

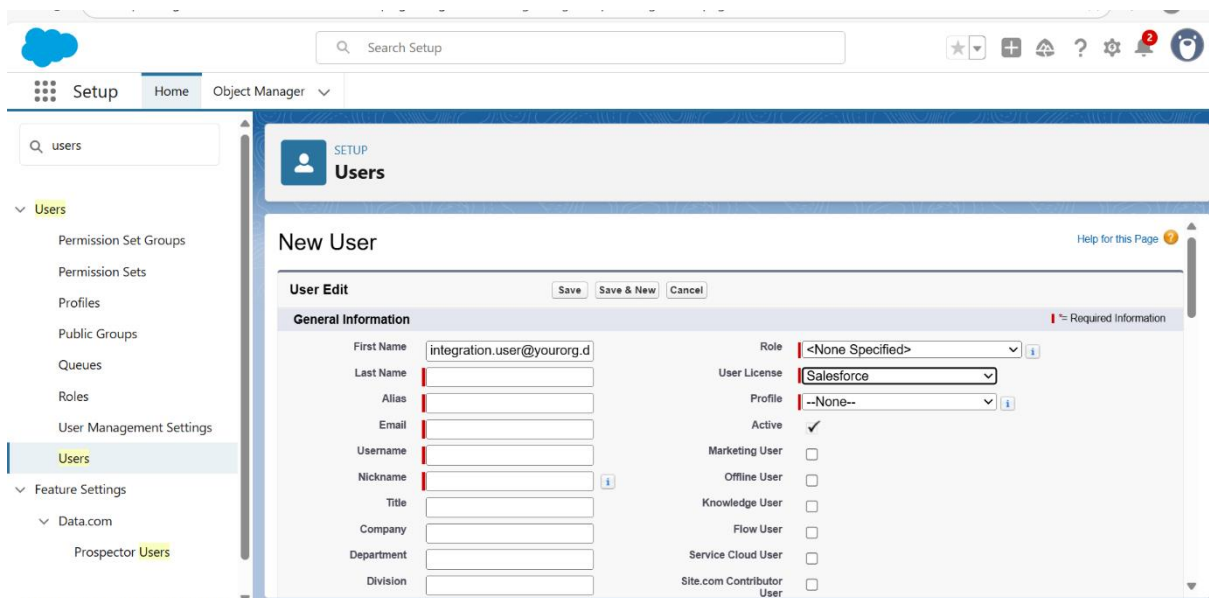
## Phase 7: Integration & External Access

### Objective

To enable secure communication between Salesforce and external systems, allowing onboarding data to flow both **into** Salesforce (Inbound) and **out of** Salesforce (Outbound).

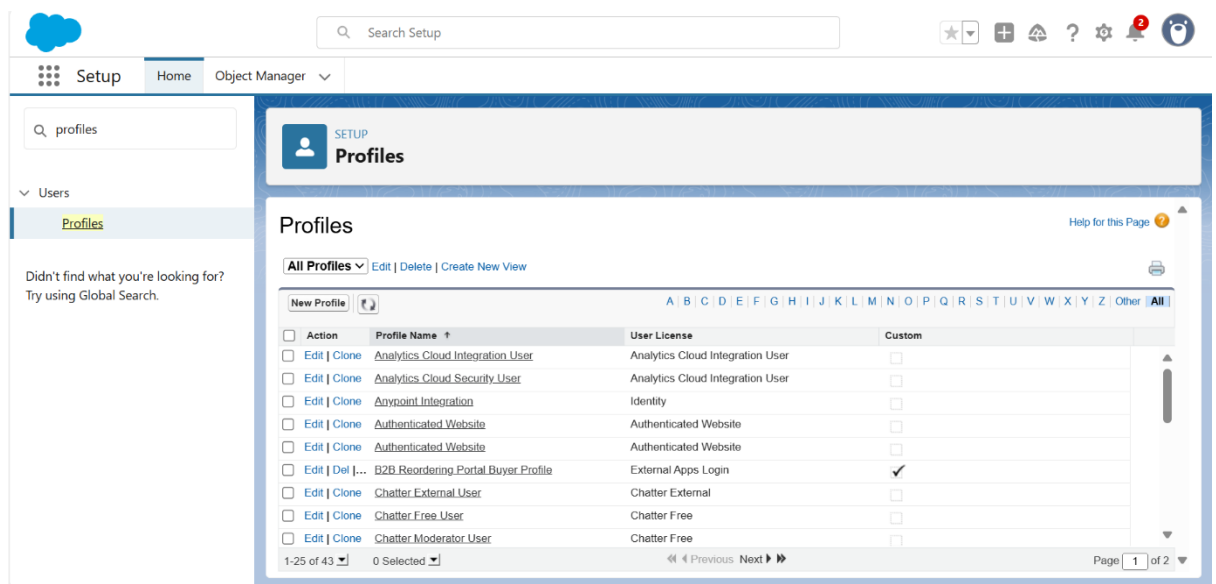
### Inbound Integration – REST API Access

