

## Phase 7 – Integration & External Access

### 1. Named Credentials (For APIs)

Steps:

1. Go to Setup → Named Credentials → New Named Credential.
2. Fill in the following fields:
  - Label: e.g., Twilio\_SMS
  - URL: Twilio API endpoint
  - Identity Type: Named Principal
  - Authentication: Password/Token (API Key)
3. Click Save.
4. Repeat the above steps for other APIs like SendGrid (Email API).

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled "Search Setup", and utility icons. The left sidebar shows the Setup menu with "Home" and "Object Manager" options. The main content area is titled "SETUP > NAMED CREDENTIALS" and displays the configuration for a Named Credential named "Twilio\_SMS".

**Twilio\_SMS** [Edit] [Delete]

Label	Name
Twilio_SMS	Twilio_SMS

URL  
https://api.twilio.com

Enabled for Callouts  
☒

**Authentication**

External Credential  
[Twilio\\_Credential](#)

Client Certificate

**Callout Options**

Generate Authorization Header <sup>?</sup>  
☒

Allow Formulas in HTTP Header <sup>?</sup>  
☐

Allow Formulas in HTTP Body <sup>?</sup>  
☐

Outbound Network Connection <sup>?</sup>

**Managed Package Access**

Created By Namespace <sup>?</sup>

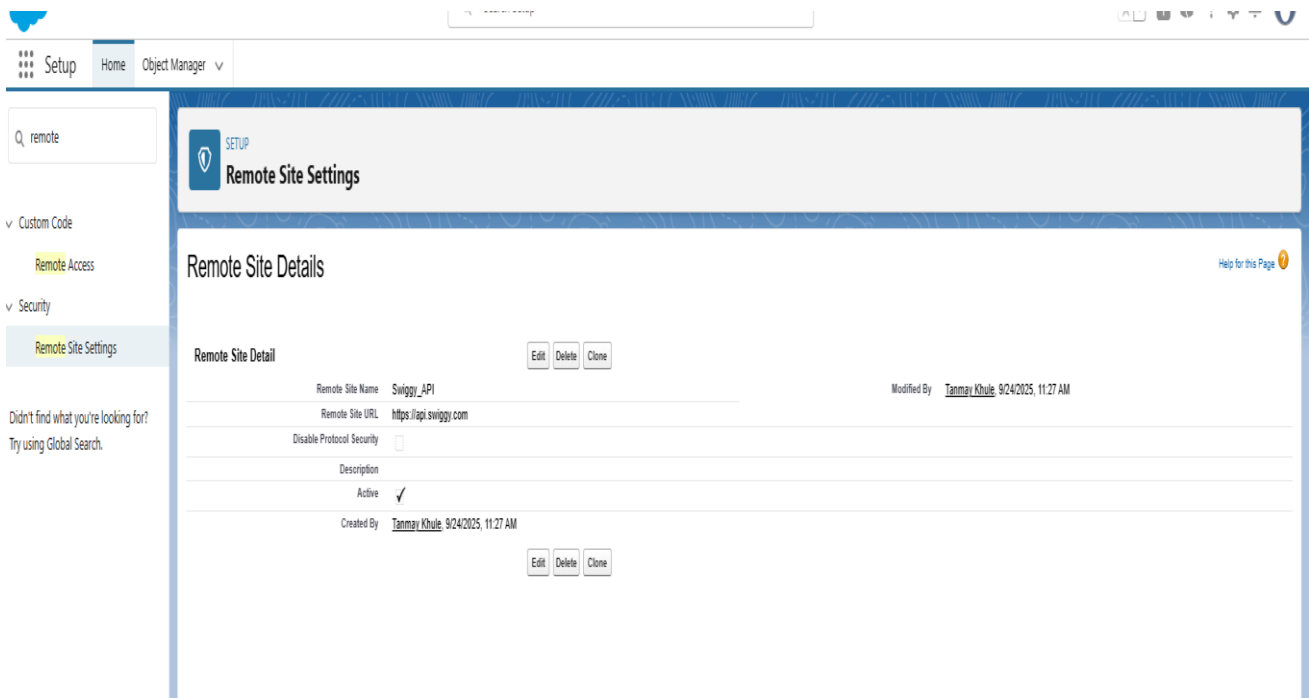
Allowed Namespaces for Callouts <sup>?</sup>

## 2.Remote Site Settings

Steps:

1. Go to Setup → Remote Site Settings → New Remote Site.
2. Fill in the following fields:
  - Name: e.g., Swiggy\_API
  - URL: API base URL
3. Click Save.

Purpose: Allow Salesforce to call external APIs.



## 3. REST Callouts (Future Scope)

Steps:

1. Use Apex HttpRequest & HttpResponse to make API calls.
2. Example: Integrate Swiggy/Zomato to fetch orders.

3. Ensure that Named Credentials and Remote Site Settings are configured before making callouts.