

Module 2:

Environment & Tools Setup

Environment & Tools Setup

- In this module we will be doing some of the basic Salesforce environment and tools setup that is required for doing the hands-on exercises
- As we progress through the course we will be instructing you to make few more additions & updates to both Salesforce Org and tools to make it easier for you to make API calls

Objectives



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer



Basics Of Postman

Using This Guide

A couple of standards/conventions have been followed in this guide. Here is what they mean

1. Text with White background, red border and a number. In a callout format

Text with Yellow Background

Text with Red Background

Text with Green Background

Actions that you need to follow to configure. Carry out these steps **in the order of its sequence number**.

General explanation/information to support actions mentioned on the slide. This will assist you in understanding what is being done and why

Important information. Take a closer look and follow as advised. You may not be able to complete the exercise successfully if you miss these instructions

Appears on the bottom bar of the page on left hand side. Provides information on the Hardware and Software currently being used (if applicable)

Objectives

-  **Sign Up For Developer Org**
- Edit/Validate My Domain**
- Get Your Security Token**
- Create Connected App In Salesforce**
- Install Postman On Your Computer**
- Basics Of Postman**

Sign Up For Developer Org

The screenshot shows a web browser window at the URL `developer.salesforce.com/signup`. The page features a dark blue header with the Salesforce logo and a white sign-up form. The form includes fields for First Name, Last Name, Email, Role, Company, and Country. A red box highlights the first step: "1. Go to <https://developer.salesforce.com/signup> in a new browser window". Another red box highlights the second step: "2. Fill in the all the relevant details & scroll down". A yellow box at the bottom left contains the text: "We strongly recommend to sign up for a new Developer Org for this course".

1. Go to <https://developer.salesforce.com/signup> in a new browser window

2. Fill in the all the relevant details & scroll down

We strongly recommend to sign up for a new Developer Org for this course

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Upgrade security
- Upgrade leading-edge web

Sign Up For Developer Org

The screenshot shows the Salesforce Developer Edition Signup page. The browser address bar displays 'developer.salesforce.com/signup'. The page contains a registration form with the following fields and options:

- Country***: A dropdown menu with 'Singapore' selected.
- Postal Code***: A text input field containing '199011'.
- Username***: A text input field containing 'ashish@asagarwal-msapi-dev-ed.com'.
- Yes, I would like to receive marketing communications by email regarding salesforce products, services and events, including Salesforce Trailhead communications. I can unsubscribe at any time.

Below the form, there is a paragraph of text: "By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes."

At the bottom of the form, there is a blue button labeled "Sign me Up". Below this button, there is a link "Log in" and a question "Already have a Salesforce Developer Environment?".

Two red callout boxes with white text provide instructions:

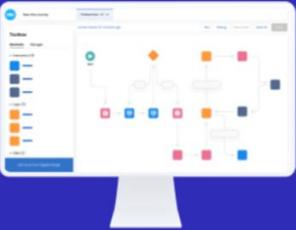
1. Ensure the given username is unique across **all** the Salesforce Orgs, across **all** customers
2. Click 'Sign me Up'

Sign Up For Developer Org

Successful Developer Edition Sig x +

developer.salesforce.com/signup/success

Guest



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework



Almost there...

Please check your email to confirm your account.

Wondering where to start?
Learn Salesforce Platform basics on [Trailhead](#)

Sometime the new dev org creation can take up to an hour depending on the load on Salesforce Servers. So keep calm & be patient 😊

Sign Up For Developer Org

Successful Developer Edition Sig | Welcome to Salesforce: Verify yo | +

mail.google.com/

Gmail Search mail

Compose

Inbox

1. Log in to your email and go to your 'Inbox'

salesforce

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

2. Save your login 'URL' and 'Username' for reference

3. Click on 'Verify Account' & follow the in app instructions

To easily log in later, save this URL:
<https://asagarwalcom2-dev-ed.my.salesforce.com>

Username:
ashish@asagarwal-msapi-dev-ed.com

1 of 2,168

Sign Up For Developer Org

Successful Developer Edition Sig | Welcome to Salesforce: Verify yo | Change Your Password | Salesforce | +

asagarwalcom2-dev-ed.my.salesforce.com/_ui/system/security/ChangePassword?retURL=%2Fflightning%2Fsetup%2FSetupOneHome%2Fhome&fromFrontdoor=1&setupid=ChangePassword Guest

salesforce

Change Your Password

Enter a new password for
ashish@asagarwal-msapi-dev-ed.com. Make sure to
include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

▼ In what city were you born?

