

Salesforce Revenue Lifecycle Management

Technical API Session Pre-requisites - Connect Postman to Salesforce Instructions

Prep

1. [Install Postman](#)
2. Use the latest RLM Collection and Environment files from the [repo](#)

Part One: Setting up the RLM Post Connected App in your Org

Connected App

A connected app is a framework that enables an external application to integrate with Salesforce using APIs and standard protocols, such as SAML, OAuth, and OpenID Connect. Connected apps use these protocols to authenticate, authorize, and provide single sign-on (SSO) for external apps.

Create Connected App

Based on: https://help.salesforce.com/s/articleView?id=sf.connected_app_create_api_integration.htm&type=5

1. From **Setup**, enter Apps in the Quick Find box, and select **App Manager**
2. Click **New Connected App**
3. Give it a name
 - a. Recommended standardized name: **RLM Postman**
4. Enter the API name used when referring to your app from a program.
 - a. It defaults to a version of the name without spaces. Only letters, numbers, and underscores are allowed, so if the original app name contains any other characters, edit the default name.
5. Enter your email address
6. In the API (Enable OAuth Settings) area of the page, select **Enable OAuth Settings**.
7. Enter the following in the **Callback URL** field
 - a. <https://oauth.pstmn.io/v1/callback>
 - b. <https://oauth.pstmn.io/v1/browser-callback>
 - c. <https://login.salesforce.com/>
8. In Selected OAuth Scopes select:
 - a. **Access Connect REST API resources (chatter_api)**
 - b. **Manage user data via APIs (api)**
 - c. **Perform requests at any time (refresh_token, offline_access)**
9. Enable the following settings are enabled:
 - a. **Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows**
 - b. **Require Secret for Web Server Flow**
 - c. **Require Secret for Refresh Token Flow**

Basic Information

Connected App Name	RLM Postman
API Name	RLM_Postman
Contact Email	dgunaseelan@salesforce.com
Contact Phone	
Logo Image URL	Upload logo image or Choose one of our sample logos
Icon URL	Choose one of our sample logos
Info URL	
Description	

API (Enable OAuth Settings)

Enable OAuth Settings	<input checked="" type="checkbox"/>								
Enable for Device Flow	<input type="checkbox"/>								
Callback URLs	https://oauth.pstmn.io/v1/callback https://oauth.pstmn.io/v1/browser-callback								
Use digital signatures	<input type="checkbox"/>								
Selected OAuth Scopes	<table border="1"> <tr> <td>Available OAuth Scopes</td> <td>Selected OAuth Scopes</td> </tr> <tr> <td> Access Analytics REST API Charts Geodata resources (eclair_api) Access Analytics REST API resources (wave_api) Access Einstein GPT services (einstein_gpt_api) Access Headless Forgot Password API (forgot_password) Access Headless Passwordless Login API (pwdless_login_api) Access Headless Registration API (user_registration_api) Access Interaction API resources (interaction_api) Access Lightning applications (lightning) Access Visualforce applications (visualforce) Access all Data Cloud API resources (cdp_api) </td> <td> Access Connect REST API resources (chatter_api) Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access) </td> </tr> <tr> <td>Add</td> <td></td> </tr> <tr> <td>Remove</td> <td></td> </tr> </table>	Available OAuth Scopes	Selected OAuth Scopes	Access Analytics REST API Charts Geodata resources (eclair_api) Access Analytics REST API resources (wave_api) Access Einstein GPT services (einstein_gpt_api) Access Headless Forgot Password API (forgot_password) Access Headless Passwordless Login API (pwdless_login_api) Access Headless Registration API (user_registration_api) Access Interaction API resources (interaction_api) Access Lightning applications (lightning) Access Visualforce applications (visualforce) Access all Data Cloud API resources (cdp_api)	Access Connect REST API resources (chatter_api) Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access)	Add		Remove	
Available OAuth Scopes	Selected OAuth Scopes								
Access Analytics REST API Charts Geodata resources (eclair_api) Access Analytics REST API resources (wave_api) Access Einstein GPT services (einstein_gpt_api) Access Headless Forgot Password API (forgot_password) Access Headless Passwordless Login API (pwdless_login_api) Access Headless Registration API (user_registration_api) Access Interaction API resources (interaction_api) Access Lightning applications (lightning) Access Visualforce applications (visualforce) Access all Data Cloud API resources (cdp_api)	Access Connect REST API resources (chatter_api) Manage user data via APIs (api) Perform requests at any time (refresh_token, offline_access)								
Add									
Remove									
Require Proof Key for Code Exchange (PKCE)	<input checked="" type="checkbox"/>								
Extension for Supported Authorization Flows	<input checked="" type="checkbox"/>								
Require Secret for Web Server Flow	<input checked="" type="checkbox"/>								
Require Secret for Refresh Token Flow	<input checked="" type="checkbox"/>								
Enable Client Credentials Flow	<input type="checkbox"/>								
Enable Authorization Code and Credentials Flow	<input type="checkbox"/>								

