



PausePlay Connection Setup Guide

How to connect a Source org to a Target org (or the same org) so PausePlay can pause/resume automations.

Audience: Salesforce Admins and Implementation Leads

Prerequisites: PausePlay installed in the Source org; admin access in Source and Target; a dedicated integration user in the Target org.

1. Overview

PausePlay can control automations in two ways:

- Cross-org: PausePlay runs in the Source org and pauses/resumes automations in a separate Target org.
- Same-org: PausePlay controls automations in the same org it is running in (Source and Target are the same).

In both cases the setup uses Salesforce's modern authentication components:

- 1) Create an External Client App (in the Target org)
- 2) Use its Client ID and Client Secret to create an External Credential + Principal (in the Source org)
- 3) Create a Named Credential (in the Source org)
- 4) Enter the Named Credential name in PausePlay when creating a Connection

2. Cross-org Setup (Source -> Target)

Follow these steps when you want to pause/resume automations in a separate Target org from your Source org.

2.1 In the Target org: Create the External Client App

- 1) In the Target org, open Setup and search for External Client App Manager.
- 2) Click New External Client App.
- 3) Enter a clear name (example: "PausePlay Demo Org 1") and a contact email.
- 4) Under API (Enable OAuth Settings), check Enable OAuth.
- 5) Choose the OAuth scopes required for your use case (typical: api, full, refresh_token/offline_access).
- 6) Under Flow Enablement, enable Client Credentials Flow.

SETUP
External Client App Manager

Basic Information

- External Client App Name: PausePlay Demo Org 1
- API Name: PausePlay_Demo_Org_1
- Contact Email: terence.viban@saika-online.com
- Distribution State: Local
- Contact Phone: Enter a phone number...
- Info URL: Enter a URL...
- Logo Image URL: Enter a URL...
[Choose one of our sample logos.](#)
- Icon URL: Enter a URL...
[Choose one of our sample logos.](#)
- Description: [Empty text area]

API (Enable OAuth Settings)

- Enable OAuth

App Settings

- Callback URL: https://localhost
- Available OAuth Scopes:
 - Access the identity URL service (id, profile, email, address, phone)
 - Manage user data via Web browsers (web)
 - Access Connect REST API resources (chatter_api)
 - Access Visualforce applications (visualforce)
 - Access unique user identifiers (openid)
 - Access custom permissions (custom_permissions)
- Selected OAuth Scopes:
 - Manage user data via APIs (api)
 - Full access (full)
 - Perform requests at any time (refresh_token, offline_access)
- Intercept all Tokens

Cancel Create

Figure 1 - Create the External Client App in the Target org (External Client App Manager).

When you enable the Client Credentials Flow, Salesforce displays a warning. Confirm it if you understand that anyone with the client credentials can request tokens on behalf of the selected Run As user.

