

Salesforce Knowledge Base Sandbox Configuration Guide



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Introduction

Cloudwords offers a dedicated “sandbox” environment that is designed to let you test drive our [Salesforce Knowledge Base integration](#) in an automated way, for free. The Cloudwords Sandbox is your private testing environment, and it comes with full Cloudwords functionalities enabled.

To simplify your testing experience, your sandbox account also comes with an “automated vendor” that will automatically respond to your test projects and even deliver “mocked” machine translation for your Salesforce Knowledge Base content. With Sandbox, you can essentially go through the entire Cloudwords project lifecycle without having to login as a “test vendor” at all.

Configure Your Salesforce Knowledge Base for Cloudwords Sandbox

After you have installed the “Cloudwords for Salesforce Knowledge” AppExchange app into your salesforce.com sandbox (or if is already present in your sandbox), follow the instructions below. This will only need to be done once.

1. Point Your Module to Cloudwords Sandbox

In Salesforce, go to Setup and click on Develop -> Custom Settings. Once there, click on Manage for “Cloudwords Settings”. In Cloudwords Settings, click on the Edit link for the System Administrator.

Under “Cloudwords Settings Information”, set the following fields:

For Cloudwords API URL, the value should be “https://api-sandbox.cloudwords.com/1/” without the quotes. For Cloudwords APP URL, the value should be “https://app-sandbox.cloudwords.com/” without the quotes. See screenshot below:

A screenshot of the Salesforce "Cloudwords Settings Edit" page. The page title is "Cloudwords Settings Edit" and it includes a sub-header "Edit Cloudwords Settings" with "Save" and "Cancel" buttons. Below this is a section titled "Cloudwords Settings Information" containing four fields: "Location" (a dropdown menu set to "System Administrator"), "Cloudwords API URL" (a text input field containing "https://api-sandbox.c"), "Cloudwords App URL" (a text input field containing "https://app-sandbox."), and "Is Cloudwords Enabled" (a checkbox that is checked).

Click **Save** to save your changes and proceed to the next section.



2. Enable Salesforce Remote Site Settings

In **Setup**, under **Administration Setup** click on **Security Controls -> Remote Site Settings**. Click on **New Remote Site**. For “Remote Site Name”, type in “CW_Sandbox” and for “Remote Site URL”, type in “https://api-sandbox.cloudwords.com” without the quotes. See screenshot below:

A screenshot of the Salesforce "Remote Site Edit" form. The form title is "Remote Site Edit" and it includes a subtitle: "Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy". The form contains several fields: "Remote Site Name" with the value "CW_Sandbox", "Remote Site URL" with the value "https://api-sandbox.cloudwords.com", "Disable Protocol Security" which is an unchecked checkbox with an information icon, a "Description" text area, and "Active" which is a checked checkbox. At the top and bottom of the form are buttons for "Save", "Save & New", and "Cancel".

Click **Save** to save your changes and proceed to the next section.



3. Enable Salesforce OAuth

In **Setup**, under **App Setup** click on **Create -> Apps**. Under the **Connected Apps** section, click on **Cloudwords Knowledge Article Translation**. Once there click on **Edit**. See screenshot below:

Connected App Name
Cloudwords Knowledge Article Translation - STAGING

To publish an app, you need to have chosen a namespace prefix. [Click here to choose a namespace prefix.](#)

▼ **Basic Information**

Connected App Name

API Name

Description

Logo Image URL

Icon URL

Info URL

Start URL

Mobile Start URL

Contact Phone

Contact Email

▼ **OAuth Settings**

Enable OAuth Settings

Callback URL

Use digital signatures

Selected OAuth Scopes

Available OAuth Scopes

- Access and manage your Chatter feed (chatter_api)
- Access and manage your data (api)
- Access your basic information (id)
- Perform requests on your behalf at any time (refresh_token)
- Provide access to custom applications (visualforce)
- Provide access to your data via the Web (web)

Add

Remove

Selected OAuth Scopes

- Full access (full)

Find the field **Callback URL** and put “https://app-sandbox.cloudwords.com/oauth/sfcallback.json” without the quotes. Click **Save** to save your changes and proceed to the next section.



4. Create New Web Tab for Cloudwords Sandbox

In **Setup**, under **App Setup** click on **Create -> Tabs**. Under “Web Tabs”, click on **New**. In Step 1, click **Next**. In Step 2, type in “Cloudwords Sandbox” as the **Tab Label** and “Cloudwords_Sandbox” as the **Tab Name**. Click **Next**. See screenshot below:

A screenshot of a web application configuration interface. At the top, a blue header bar reads "Step 2. Define Content and Display Properties". Below this, a light gray box contains the instruction "Fill in information about the web tab." The main area is titled "Display Properties" and contains several fields: "Tab Label" with the value "Cloudwords Sandbox" and a red "1" icon; "Tab Name" with the value "Cloudwords_Sandbox" and an "i" icon; "Tab Style" with a yellow "Bank" style selected, a magnifying glass icon, and a red "2" icon; "Content Frame Height (pixels)" with the value "600" and a red "3" icon; and "Mobile Ready" with an unchecked checkbox and a link "What Is This?".

In Step 3, under the section **Button or Link URL**, type in the following without the quotes: “https://app-sandbox.cloudwords.com/sso/sfdc.htm?sfdcSessionId={!API.Session_ID}&sfdcServerUrl={!API.Partner_Server_URL_220}”. See screenshot below:

Step 3. Enter the URL Details

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser parameters.