* Answer

.....

Change Password

1. Add a strong password

2. Ensure you answer the 'Security question' and remember the same in case you forget your password

Sign Up For Developer Org

1. Yay !!! You are now in your in brand new Org's 'Home' page

Successful Developer Edition Sign | Welcome to Salesforce: Verify yo | Home | Salesforce

asagarwalcom2-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile

Learn More

Go Mobile

Take This Page Anywhere

Salesforce is as mobile as you are with the free Salesforce mobile app. Click 'Go Mobile' to get the app today.

Go Mobile

Most Recently Used

1 items

NAME	TYPE
Harish Kumar Shankar	User

Objectives



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer



Basics Of Postman

Configure 'My Domain' URL

Next, configure the 'My Domain' URL of your newly created Salesforce Org

- When you signed up for the developer org, Salesforce automatically assigned a My Domain URL based on the company name that was specified in sign up form. However you can change this URL
- With My Domain, you can have your company specific branded URL to login to Salesforce. Like for us it is 'https://**asagarwal**.my.salesforce.com'
- With My Domain you can also have your own images and logo on the Salesforce Login page
- For more information on My Domain, you may also want to refer to [this help article](#)

Configure 'My Domain' URL

The screenshot shows the Salesforce Home page for a user named Ashish Agarwal. The browser address bar displays the URL: `asagarwalcom2-dev-ed.lightning.force.com/lightning/page/home`. The page header includes a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, and Contacts. A search bar is also present. The main content area features a 'Quarterly Performance' chart with data for Nov, Dec, Jan, Feb, and Mar. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. The 'Setup' menu is open, showing options: Setup, Setup for current app, Service Setup, Developer Console, and Edit Page. A red box highlights the 'Setup' option with the text '1. Log on to Salesforce & click on 'Setup''. A yellow callout box in the bottom right corner says 'Let's start with configuring the My Domain for the org'.

1. Log on to Salesforce & click on 'Setup'

Let's start with configuring the My Domain for the org

asagarwalcom2-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home?...

Configure 'My Domain' URL

The screenshot shows the Salesforce 'My Domain' configuration page. A search bar at the top contains 'My Domain', and the 'My Domain' link in the left sidebar is highlighted with a red box and an arrow. A red callout box points to this link with the text: '1. Within 'Home' type 'My Domain' in the Search bar and click the link'. The main content area shows 'My Domain Settings' with an 'Edit' button highlighted by another red callout box containing the text: '2. To change My Domain URL, click on 'Edit''. The 'My Domain Details' section shows the current URL as 'asagarwalcom2-dev-ed.my.salesforce.com', the domain name as 'asagarwalcom2-dev-ed', and the domain suffix as 'Standard (*.my.salesforce.com)'. The 'Routing' section shows the 'Salesforce Edge Network' option is currently disabled.

1. Within 'Home' type 'My Domain' in the Search bar and click the link

2. To change My Domain URL, click on 'Edit'

Configure 'My Domain' URL

The screenshot shows the Salesforce 'My Domain' configuration page. The browser address bar shows the URL: asagarwalcom2-dev-ed.lightning.force.com/lightning/setup/OrgDomain/home. The page header includes the user's name 'Ashish Agarwal' and a search bar. The main content area is titled 'My Domain' and contains a form with the following fields: 'My Domain Name' (asagarwal-msapi-dev-ed), 'Check Availability' (Available), 'Domain Suffix' (Standard (*.my.salesforce.com)), and 'Your chosen new My Domain URL' (asagarwal-msapi-dev-ed.my.salesforce.com). A red box highlights the first step: '1. Specify the new my domain name. Note that in a developer org, Salesforce will automatically add "-dev-ed" to the name you specify. Click on check availability'. A yellow box highlights the second step: 'The domain name must be unique across all Salesforce orgs. If the one you specify is not available, just specify another domain name'. A second red box highlights the second step: '2. Click 'Save' and click 'Ok' in the confirmation window that will pop up'.

Configure 'My Domain' URL

The screenshot shows the Salesforce 'My Domain' setup interface. The browser address bar displays 'asagarwalcom2-dev-ed.lightning.force.com/lightning/setup/OrgDomain/home'. The left sidebar shows 'Setup' > 'My Domain' selected. The main content area is titled 'My Domain Settings' and includes a progress indicator with three steps: 1. Choose and register a My Domain (checked), 2. Salesforce provisions your new domain (checked), and 3. Deploy your new domain to users (not checked). Below the progress indicator, it shows 'Current domain' as 'asagarwalcom2-dev-ed.my.salesforce.com' and 'New domain' as 'asagarwal-msapi-dev-ed.my.salesforce.com'. There are buttons for 'Keep Current Domain' and 'Deploy New Domain'. An email notification overlay from 'support@salesforce.com' is visible, stating 'Your Salesforce My domain ready to be deployed' and providing instructions to log in to the new domain.

