

## INTEGRATION GUIDES

# Arcline + Salesforce Integration Guide

Connect Arcline to Salesforce CRM: OAuth setup, field mapping, lead routing, and deal stage triggers.

## Prerequisites

- Arcline workspace on Starter plan or above
- Salesforce org with API access (Professional, Enterprise, or Developer Edition)
- Connected App credentials: Consumer Key and Consumer Secret
- Salesforce user with 'API Enabled' and 'Modify All Data' profile permissions

## Step 1 — OAuth Authorization

In your Arcline workspace, navigate to Integrations › Salesforce and click Connect. You will be redirected to Salesforce to authorize the connection using OAuth 2.0. Arcline requests the following scopes: `api`, `refresh_token`, and `offline_access`. After authorizing, Arcline stores a refresh token to maintain a persistent connection.

```
OAuth 2.0 Flow:  Authorization Code Grant
Redirect URI:    https://app.arcline.io/oauth/salesforce/callback
Scopes:         api refresh_token offline_access
```

## Step 2 — Field Mapping

Open the Salesforce connector settings to configure field mappings. Arcline auto-discovers all standard and custom objects in your org. For each workflow that reads or writes Salesforce data, define mappings that translate between Arcline's data model and your Salesforce schema. Mappings support static values, dynamic expressions, and transformations.

## Step 3 — Automated Lead Routing

Use the Lead Created trigger to fire a workflow whenever a new Lead record is created in Salesforce. Configure assignment conditions based on lead source, territory, or industry vertical to route leads to the correct owner. Arcline can update OwnerId, enroll the lead in a nurture sequence, and post a Slack notification — in one workflow.

## Step 4 — Deal Stage Triggers

Opportunity stage changes are a powerful trigger for downstream workflows. Common patterns: notify finance on Closed Won, create an onboarding project, or trigger a handoff to Customer Success. Configure stage filters in the trigger settings to scope the automation to specific pipeline stages or record types.