Create a Secure Salesforce API User

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If needed, it is possible to create a Salesforce user account dedicated to FormAssembly.

This can allow you to keep your own credentials private and let you restrict the permissions to the minimum needed by FormAssembly.

> **Note**: With Salesforce's recent MFA enablement, this setup is not highly recommended for multiple users utilizing one Salesforce authentication. When authenticating a Salesforce connector, you will be prompted to complete a second step and approve your login on the Salesforce Authenticator app or provide the verification code. This means that the Salesforce account owner will need to approve the login, which can be difficult if multiple users are authenticating to the same Salesforce user.
>
> Please be mindful of the Salesforce OAuth Token Limit if considering this approach.

Creating a Salesforce API User

To create the user and its permission profile, please contact your Salesforce administrator or refer to the Salesforce documentation:

- Create or edit a profile
- Set login IP range or set a security token
- Create a new user

When you check the API User checkbox, it ensures that you can't use those credentials to actually log into the instance. This is safer but does cost an additional license.

Salesforce Profile Settings

Whether you use a dedicated user or your own account, the following options must be enabled in your user's profile:

1. **Administrative Permissions** Section: Check **API Enabled**.
2. **Standard Object Permissions** Section: Check all the objects that you wish to create using your web form (e.g., **Lead**, **CampaignMember**, etc.).
3. **Login IP Ranges** (Optional: if not set, a security token is needed).

Note:

- FormAssembly Enterprise customers will have a different range of IP addresses to white-list in their Salesforce interface. If you do not know your IP, contact our Support Team.
- You can also go to **Setup → Users → Login History** in Salesforce to determine if there are additional IP addresses you need to whitelist.