Identity license adds users at a lower cost than the Customer Community license, but without access to community critical features like Cases or Knowledge. Store and manage these users, authenticate them through username and password, single sign-on, and social sign-on (using identities from Facebook, Google+, LinkedIn, and other authentication providers). Allow user self-registration for efficient provisioning of new users. These users are typically consumers for your business, partners, dealers, patients, and other customers.

This table shows which features are available to users with an External Identity license and a Customer Community license.

Feature	External Identity	Customer Community
Accounts	✓ Read and Edit	✓ Read and Edit
Assets	✓ Read, Create, Edit	✓ Read, Create, Edit
Chatter	✓	✓
Contacts	✓ Read, Create, Edit	✓
Identity	✓	✓
Cases		✓ Can create and manage their own cases
Products		✓ Read only
Orders		✓
Files	✓	✓
Chatter Answers		✓
Ideas		✓

EDITIONS

Available in: Salesforce Classic

External Identity licenses are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign and manage External Identity users:

- "Manage Users"

To enable Communities:

- "Customize Application"

Feature	External Identity	Customer Community
Knowledge		✅ Read only
Tasks		✅ Read only
Custom Objects	✅ 2 custom objects per license (custom objects in managed packages don't count toward this limit)	✅ 10 custom objects per license (custom objects in managed packages don't count toward this limit)
Notes and Attachments		✅ Note: The Notes and Attachments related list is not available on accounts and contacts.
Additional Storage	150 MB (25,000 active users license) 2 GB (250,000 active users license) 10 GB (1,000,000 active users license) 60 GB (5,000,000 active users license)	

We recommend that the number of External Identity license users in your community not exceed ten million unique users per month. If you require additional user licenses beyond this limit, contact your Salesforce account executive. Exceeding this limit may result in an extra charge and decrease expected functionality.

For more information on setting up your community to support External Identity license users, see Getting Started with Communities and Community Templates for Self-Service Implementation Guide.

CHAPTER 13 Get More Information about Salesforce Identity, Single Sign-On and Security

Links to more sources of information about Salesforce Identity.

Salesforce Identity also supports external identities for portal access, and you can enable partners and customers as Identity users. For information on using external identities, see

Use the following links for other useful resources.

- Salesforce Identity Web page
- Salesforce Identity "How To" videos
- Security Single Sign-On Implementation Guide [PDF]
- Understanding Authentication in the Force.com REST API Developer Guide
- Salesforce Identity Connect User Guide
- The developer.salesforce.com Identity home page
- Salesforce Security cheatsheets

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