1. Salesforce may take a few minutes to provision your domain. Once done Salesforce will send you an email and you will also see a green tick on the page

2. Finally, click on 'Deploy New Domain' to deploy the domain

Configure 'My Domain' URL

The screenshot shows the Salesforce login page in a browser. The browser's address bar shows 'login.salesforce.com'. The page features the Salesforce logo, a login form with fields for 'Username' (containing 'ashish@asagarwal-msapi-dev-ed.com') and 'Password', and a blue 'Log In' button. Below the button are links for 'Remember me', 'Forgot Your Password?', and 'Use Custom Domain'. To the right, there is promotional text about a free trial and a list of benefits. A red callout box with a white background and a red border points to the 'Log In' button, containing the text: '1. You will be logged out of Salesforce once the domain is deployed. Just log back in with your username & password'. In the background, a blurred image of the Salesforce dashboard is visible, showing various charts and data points.

Start your free trial. No credit card required, no software to install.

With your trial, you get:

- ✓ Preloaded data or upload your own
- ✓ Preconfigured processes, reports, and dashboards
- ✓ Guided experiences for sales reps, leaders, and administrators
- ✓ Online training and live onboarding webinars

1. You will be logged out of Salesforce once the domain is deployed. Just log back in with your username & password

Configure 'My Domain' URL

The screenshot shows a web browser window with the address bar displaying the URL: `asagarwal-msapi-dev-ed.lightning.force.com/lightning/page/home`. A red box highlights the text: "1. And now you can see the new domain URL in the browser after logging on". The browser tab is titled "Home | Salesforce". The page content includes a navigation bar with "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", and "More". A main dashboard area shows a "Quarterly" performance chart with a y-axis from 0 to 500k and an x-axis from Nov to Mar. The chart includes a legend for "Closed", "Goal", and "Closed + Open (>70%)". An "Assistant" panel on the right shows a notification: "30 days without any activity" with a link to "New Year Sale - 2022". At the bottom, there are sections for "Today's Events" and "Today's Tasks".

Configure 'My Domain' URL

The screenshot shows the Salesforce user interface for Ashish Agarwal. The browser address bar displays the URL: `asagarwal-msapi-dev-ed.lightning.force.com/lightning/page/home`. The user profile dropdown menu is open, showing the user's name, email address, and a **Log Out** link. A red box highlights the **Log Out** link with the instruction: "1. Click on your picture on top right corner and click Log Out." The main dashboard area includes a "Quarterly Performance" chart, "Today's Events" section, and "Today's Tasks" section.

Quarterly Performance

As of Today 9:01 PM

CLOSED \$0 OPEN (>70%) \$0 GOAL --

500k
400k
300k
200k
100k
0

Nov Dec Jan Feb Mar

■ Closed ■ Goal ■ Closed + Open (>70%)

Today's Events

Looks like you're free and clear the rest of the day.

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

View All

1. Click on your picture on top right corner and click Log Out.

<https://asagarwal-msapi-dev-ed.lightning.force.com/secure/logout.jsp>

Configure 'My Domain' URL

1. Salesforce will log you out and now redirect you to 'My Domain' login URL of your org. Bookmark this URL for all subsequent logins to this org

Username

Password

Remember me

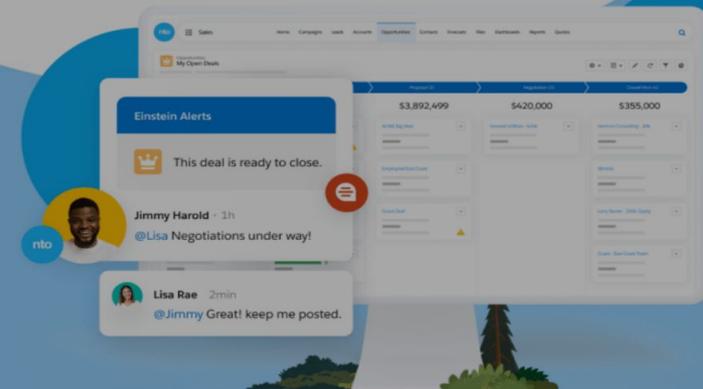
[Forgot Your Password?](#)

Start your free trial. No credit card required, no software to install.