- Created an **Integration User** with restricted permissions and **API Enabled**.
- Configured a **Connected App** to generate a Client ID/Secret for OAuth.



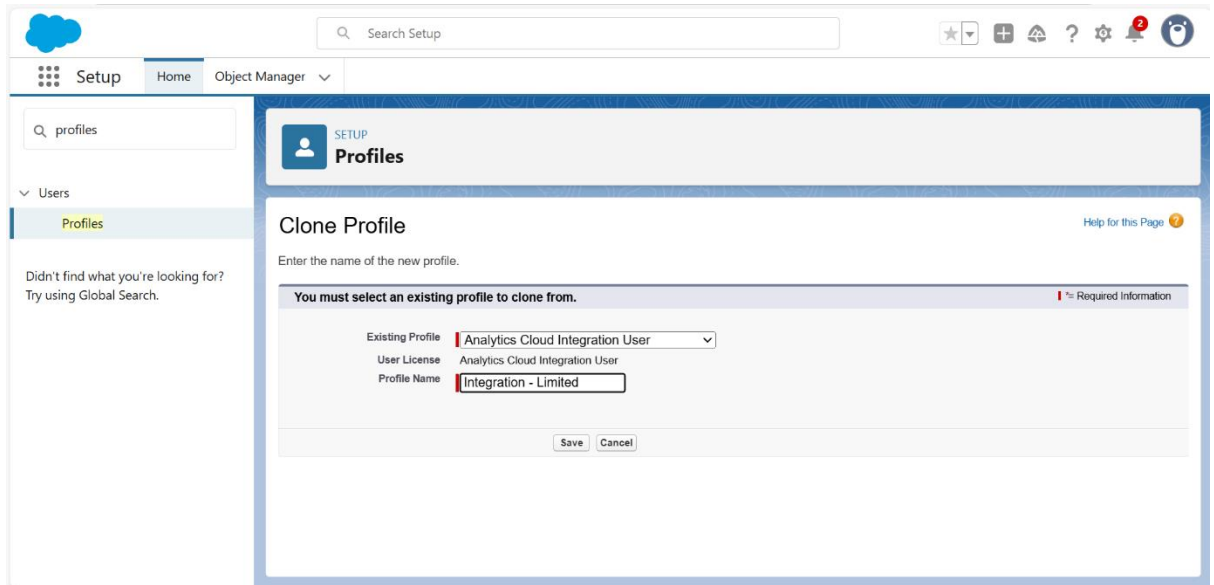
The screenshot displays the Salesforce Setup interface. On the left, a sidebar shows the 'Setup' menu with 'Users' selected. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two columns. The left column, labeled 'General Information', includes fields for First Name (filled with 'integration.user@yourorg.d'), Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The right column includes fields for Role (set to '<None Specified>'), User License (set to 'Salesforce'), Profile (set to '--None--'), and a list of checkboxes for user types: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User. A 'Help for this Page' link is visible in the top right corner of the form area.

- Used **Postman** to authenticate (OAuth 2.0) and call Salesforce REST API:
  - Endpoint: /services/data/v58.0/subjects/Employee\_\_c/
  - Request created a new Employee record successfully.



