



Connecting People to Salesforce

20th September 2016

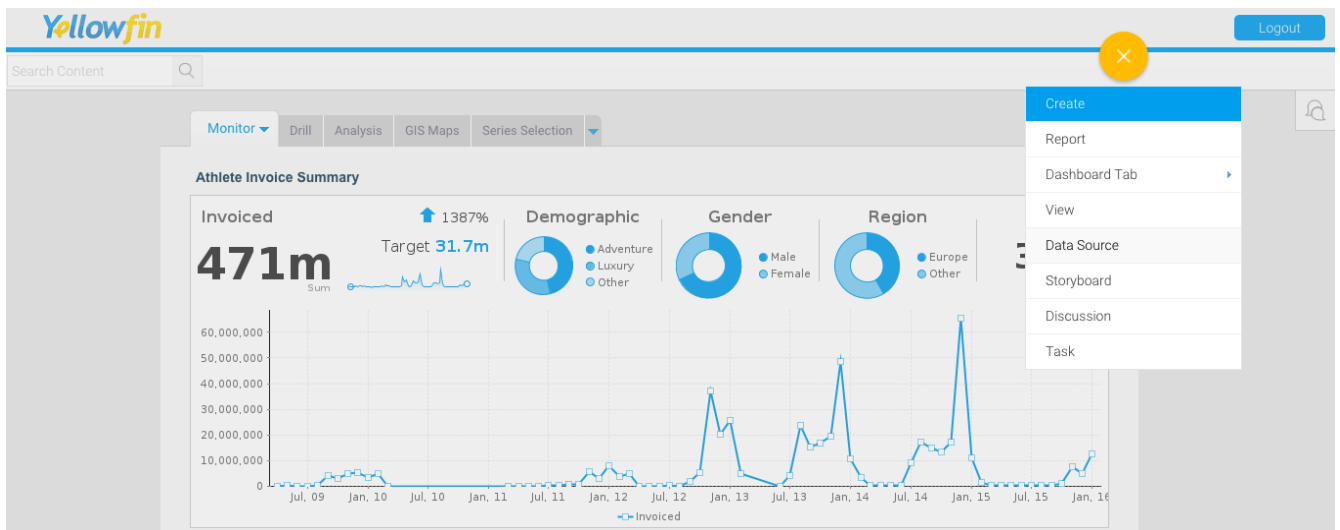
Yellowfin makes connecting to Salesforce and sharing insights easy:

1. [Install your connector](#)
2. [Connect to your account](#)

Install your Connector

Add a New Data Source

- a) Log into your Yellowfin Server
(The User must have permissions to add a new Data Source)
- b) Click **Create** and select **Data Source**

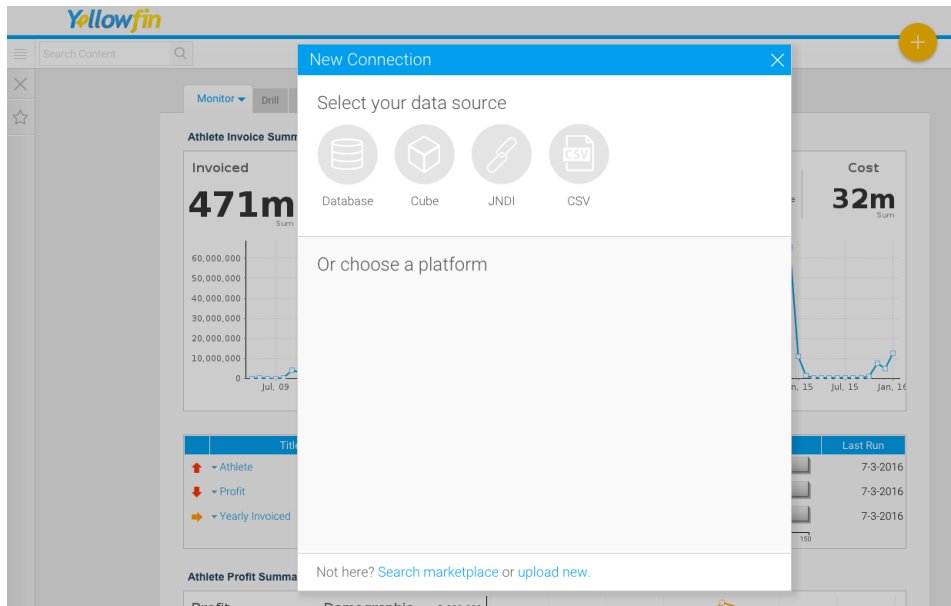


Upload new connector

If you can see the icon for the Salesforce Connector at the **New Connection** step, then you can skip to step **Connect to your Salesforce Account**. Otherwise you will need to select the **Not here?** link.