With your trial, you get:

- ✓ Preloaded data or upload your own
- ✓ Preconfigured processes, reports, and dashboards
- ✓ Guided experiences for sales reps, leaders, and administrators
- ✓ Online training and live onboarding webinars

[START MY FREE TRIAL](#)



Objectives



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer



Basics Of Postman

Get Your Security Token

The screenshot shows a Salesforce user interface. At the top, there's a navigation bar with the user's name 'Ashish Agarwal' and a search bar. Below that, there's a navigation menu with options like 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'Reports'. The main content area displays 'Quarterly Performance' with a line chart showing 'CLOSED \$0', 'OPEN (>70%) \$0', and 'GOAL --'. Below the chart, there's a message: 'Add the opportunities you're working on, then come back here to view your performance.' The right sidebar shows the user's profile with a dropdown menu open, containing options like 'Settings', 'Log Out', 'DISPLAY DENSITY', 'Comfy', 'Compact', 'OPTIONS', 'Switch to Salesforce Classic', and 'Add Username'. A red box highlights the profile image and the 'Settings' link, with an arrow pointing to the 'Settings' link. A yellow callout box at the bottom right contains text about API calls and security tokens.

1. Click on your profile image -> Settings

To make API calls to Salesforce you will need security token. Let's see how to get the security token (if you already have the security token, you can skip this section)

Get Your Security Token

Reset My Security Token | Sales x +

asagarwal-msapi-dev-ed.lightning.force.com/lightning/settings/personal/ResetApiToken/home

Guest

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

All Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Quick Find

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token**
- Security Central

Display & Layout

Email

Chatter

Calendar & Reminders

Reset My Security Token

Reset Security Token [Help for this Page](#)

When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token to log in. What's a security token? It's a case-sensitive alphanumeric code that's tied to your password. Whenever your password is reset, your security token is also reset.

After you reset your token, you can't use your old token in API applications and desktop clients.

Reset Security Token

1. Click 'Reset My Security Token'. If you have specified the 'Login IP Ranges' at the profile level, then you will not see this option. In that case you don't need the security token and you can skip the rest of the steps in this section

Get Your Security Token

Home | Salesforce x Reset My Security Token | Salesforce x +

asagarwal-msapi-dev-ed.lightning.force.com/lightning/settings/personal/ResetApiToken/home

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

Search Setup

Setup Home Object Manager

Quick Find

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token**
- Security Central

Display & Layout

Email

Chatter

Calendar & Reminders

Desktop Add-Ons

Reset My Security Token

Reset Security Token [Help for this Page](#)

When you access Salesforce from an IP address that isn't trusted for your company, and you use a desktop client or the API, you need a security token to log in. What's a security token? It's a case-sensitive alphanumeric code that's tied to your password. Whenever your password is reset, your security token is also reset.

After you reset your token, you can't use your old token in API applications and desktop clients.

[Reset Security Token](#)

1. Click 'Reset Security Token'. The security token will be emailed to your email address

Get Your Security Token

The screenshot shows a web browser window with the URL `asagarwal-msapi-dev-ed.lightning.force.com/lightning/settings/personal/ResetApiToken/home?url=%2F_ui%2Fsystem%2Fsecurity%2FResetApiTokenConfirm%3FretURL%3...`. The page title is "Reset My Security Token | Sales". The user is logged in as "Guest". The navigation menu includes "Sales", "Home", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", and "More". The left sidebar shows "My Personal Information" with sub-items: "Advanced User Details", "Approver Settings", "Authentication Settings for External Systems", "Change My Password", "Connections", "Grant Account Login Access", "Language & Time Zone", "Login History", "Personal Information", "Reset My Security Token" (highlighted), and "Security Central". Below these are "Display & Layout", "Email", "Chatter", and "Calendar & Reminders". The main content area is titled "Reset My Security Token" and contains a "Check Your Email" section. A green success message reads: "We sent a new security token to the email address for your account, asagarwal@...com." A red box highlights the text: "1. The security token will be sent to the email address associated to your user account".

Get Your Security Token

The screenshot shows a Gmail interface with an email from support@salesforce.com. The email content includes the following text:

support@salesforce.com <support@salesforce.com> 6:22 AM (0 minutes ago) ☆ ↶ ⋮
to me ▾

We've sent you a new Salesforce security token because you recently changed your password or requested to reset your security token. Use this updated security token with API or desktop clients that require it.

