[Salesforce REST API Integration](https://engineering.gosquared.com/salesforce-rest-api-integration" \o "How to build a basic Salesforce REST API Integration)

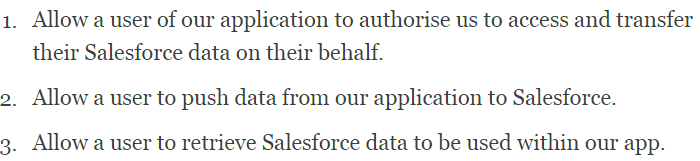
## Salesforce API Integration vs Salesforce App

It’s important to highlight the difference between a Salesforce API Integration and a Salesforce App that you’d find on their AppExchange (essentially the Salesforce App Store.)

A Rest API integration is a lot simpler and is primarily focused around sending data from your application and fetching data from Salesforce. Currently there is no cost associated with this type of integration however it’s worth noting that REST integrations are only accessible to Salesforce users on their enterprise plans (there is scope to get REST API access on Professional and Group editions but involves getting your app whitelisted.)

For the purposes of this post, our example REST API integration is going to be super basic. Our app is going to have customer data that we want to send to Salesforce and there will be customer data in Salesforce that we want to retrieve.

Essentially then, our REST API integration is going to need to do 3 critical things:

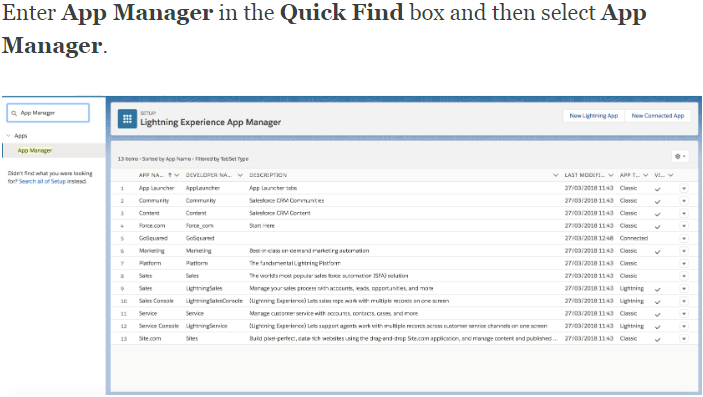


### Set up a Connected App

Once you have your developer account set up you’ll want to set up a **Connected App**. Connected Apps have the ability to offer a lot of functionality and sometimes that can make it a bit difficult to get your head around them.

For the purposes of this and how we’re going to use it, it’s easiest to think of a connected app as a small app that sits on Salesforce’s infrastructure that you point your integration to. It is responsible for managing the authentication and also the routing of requests to the relevant client instances.

Once you’ve set up your Salesforce developer account, you can set up a connected app by clicking the **Setup** icon in the top-right navigation menu and select **Setup**.



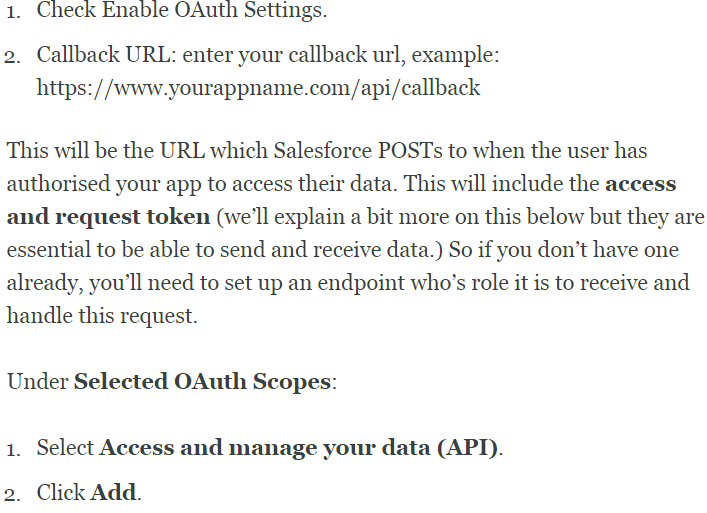
1. Click **New Connected App**.

