Salesforce API access

Step 1: Create a Connected App

1. Log in to Salesforce as an administrator.
2. From **Setup** (on top right the gear looking icon), enter External Client Apps in the **Quick Find** box, then select **Settings** under External Client Apps.
3. Enable **Allow creation of connected apps** if not already enabled.
4. Click **New Connected App** to create a new app.
5. Fill in the required fields:

- **Connected App Name**: Enter a unique name for the app (displayed in App Manager and App Launcher).
- **API Name**: Defaults to the app name without spaces. Use only letters, numbers, and underscores.
- **Contact Email**: Provide an email for Salesforce to contact you or your support team.
- **Contact Phone** (optional): Provide a phone number for support contact.

Step 2: Enable OAuth Settings

1. In the Connected App setup page, locate the **API (Enable OAuth Settings)** section.
2. Check **Enable OAuth Settings**.
3. Enable the following options:

- **Enable for Device Flow**.
- **Require Secret for Web Server Flow** (keep selected).
- **Require Secret for Refresh Token Flow** (keep selected).
- **Enable Client Credentials Flow**.

4. Under **Selected OAuth Scopes**, add:

- **Manage user data via APIs** (api scope, we need to discuss on what we actually need).
- This link contains all the scopes available and their explanations: [OAuth Tokens and Scopes].

5. Click **Save** to apply the changes and then **Continue**.

Step 3: Retrieve Consumer Key and Secret

1. From **Setup**, go to **App Manager** (search Apps in the **Quick Find** box).
2. Locate your Connected App, click the dropdown arrow, and select **View**.

3. In the **API (Enable OAuth Settings)** section, click **Manage Consumer Details**.
4. Complete the email verification process (a code will be sent to the contact email).
5. Copy the **Consumer Key** and **Consumer Secret** displayed on the page for use in the API integration.

Step 4: Configure Client Credentials Flow

1. From **Setup**, search Apps in the **Quick Find** box, then select **Manage Connected Apps**.
2. Click the name of your Connected App.
3. Click **Edit Policies**.
4. In the **Client Credentials Flow** section, for **Run As**, select a user with API access permissions.
5. Click **Save** to apply the changes.

Step 5: Copy My Domain URL

1. From **Setup**, search My Domain in the **Quick Find** box, then select **My Domain**.
2. Copy the **My Domain URL** (e.g., https://yourdomain.my.salesforce.com). This is required for API authentication endpoints.

Additional Notes

- Ensure the user selected for **Run As** in the Client Credentials Flow has the necessary API permissions.