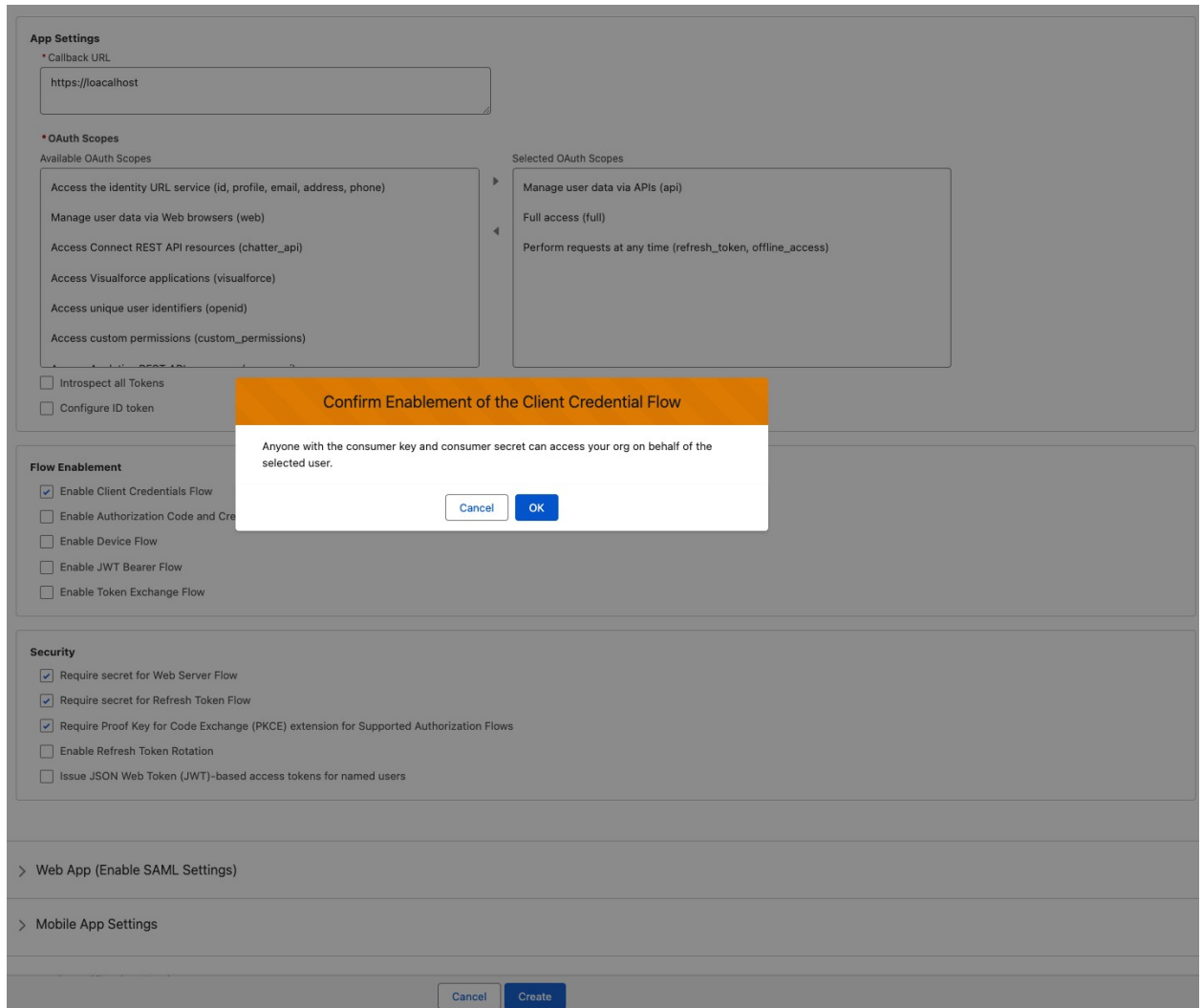


Figure 2 - Confirm enabling the Client Credentials Flow.

Next, open the newly created External Client App, go to Policies, and set:

- Permitted Users: typically "All users may self-authorize" (or restrict per your org policy)
- Run As (Username): choose the dedicated Target org user that PausePlay should act as.

Recommendation: Use a dedicated integration user with the minimum permissions required to manage automations.

Manage External Client Apps
PausePlay Demo Org 1 Help for this Page [?](#) Disable ▼

Contact Email: **terence.viban@saika-online.com** App Authorization: **All users can self-authorize**
 Type: **Local** App Status: **Enabled**

Policies Settings Package Defaults

Configure policies to customize the external client app and plugins for this Salesforce organization. Save

▼ App Policies

* Start Page ⓘ
 None ▼

▼ OAuth Policies

Plugin Policies

* Permitted Users: All users can self-authorize ▼ OAuth Start URL: Enter a URL...
 Custom Scopes: You don't currently have any OAuth Custom Scopes defined. You can define them [here](#) before assigning to your app.
 Apex Plugin Class: Search classes 🔍

OAuth Flows and External Client App Enhancements

Enable Client Credentials Flow
 * Run As (Username): demouser1@pauseplay.com ⋮

App Authorization

Refresh Token Policy: Refresh token is valid until revoked Immediately expire refresh token Expire refresh token after specific time
 * IP Relaxation: Enforce IP restrictions ▼

Cancel Save

Figure 3 - Configure policies and set the Run As (Username) user for client credentials.

Finally, open the “Consumer Key and Secret” section to retrieve:

- Client ID (Consumer Key)
- Client Secret

Keep these values secure. You will paste them into the Source org when creating the Principal.