Username: ashish@asagarwal-msapi-dev-ed.com
Security token (case-sensitive): VM [REDACTED] jVZ7

For more information [ViewHelpDoc?id=user_security_token.htm](#)

Buttons: Reply, Forward

A red box highlights the instruction: "1. Navigate to your inbox and copy and paste the security token in a text editor".

Objectives



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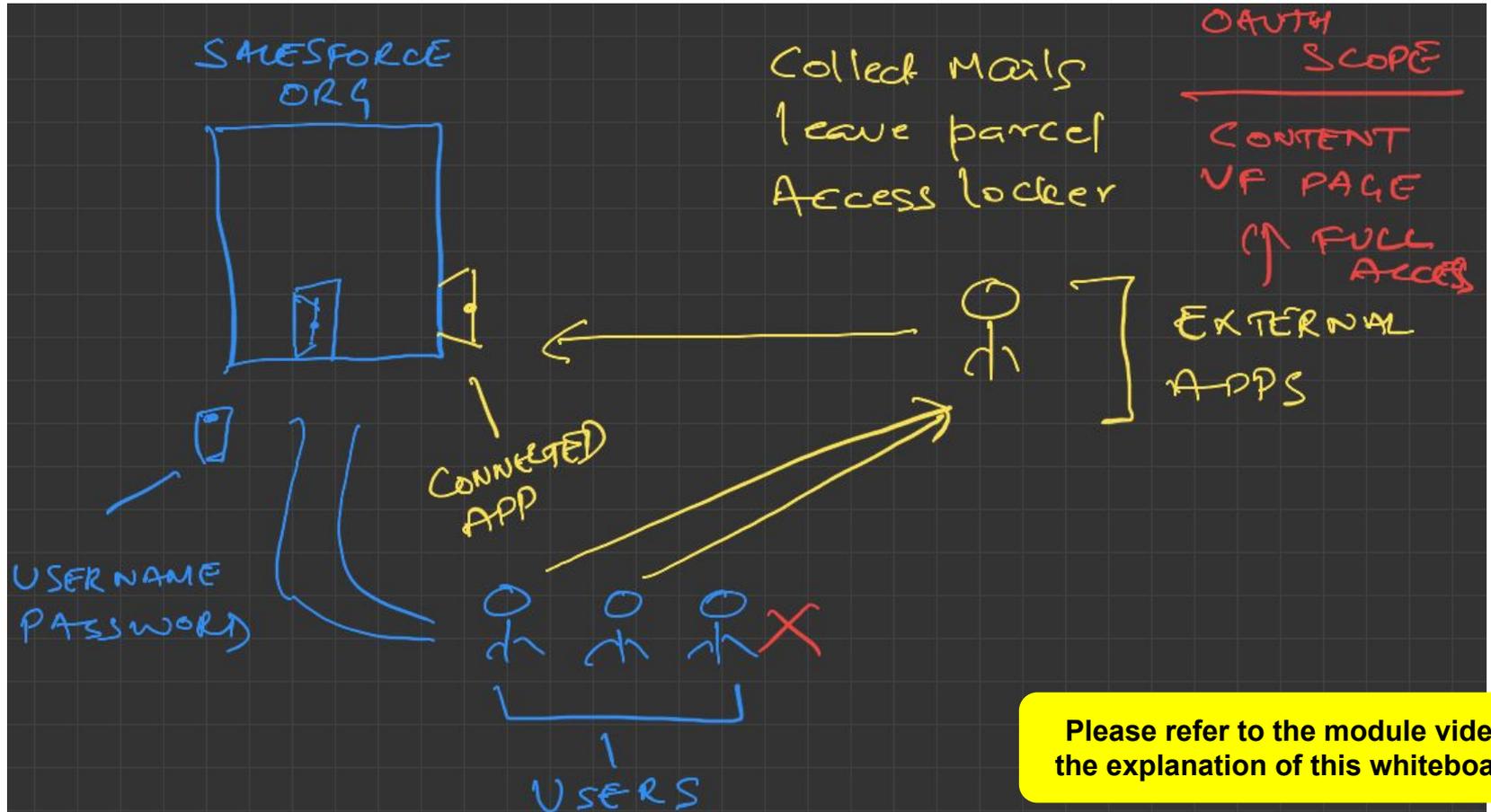