10. Click **Save** → Click **Continue**

Fetch Consumer Key and Secret

1. Open the menu for the your Connected App and click **View**

SmartBytes

Setup Home Object Manager

Lightning Experience App Manager

28 items · Sorted by App Name · Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi... ▾
7 Content	Content	Salesforce CRM Content	2/20/2024, 12:08 PM	Classic	▼
8 DataLoader Bulk	DataLoader_Bulk	The Data Loader is an easy to use graphical tool that helps you...	2/20/2024, 12:08 PM	Connected (Managed)	▼
9 DataLoader Partner	DataLoader_Partner	The Data Loader is an easy to use graphical tool that helps you...	2/20/2024, 12:08 PM	Connected (Managed)	▼
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	2/20/2024, 12:08 PM	Lightning	✓ ▾
11 Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for creati...	2/20/2024, 12:08 PM	Connected (Managed)	▼
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	2/20/2024, 12:08 PM	Lightning	✓ ▾
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	2/20/2024, 12:08 PM	Classic	✓ ▾
14 Platform	Platform	The fundamental Lightning Platform	2/20/2024, 12:08 PM	Classic	▼
15 Price Management	PriceManagement	Set, manage, and optimize prices across your product and s...	2/20/2024, 12:08 PM	Lightning	✓ ▾
16 Product Catalog Management	Industriespc	Manage product catalog with attributes, product classificati...	2/20/2024, 12:08 PM	Lightning	✓ ▾
17 Revenue Lifecycle Management	Revenue_Lifecycle_Manageme...		2/20/2024, 12:08 PM	Lightning	✓ ▾
18 RLM Postman	RLM_Postman		3/8/2024, 8:16 AM	Connected	▼
19 Sales	Sales	The world's most popular sales force automation (SFA) solut...	2/20/2024, 12:08 PM	Classic	▼
20 Sales	LightningSales	Manage your sales process with accounts, leads, opportunit...	2/20/2024, 12:08 PM	Lightning	▼
21 Sales & Quoting	Sales_Quoting		2/20/2024, 12:08 PM	Lightning	▼
22 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles an...	2/20/2024, 12:08 PM	Classic	▼
23 Salesforce for Outlook	Salesforce_for_Outlook	A powerful Outlook integration application that lets you add...	2/20/2024, 12:08 PM	Connected (Managed)	▼
24 Salesforce Mobile Dashboards	Salesforce_Mobile_Dashboards	The Salesforce.com Analytics Mobile application lets you ac...	2/20/2024, 12:08 PM	Connected (Managed)	▼
25 Salesforce Touch	Salesforce_Touch	Salesforce Touch is Salesforce, optimized for mobile touch...	2/20/2024, 12:08 PM	Connected (Managed)	▼
26 SB Partners	sb partners		2/20/2024, 12:08 PM	Community	▼
27 Service	Service	Manage customer service with accounts, contacts, cases, a...	2/20/2024, 12:08 PM	Classic	✓ ▾
28 Workbench	Workbench	Workbench is a powerful, web-based suite of tools designe...	2/20/2024, 12:08 PM	Connected (Managed)	▼

2. Under API (Enable OAuth Settings), please click **Manage Consumer Details** (you may be asked to verify your identity)

SmartBytes

Setup Home Object Manager

Manage Connected Apps

Connected App Name: RLM Postman

Version: 1.0 API Name: RLM_Postman

Created Date: 3/8/2024, 8:16 AM By: Joshua Serene

Contact Email: jserene+rlm.postmanexample@salesforce.com

Contact Phone:

Last Modified Date: 3/8/2024, 8:16 AM By: Joshua Serene

Description: Info URL

API (Enable OAuth Settings)

Consumer Key and Secret

Selected OAuth Scopes: Manage user data via API (api), Access Connect REST API resources (chatter_api), Perform requests at any time (refresh_token, offline_access)

Callback URL: https://oauth.postman.io/v1/callback

Enable for Device Flow:

Require Proof Key for Code Exchange (PKCE):

Enable Authorization Flows:

Require Secret for Web Server Flow:

Require Secret for Refresh Token Flow:

Enable Client Credentials Flow:

Enable Authorization Code and Credentials Flow:

Enable Token Exchange Flow:

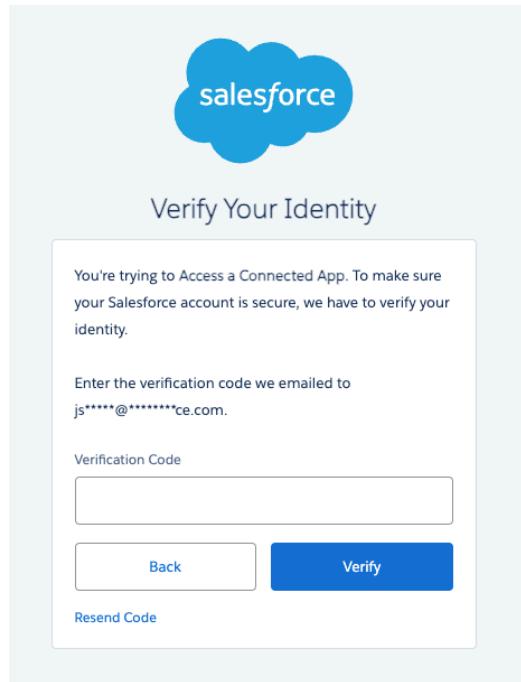
Enable Refresh Token Rotation:

Issue JSON Web Token (JWT)-based access tokens for named users:

Introspect All Tokens:

Token Valid for: 0 Hour(s)

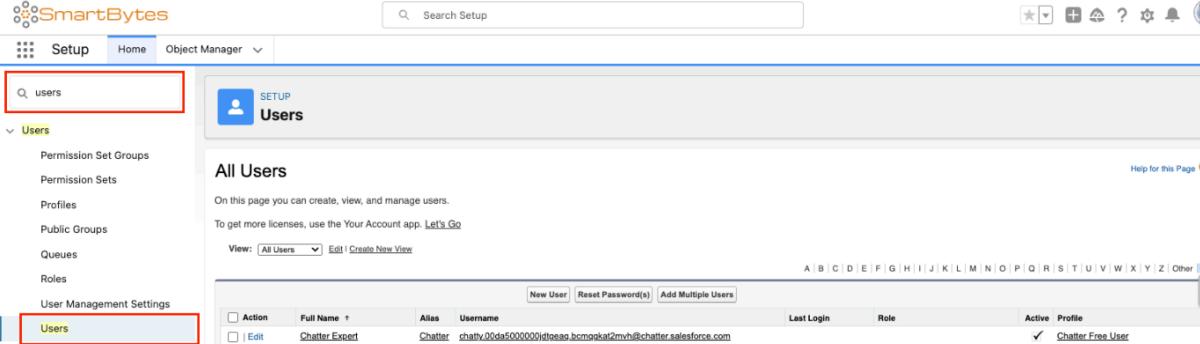
3. Verify Your Identity



4. Copy the values of your **Consumer Key** and **Consumer Secret**
5. Keep them close at hand

Update User Profile Permissions

1. Go to **Setup** → Search for and select **Users**
2. Select the **Profile** associated to your User



The screenshot shows the SmartBytes Home Page. The top navigation bar includes links for Setup, Home, Object Manager, and a search bar labeled "Search Setup". A red box highlights the "Setup" link. On the left sidebar, under the "Users" section, there is a "Global Search" input field containing "users" and a "Users" link, both of which are also highlighted with a red box. The main content area displays the "All Users" page. At the top of this page is a search bar with "users" and a "View" dropdown set to "All Users". Below the search bar is a table listing users. The columns are: Action, Full Name, Alias, Username, Last Login, Role, and Active. The table contains 12 user entries, each with a checkbox in the "Action" column and a "Edit" link. The "Active" column for the first user has a checked checkbox. The "Role" column for the first user is "CEO". The "Active" column for the last user has a checked checkbox. The "Role" column for the last user is "System Administrator". The "Last Login" column for the last user is "3/8/2024, 8:00 AM". The "Profile" column for the last user is "Tax Admin". The bottom of the page features a footer with a "Show me fewer" button, a "records per list page" dropdown set to "10", and three buttons: "New User", "Reset Password(s)", and "Add Multiple Users". The footer also includes a "Help for this Page" link and a "A B C D E F G H I J K L M N O P Q R S T U V W X Y Z" navigation bar.

3. Click **Edit**
 4. In the Connect App Access section, **enable access to your Connect App**
 5. Click **Save**

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SmartBytes, Search Setup, and various setup icons.
- Left Navigation:** Setup, Home, Object Manager, and a search bar for users.
- Current Page:** Profiles - System Administrator.
- Page Content:**
 - Profile Edit:** Set permissions and page layouts for the System Administrator profile.
 - Custom App Settings:** A grid of app settings with checkboxes for Visible and Default. A red box highlights the "Visible" checkbox for RLM Postman.
 - Connected App Access:** A list of connected apps with checkboxes. A red box highlights the "Visible" checkbox for RLM Postman.
- Help:** Help for this Page.

Part Two: Connecting your Org to Postman

Create a Workspace

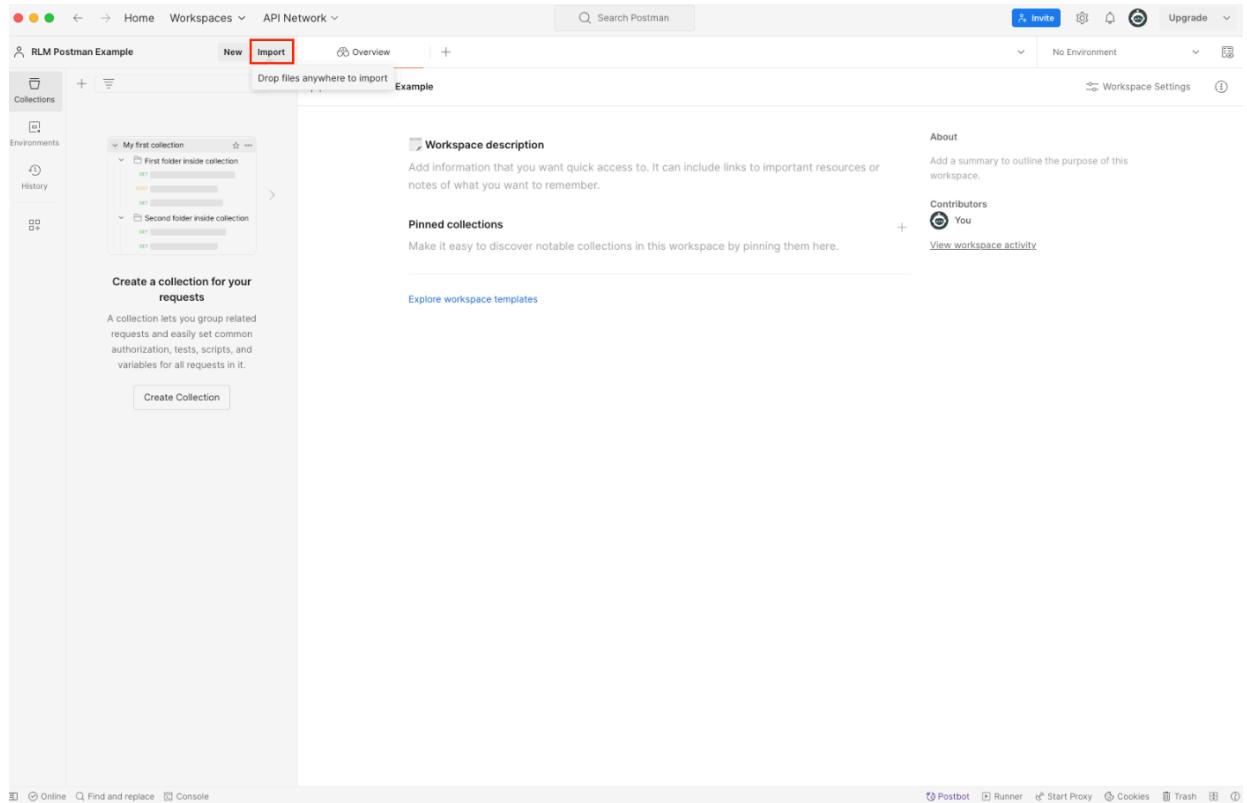
1. Go to **Workspaces** → **Create Workspace**
2. Select the **Black workspace** template → Click **Next**
3. Give it a name → Click **Create**

The screenshot shows the Postman application interface. At the top, there's a navigation bar with 'Home', 'Workspaces', 'API Network', and a search bar. Below the navigation is a sidebar with sections like 'Join a team in your organization', 'Workspaces', 'Private API Network', 'Integrations', and 'Reports'. The main content area has a 'Create Workspace' button highlighted with a red box. To the right, there are sections for 'Recently visited workspaces' (RLM Training, My Workspace) and 'Discover what you can do in Postman' (EST API basics, Integration testing, API documentation, API scenario testing, Data visualization, Authorization methods). At the bottom, there's a section for 'Explore popular APIs' featuring the 'Salesforce Platform APIs' collection.

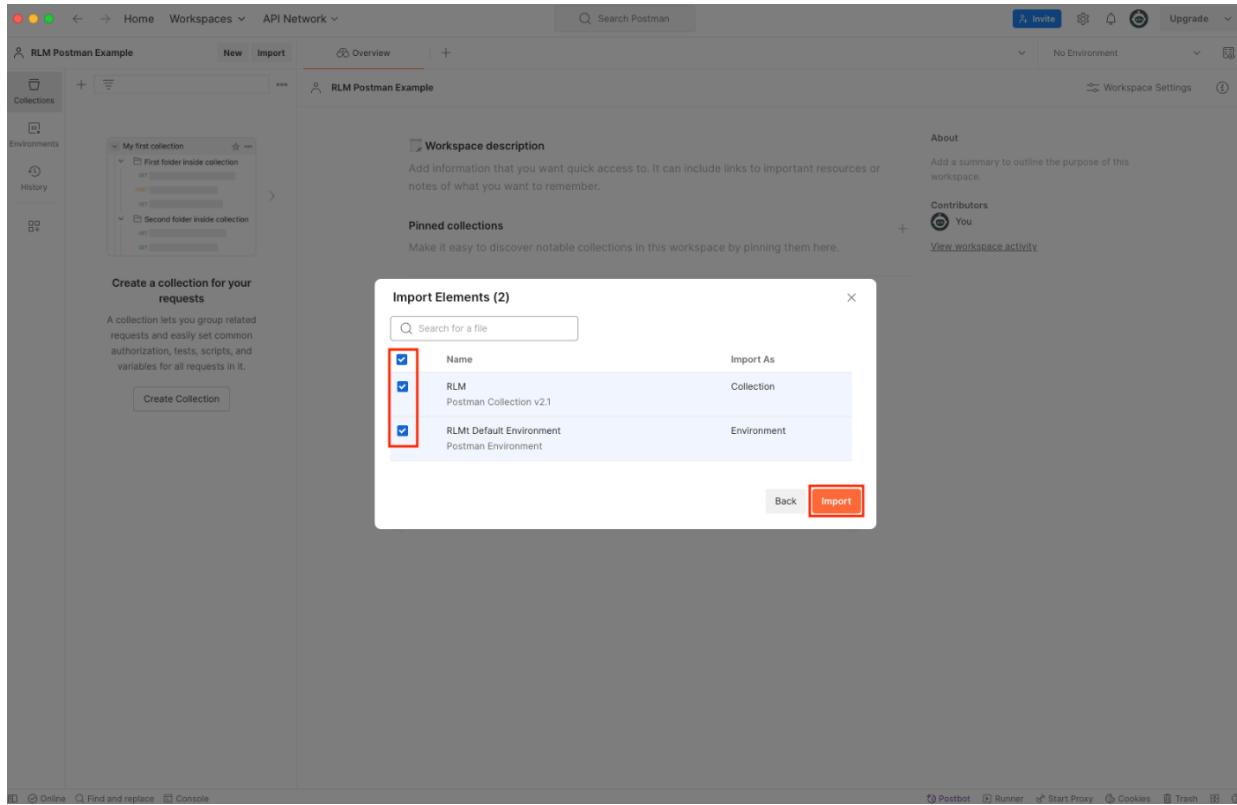
Import the Collection and Environment

Make sure you have downloaded the latest RLM Collection and Environment files from the repo

1. Press **Import**



2. Drag and drop the Collection and Environment files
3. Ensure both items are selected → Press **Import**



You will now find the RLM Collection under Collections and the RLM Default Environment

4. Navigate to the **Environments** tab
5. Press the **Three Dots** by the RLM Default Environment
6. Select **Rename**
7. Give it a name

Connect Your Org to Postman

1. Open your environment to see the Variables

The screenshot shows the Postman application interface. The top navigation bar includes Home, Workspaces, API Network, a search bar, and various user and workspace management buttons. On the left, there's a sidebar with Collection, Globals, Environments, and History sections. The main area is titled 'RLM Postman Example' and shows an 'Overview' card for 'jserene@rlm.postman.test'. Below this, the 'Environments' tab is selected, displaying a table of variables. The table has columns for Variable, Type, Initial value, and Current value. Most variables are of type 'default' with their initial and current values matching. Some variables like 'clientSecret' and 'defaultAccountName' have their current values explicitly set to 'Acme'. Other variables like 'defaultOneTimeProductName' and 'defaultTermMonthlyProductName' have their current values set to 'Monitor' or 'Warranty'.

Variable	Type	Initial value	Current value
url	default	https://login.salesforce.com	
site	default		
_endpoint	default	https://mydomain.my.salesforce....	
version	default		
clientId	default		
clientSecret	secret		
defaultAccountName	default	Acme	Acme
defaultAccountId	default		
standardPricebookId	default		
defaultEvergreenProductName	default		
defaultEvergreenProductId	default		
defaultEvergreenPSM	default		
defaultEvergreenPBE	default		
defaultOneTimeProductName	default	Monitor	Monitor
defaultOneTimeProductId	default		
defaultOneTimePSM	default		
defaultOneTimePBE	default		
defaultTermMonthlyProductName	default	Warranty	Warranty
defaultTermMonthlyProductId	default		
defaultTermMonthlyPSM	default		
defaultTermMonthlyPBE	default		
defaultTermAnnualProductName	default	Warranty	Warranty
defaultTermAnnualProductId	default		
defaultTermAnnualPSM	default		

2. Specify your Environment as the target Environment in the top left

The screenshot shows the Postman application interface. In the top right corner, there are three environment dropdown menus. The first two are highlighted with red boxes and show "No Environment". The third one, which is the active environment, shows "jserene@rlmtestpostman.t...". On the left side, there is a sidebar with sections for Collections, Globals, Environments, and History. The "Environments" section is currently selected. It displays a table of variables with their initial and current values. Most variables have their initial and current values set to "Acme", except for "Current value" which is set to "Monitor" for several variables like "defaultOneTimeProductName" and "defaultTermAnnualProductName".

	Variable	Type	Initial value	Current value
✓	url	default	https://login.salesforce.com	
✓	site	default		
✓	_endpoint	default	https://mydomain.my.salesforce....	
✓	version	default		
+ :: ✓	clientId	default		
✓	clientSecret	secret		
✓	defaultAccountName	default	Acme	Acme
✓	defaultAccountId	default		
✓	standardPricebookId	default		
✓	defaultEvergreenProductName	default		
✓	defaultEvergreenProductId	default		
✓	defaultEvergreenPSM	default		
✓	defaultEvergreenPBE	default		
✓	defaultOneTimeProductName	default	Monitor	Monitor
✓	defaultOneTimeProductId	default		
✓	defaultOneTimePSM	default		
✓	defaultOneTimePBE	default		
✓	defaultTermMonthlyProductName	default	Warranty	Warranty
✓	defaultTermMonthlyProductId	default		
✓	defaultTermMonthlyPSM	default		
✓	defaultTermMonthlyPBE	default		
✓	defaultTermAnnualProductName	default	Warranty	Warranty
✓	defaultTermAnnualProductId	default		
✓	defaultTermAnnualPSM	default		

Ensure it was selected! You should see your environment name in bold. If you see "No Environment" you do not have your Environment specified as the target for saved changes and the following steps will not work.

The screenshot shows the Postman interface with the 'Environments' tab selected. A specific environment named 'jserene@rlmpostman.tester' is chosen. The 'Globals' section displays a table of variables:

	Variable	Type	Initial value	Current value	...
<input checked="" type="checkbox"/>	url	default	https://login.salesforce.com		
<input checked="" type="checkbox"/>	site	default			
<input checked="" type="checkbox"/>	_endpoint	default	https://mydomain.my.salesforce....		
<input checked="" type="checkbox"/>	version	default			
<input checked="" type="checkbox"/>	clientId	default			
<input checked="" type="checkbox"/>	clientSecret	secret			
<input checked="" type="checkbox"/>	defaultAccountName	default	Acme	Acme	
<input checked="" type="checkbox"/>	defaultAccountId	default			
<input checked="" type="checkbox"/>	standardPricebookId	default			
<input checked="" type="checkbox"/>	defaultEvergreenProductName	default			
<input checked="" type="checkbox"/>	defaultEvergreenProductId	default			
<input checked="" type="checkbox"/>	defaultEvergreenPSM	default			
<input checked="" type="checkbox"/>	defaultEvergreenPBE	default			
<input checked="" type="checkbox"/>	defaultOneTimeProductName	default	Monitor	Monitor	
<input checked="" type="checkbox"/>	defaultOneTimeProductId	default			
<input checked="" type="checkbox"/>	defaultOneTimePSM	default			
<input checked="" type="checkbox"/>	defaultOneTimePBE	default			
<input checked="" type="checkbox"/>	defaultTermMonthlyProductName	default	Warranty	Warranty	
<input checked="" type="checkbox"/>	defaultTermMonthlyProductId	default			
<input checked="" type="checkbox"/>	defaultTermMonthlyPSM	default			
<input checked="" type="checkbox"/>	defaultTermMonthlyPBE	default			
<input checked="" type="checkbox"/>	defaultTermAnnualProductName	default	Warranty	Warranty	
<input checked="" type="checkbox"/>	defaultTermAnnualProductId	default			
<input checked="" type="checkbox"/>	defaultTermAnnualPSM	default			

3. Update the 'Current value' column for following Variables

a. _endpoint

- Please replace lightning.force.com in org url (<https://dg-rlm248-v5.lightning.force.com/>) → my.salesforce.com (<https://dg-rlm248-v5.my.salesforce.com>)
- Use this <https://dg-rlm248-v5.my.salesforce.com> as your value. Please make sure it's your org url.

The screenshot shows a browser window with the URL <https://dg-rlm248-v5.lightning.force.com/lightning/o/ProductConfigurationFlow/list?filterName=00BHp00000Kb5FkMAJ>. The page displays a table of product configuration flows:

Product Configuration Flow Name	Flow Identifier	Default	Status
00000001	Custom_Product_Configurator	<input checked="" type="checkbox"/>	Active

b. clientId

- Your RLM Postman Connect App Consumer Key

c. clientSecret

- Your RLM Postman Connect App Consumer Secret

4. Press Save

The screenshot shows the Postman interface with the following details:

- Header:** Home, Workspaces, API Network.
- Title Bar:** POST/CON 24, Postman's annual user conference. Gain new skills through hands-on workshops, hear from industry leaders, and join conversations about innovation, APIs, and the future of software. Learn more.
- Toolbar:** Invite, Upgrade, Save (highlighted with a red box), Share, ...
- Environment:** jserene@rlm.postman.tester (selected)
- Variables Table:** A table listing environment variables with their type, initial value, and current value. The 'clientSecret' variable is highlighted with a red box.

	Variable	Type	Initial value	Current value
<input checked="" type="checkbox"/>	url	default	https://login.salesforce.com	https://login.salesforce.com
<input checked="" type="checkbox"/>	site	default		
<input checked="" type="checkbox"/>	_endpoint	default	https://mydomain.my.salesforce....	https://mydomain.my.salesforce.com
<input checked="" type="checkbox"/>	version	default		
<input checked="" type="checkbox"/>	clientId	default		3MVG9Gm6vbdfgMWQqnwH3vtGKNT.LpcxAETBnt...
<input checked="" type="checkbox"/>	clientSecret	secret		*****
<input checked="" type="checkbox"/>	defaultAccountName	default	Acme	Acme
<input checked="" type="checkbox"/>	defaultAccountId	default		
<input checked="" type="checkbox"/>	standardPricebookId	default		
<input checked="" type="checkbox"/>	defaultEvergreenProductName	default		
<input checked="" type="checkbox"/>	defaultEvergreenProductId	default		
<input checked="" type="checkbox"/>	defaultEvergreenPSM	default		
<input checked="" type="checkbox"/>	defaultEvergreenPBE	default		
<input checked="" type="checkbox"/>	defaultOneTimeProductName	default	Monitor	Monitor
<input checked="" type="checkbox"/>	defaultOneTimeProductId	default		
<input checked="" type="checkbox"/>	defaultOneTimePSM	default		
<input checked="" type="checkbox"/>	defaultOneTimePBE	default		
<input checked="" type="checkbox"/>	defaultTermMonthlyProductName	default	Warranty	Warranty
<input checked="" type="checkbox"/>	defaultTermMonthlyProductId	default		
<input checked="" type="checkbox"/>	defaultTermMonthlyPSM	default		

- Bottom Bar:** Online, Find and replace, Console, Import Complete, Postbot, Runner, Start Proxy, Cookies, Trash, Help.

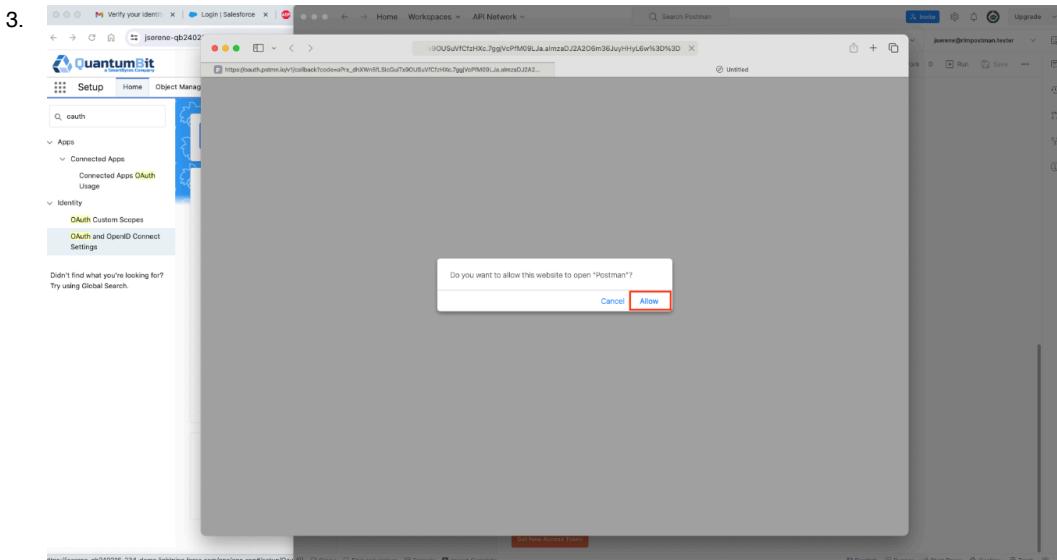
Authorize your Collection

1. Navigate to the **Collections** tab
2. **Select your Collection** [Default name is RLM]
3. Select **Authorization**
4. At the bottom, press **Clear cookies** → Press **Get New Access Token**

The screenshot shows the Postman RLM configuration interface for a workspace named "RLM Postman Example". The "Authorization" tab is selected. Under "Code Challenge Method", "SHA-256" is chosen. "Code Verifier" is set to "Automatically generated if left blank". "Scope" is set to "e.g. read:org". "State" is set to "State". "Client Authentication" is set to "Send client credentials in body". An info message states: "You can add more specific customizations to your OAuth2 requests here. Learn more about configuration >". Below this are sections for "Auth Request", "Token Request", and "Refresh Request", each with a table for parameters. At the bottom, two buttons are highlighted with red boxes: "1 Clear cookies" and "2 Get New Access Token".

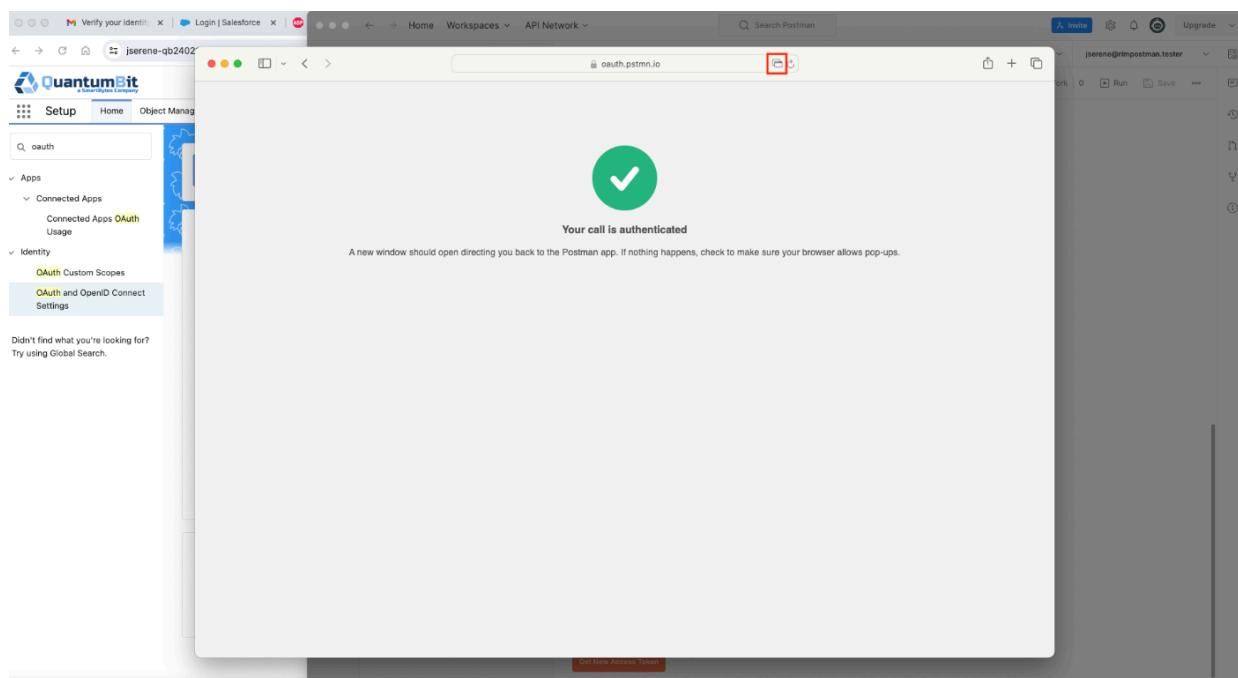
1. A log in prompt will open in your default browser, **Log In** → Press **Allow**

The screenshot shows a browser window with two tabs: "Verify your identity" and "Login | Salesforce". The main content is a Salesforce login page with fields for "Username" (jserene@rlm.postman.test) and "Password". To the right of the login form is a promotional overlay for a free trial: "Start your free trial. No credit card required, no software to install." It lists benefits: "With your trial, you get:" followed by a bulleted list: "Preloaded data or upload your own", "Preconfigured processes, reports, and dashboards", "Guided experiences for sales reps, leaders, and administrators", and "Online training and live onboarding webinars". A "START MY FREE TRIAL" button is at the bottom of the overlay. The URL in the address bar is "jserene-240223-558-demo.my.salesforce.com".

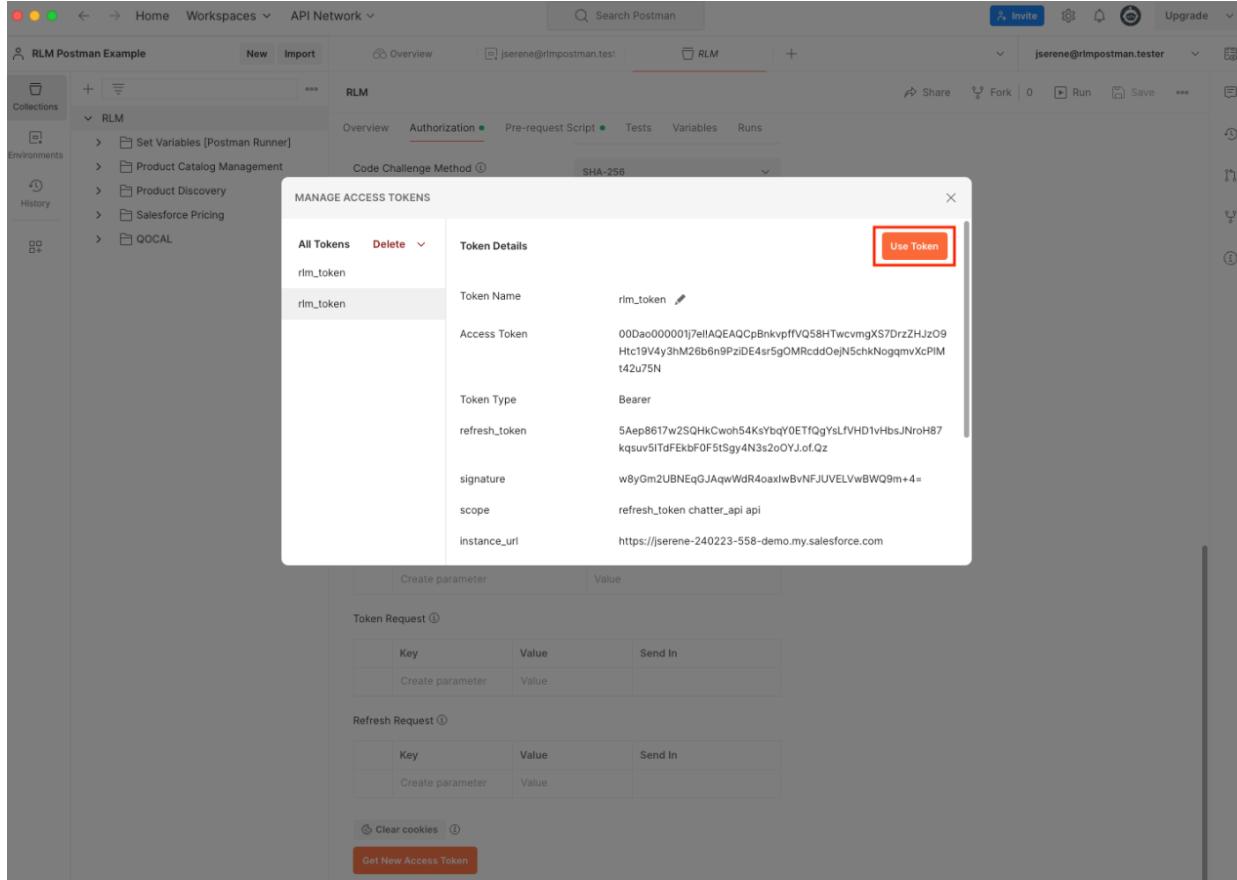


4. Return to Postman

If you see a failure, ensure you have cleared your browser cache and Postman cookies. Also ensure a popup blocker is not preventing the callback url from successfully firing.