Manage External Client Apps
PausePlay Demo Org 1

Help for this Page [Help for this Page](#) [Disable](#)

Contact Email: terence.viban@saika-online.com
App Authorization: All users can self-authorize
Type: Local
App Status: **Enabled**

Policies **Settings** Package Defaults

Configure basic settings for the external client app and plugins. [Edit](#)

Basic Information

* External Client App Name PausePlay Demo Org 1	* API Name PausePlay_Demo_Org_1
* Contact Email terence.viban@saika-online.com	* Distribution State Local
Contact Phone Enter a phone number...	Info URL Enter a URL...
Icon URL Enter a URL...	Logo Image URL Enter a URL...
Description <input type="text"/>	

OAuth Settings [Disable OAuth](#)

App Settings

[Consumer Key and Secret](#)

* Callback URL

* OAuth Scopes

Available OAuth Scopes	Selected OAuth Scopes
Access the identity URL service (id, profile, email, address, phone)	Manage user data via APIs (api)
Manage user data via Web browsers (web)	Full access (full)
Access Connect REST API resources (chatter_api)	Perform requests at any time (refresh_token, offline_access)

Figure 4 - Retrieve the Client ID (Consumer Key) and Client Secret.

Salesforce may prompt you to verify your identity before showing the secret. Enter the verification code sent to your email.

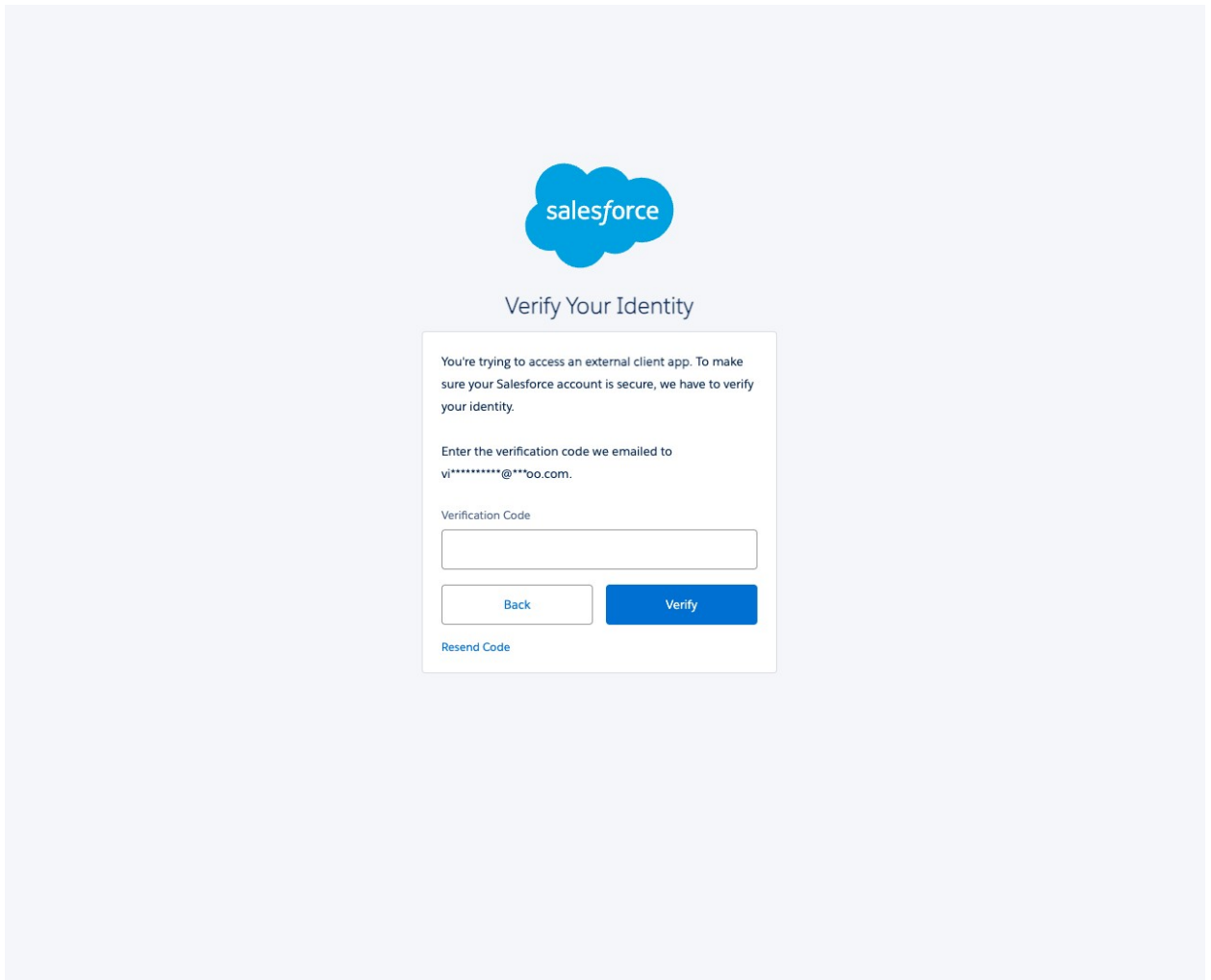


Figure 5 - Verify your identity when accessing the Consumer Key and Secret (if prompted).

2.2 In the Source org: Create External Credential, Principal, and Named Credential

In the Source org (where PausePlay is installed), create credentials that allow secure callouts to the Target org.

Step A - Create External Credential

- 1) Setup -> Named Credentials -> External Credentials tab -> New.
- 2) Authentication Protocol: OAuth 2.0
- 3) Authentication Flow Type: Client Credentials (with client secret flow)
- 4) Identity Provider URL: the Target org token endpoint, for example:
https://<target-domain>.my.salesforce.com/services/oauth2/token
- 5) Save.