Basics Of Postman

Create Connected App In Salesforce

- To connect to Salesforce from External Apps, you need to create a Connected App
- You can then define which users can use this Connected App to connect to Salesforce from External Apps
- You can also define what these users can do through the Connected App.
 - This acts as an additional layer of security on top of the profiles, permission sets and sharing rules that you have defined in your Org
- For more information on Connected App, you may also want to refer to [this Salesforce docs page](#)

Create Connected App In Salesforce



Create Connected App In Salesforce

The screenshot shows the Salesforce user interface. At the top, there are browser tabs and a search bar. The main navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Setup' button in the top right corner, with the text '1. Click on 'Setup'' next to it. Below the navigation bar, the 'Reset My Security Token' page is visible. The left sidebar contains a 'Quick Find' search box and a list of navigation items, with 'Reset My Security Token' selected. The main content area displays the 'Reset Security Token' page, which includes a warning message and a 'Reset Security Token' button. At the bottom right, a yellow callout box contains the text 'Now, Let's create a Connected App in Salesforce'. The URL at the bottom of the page is 'https://asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home?setupApp=all'.

Now, Let's create a Connected App in Salesforce

Create Connected App In Salesforce

The screenshot shows the Salesforce App Manager interface. The browser address bar indicates the URL is `asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home`. The user is logged in as 'Guest'. The navigation menu shows 'Setup', 'Home', and 'Object Manager'. The 'Home' tab is active, and the search box contains 'App Manager'. The 'App Manager' link is highlighted in the left sidebar. The main content area shows the 'Lightning Experience App Manager' with a table of apps. The 'New Connected App' button is highlighted in a red box. A red box highlights the search box and the 'App Manager' link, with an arrow pointing to the search box and another arrow pointing to the 'App Manager' link. A red box highlights the 'New Connected App' button. A red box highlights the 'App Manager' link in the sidebar.

1. Within 'Home' tab type 'App Manager' in the search box and click the link

2. click 'New Connected App'

	Description	Last Modified D...	App ...	Visi...		
1	All Tabs	AllTabSet	11/10/2021, 1:19 AM	Classic		
2	Analytics Studio	Insights	Build Tableau CRM dashboards and apps	11/10/2021, 1:19 AM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/10/2021, 1:19 AM	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	11/10/2021, 1:21 AM	Lightning	✓
5	Community	Community	Salesforce CRM Communities	11/10/2021, 1:19 AM	Classic	✓
6	Content	Content	Salesforce CRM Content	11/10/2021, 1:19 AM	Classic	✓
7	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	11/10/2021, 1:19 AM	Lightning	✓
8	Marketing	Marketing	Best-in-class on-demand marketing automation	11/10/2021, 1:19 AM	Classic	✓
9	Platform	Platform	The fundamental Lightning Platform	11/10/2021, 1:19 AM	Classic	
10	Queue Management	QueueManagement	Create and manage queues for your business.	11/10/2021, 1:19 AM	Lightning	✓
11	Sales	Sales	The world's most popular sales force automation (SFA) solution	11/10/2021, 1:19 AM	Classic	
12	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	11/10/2021, 8:09 PM	Lightning	✓
13	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	11/10/2021, 8:09 PM	Lightning	✓
14	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	11/10/2021, 1:19 AM	Classic	✓

Create Connected App In Salesforce

Manage Connected Apps | Sales | Your new Salesforce security tok...

asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApplication/page?address=%2Fapp%2Fmgmt%2Fforceconnectedapps%2FforceAppEdit.apexp%3FconnectedAppId%3D0H45j000...

Logged in as Ashish Agarwal (ashish@asagarwal-msapi-dev-ed.com) Log out as Ashish Agarwal

Ashish Agarwal

Search Setup

Setup Home Object Manager

App Manager

Apps

App Manager

Didn't find what you're looking for?
Try using Global Search.

SETUP

Manage Connected Apps

Connected App Name
Postman

Save Cancel

Basic Information

Connected App Name

API Name

Contact Email

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

Enable for Device Flow

Callback URL

Help for this Page

Required Information

1. Specify the 'Connected App Name', 'API Name' and 'Contact Email'

2. Scroll down a bit

Create Connected App In Salesforce

The screenshot shows the Salesforce App Manager setup page for a new connected app. The page is titled 'App Manager' and is under the 'API (Enable OAuth Settings)' section. The 'Enable OAuth Settings' checkbox is checked. The 'Callback URL' field contains 'https://localhost:8080'. The 'Available OAuth Scopes' list includes 'Full access (full)', which is selected in the 'Selected OAuth Scopes' list. The 'Secret for Web Server Flow' and 'Secret for Refresh Token Flow' checkboxes are checked. The page is annotated with five numbered steps in red boxes:

1. Check 'Enable OAuth Settings'
2. Specify 'Callback URL'. Just specify the value <https://localhost:8080>. This will not be used
3. Select 'Full Access (full)' from 'Available OAuth Scopes' and move it to 'Selected OAuth Scopes'
4. Leave these two values checked for now
5. Scroll down

A yellow callout box on the left contains the text: **OAuth (Open Authentication) is an open-standard authorization protocol for secure designated access.**

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for managing a connected app. The browser tabs include 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'Manage Connected Apps | Salesforce', and 'Your new Salesforce security token...'. The address bar shows the URL: 'asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApplication/page?address=%2Fapp%2Fmgmt%2Fforceconnectedapps%2FforceAppEdit.apexp%3FapplicationId%3D06P5j000000s...'. The user is logged in as 'Guest'. The page title is 'Manage Connected Apps'. The left sidebar contains a 'Quick Find' search bar and a navigation menu with categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS, and Apps (App Manager, AppExchange Marketplace, Connected Apps, Connected Apps OAuth). The main content area is titled 'Manage Connected Apps' and contains the following settings:

- Apex Plugin Class: [Text Field]
- Run As: [Text Field]
- Mobile App Settings**
 - Mobile Start URL: [Text Field]
 - PIN Protect:
 - App Platform: [Dropdown]
 - Restrict to Device Type: [Dropdown]
 - App Version: [Text Field]
 - Minimum OS Version: [Text Field]
 - Private App:
 - App Binary URL: [Text Field]
- Push Messaging Enabled:
- Enable subscription to notification types:
- Canvas App Settings**
 - Canvas:

At the bottom of the settings area, there are 'Save' and 'Cancel' buttons. A red box highlights the 'Save' button with the text '1. Click on 'Save''.

Create Connected App In Salesforce

The screenshot shows the Salesforce App Manager interface. The browser tabs include 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'App Manager | Salesforce', and 'Your new Salesforce security token'. The URL is 'asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/page?address=%2Fapp%2Fmgmt%2Fforceconnectedapps%2FforceAppEdit.apexp%3FretURL%3D%252Fsetup%252FNav...'. The user is logged in as 'Guest'. The page title is 'App Manager' and the sub-page title is 'New Connected App'. A red box highlights the 'Continue' button. A yellow callout box at the bottom right contains the text: 'It may take up to 10 minutes for the changes to reflect. Let's have a cup of coffee ☕'.

Home | Salesforce | Reset My Security Token | Salesforce | App Manager | Salesforce | Your new Salesforce security token | +

asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/page?address=%2Fapp%2Fmgmt%2Fforceconnectedapps%2FforceAppEdit.apexp%3FretURL%3D%252Fsetup%252FNav...

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

Search Setup

Setup Home Object Manager

App Manager

Apps

App Manager

Didn't find what you're looking for?
Try using Global Search.

SETUP App Manager

New Connected App [Help for this Page](#)

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

Continue Cancel

1. Click 'Continue'

It may take up to 10 minutes for the changes to reflect. Let's have a cup of coffee ☕

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for 'Manage Connected Apps'. The main content area displays details for a connected app named 'Postman'. The details include:

- Connected App Name: Postman
- Version: 1.0
- API Name: Postman
- Created Date: 11/11/2021, 2:14 AM
- Contact Email: harish21@gmail.com
- Contact Phone: 9591201285
- Last Modified Date: 11/11/2021, 2:14 AM
- Description: Info URL

Below the details, the 'API (Enable OAuth Settings)' section is visible, showing the Consumer Key and Consumer Secret. The Consumer Key is highlighted with a red box and a callout box containing the instruction: '1. Click 'Copy' to copy the Consumer Key & paste in a text editor. We will need to use it later'. The Consumer Secret is also highlighted with a red box and a callout box containing the instruction: '2. Click 'Click to reveal' to show the Consumer Secret'.

Navigation and search options are visible at the top, including 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'Manage Connected Apps | Salesforce', and 'Your new Salesforce security token | Salesforce'. The user profile 'Ashish Agarwal' is shown in the top right corner.

1. Click 'Copy' to copy the Consumer Key & paste in a text editor. We will need to use it later

2. Click 'Click to reveal' to show the Consumer Secret

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for 'Manage Connected Apps'. The main content area displays details for a connected app named 'Postman'. A red box highlights the 'Manage' button with the text '2. Click 'Manage''. Below the app details, the 'API (Enable OAuth Settings)' section is visible, showing a 'Consumer Key' and a 'Consumer Secret'. A red box highlights the 'Copy' button next to the 'Consumer Secret' with the text '1. Click 'Copy' to get the Consumer Secret & paste in a text editor. We will need to use it later together with the Consumer Key'.

