

Project Title: Event Venue CRM

Phase 7 — Integration & External Access (Developer)

7.1 Remote Site Setting

Purpose: Enable Salesforce to communicate with external APIs (demo).

Setup:

- Setup → Quick Find → Remote Site Settings → New
- Remote Site Name: PaymentAPI_Test
- URL: https://api.testpayment.com
- Description: Allow callouts to payment gateway (test)

Outcome: Org is API-ready for future integrations.

Setup

Home

Object Manager

Q Remote

Custom Code

Remote Access

Security

Remote Site Settings

Didn't find what you're looking for? Try using Global Search.

SETUP

Remote Site Settings

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓	EPIC_OrgFarm	7/17/2025, 9:58 PM	EPIC_OrgFarm	7/17/2025, 9:58 PM
Edit Del	PaymentAPI_Test	-	https://api.testpayment.com	✓	Hunashyal, Abhishek	9/25/2025, 3:02 AM	Hunashyal, Abhishek	9/25/2025, 3:02 AM

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

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SETUP

Remote Site Settings

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit

Save Save & New Cancel

Remote Site Name

PaymentAPI_Test

Remote Site URL

https://api.testpayment.com

Disable Protocol Security

☐

1

Description

Allow callouts to payment gateway (test)

Active

☒

Save

Save & New

Cancel

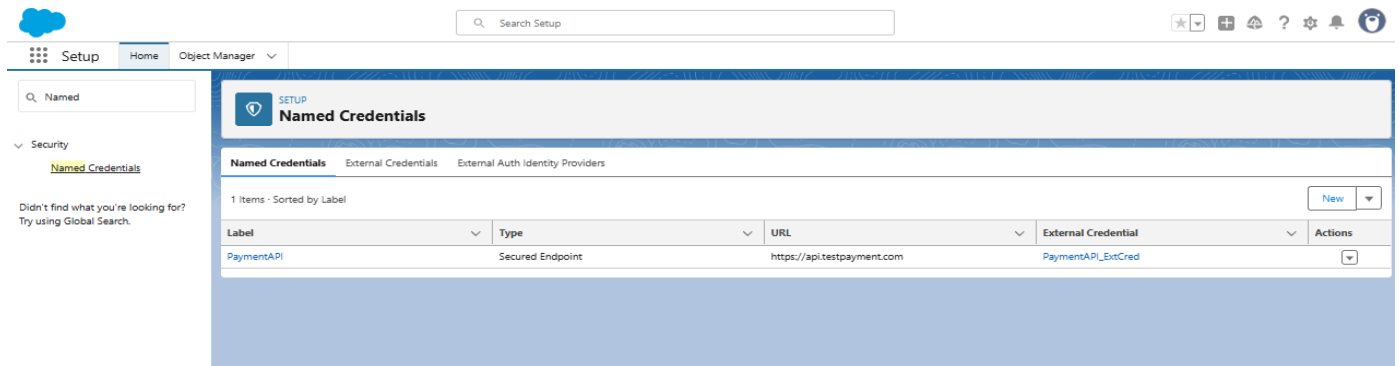
7.2 Named Credential

Purpose: Simplify authentication for external API calls.

Setup:

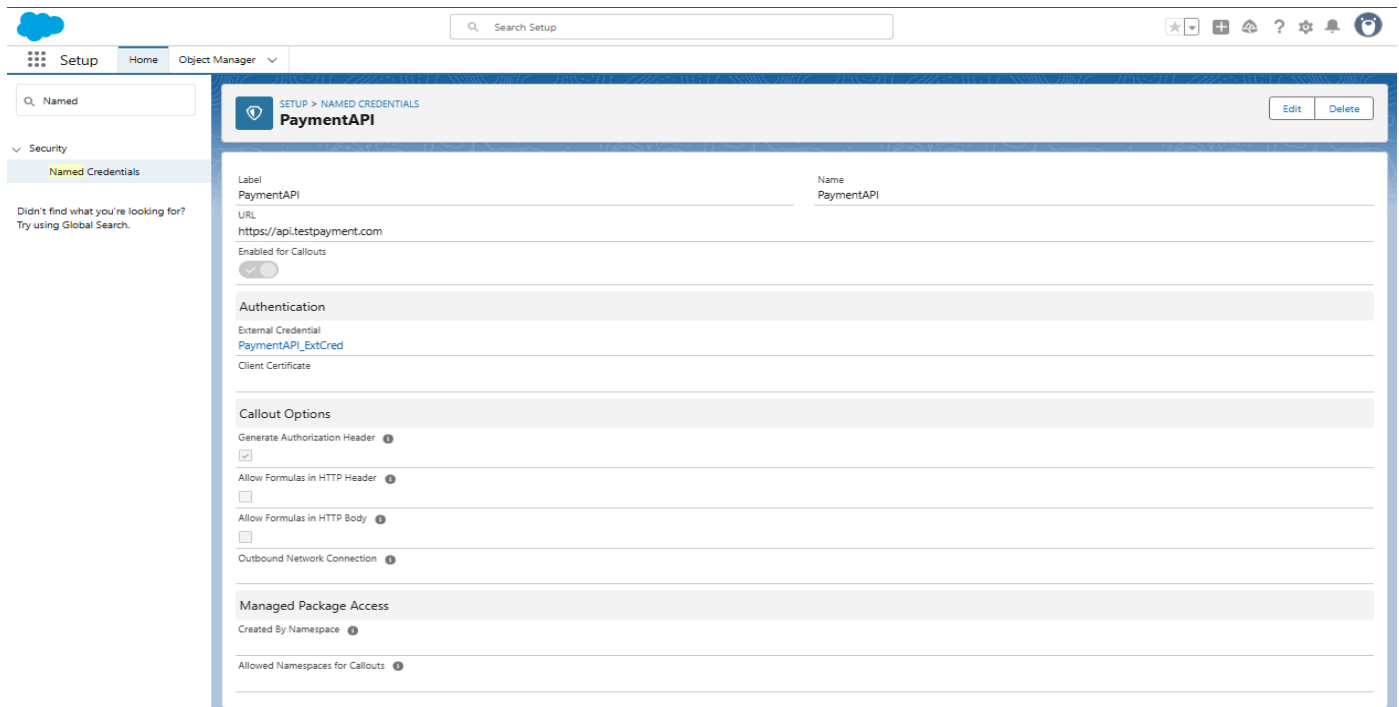
- Setup → Quick Find → Named Credentials → New
- Label/Name: PaymentAPI
- URL: <https://api.testpayment.com>
- Identity Type: Named Principal
- Authentication Protocol: No Authentication

Outcome: Future-proof setup for API calls without requiring authentication now.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Named" and a list of items under "Security", including "Named Credentials". The main content area is titled "Named Credentials" and shows a table with one item:

Label	Type	URL	External Credential	Actions
PaymentAPI	Secured Endpoint	https://api.testpayment.com	PaymentAPI_ExtCred	New



The screenshot shows the configuration page for the "PaymentAPI" Named Credential. The left sidebar is the same as the previous screenshot. The main content area is titled "PaymentAPI" and contains the following fields:

- Label: PaymentAPI
- Name: PaymentAPI
- URL: <https://api.testpayment.com>
- Enabled for Callouts: ☒
- Authentication: External Credential: [PaymentAPI_ExtCred](#), Client Certificate:
- Callout Options: Generate Authorization Header: ☒, Allow Formulas in HTTP Header: ☐, Allow Formulas in HTTP Body: ☐, Outbound Network Connection: ☐
- Managed Package Access: Created By Namespace: , Allowed Namespaces for Callouts:

