Configure SalesLoft for Single Sign-On

Configuring SalesLoft for single sign-on (SSO) enables administrators to manage users of Citrix Gateway service. Users can securely log on to SalesLoft by using the enterprise credentials.

To configure SalesLoft for SSO by using SAML:

- 1. In a browser, type <u>https://accounts.salesloft.com/sign in</u> and press **Enter**.
- 2. Enter your SalesLoft admin account credentials (Email and Password) and click Login.

Sales Loft		
•••••	Forgot Password?	
Not a Customer?	Login	

3. In the dashboard page, click the account name in the top-right corner and click **Settings**.



4. In the **Settings** page, click **Single Sign On** in the left pane.

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Settings			
YOUR SETTINGS	Single Sign On		
🎄 Profile	Single Sign On		
📞 Calls	We support single sign on (also called SSO or SAML) identity providers, such as OneLogin or Okta. These are session and user authentication services applications.	that permit a user to use one set of lo	gin credentials to access multiple
CRM	You can find a walkthrough of how to use IDPs with SalesLoft here.		
🐱 Email	Follow the instructions in the Knowledge Base article to locate the SalesLoft application in your IDP. The RelayState to use with your setup is:	and the state of t	
TEAM SETTINGS	Please download the Metadata file from your IDP and upload it here.		
a _e Admin	Choose File		
¢ ^e ₆ Automation Rules			
Company Management	Once you've uploaded the metadata file, click Test SSO Login to test if SSO login works.		
11 Dialer	Test SSO Login		
🔄 Email			
Field Configuration	Click Enable SSO Login once you pass the SSO login test.		
P Integrations			
E Payments			
Roles & Permissions			
Salesforce Connector			
 Single Sign On 			
Ma Stages			
 Visibility 			

5. Click **Choose File** and upload the metadata file.

Required Information	Description
IdP Metadata	Upload the IdP metadata file. Note: The IdP metadata is provided by Citrix and can be accessed from the link below: <u>https://ssb4.mgmt.netscalergatewaydev.net/idp/saml/templatetest/</u> <u><app id="">/idp metadata.xml</app></u>

6. Click **Test SSO Login** to test your configuration.

Note: If you have configured your account successfully, you will be redirected to the new sign-in screen and will be logged into SalesLoft.

7. Click Enable SSO Login.