Reauthenticate your Salesforce Connector

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Introduction

There are some cases where you might need to reauthenticate or change the authenticated account for your Salesforce Connector. You might be switching from Sandbox to Production accounts, you might be adding a new user to your organization, or you might be updating credentials that are no longer in use.

This page can be used to help guide you through the re-authentication process.

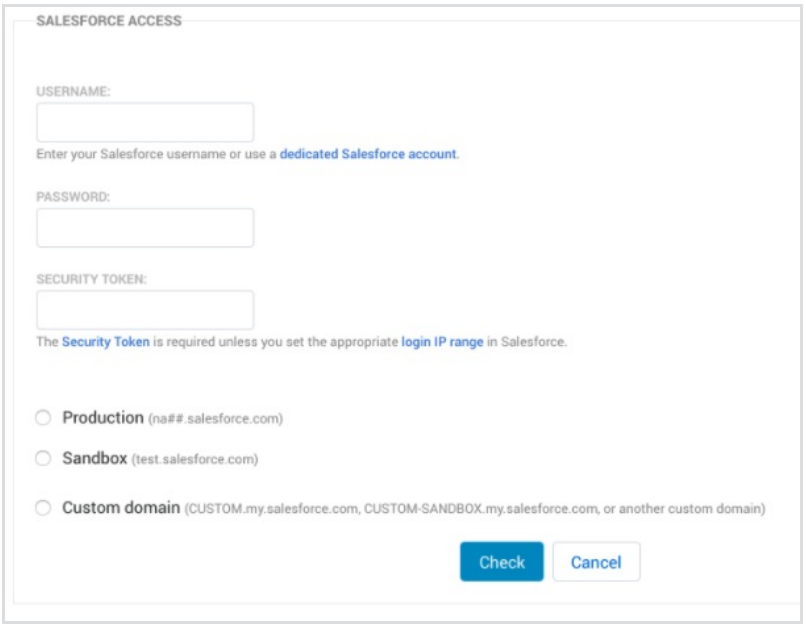
Determine Your Authentication Type

If you added a Salesforce Connector to a form after September 2016, you are likely using the OAuth authentication method. This means that you never need to update your password or security token, and your connector will always be connected to your Salesforce account.

For connectors created before September 2016, you may be using the previous authentication method of providing a username, password, and security token to connect to Salesforce.

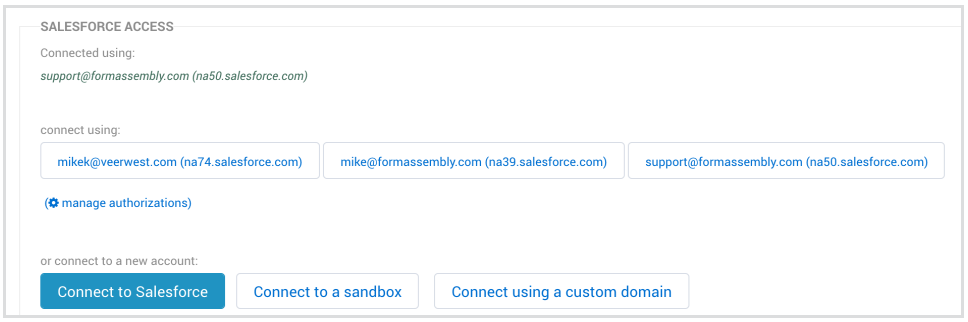
To confirm which method you have used to authenticate, you'll need to go to your connector timeline, click **Configure** for your Salesforce Connector, and then click **Change Access**.

After you click Change Access, if you see a prompt for your username, password, and security token, then you are using our previous version of authentication:



Note: If you would like to switch from this authentication method to the new OAuth method (which we recommend), click Cancel on this page, and then click Connect to Salesforce.

If you see "**connect using**" and a list of other authenticated accounts, as well as the option to " **Connect to Salesforce**", then you are using the current OAuth authentication method.



Reauthenticate Using OAuth

Reauthenticate through the External Authorizations Page

To quickly reauthenticate your existing Salesforce Connections from one place,

- Navigate to the External Authorizations page by clicking **Preferences Menu > External Authorizations**.
- Locate the authorization you want to update, and select **Reauthorize**.

When reauthorizing through this page, the update is applied to all connectors and dynamic picklists that were using the authorization.

Note: There can only be 5 active Salesforce OAuth tokens for a given Salesforce user/service combo. A new token is generated each time you select **Reauthorize** and log into Salesforce. Refer to our Salesforce OAuth Token Limit article for more information and troubleshooting details.

Reauthenticate through the Salesforce Connector

From your Salesforce Connector, click on the username/authentication you would like to use under the " **connect using**" section to reauthenticate to that Salesforce user. You can also click on a different user before clicking on the one you'd like to utilize.

If you would like to set up a **new** authentication, click "**Connect to Salesforce**" to authenticate a new Salesforce user. **Do not click this** if the authentication you would like to use is already available in " **connect using**". This may cause an issue with the authentication tokens being used by your forms.

Changing authentication to a new user will only cause this change to occur in the specific connector you are working with. In other words, each connector authentication happens on a form-by-form basis. This way, you can change the authentication on one connector without impacting all your other connectors.

Changing from Password and Security Token to OAuth Authentication

If you were previously using the Password and Security Token method to authenticate, you can reauthenticate using OAuth by following these steps:

1. Select **Change Access**
2. Click **Cancel**
3. You should now see the boxes to "**Connect**" or "**Connect to Sandbox**"
4. Select the method you would like to use, and you will be redirected to Salesforce
5. Allow the authentication and complete any necessary authentication steps in Salesforce.
6. You will be redirected back to your connector, which will now be authenticated

Note:

- When using the OAuth authentication method, you should not need to reauthenticate for the same username and password at any point. However, under rare circumstances for troubleshooting, this might be one suggestion our support team suggests.
- When you reauthenticate using the OAuth authentication method, it will automatically update the authentication for any forms you own that were using the same credentials. Please note, this does not impact forms that were shared with you, even if the credentials are the same as those that you are updating.
- Additionally, there can only be 5 active Salesforce OAuth tokens for a given Salesforce user/service combo. A new token is generated each time you select "Connect to Salesforce" and log into Salesforce, so please use existing authentications if they're available instead of redoing the login in order to preserve tokens. Refer to our Salesforce OAuth Token Limit article for more information and troubleshooting details.

Reauthenticate using Username, Password, and Security Token

If you are using the older method of authenticating with a username, password, and security token, then you will need to update all three of these pieces of information in order to reauthenticate the connector.

If you are reauthenticating the connector with the same login information, you will receive a prompt asking if you would like to update all your other connectors using that login name. This can be useful for troubleshooting purposes, and sometimes it is necessary to reauthenticate your connector using the same login information to refresh your Salesforce schema.

Credentials saved

Done! If you have any other connector with the same credentials, click here to apply this change globally.

Okay