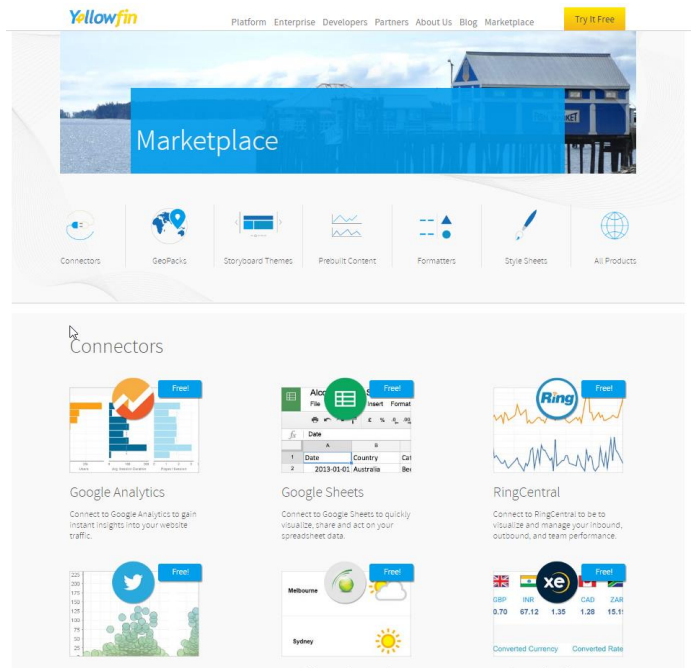
Search Marketplace - download your connector from the Yellowfin Marketplace

Upload New - upload your connector to your instance of Yellowfin



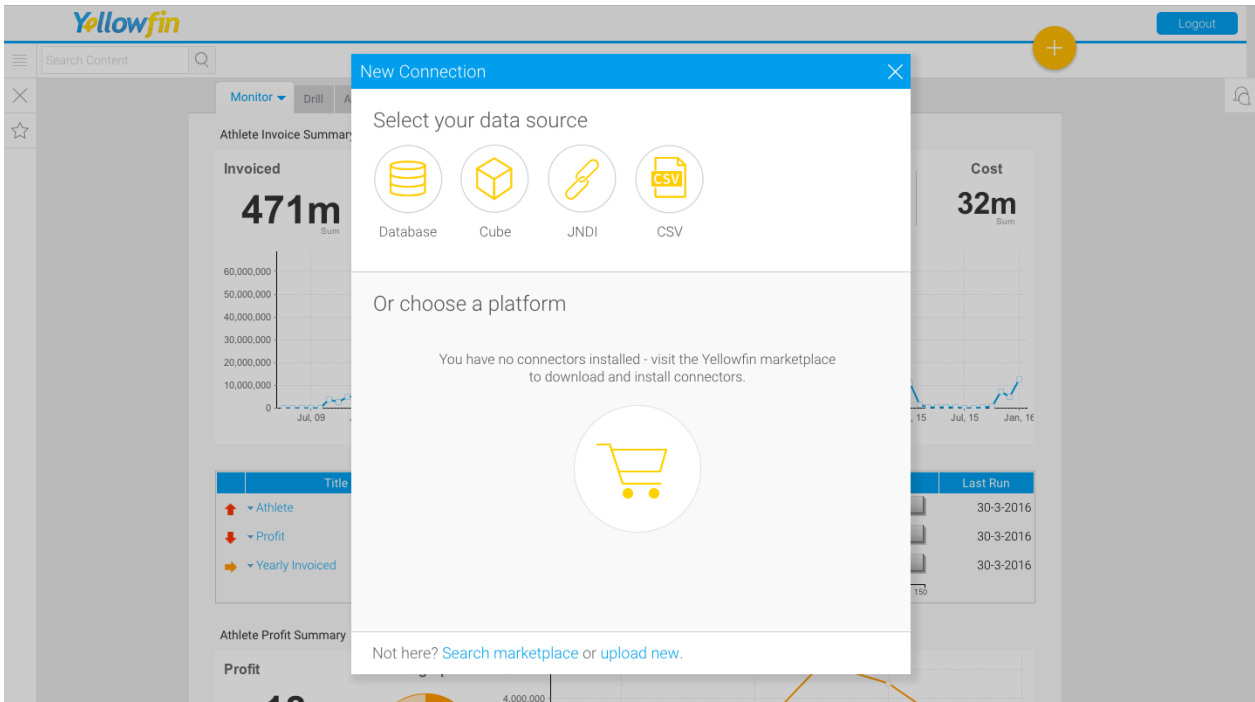
Download the connector from the Yellowfin Marketplace

- c) Go to the [Yellowfin Marketplace](#)
- d) Download the **Salesforce Connector** (it's free!)



