

Subscription / Personal Services Tracker CRM

Phase 7: Integration & External Access

Objective:

To expose Salesforce CRM data to external systems using REST APIs.
This allows third-party apps (like web or mobile apps) to connect securely, fetch data, and perform actions such as creating or updating subscriptions.

Key Tasks:

Task	Description
Enable API Access	Salesforce Developer Orgs have API access by default
Create Connected App	Allows secure access using OAuth 2.0
Get Access Token (Postman)	Authenticate using credentials to receive a token
Perform API Operations (GET/POST)	Use token to fetch or create data from/to Salesforce

Steps Performed:

Step 1: Create a Connected App

Navigation:

Setup → App Manager → New Connected App

Values Entered:

Field	Value
Connected App Name	SubscriptionAPIApp
Callback URL	https://login.salesforce.com/services/oauth2/callback
Selected OAuth Scopes	Access and manage data (api), Perform requests on your behalf (refresh_token)

Saved → Waited 10 minutes for activation.

Step 2: Get Access Token using Postman

Postman Request Type: POST

URL:

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

Body (x-www-form-urlencoded):

Key	Value
grant_type	password
client_id	[Consumer Key from Connected App]
client_secret	[Consumer Secret]
username	[Your Salesforce Username]
password	[YourPassword + SecurityToken]

Result: Access token successfully received.

Step 3: Use REST API to Fetch Subscription Data

GET Request:

[instance_url]/services/data/v60.0/subjects/Subscription__c

Headers:

Key	Value
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Authorization	Bearer [access_token]
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Content-Type	application/json
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Result: All subscription records retrieved in JSON format.

Step 4: Create Subscription via REST API

POST Request URL:

[instance_url]/services/data/v60.0/subjects/Subscription__c

Body:

```
{  
  "Start_Date__c": "2025-09-01",  
  "End_Date__c": "2025-09-30",  
  "Renewal_Status__c": "Active",  
  "Amount__c": 499.00  
}
```

Result: New Subscription record created successfully with ID returned.

Output Summary:

Feature	Status
Connected App Setup	Done
Access Token Generation	Done
API Data Fetch (GET)	Done

Feature	Status
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API Data Create (POST)	Done
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External Integration Tested	Done
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