2. In the New Connected App form, fill in:

In the **Basic Information** section:

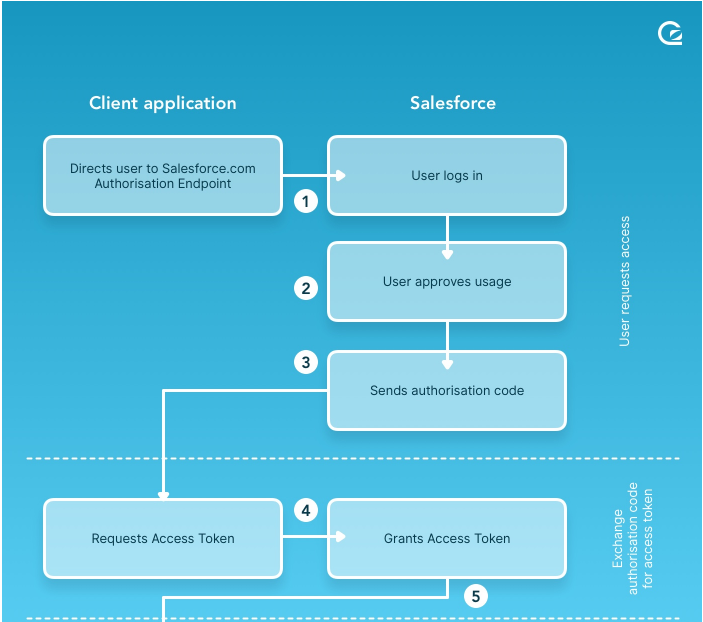
1. Connect App Name: YourAppName.
2. API Name: this will automatically become ‘YourAppName’.
3. Contact Email: enter your email address.

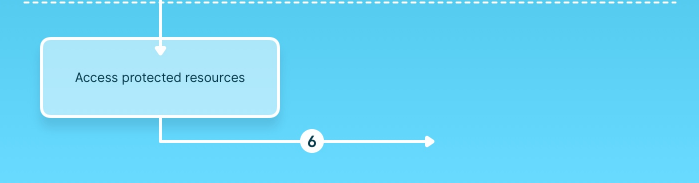
In the **API (Enable OAuth Settings)** section:



Once you’ve set up your app, you’ll be given a **Consumer Key** and a **Consumer Secret** for you app.

## The basic Salesforce Oauth data flow





With the connected app set up, its handy to get an idea of how the data flow works.

To start, your user is directed to a Saleforce.com authorisation endpoint, there they log in and approve access for your app to access their data.

After a successful authorisation Salesforce sends a response with an **Access token** and **Refresh token**.

The **Access token** is to be passed in the header of all API requests for data. This token has an expiry date and will always expire. By default the Connected Apps have an access token with an expiry of 15 minutes (inline with the sessions settings within your Salesforce settings).

The **Refresh token** is to be used to retrieve a valid access token (e.g. when the current access token expires). You can change the expiry settings on this but you can also set this never to expire, only when it revoked.

### Example API calls:

To make the initial authorisation request for a user to grant your app access to their data (this is where your user is initially directed to a Saleforce.com authorisation endpoint and logs in) you’d make the following request. The **client\_id** in the below call will be your **consumer ID** from the connected app. The **redirect\_uri** will be the **Callback URL**.

curl https://login.salesforce.com/services/oauth2/authorize?response\_type=code

&client\_id=YOURCONSUMERID&redirect\_uri=https://www.yourappname.com/api/callback

A successful response from this will redirect the page to a Salesforce login page where the user is able to login and authenticate. After Salesforce confirms that the client has authorised your app to access their data, the end-user’s browser is redirected to the callback URL you’ve specified by the redirect\_uri parameter. Salesforce then appends an **authorisation code** to the redirect URL, their request will look similar to the below.

https://www.yourappname.com/api/callback?code=aWekysIEeqM9PiThEfm0Cnr6MoLIfwWyRJcqOqHdF8f9INokharAS09ia7UNP6RiVScerfhc4w%3D%3D

You’ll use this as the value for your **code** parameter when you make a request to Salesforce’s token endpoint to receive your **Access and Refresh Token**.

### Example request:

curl login.salesforce.com/services/oauth2/token?grant\_type=authorization\_code&redirect\_uri=https://www.yourappname.com/api/callback&client\_id=YOUR\_CONSUMER\_ID&client\_secret=YOUR\_CONSUMER\_SECRET&code=aWekysIEeqM9PiThEfm0Cnr6MoLIfwWyRJcqOqHdF8f9INokharAS09ia7UNP6RiVScerfhc4w%3D%3D

### Example Response:

{

"access\_token": "YOUR\_ACCESS\_TOKEN",

"refresh\_token": "YOUR\_REFRESH\_TOKEN",

"signature": "signature",

"scope": "refresh\_token api id",

"instance\_url": "https://instance.salesforce.com",

"id": "https://login.salesforce.com/id/id,

"token\_type": "Bearer",

"issued\_at": "timestamp"

}

Outside of the access and response token, the instance\_url is import also. It’s what you’ll need to build the base of your future API calls.

Now we have the access token, we’re able to start making requests to send and receive data on our users behalf. Something to keep in mind though, as mentioned earlier, is that these access tokens will always expire at some point.