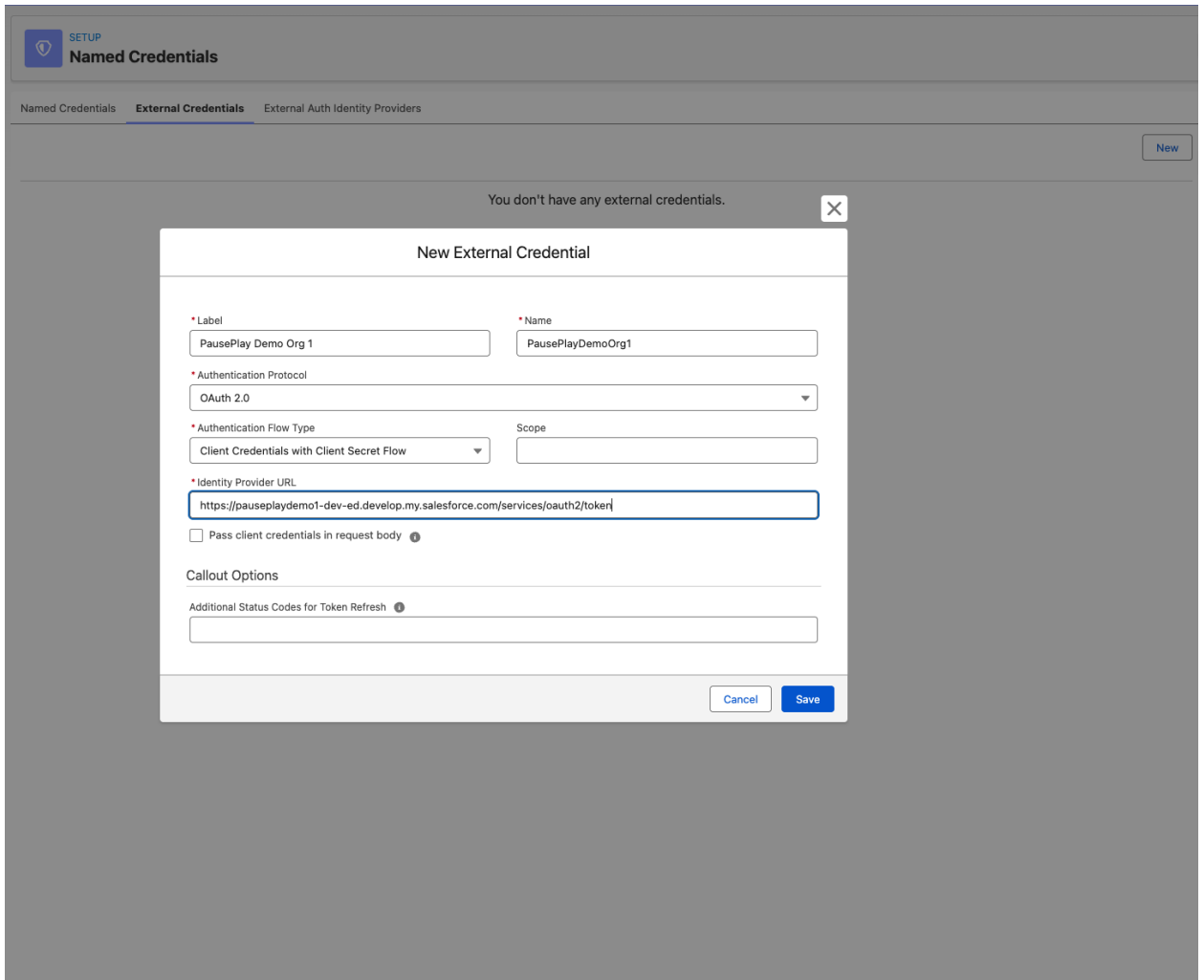


Figure 6 - Create an External Credential (OAuth 2.0 - Client Credentials flow).

Step B - Create Principal

- 1) On the External Credential record, click New under Principals.
- 2) Enter a Parameter Name and Sequence Number.
- 3) Paste the Client ID and Client Secret from the Target org External Client App.
- 4) Save.

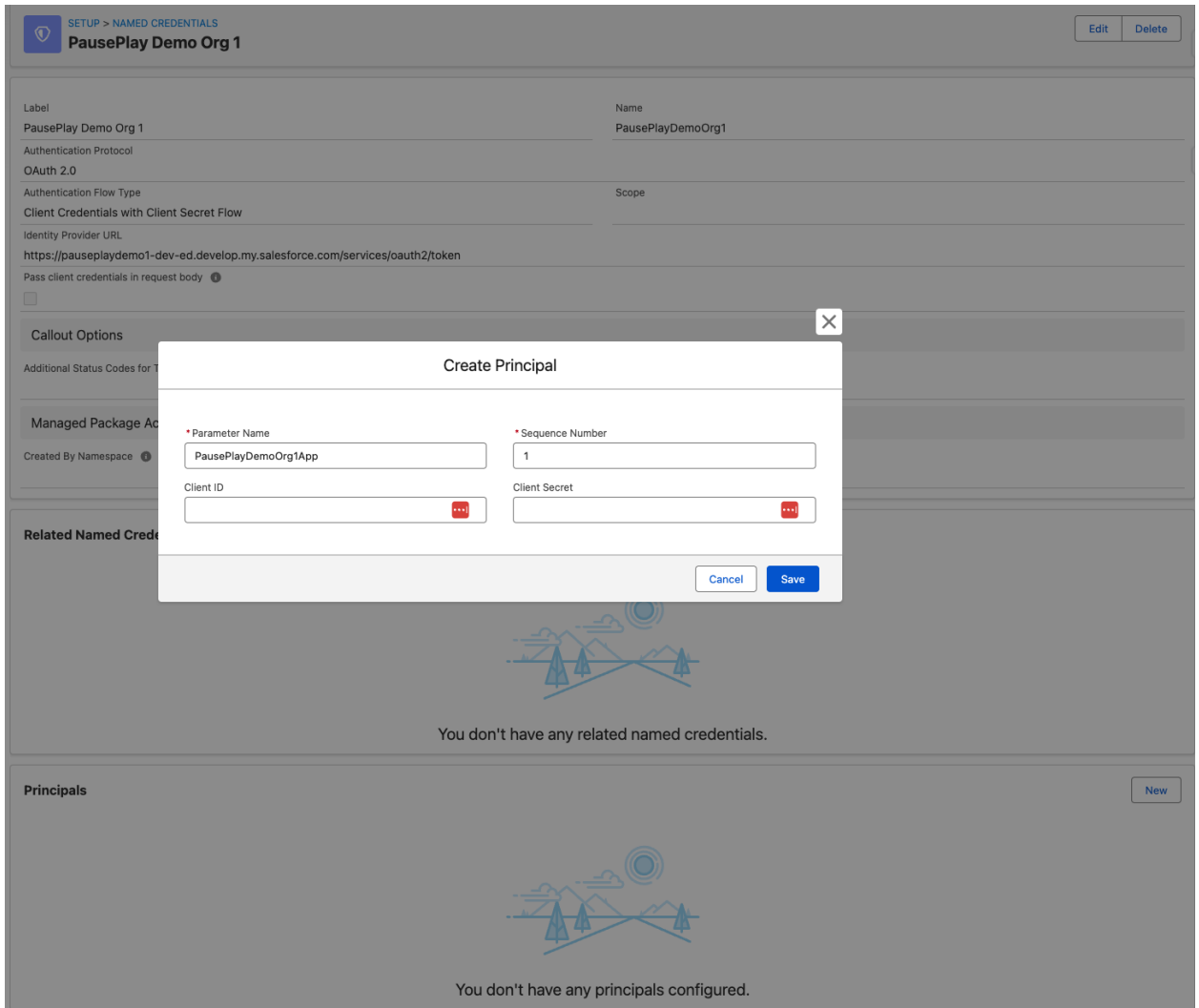


Figure 7 - Create a Principal and paste the Client ID and Client Secret.

Step B.1 - Assign External Credential Access (Required)

After creating the External Credential and Principal, you must grant users permission to use that External Credential. The recommended approach is to assign a permission set that includes access to the External Credential principal.

1. Go to Setup → Permission Sets.
2. Open "PausePlay External Credential Access".
3. Click Manage Assignments → Add Assignments.
4. Select the user(s) who will create/manage PausePlay connections and click Save.
5. Also assign the "PausePlay Admin" permission set to the same user(s).

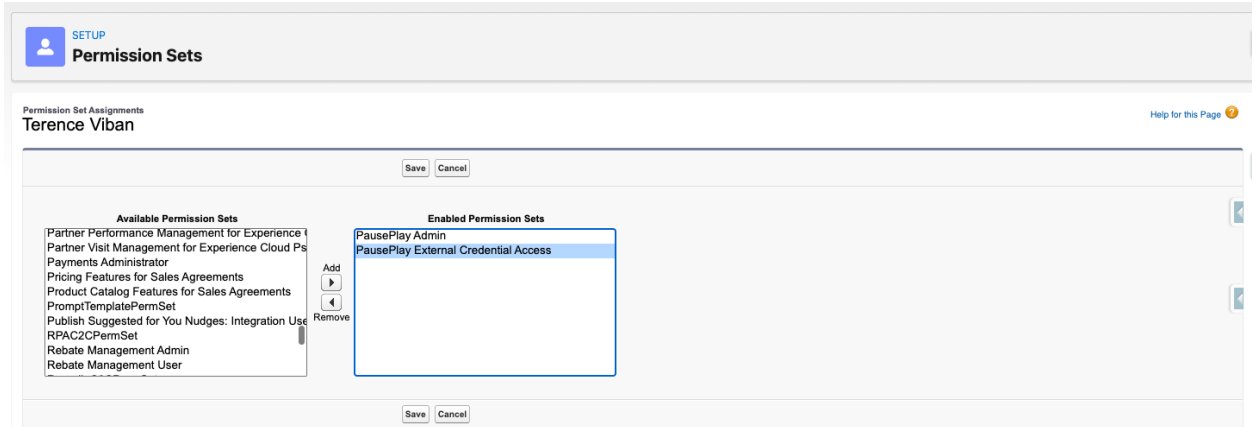


Figure 8: Assign External Credential access to the PausePlay user.

Step C - Create Named Credential

- 1) Setup -> Named Credentials tab -> New.
- 2) URL: Target org base URL (example: <https://<target-domain>.my.salesforce.com/>)
- 3) External Credential: select the External Credential you created.
- 4) Enable for Callouts: On.
- 5) (Recommended) Generate Authorization Header: checked.
- 6) Managed Package Access: add the namespace allowed to use this credential.
Example: saikapp (replace with your package namespace).
- 7) Save.

