

EXPENSE TRACKER APP

Phase 7: Integration & External Access — Expense Tracker

Goal: Connect the Expense Tracker Salesforce app with external systems or APIs to enhance functionality (e.g., validate expenses against an external system, notify external services, etc.).

Step 1 — Remote Site Settings

Purpose: Allow Salesforce to make API callouts to external systems. Salesforce blocks unknown endpoints by default.

Navigation:

- Setup → Security → Remote Site Settings → New Remote Site

Steps:

1. Click New Remote Site.
2. Enter the following:
 - Remote Site Name: ExpenseAPI
 - Remote Site URL: https://api.example.com (replace with your external API URL)
 - Description: For Expense Tracker external validation
3. Click Save.

The screenshot displays the 'Remote Site Settings' page in Salesforce. The page title is 'Remote Site Settings' with a 'SETUP' icon. Below the title, there is a 'Remote Site Details' section. This section contains a table with the following information:

Remote Site Detail		Edit Delete Clone	Modified By: John Manager 10/9/2025, 6:54 PM
Remote Site Name	ExpenseAPI		
Remote Site URL	https://api.example.com		
Disable Protocol Security	<input type="checkbox"/>		
Description	For Expense Tracker external validation		
Active	<input checked="" type="checkbox"/>		
Created By	John Manager 10/9/2025, 6:54 PM	Edit Delete Clone	

Step 2 — Named Credentials

Purpose: Store external API credentials securely so Apex/Flows can call APIs without exposing sensitive information.

Navigation:

- Setup → Security → Named Credentials → New Named Credential

Steps:

1. Click New Named Credential.
2. Fill in the fields:

Field	Value / Notes
Label	ExpenseAPI_Credentials
Name	Auto-filled ExpenseAPI_Credentials
URL	https://api.example.com (your API endpoint)
Identity Type	Named Principal (all users use the same credential)
Authentication	Password Authentication or OAuth (based on API)
Username/Password or OAuth	Enter credentials
Generate Authorization Header	Check if required by API

3. Click Save.

New External Credential

* Label: ExpenseAPI_Credential

* Name: ExpenseAPI_Credential

* Authentication Protocol: OAuth 2.0

* Authentication Flow Type: Browser Flow

Scope:

* Identity Provider: External Aut... Search External Auth Identity Providers...

Callout Options

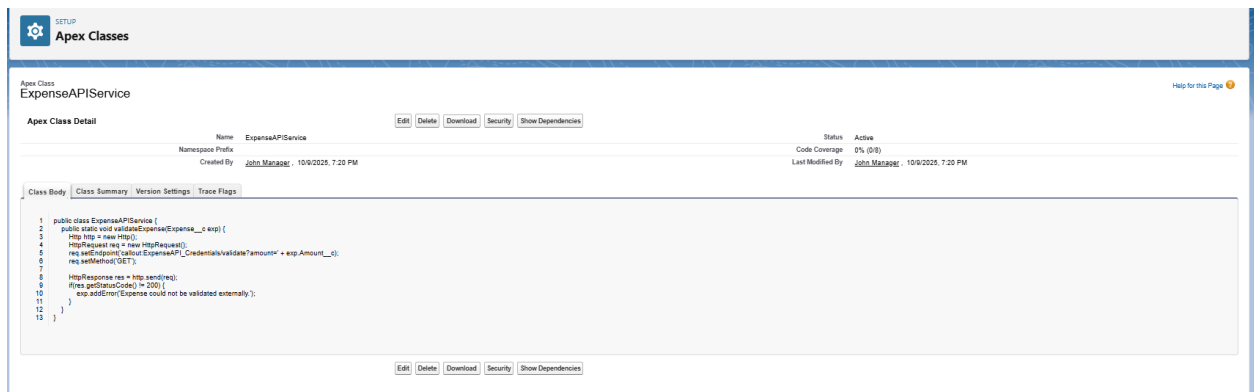
Additional Status Codes for Token Refresh

Cancel Save

Step 3 — Apex Callout Example (Optional)

Purpose: Demonstrate how to use Named Credentials to make REST API calls.

Navigation: Setup → Apex Classes → New



Step 4 — Optional: Platform Events / Change Data Capture

Purpose: Notify external systems when a record changes.

Navigation:

- Setup → Platform Events → New Platform Event
- Setup → Change Data Capture → Enable on Expense object

Use Case:

- Publish a Platform Event when a new expense is submitted or approved.
- External system subscribes to events for further processing.

Step 5 — Security & API Limits

- Monitor API usage to avoid hitting governor limits (Setup → System Overview → API Usage).
- Ensure OAuth / Named Credential permissions are properly scoped.
- Only allow callouts to trusted domains.