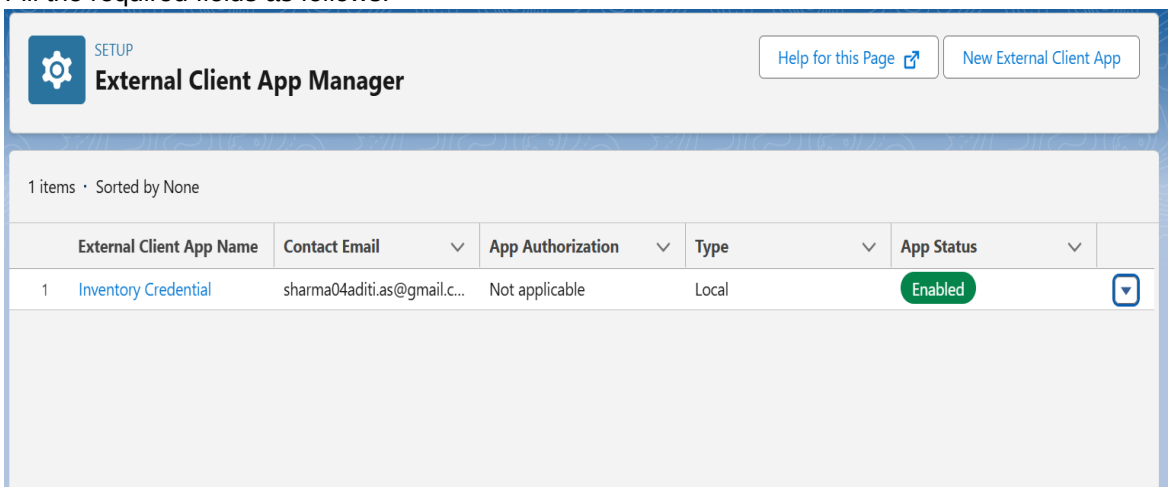
Phase 7: Integration & External Access - Step by Step Guide

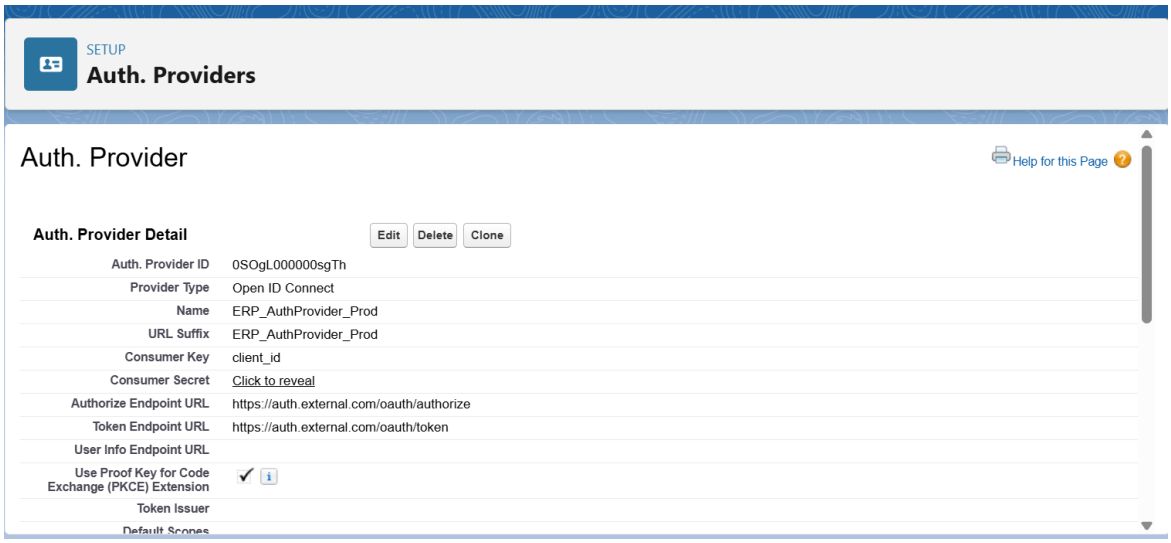
Step 1: Create OAuth Client in External System (App Manager)

1. Login to your external system (ERP, API Gateway, Identity Provider) with Admin/Developer role.
2. Navigate to Developer → App Manager / Applications / OAuth Clients.
3. Click 'New Application' or 'Register Client'.
4. Fill the required fields as follows:



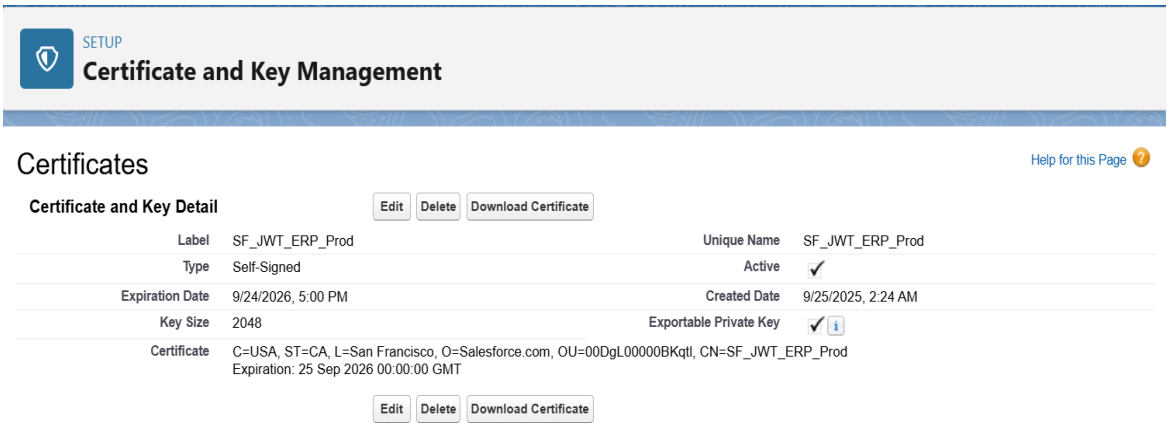
Step 2: Configure Salesforce Auth Provider

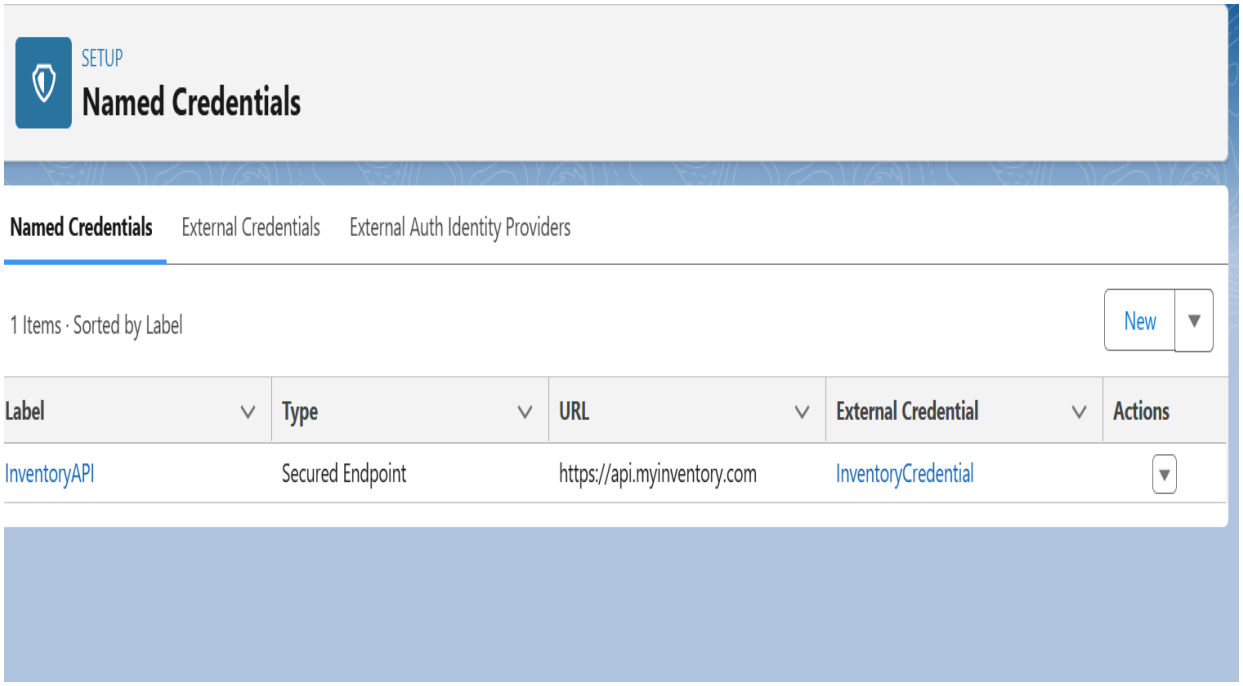
1. In Salesforce, go to Setup → Quick Find → Auth. Providers → New.
2. Select Provider Type (OpenID Connect or Generic OAuth 2.0).
3. Fill in Consumer Key, Consumer Secret, Authorize URL, Token URL, Scopes.
4. Save. Salesforce generates a Callback URL.
5. Copy the Callback URL into the external system's App Manager.



Step 3: Certificates

1. In Salesforce, go to Setup → Certificate and Key Management.
2. Create a Self-Signed Certificate OR Import an existing key.



Step 4: Create Named Credential in Salesforce

1. In Salesforce, Setup → Named Credentials → New.
2.Label: ERP_Inventory_API