Action Button Sync from Salesforce

You can create an action button in the Salesforce Developer Console that initiates a synchronization between the Agiloft knowledgebase and Salesforce.

> **Prerequisites**
>
> You must have already set up a working synchronization between Agiloft and Salesforce. For more information, see Salesforce Integration.

Adding the Button

The steps here require you to switch between Salesforce and your Agiloft knowledgebase, so open each one in its own browser window or tab.

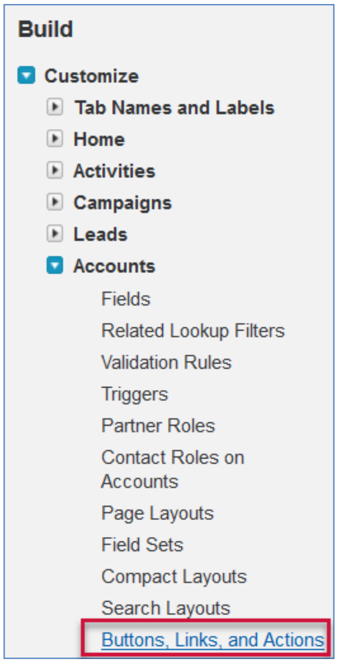
First, create the new button in Salesforce.

- In Salesforce Lightning:

    a. Log in to your Salesforce account and go to Setup.
    b. Open the Object Manager and select the Salesforce object. For example, open Account to add the button to the Account object.
    c. In the left pane, click Buttons, Links, and Actions.
    d. Click New Button or Link.

- In Salesforce Classic:

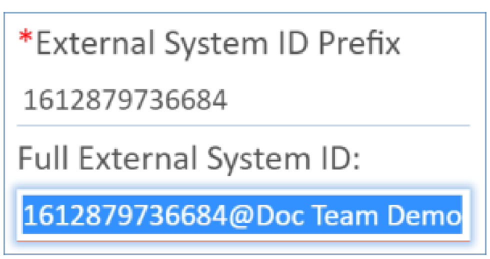
a. Log in to your Salesforce account and go to **Setup > Build (on the left pane) > Accounts > Buttons, Links and Actions**.



b. Click New Button or Link at the top of the screen.

In the New Button or Link setup screen:

1. Fill in the mandatory fields marked with a red bar:
    a. **Label -** Add a name based on the sync in Agiloft.
    b. **Name -** Use the Configuration Name of the Agiloft sync.
    c. **Behavior -** Display in existing window without sidebar.
    d. **Content Source** - URL.
2. In Agiloft, go to Setup > Sync, edit your Salesforce sync configuration, and copy the Full External System ID.



Full External System ID text, highlighted

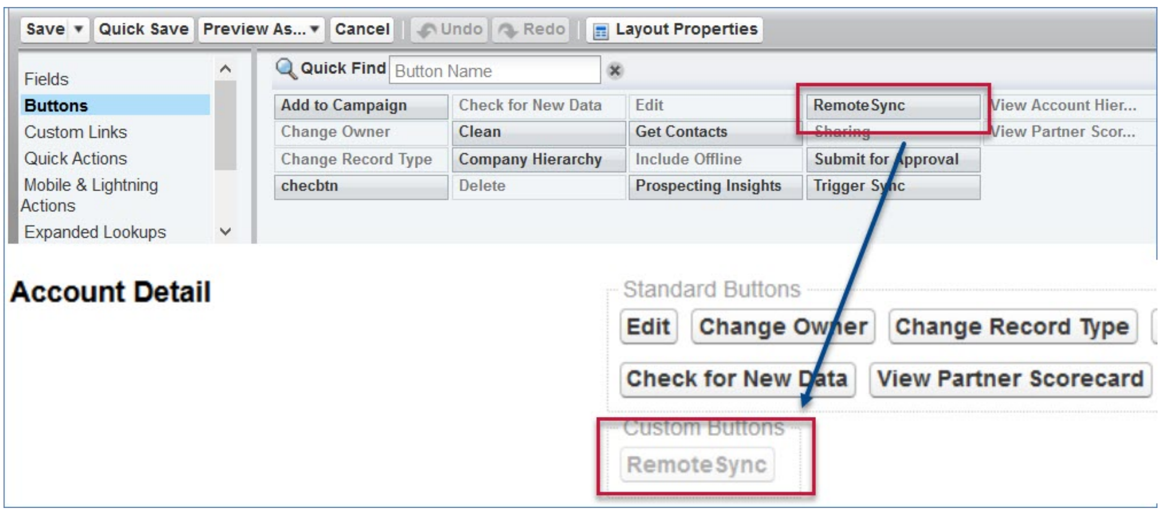
3. In Salesforce, fill in the URL to trigger the API call.
    a. Prepare the unencrypted endpoint URL using this syntax, where <ewserver> is replaced with your domain name: https://<ewserver>/gui2/login.jsp?keyID=0&user=<adminusername>&passwd=<adminpassword>&KB=<KBName>&actio

Example

```
https://example.agiloft.com/gui2/login.jsp?
keyID=0&user=admin&passwd=qwerty&KB=Demo&action=sync&externalSystemID=1
Team Demo
```

b. With the endpoint URL written, go to **Setup > Access** and click **Automatic Login Hotlinks**.
c. Paste the unencrypted endpoint URL in the Encrypt Hotlink input box, then click Encrypt.
d. Copy the Encrypted hotlink URL, switch back to Salesforce, and paste it in the button URL field to trigger the sync from Salesforce.
e. Save the button.

4. Go to **Build > Customize > Accounts > Page Layouts** on the left pane, and click Edit on the page layout to which you want to add the button.
5. In the layout editor, click Buttons and then click and drag the newly created button to the Custom Buttons section in Account Detail. Save the layout.



6. To check the new sync button, navigate to Accounts in the top menu, and choose one account in the list.
7. The new button appears at the top of the account details. When you click the button, the sync is initiated with your Knowledgebase.