5. Press **Proceed** (or wait) → Press **Use Token**



🎉 Congratulations, your Environment has now been authorized with your org! 🎉

Part Three: Testing the Postman Collection

Run “Set Environment Variables - (Runner)” Folder

1. Click on **Set Environment Variables - (Runner)** folder under **RLM** collection
2. Click Run from top-right corner of the screen

The screenshot shows the Postman interface with the 'Enablement Workspace' selected. On the left, the 'Collections' sidebar lists several collections under 'RLM', including 'Set Environment Variables (Runner)'. This collection is highlighted with a red box. The main panel displays the 'Set Environment Variables (Runner)' collection with its overview, authorization, pre-request script, and tests sections. A red box highlights the 'Run' button at the top right of the main panel.

6. In the page that appears → click **Run RLM**

The screenshot shows the Postman interface with the 'Enablement Workspace' selected. The 'Set Environment Variables (Runner)' collection is selected in the sidebar. The main panel shows the 'Run order' configuration for this collection. The 'Functional' tab is selected, showing a list of 27 API requests (all checked) under 'Choose how to run your collection'. The 'Run configuration' section includes fields for 'Iterations' (set to 1), 'Delay' (0 ms), and 'Data' (with a 'Select File' button). A red box highlights the 'Run RLM' button at the bottom right of the configuration panel.

7. All tests should run successfully and you should see object Ids populated in your postman environment

Variable	Type	Initial value	Current value
url	default	https://login.salesforce.com	https://login.salesforce.com
site	default		
_endpoint	default		https://dg-rlm248-v1.my.salesforce.com
version	default		60.0
clientId	default		3MVG9X13BC6VHB.bhuIB3Y0Egv978AsRtBUJNQrvnUeXn49dVb2...
clientSecret	secret		*****
defaultAccountName	default	Acme	Acme
defaultAccountId	default		001Hp000002pAFVjAO
standardPricebookId	default		01sHp000000AX0zrIAH
defaultEvergreenAnnualProduct	default		
defaultEvergreenMonthlyProductName	default	Subscription	Subscription
defaultEvergreenMonthlyProductId	default		
defaultEvergreenMonthlyPSM	default		0jPHp000000kCfNMAU
defaultEvergreenMonthlyPBE	default		
defaultEvergreenAnnualProductName	default	Subscription	Subscription
defaultEvergreenAnnualProductId	default		
defaultEvergreenAnnualPSM	default		0jPHp000000kCfNMAU
defaultEvergreenAnnualPBE	default		
defaultTermDefinedMonthlyProductName	default	Support	Support
defaultTermDefinedMonthlyProductId	default		01tHp000000BT1Z7IAL
defaultTermDefinedMonthlyPSM	default		0jPHp000000kCfLMAU
defaultTermDefinedMonthlyPBE	default		01uHp000000R8ClqjAN

Use variables to reuse values and protect sensitive data

Store sensitive data in variable type secret to keep its values masked on the screen. Learn more about Learn more about.

Work with the current value of a variable to prevent sharing sensitive values with your team. Learn more about Learn more about.

Test Order Creation

- If you haven't refreshed Pricing Decision Tables in the newly created org, please sync pricing first before proceeding further
 - Under **Setup** in the org, go to **Salesforce Pricing Setup**
 - Click on **Sync Pricing Data → Sync**

The screenshot shows the SmartBytes Salesforce Pricing Setup interface. On the left, there's a sidebar with 'Feature Settings' expanded, showing 'Salesforce Pricing' selected. Under 'Salesforce Pricing', 'Pricing Action Parameters' and 'Pricing Recipes' are listed, with 'Salesforce Pricing Setup' highlighted and surrounded by a red box. A search bar at the top right says 'Search Setup'. The main content area has a title 'Set your basic Salesforce Pricing data'. It includes sections for 'Select a Pricing Recipe' (with 'NGPDefaultRecipe' selected), 'Select a Pricing Procedure' (with 'Revenue Management Default Pricing Procedure' selected), 'Sync Pricing Data' (with a 'Sync' button highlighted by a red box), 'Turn On Price Waterfall' (with a toggle switch set to 'On'), and 'Turn On Price Waterfall Persistence' (with a toggle switch set to 'On').

1. Click on **Place Order** request under RLM → Quote and Order Capture
2. Click Send from top-right corner of the screen

The screenshot shows a Postman API workspace titled 'Enabling Workspace'. The left sidebar lists collections like 'RLM', 'Quote and Order Capture', and 'eCommerce Flow'. In the center, a 'Place Order' request is selected under 'POST Place Order'. The request URL is `(Lendpoint)/services/data/v/(version)/commerce/sales-orders/actions/place`. The 'Body' tab shows a JSON payload for placing an order. The 'Send' button in the top right is highlighted with a red box. The bottom section shows the response body, which includes an 'orderId' field. The status bar at the bottom indicates 'Status: 201 Created'.

8. Copy **OrderId** from the response
9. Access the Id in your org to verify that the order has been created

The screenshot shows a Salesforce Order detail page. At the top, the URL is <rlm-enabling-tf.lightning.force.com/lightning/r/Order/001Hr0000001Zo3HIAS/view>. The page title is "Test Order 2 | Order | Salesforce". The header includes a search bar and various navigation links like "Salesforce", "Sign In", "Aloha!", "Inbox", "OrgFarm", etc.

The main content area displays an Order record with the following details:

Account Name	Contract Number	Order Start Date	Status	Order Amount
Acme		2/1/2024	Draft	\$598.47

Below the summary, there is a status bar showing "Draft" and "Activated". A button "Mark Status as Complete" is available.

The page is divided into sections:

- Details:** Contains fields for Order Owner (Admin User), Order Number (00000158), Account Name (Acme), Order Start Date (2/1/2024), Contract Number, Quote, Order Type, and Status (Draft).
- Pricing Information:** Shows Order Amount (\$598.47).
- Shipping and Billing Information:** Contains fields for Billing Address and Shipping Address.
- System Information:** Shows Created By and Last Modified By.

At the bottom left, there is a link "List View".

🎉 Congratulations, you have successfully tested the request and your pre-requisites for the RLM Technical API session has been completed 🎉