Due to that, you’ll want to keep your access token up to date by making a call to the token endpoint and changing the grant\_type to ‘**refresh\_token**’ along with including the refresh token you had received in the previous call.

### Example call:

curl https://login.salesforce.com/services/oauth2/token?grant\_type=refresh\_token&client\_id=YOUR\_CONSUMER\_\_ID&client\_secret=YOUR\_CONSUMER\_\_SECRET&refresh\_token=YOUR\_REFRESH\_TOKEN

### Example response:

{

"access\_token": "REFRESHED\_ACCESS\_TOKEN",

"signature": "signature",

"scope": "refresh\_token id api",

"instance\_url": "https://INSTANCE.salesforce.com",

"id": "https://login.salesforce.com/id/idE",

"token\_type": "Bearer",

"issued\_at": "timestamp"

}

Now we have a way to keep our access tokens valid and up to date, we’re set up and ready to start working with Salesforce objects.

## Understanding Salesforce objects

Salesforce **objects** (sobjects) are effectively database tables that contain an organisation’s data. Examples of standard Salesforce objects will be “Accounts”, “Contacts”, “Leads”, and “Tasks.” You also have scope to create your own custom objects.

A Salesforce **record** describes a specific occurrence of an object (such as a specific contact like “Jonny Appleseed” that is represented by a Contact object). A basic comparison would be like a row in a database table.

For the following examples, we’re just going to focus on Contacts.

## Send data from your app to Salesforce

Creating a contact in salesforce is really straightforward. You just need to build the API url using the instance from your access token response and use the access token value as your bearer token in the header.

One thing to keep an eye out for through is for characters that need to be escaped in your access token.

For example this access token should have the exclamation mark escaped

So this:

00D1r000000dumU!AQEAQFd.O1Q5DVQrUYvr.........

Becomes this:

00D1r000000dumU\!AQEAQFd.O1Q5DVQrUYvr........

you can then make the below call to create a contact.

### Example request

curl https://INSTANCE.salesforce.com/services/data/v42.0/sobjects/Contact -H "Authorization: Bearer YOUR\_ACCESS\_TOKEN" -H "Content-Type: application/json" -d '{"FirstName" : "Johnny", "LastName" : "Appleseed"}'

(Your contact will need a last name as the minimum for an entry to be created.)

The response you get back will be the id of your contact

{"id":"0031r000029NDckAAG","success":true,"errors":[]}

Which will also let you build a link directly to the contact.

https://INSTANCE.salesforce.com/0031r000029NDckAAG

## Retrieving data from Salesforce to your app

If you want to retrieve a list of contacts there are a few ways you can do it. You can make a request to the contact endpoint and it will return a bunch of information about your contacts that I found a bit cumbersome to navigate.

I actually prefer to use a combination a contacts ‘describe’ endpoint, which will return all of the fields we can populate about our user.

Example request:

curl https://INSTANCE.salesforce.com/services/data/v20.0/sobjects/Contact/describe -H "Authorization: Bearer YOUR\_ACCESS\_TOKEN"

That will give a detailed response of all of the fields available. (I’ve just given an example of the ‘first name’ element for brevity)

{

"autoNumber": false,

"byteLength": 120,

"calculated": false,

"calculatedFormula": null,

"caseSensitive": false,

"controllerName": null,

"createable": true,

"custom": false,

"defaultValue": null,

"defaultValueFormula": null,

"defaultedOnCreate": false,

"dependentPicklist": false,

"deprecatedAndHidden": false,

"digits": 0,

"externalId": false,

"filterable": true,

"groupable": true,

"htmlFormatted": false,

"idLookup": false,

"inlineHelpText": null,

"label": "First Name",

"length": 40,

"name": "FirstName",

"nameField": false,

"namePointing": false,

"nillable": true,

"picklistValues": [],

"precision": 0,

"referenceTo": [],

"relationshipName": null,

"relationshipOrder": null,

"restrictedPicklist": false,

"scale": 0,

"soapType": "xsd:string",

"sortable": true,

"type": "string",

"unique": false,

"updateable": true,

"writeRequiresMasterRead": false

}

Once you’ve got the fields you can then use them (or a selection) to build a custom query:

curl https://INstance.salesforce.com/services/data/v42.0/query/?q=SELECT+id,name,email,phone+from+Contact -H 'Authorization: Bearer YOUR\_ACCESS\_TOKEN'

That will return all contacts with their associated properties.

{"totalSize":1,"done":true,"records":[{"attributes":{"type":"Contact","url":"/services/data/v42.0/sobjects/Contact/id"},"Id":"id","Name":"Jonny Appleseed","Email":"jonny.appleseed@myfriend.com","Phone":"555-555-555"} ]}

That should now give you a way to retrieve contact data from Salesforce to use within your app.