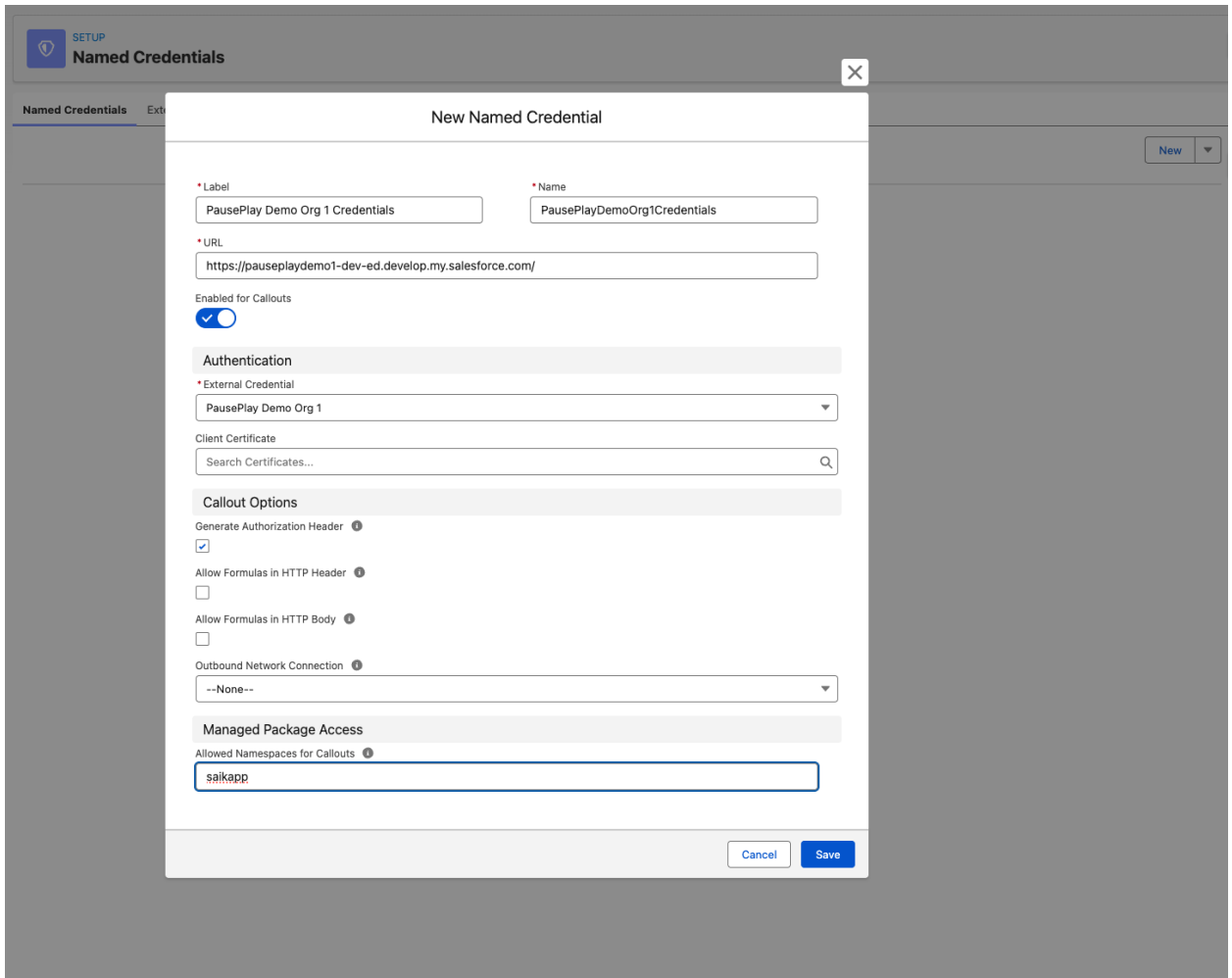


Figure 9 - Create a Named Credential that references the External Credential and sets allowed namespaces.

3. Same-org Setup (Source = Target)

If you want PausePlay to manage automations within the same org, follow the same steps above, but do everything in one org:

- Create the External Client App in the org.
- Retrieve its Client ID/Secret.
- Create the External Credential, Principal, and Named Credential in the same org.

This approach is useful for self-contained environments and demos.

4. Use the Named Credential in PausePlay

After creating the Named Credential, return to PausePlay:

- 1) Open PausePlay.
- 2) Go to Connections.
- 3) Create a new Connection (or edit an existing one).
- 4) Enter/select the Named Credential name you created in Setup.
- 5) Save.

PausePlay will use this Named Credential for authenticated callouts to pause/resume automations.

Screenshot placeholder (PausePlay Connection screen - Named Credential field):

[Insert image: PausePlay Connection creation/edit screen showing Named Credential selection]