

# Phase 7: Integration & External Access

## 1) Remote Site Settings:

1. In Salesforce, click Gear (⚙) → Setup.
2. Quick Find box → type Remote Site Settings → click Remote Site Settings.
3. Click New Remote Site.
4. Fill fields:
  - Remote Site Name: GoogleMaps\_API (example)
  - Remote Site URL: https://maps.googleapis.com (use the root of the API)
  - Description: Google Maps API for geocoding
5. Click Save.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Remote' entered. Below it, the 'Remote Site Settings' link is highlighted under the 'Security' section. The main content area is titled 'Remote Site Settings' and 'Remote Site Edit'. It contains a form with the following fields: 'Remote Site Name' (GoogleMaps\_API), 'Remote Site URL' (https://maps.googleapis.com), 'Disable Protocol Security' (unchecked), 'Description' (Google Maps API for geocoding), and 'Active' (checked). There are 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom of the form.

## 2) Named Credentials:

1. Setup → Quick Find → Named Credentials → Named Credentials.
2. Click New Named Credential.
3. Fill fields
  - Label: Twilio\_NC

- Name: Twilio\_NC
- URL: https://api.twilio.com
- Identity Type: Named Principal (shared credential)

4. Click Save.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'name' entered. Below it, the 'Named Credentials' section is highlighted under the 'Security' category. The main content area shows the configuration for 'Twilio\_NC'. The fields are as follows:

Field	Value
Label	Twilio_NC
Name	Twilio_NC
URL	https://api.twilio.com
Enabled for Callouts	<input checked="" type="checkbox"/>
<b>Authentication</b>	
External Credential	<a href="#">Twilio_External_Cred</a>
Client Certificate	
<b>Callout Options</b>	
Generate Authorization Header	<input checked="" type="checkbox"/>
Allow Formulas in HTTP Header	<input type="checkbox"/>

### 3) API Limits & enabling API for users:

1. Setup → Quick Find → Company Information → click it.
2. Look for API Requests, Last 24 Hours (shows usage).  
(Alternative: Setup → System Overview — some orgs show API usage there too.)

Setup Home Object Manager

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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

### Company Information

Organization Detail

Organization Name: OrgFarm EPIC

Travel Booking: [Edit]

Phone: [Edit]

Primary Contact: [Edit]

Division: United States

Default Locale: English (United States)

Address: United States

Default Language: English

Fiscal Year Starts In: April

Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Activate Multiple Currencies: [ ]

Currency Locale: English (India) - INR

Enable Data Translation: [ ]

Used Data Space: 485 KB (9%) [View]

Newsletter: [x]

Used File Space: 17 KB (0%) [View]

Admin Newsletter: [x]

API Requests, Last 24 Hours: 131 (15,000 max)

Hide Notices About System Maintenance: [ ]

Streaming API Events, Last 24 Hours: 0 (10,000 max)

Hide Notices About System Downtime: [ ]

Restricted Logins, Current Month: 0 (0 max)

Locale Formats: ICU

Salesforce.com Organization ID: 00DgL000007Sjkj

Organization Edition: Developer Edition

Instance: CAN98

Created By: OrgFarm EPIC, 7/17/2025, 11:24 AM

Modified By: Purva Akshita Velivela, 9/22/2025, 11:38 PM

[Edit]

## Enable API access for a profile

1. Setup → Quick Find → **Profiles** → open the profile (e.g., Agent Profile).
2. Under **System Permissions** click **Edit**.
3. Ensure **API Enabled** is checked for users who need API (integration users).  
Save