Upload your new Connector

- a) Click **Upload New**.




- b) Give your connector a **name** and **description**.
- c) Click **Connect Platform**.

Your connector will now be available under your **Data Source's** list.

Campaign Analysis Engagement Twitter Dashboard RingCentral SurveyMonkey Salesforce






New Connection

Marketplace Connect Platform Create View Analyse

 **File Uploaded Successfully**
salesforce.yfp [+ Add more](#)

Name

Description
Give your view a great description to help others find it

 json.jar	<input type="text"/>	<input type="button" value="x"/>
 commons-logging-1.2.jar	<input type="text"/>	<input type="button" value="x"/>
 commons-httpclient-3.0.jar	<input type="text"/>	<input type="button" value="x"/>
 content.xml	<input type="text"/>	<input type="button" value="x"/>
 httpclient-osgi-4.3.jar	<input type="text"/>	<input type="button" value="x"/>

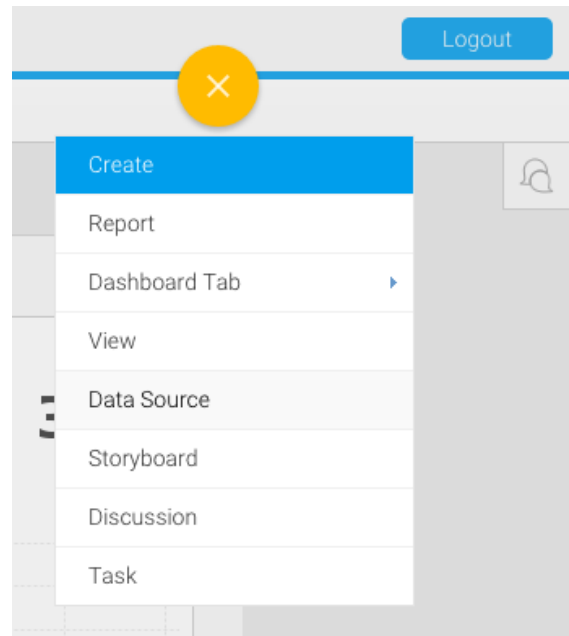
Connect to your Salesforce account

Once your Salesforce Connector is installed, you can use it to connect to your Salesforce account.

Create a new Data Source

a) Click **Create** and select **Data Source**.

(If you have just installed your connector, then you will be immediately taken to the next step)



b) Select **Salesforce**

Campaign Analysis Engagement Twitter Dashboard RingCentral SurveyMonkey Salesforce

New Connection

Select your data source

- Database
- Cube
- JNDI
- CSV

Or choose a platform

- Reporting...
- RingCentr...
- Salesforce**
Connect to Salesforce.com
Connect to your data in Salesforce.com and analyse your leads, opportunities and accounts.
- er

Not here? [Search marketplace](#) or [upload new](#).

Name your Connection and Enter your Account Details

- c) Give your connector a **name** and **description**.
- d) Click **“Authorise Salesforce”**
- e) In the window that opens, click into your Salesforce Account.
- f) Copy the **“Verification Code”** to your clip board.
- g) Paste your **“Verification Code”** into the **“PIN”** box in Yellowfin.
- h) Click **“Validate Pin”**
- i) Click **Launch Pre-Built Content**

New Connection

Connection Setti... Create View Analyse

Name:

Description:

Connection Instructions:

1. Click the 'Authorise Salesforce' button, login, and 'Allow' access to your account.
2. Copy the PIN provided and paste it into Yellowfin.
3. Click the 'Validate PIN' button.

1. Request Access PIN:

2. Enter PIN:

3. Validate PIN:

Access Token:

Refresh Token:

About Yellowfin

Yellowfin is a global Business Intelligence (BI) and analytics software vendor passionate about making BI easy. Founded in 2003 in response to the complexity and costs associated with implementing and using traditional BI tools, Yellowfin is a highly intuitive 100 percent Web-based reporting and analytics solution. Yellowfin is a leader in mobile, collaborative and embedded BI, as well as Location Intelligence and data visualization.

Over 10,000 organizations, and more than 2 million end-users across 70 different countries, use Yellowfin every day. For more information, visit www.yellowfinbi.com

Additional Resources

[**Yellowfin Website**](#)

[**Yellowfin Marketplace**](#)

[**Yellowfin Wiki**](#)

[**Support Forum**](#)

[**YouTube Channel**](#)