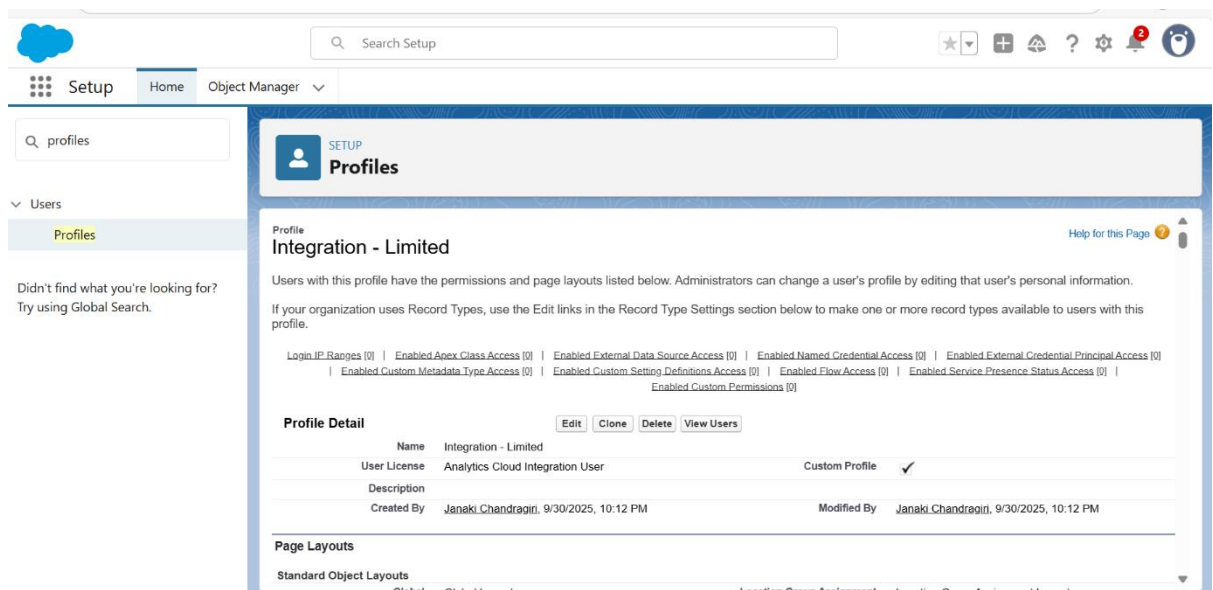
## Custom Apex REST Service

- Built an **Apex REST class** (EmployeeRestService) to allow external apps to create Employee records with custom logic.
- Tested via Postman → POST /services/apexrest/EmployeeAPI/ → Verified new Employee created.



## Outbound Integration – External API Callout

- Configured **Named Credential** to connect Salesforce with an external LMS API.
- Wrote a sample **Apex callout** using HttpRequest to fetch course details.
- Verified response in Debug Logs.



The screenshot shows the Salesforce Setup interface for the 'External Client App Manager'. The left sidebar contains a search bar and a navigation menu with 'Apps', 'App Manager', 'External Client Apps', and 'External Client App Manager' (highlighted). The main content area is titled 'External Client App Manager' and contains a 'Basic Information' section with the following fields:

- \* External Client App Name: Onboarding Integration App
- \* API Name: Onboarding\_Integration\_App
- \* Contact Email: Enter an email address...
- \* Distribution State: Local (dropdown menu)
- Contact Phone: Enter a phone number...
- Info URL: Enter a URL...
- Logo Image URL: Enter a URL... (with a link to 'Choose one of our sample logos.')
- Icon URL: Enter a URL... (with a link to 'Choose one of our sample logos.')

The screenshot shows the Salesforce Setup interface for the 'External Client App Manager' at the 'API (Enable OAuth Settings)' step. The left sidebar is identical to the previous screenshot. The main content area shows the 'API (Enable OAuth Settings)' section with a checkbox for 'Enable OAuth' which is checked. Below this is the 'App Settings' section with the following fields:

- \* Callback URL: https://localhost:8443/oauth/\_callback
- \* OAuth Scopes: A table with two columns: 'Available OAuth Scopes' and 'Selected OAuth Scopes'. The 'Available OAuth Scopes' column contains 'Access the identity URL service (id, profile, email...)' and the 'Selected OAuth Scopes' column contains 'Perform requests at any time (refresh token, offline...)'.

At the bottom of the form are 'Cancel' and 'Create' buttons.

## Outcome of Phase 7

- External systems can now securely create Employee records in Salesforce.
- Salesforce can call external APIs (like LMS) using Named Credentials.
- Integration ensures a connected onboarding & training ecosystem.