Examples:

Simple	<code>http://www.google.com</code>
With Merge Field	<code>http://www.google.com/search?q={!Org_Name}</code>

Available Merge Fields

Available Merge Fields
Select Field Type

Select Field

Copy Merge Field Value

Copy and paste the merge field value into your template below.

Button or Link URL

`https://app-sandbox.cloudwords.com/sso/sfdc.htm?sfdcSessionId={!API.Session_ID}&sfdcServerUrl={!API.Partner_Server_URL_220}`

Encoding |

Click **Next**. In Step 4, click **Next**. Finally, in Step 5, **uncheck** everything except for **Cloudwords**. See screenshot below:



Step 5. Add to Custom Apps Step 5 of 5

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Call Center	<input type="checkbox"/>
Marketing	<input type="checkbox"/>
Sample Console	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Community	<input type="checkbox"/>
Site.com	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>
Cloudwords	<input checked="" type="checkbox"/>

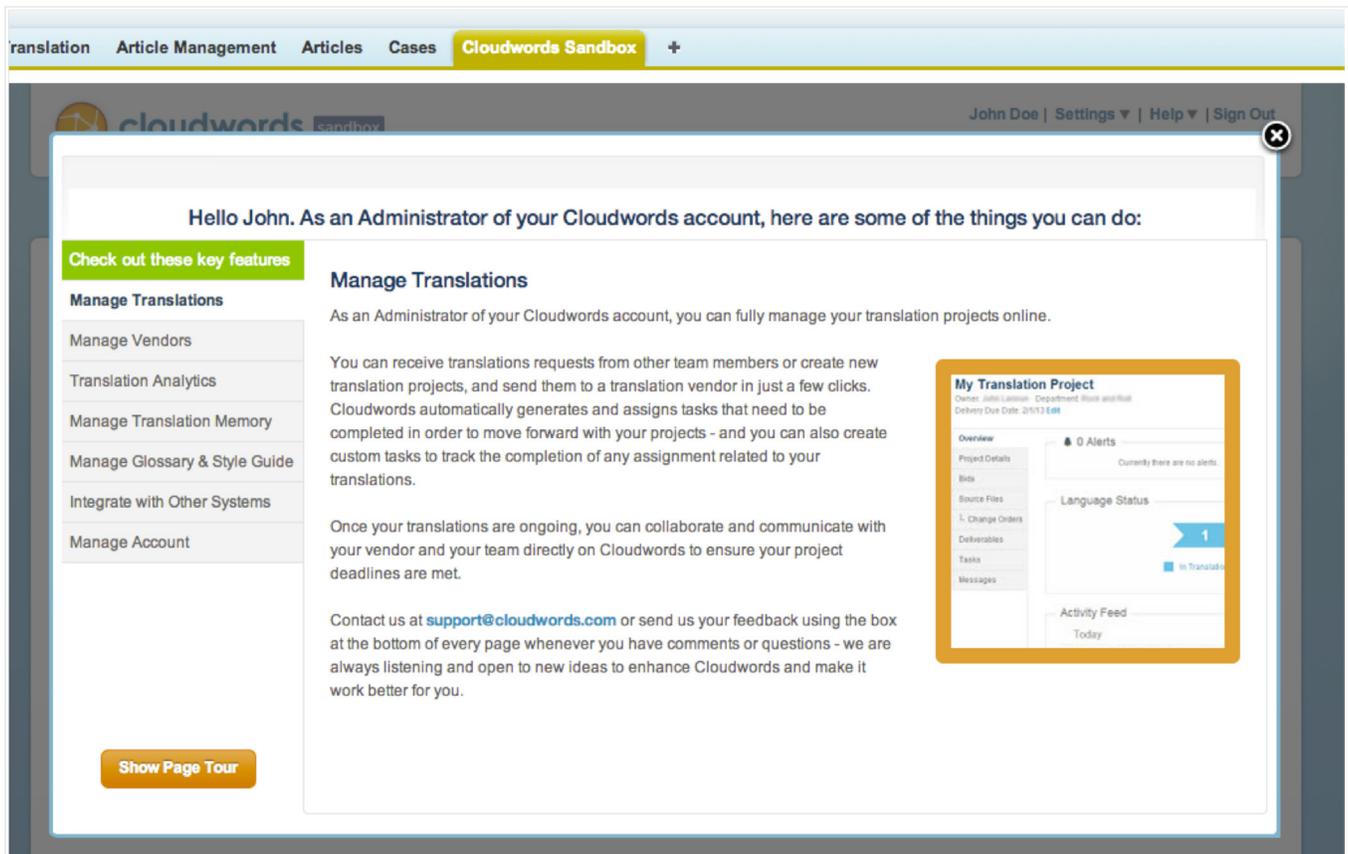
Append tab to users' existing personal customizations

Click **Save**. You should now be able to see a new **Cloudwords Sandbox** tab in Salesforce.



5. Click on the new “Cloudwords Sandbox” WebTab

Clicking on the “**Cloudwords Sandbox**” WebTab will link your salesforce.com and Cloudwords sandbox environments, and you should see the Cloudwords sandbox environment load in the WebTab with the text “sandbox” next to the Cloudwords logo in the upper left corner of the WebTab. See screenshot below:



Congratulations, you are now ready to start!

You have finished the one-time configuration and you are now ready to start using Salesforce Knowledge Base with Cloudwords Sandbox.

If you have questions or need support at any time, please contact us at support@cloudwords.com.