



Salesforce SSO instructions

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Salesforce configuration intro

Salesforce SSO will restrict access to your knowledge base to only individuals with a valid login to your Salesforce account. Readers logged in to Salesforce will be able to access your knowledge base, and anyone who tries to access your knowledge base that is not logged into Salesforce will be redirected to Salesforce to log in.



Salesforce SSO will override any other Default Access security settings such as IP address, shared password, and readers.

You will likely need Admin privileges in Salesforce to complete all the steps below.

Step 1: Enable Salesforce SSO in KnowledgeOwl

First, we need to enable Salesforce SSO in KnowledgeOwl and add the Salesforce Login URL.

1. In KnowledgeOwl, go to **Settings > SSO**.
2. Click on the **Salesforce SSO** tab near the top.
3. Check the box next to **Enable Salesforce**.
4. In Salesforce, copy the base URL for your account. On older accounts, this will look something like `https://na17.salesforce.com`. In newer or branded accounts, it will look like `https://knowledgeowl.my.salesforce.com`.
5. In KnowledgeOwl, paste your Salesforce URL in the field called **SF login URL** and add `"/apex/ko_login"` to the end. In the end, the entire URL will look similar to `https://na17.salesforce.com/apex/ko_login`.

Sample Salesforce SSO setup in KnowledgeOwl

6. **Save those settings in KnowledgeOwl.**

Step 2: Create LoginController apex class in Salesforce

Now we'll begin setting up the Salesforce components. For all Salesforce steps, you'll need to be in the **Setup** portion of Salesforce.

1. In Salesforce, go to **Setup > Custom Code > Apex Classes**.
2. Create a new apex class.



No Apex Class option

If you don't see the option to create a new apex class, you'll likely need to perform the following steps in your sandbox environment before deploying to your production instance.

3. Copy and paste the following code into the new apex class:

```

public class KnowledgeOwlLoginController {
    public string md5String {get;set;}
    public string timeStamp {get;set;}
    public string redirect {get;set;}
    private User activeUser;
    private string koToken = '<YOUR_KO_REMOTE_AUTH_TOKEN>';

    public KnowledgeOwlLoginController () {
        String userName = UserInfo.getUserName();
        activeUser = [Select Email From User where Username = : userName limit 1];
        timeStamp = String.valueOf(DateTime.now().getTime() / 1000);
        redirect = ApexPages.CurrentPage().getParameters().get('r');
        String hash = UserInfo.getUserId() + this.koToken + timeStamp;
        Blob keyblob = Blob.valueOf(hash);
        Blob key = Crypto.generateDigest('MD5',keyblob);
        md5String = encodingUtil.convertToHex(key);

        UpsertReader();
    }

    //create or update the reader information in KnowledgeOwl
    public HttpResponse UpsertReader() {
        //replace static value with user specific field to pass through desired reader groups
        String reader_groups = '<SF Group1,SF Group2>';

        HttpRequest req = new HttpRequest();
        HttpResponse res = new HttpResponse();
        Http http = new Http();

        //post reader information to KnowledgeOwl
        req.setEndpoint('https://<YOUR_KO_URL>/sf-reader-create');
        req.setMethod('POST');
        req.setBody('timestamp='+timeStamp+'&hash='+md5String+'&ssoid='+UserInfo.getUserId()+&username='
+activeUser.Email+'&first_name='+UserInfo.getFirstName()+&last_name='+UserInfo.getLastName()+&groups='
+reader_groups);
        req.setHeader('Content-Type', 'application/x-www-form-urlencoded');
        req.setCompressed(false);

        res = http.send(req);
        return res;
    }
}

```

4. Replace `<YOUR_KO_REMOTE_AUTH_TOKEN>` in row 6 with your KnowledgeOwl token found under **Settings > SSO > Salesforce SSO > KO Auth Token**.
5. Replace `<SF Group1,SF Group2>` in row 24 with either a comma-separated list of groups you'd like to add your reader to or a field that stores that information.
6. Replace `<YOUR_KO_URL>` in row 31 with the URL of your knowledge base's homepage. Our domain is `support.knowledgeowl.com/help` so that's what we would use, for example:

```

//post reader information to KnowledgeOwl
req.setEndpoint('https://support.knowledgeowl.com/help/sf-reader-create');
req.setMethod('POST');
req.setBody('timestamp='+timeStamp+'&hash='+md5String+'&ssoid='+UserInfo.getUserId()+&username='+
+activeUser.Email+'&first_name='+UserInfo.getFirstName()+&last_name='+UserInfo.getLastName()+&groups='
+reader_groups);
req.setHeader('Content-Type', 'application/x-www-form-urlencoded');
req.setCompressed(false);

res = http.send(req);
return res;
}
}

```

7. Once you're done updating those fields, **Save** the apex class in Salesforce.

Step 3: Add the Remote Site in Salesforce

Next, we need to add the knowledge base URL as an allowed Remote Site in Salesforce. To do so:

1. In Salesforce, navigate to **Setup > Security > Remote Site Settings**.
2. Click on **New Remote Site**.
3. For the URL, use your knowledge base's homepage URL with the **/help**, **/home**, or **/docs** removed. So for our site, we'd use `https://support.knowledgeowl.com` :

Remote Site Details

Remote Site Detail	
Remote Site URL	https://support.knowledgeowl.com
Disable Protocol Security	<input type="checkbox"/>
Description	KO Support knowledge base
Active	<input checked="" type="checkbox"/>

4. Be sure to **save** your changes.

Step 4: Create a Visualforce page in Salesforce

For this step, you'll need to find your **Develop > Pages** settings in Salesforce.

