

Salesforce API Setup - Step-by-Step Guide

Step 1: Enable API Access in Salesforce

1. Login to Salesforce as System Administrator.
 2. Go to **Setup** (gear icon > Setup).
 3. In the Quick Find box, type **Profiles**.
 4. Select the appropriate profile (e.g., *System Administrator*).
 5. Scroll to **Administrative Permissions**.
 6. Ensure that **API Enabled** is checked.
 7. Click **Save** if any changes are made.
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Step 2: Create a Connected App for OAuth Authentication

1. In Setup, search for **App Manager** in the Quick Find box.
 2. Click **New Connected App** in the top-right.
 3. Fill out the Basic Information:
 4. Connected App Name:
 5. API Name: auto-fills
 6. Contact Email: your email
 7. Under **API (Enable OAuth Settings)**:
 8. Check **Enable OAuth Settings**
 9. Callback URL: (or your custom app URL)
 10. Selected OAuth Scopes:
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 11. Click **Save**
 12. Wait approximately 10 minutes for Salesforce to provision the connected app.
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Step 3: Get Consumer Key and Secret

1. Go back to **App Manager**.
 2. Find your app and click the dropdown arrow > **View**.
 3. Copy:
 4. **Consumer Key**
 5. **Consumer Secret** (click **Manage Consumer Details** to view it)
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Step 4: Set API Security Settings

1. Navigate to **Connected Apps OAuth Usage** in Setup.
 2. Click **Manage App Policies** next to your connected app.
 3. Adjust settings:
 4. IP Relaxation: Set to **Relax IP restrictions** (if necessary)
 5. Permitted Users: Choose **All users may self-authorize**
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Step 5: Generate Access Token using OAuth 2.0

Use tools like **Postman** or **cURL**:

POST Request URL:

```
https://login.salesforce.com/services/oauth2/token
```

Request Body (x-www-form-urlencoded):

```
grant_type=password
client_id=YOUR_CONSUMER_KEY
client_secret=YOUR_CONSUMER_SECRET
username=YOUR_USERNAME
password=YOUR_PASSWORD+SECURITY_TOKEN
```

Sample Response:

```
{
  "access_token": "...",
  "instance_url": "https://yourInstance.salesforce.com",
  "...
}
```

Step 6: Use Access Token to Make API Calls

Example API Call using cURL:

```
curl https://yourInstance.salesforce.com/services/data/v60.0/subjects/Account/ \
-H "Authorization: Bearer YOUR_ACCESS_TOKEN"
```

Additional Notes

- **Security Token** is required unless your org IP is whitelisted.
- **Remote Site Settings** must be configured to allow external callouts.
- For server-side integrations in Apex, use **Named Credentials** for security.
- Use **Visualforce** or **LWC** UI to interact with APIs if required.

Prepared for developers and administrators to enable and manage API access in Salesforce securely.