

# RecordHarbor Commercial Setup Guide

## Salesforce ODBC Driver for Microsoft Access

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Use this guide to install RecordHarbor, configure Salesforce OAuth, create an ODBC data source, and link live Salesforce objects into Microsoft Access. This guide is written for Salesforce admins, IT teams, and Access power users.

### BEFORE YOU START

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- " A RecordHarbor commercial license key from the customer portal.
- " A Windows machine or server with Microsoft Access, Excel, Power BI, or another ODBC client.
- " The Office bitness: 64-bit Office needs the 64-bit MSI and 64-bit ODBC Data Sources; 32-bit Office needs the 32-bit MSI and 32-bit ODBC Data Sources.
- " Salesforce admin access to create or approve an External Client App or Connected App.
- " Salesforce OAuth values: Salesforce login URL, client ID, client secret, and callback URL.

### RECOMMENDED OAUTH SETTINGS

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- " Callback URL: <https://record-harbor.com/oauth/salesforce/callback>
- " OAuth scopes: api, refresh\_token, and offline\_access. Salesforce may show refresh\_token and offline\_access as the same permission.
- " Use the production Salesforce login URL for production orgs: <https://login.salesforce.com>. Use <https://test.salesforce.com> for sandboxes.
- " Keep the client secret with admins or IT. End users can use RecordHarbor after the DSN has been configured for them.

## DETAILED SETUP STEPS

### 1 Download the correct RecordHarbor installer

Sign in to the RecordHarbor customer portal and download the installer that matches Microsoft Office, not just Windows.

- Most modern Access installs are 64-bit. Use the 64-bit MSI unless Office is definitely 32-bit.
- If Access reports an architecture mismatch, uninstall the wrong driver and install the other bitness.

### 2 Install the MSI

Run the MSI and complete the setup wizard. Windows SmartScreen may warn for new vendors until the app builds reputation.

- If SmartScreen appears, choose More info, then Run anyway if you trust the installer source.
- The installer registers the ODBC driver and opens the RecordHarbor Commercial DSN setup window.

### 3 Create or confirm the Salesforce OAuth app

In Salesforce Setup, create an External Client App or Connected App for RecordHarbor.

- Enable OAuth settings.
- Add the RecordHarbor callback URL exactly:  
<https://record-harbor.com/oauth/salesforce/callback>
- Grant api and refresh\_token/offline\_access scopes.
- Copy the client ID and client secret for the ODBC setup window.

### 4 Create the ODBC data source

Open ODBC Data Sources that matches Office bitness, then add a RecordHarbor Salesforce ODBC Driver Commercial DSN.

- 64-bit Office: open ODBC Data Sources (64-bit).
- 32-bit Office: open ODBC Data Sources (32-bit).
- Give the DSN a clear name such as RecordHarborSalesforce or CompanySalesforce.

## 5

### Enter connection values

In the RecordHarbor Commercial setup window, fill in the DSN settings.

- DSN name: a friendly name users will select in Access.
- Salesforce URL: <https://login.salesforce.com> for production or <https://test.salesforce.com> for sandbox.
- License key: paste the RecordHarbor license key from the customer portal.
- Client ID and client secret: paste the Salesforce OAuth app values.

## 6

### Run OAuth Login

Click OAuth Login and sign in to Salesforce in the browser. After Salesforce completes the authorization, return to the setup window.

- The setup stores tokens in Windows Credential Manager when possible.
- Use a Salesforce user that has access to the objects and fields you want to query.
- If login fails, confirm the callback URL and OAuth scopes in Salesforce.

## 7

### Test and save the DSN

Click Test Connection. If successful, click OK to save the DSN.

- A valid RecordHarbor license is required.
- The license is verified when the driver connects.
- Seats are consumed by Salesforce user and org when a user successfully connects.

## 8

### Link tables in Microsoft Access

Open Access and link Salesforce objects through the RecordHarbor DSN.

- External Data > New Data Source > From Other Sources > ODBC Database.
- Choose Link to the data source by creating a linked table.
- Select the RecordHarbor DSN, then choose objects such as Account, Contact, Case, Opportunity, and custom objects.

## MANAGING SEATS

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Use the RecordHarbor portal to manage billing, downloads, license recovery, and seat visibility. Add teammate emails in Manage Seats so admins can track expected users. A seat becomes active after the user connects successfully through Salesforce OAuth with the license key.

- " Active seats show Salesforce org ID, Salesforce user ID, and last seen date.
- " Invited users are a planning/admin list. They do not consume a seat until they connect.
- " If the active seat count reaches the plan limit, new Salesforce users are denied until seats are freed or the plan is expanded.

## TROUBLESHOOTING

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- " No License Key field: confirm you installed RecordHarbor Commercial 1.0.4.0 or newer. Older/internal installers open a setup window without commercial licensing.
- " Architecture mismatch: install the driver bitness that matches Office. Windows can be 64-bit while Office is 32-bit.
- " OAuth callback error: confirm the Salesforce OAuth app callback URL exactly matches <https://record-harbor.com/oauth/salesforce/callback>.
- " Invalid or inactive license: sign in to the RecordHarbor portal, confirm subscription status, and copy the current license key.
- " Access shows stale data: close and reopen the linked table or refresh the query. RecordHarbor queries live Salesforce data, but Access can cache open views.
- " Large objects: use filters whenever possible. RecordHarbor includes Bulk API support for large queries, but Access UI workflows can still request broad table opens.

## SUPPORT

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For setup help, include the driver bitness, MSI version, Salesforce object name, Microsoft Access version, and any ODBC error text. Contact [sales@record-harbor.com](mailto:sales@record-harbor.com).