Depending on your account, this may be in several places:

- **Setup > Custom Code > Visualforce Pages**
- **Setup > Build > Develop > Pages**
- **General Account Settings > App Setup > Develop > Pages** (only for much older accounts)

Once you've found this option:

1. Create a new Visualforce page.
2. Enter any Label you'd like.
3. Enter `ko_login` as the Name. You must enter this value for the integration to work!
4. Copy the code below and paste it into the Visualforce Markup section:

```
<apex:page controller="KnowledgeOwlLoginController"><h1>Redirecting to KnowledgeOwl...</h1>

<script>
var koURL = 'https://<YOUR_KO_DOMAIN>/sf-remote-login';

koURL += '?external_id=' + escape('{!$User.Id}');
koURL += '&timestamp={!timeStamp}';
koURL += '&hash={!md5String}';
koURL += '&r={!redirect}';

window.location = koURL;
</script>
</apex:page>
```

5. Replace `<YOUR_KO_DOMAIN>` in row 4 with your KnowledgeOwl knowledge base homepage. Our homepage is `https://support.knowledgeowl.com/help` so we'd use `support.knowledgeowl.com/help` :

Visualforce Page
ko_login

Page Detail

Label	KnowledgeOwl login	Name	ko_login
Namespace Prefix		Available for Lightning Experience, Experience Builder sites, and the mobile app	<input type="checkbox"/>
Require CSRF protection on GET requests	<input type="checkbox"/>	Description	ko_login for KnowledgeOwl integration
Last Modified By	Kate Mueller, 3/30/2022 3:35 PM	Created By	Kate Mueller, 3/30/2022 3:35 PM

Visualforce Markup

```
<apex:page controller="KnowledgeOwlLoginController"><h1>Redirecting to KnowledgeOwl...</h1>

<script>
var koURL = 'https://support.knowledgeowl.com/help/sf-remote-login';

koURL += '?external_id=' + escape('{!$User.Id}');
koURL += '&timestamp={!timeStamp}';
koURL += '&hash={!md5String}';
koURL += '&r={!redirect}';

window.location = koURL;
</script>
</apex:page>
```

6. Save.

Once you've created the Visualforce page, open the Security settings for the Visualforce page you just created.

Navigate back to the menu option you used to open Pages above--if you're using Setup > Custom Code > Visualforce Pages the Security link will appear to the left of the Visualforce page name when you're viewing the list of pages.

1. Open the Security settings for the Visualforce page you just created.
2. Add the user profiles you wish to be able to use this integration. This will depend on your Salesforce

configuration.

3. Save those changes.

Step 5: Create final apex classes in Salesforce

Now, you can create the final two apex classes needed for the integration. To do so:

1. Navigate back to **Setup > Custom Code > Apex Classes**.
2. Create another new Apex class.
3. Copy the code below, paste it into the apex class body, and **Save the new class**.

```
@isTest
global class MockHttpResponseGenerator implements HttpCalloutMock {
    // Implement this interface method
    global HttpResponse respond(HttpRequest req) {
        // Create a fake response
        HttpResponse res = new HttpResponse();
        res.setHeader('Content-Type', 'application/json');
        res.setBody('{"foo":"bar"}');
        res.setStatusCode(200);
        return res;
    }
}
```

4. Finally, create one more new Apex class. Copy the code below, paste it into the body, and **Save the new class**

```
@isTest
private class KnowledgeOwlLoginTest {
    static testMethod void loginVarsTest() {
        //Set mock callout class
        Test.setMock(HttpCalloutMock.class, new MockHttpResponseGenerator());

        //instantiate the controller
        KnowledgeOwlLoginController controller = new KnowledgeOwlLoginController();

        // Call method to test.
        HttpResponse res = controller.UpsertReader();

        // Verify response received contains fake values
        String contentType = res.getHeader('Content-Type');
        System.assert(contentType == 'application/json');
        String actualValue = res.getBody();
        String expectedValue = '{"foo":"bar"}';
        System.assertEquals(actualValue, expectedValue);
        System.assertEquals(200, res.getStatusCode());
    }
}
```

5. Once you have saved that class, select **Run Test** to ensure that your new Apex classes have full code coverage and are ready to deploy to your production environment.
 6. Test it out! When a reader tries to access your knowledge base, they must be logged in to your Salesforce account. If they are not, they will be redirected to Salesforce to log in and redirected back to your knowledge base once they are authenticated.
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