



Video Transcript: Asana Connector Demo

[\[Link to video\]](#)

Hi everyone. This is Vasanthi. I'm a senior product manager on Data Cloud connectivity team. Today I'll demo Asana connector for Data Cloud. I'll walk you through the connectivity setup and also show a sample data stream on, uh, to see how you can bring in Asana data into Data Cloud.

So, uh, to begin with, if you're curious of what data can be brought in from Asana connector, you can go to our help documentation on developer.salesforce.com. Go to Asana connector and then there is a section about Asana connector objects. This is where I am in. And if you click on that, it'll show you all the objects that can be brought in from this connector. You click on any particular object and it will show all the relevant fields description and the information you need. So this is very uh helpful information, but uh please keep in mind that some of these connectors operate on dynamic APIs and what that means is uh if the source stops supporting certain objects, they may not function or show up in the Data Cloud appropriately. So this is only a representative list and not an exact list.

So let's start the connector setup process to, so to begin with, go to your home Data Cloud and then go to Data Cloud Setup. The first thing you need to do is uh go to Feature Manager and enable connectors. In my case, it's already enabled. This is required to uh start working with the Beta connectors and then go to other connectors, uh, click **New**. And then look for Asana.

And click **Next**. So, uh, to connect to Asana, this is the information we need. So workspace ID project ID, and then we need to create named credentials.

So I am logged into my Asana portal. As you can see here, I have my projects here. Um, so how do I get my workspace ID and project ID? It's very simple. You click on any project and the first number you see here in the URL is the workspace ID and the second number you see here is your project ID. So this is how you can get your workspace ID and project ID and now let's go and figure out how to set up named credentials.

Search for named credentials. And then in named credentials you need to do all these, all these three things, but start from right, you need to start with External Auth Identity Providers and then

create external credentials and then named credentials. So I already have some of these created, I'll show them, but if you have to start creating from scratch, you just click on New and enter all this information. We give a label, name, authentication protocol, client ID, and client secret.

External identity provider created, so I'll walk you guys through that. So I gave a label name and authentication protocol as Auth 2.0, authentication type flow as browser flow, and then client ID client secret are from my Asana app.

So to get those, you need to go into, go into your developer Asana portal and then you can create your apps here. I have a couple of apps already created. So you click on any app, and then here's how you get the client ID and client secret. This is exactly what I used here. And then authorization authorizing point URL and token and point URL are standard for all Asana platforms. If you're not sure what to give, please take a screenshot of this, and you can get the same. And then you click **Save**, and then we're done with the external auth identity provider.

Uh, next, we move on to external credentials. So for external credentials, you just click **new**, give it a label, name, authentication protocol as Auth 2.0. And then, um, and then we give the external identity provider we just created and then click **save**. I have created one and then I'll show you guys that. So this is my AsanaEC credentials, uh, browser flow. I did not give any scopes, and then I just selected the external auth identity provider which I just created and then click save.

Uh, and then there's one more thing we need to do here, which is creating a principal. So you need to create, uh, click on new, give it a name, a sequence number, and then identity type as named principals, and then click save. I've already created one, and then once it is, uh, created, uh, you, you will need to configure it. Basically, you click on authenticate and then gets configured. So this is about the external credential step.

Once we are done with this, the next step is to create named credentials. So you click on new, give a label name, URL and uh choose the external credentials that you just created and then click **save**. I've just created one, so I'll show you by start. Click on edit, you just give a URL and then the. The credential that we just created, um, and then you click **save**. So this is, this is the main credentials that we're going to use in our connection.

So I've already created the connection. I'll show you guys that. So this is my connection...and this is the main credential that I've created. And then this is exactly what I used. I've left workspace ID and project ID as blank for now, but you can also...you can also choose to select or deselect them as per your choice and then I'm just testing the connection here. Just to demonstrate to you guys that it's working. As you can see, the connection was established. If I click on save, if you get established and as you can see here, my connector is already active.

Now let's move on to the Data Streams. I've already created a bunch of data streams for this. Uh, basically what you need to do is click **new**, click on the connector and then select the connection that we have chosen. We already created a lot of objects here, a lot of data streams

here, so there aren't a lot...available, but basically you click on this one, select fields, and then you configure a data stream. For the sake of this, uh, demo, I will show a bunch of data streams that I've created. So for example, workspace/workspaces is one data stream that I've created. So I click on this one as you can see, this is successful and it retrieved 5 records. I can also uh show this data stream in the Data Explorer.

So if you see here, it actually got uh a bunch of workspaces, and these are the exact workspaces I see in my Asana portal and that's exactly what the data stream brought in. Now, we can also see the project's information. So It's got a bunch of uh projects we can, there's also an option to edit columns. So I'm interested in now seeing the project name, so I select that. So yeah, these are the projects. So these are all the projects that we have and and then those are the exact projects that are being shown by my. So yeah, it's uh it's very simple to connect to Asana and we can bring in very useful information from Asana. Thank you.

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