Home | Salesforce | Reset My Security Token | Salesforce | Manage Connected Apps | Salesforce | Your new Salesforce security token |

asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApplication/page?address=%2Fapp%2Fmgmt%2Fforceconnectedapps%2FforceAppDetail.apexp%3FretURL%3D%252Fsetup%252F...

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

App Manager

AppExchange Marketplace

> Connected Apps

Connected Apps OAuth

Manage Connected Apps

Connected App Name: Postman

« Back to List: Custom Apps

Edit Delete Manage

2. Click 'Manage'

Version	1.0
API Name	Postman
Created Date	11/11/2021, 2:14 AM
By	Harish Kumar Shankar
Contact Email	harish21@gmail.com
Contact Phone	9591201285
Last Modified Date	11/11/2021, 2:14 AM
By	Harish Kumar Shankar
Description	Info URL

▼ API (Enable OAuth Settings)

Consumer Key	3MVG3pRzvMkJMb6mEgZ7mVpXqS.yizrx4gx09OWPTu6AunFwMBh6j7SVmkDLz06FT2Nbcc3pC_tuaOrSQc4q	Consumer Secret	402EA8BDDC613FE3F5FD515590CBD35542AE48AC413D8C4F097CF572698FA6736
	Copy		Copy

Selected OAuth Scopes: Full access (full)

Enable for Device Flow:

Require Secret for Refresh Token Flow:

Token Valid for: 0 Hour(s)

1. Click 'Copy' to get the Consumer Secret & paste in a text editor. We will need to use it later together with the Consumer Key

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for a Connected App named 'Postman'. A red box highlights the 'Edit Policies' button. The page is divided into several sections: System Info, Basic Information, OAuth Policies, and Session Policies. The left sidebar contains navigation options like Setup Home, Service Setup Assistant, and Connected Apps.

1. Click 'Edit Policies'

System Info			
Installed By	Harish Kumar Shankar	Installed Date	11/11/2021, 2:14 AM
Last Modified By	Harish Kumar Shankar	Last Modified Date	11/11/2021, 2:14 AM

Basic Information			
Info URL		Start URL	
		Mobile Start URL	

OAuth Policies			
Permitted Users	All users may self-authorize	IP Relaxation	Enforce IP restrictions
Usage	View OAuth Usage	Refresh Token Policy:	Immediately expire refresh token
Single Logout	Single Logout disabled		
Application Permissions:	Full access		

Session Policies	

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for a Connected App named 'Postman'. The 'OAuth Policies' section is expanded, showing a dropdown menu for 'Permitted Users' with 'Admin approved users are pre-authorized' selected. A red box highlights the dropdown menu and a text box with instructions. A yellow box contains a note about the step's purpose.

1. Under OAuth Policies for 'Permitted Users' select the value 'Admin approved users are pre-authorized'

This step allows only specific users to connect to salesforce via connected app

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for a Connected App named 'Postman'. A modal dialog box is open, displaying a warning message: 'Enabling this option will result in all users currently using this app being denied access. Please reference the Connected Apps OAuth Usage Report if you are unsure who is using the app.' The dialog has 'OK' and 'Cancel' buttons. A red box highlights the 'OK' button with the text '1. Click 'OK''. Below the dialog, the 'Connected App Edit' page is visible, showing fields for 'Start URL', 'Mobile Start URL', 'Permitted Users' (set to 'All users may self-authorize'), 'IP Relaxation' (set to 'Enforce IP restrictions'), and 'Refresh Token Policy' (set to 'Immediately expire refresh token'). A red box highlights the bottom of the page with the text '2. Scroll down'. The left sidebar shows navigation options like 'Setup Home', 'Service Setup Assistant', and 'Connected Apps'.

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for configuring a Connected App. The browser address bar indicates the URL: `asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F_ui%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2FforceConnectedApplicationPage%2Ffe%3Fapp...`. The user is logged in as 'Guest'. The left sidebar contains navigation options such as 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (Users, Data, Email), 'PLATFORM TOOLS', and 'Apps' (App Manager, AppExchange Marketplace, Connected Apps, Connected Apps OAuth). The main content area is titled 'SETUP' and contains the following sections:

- Basic Information:** Includes 'Start URL' and 'Mobile Start URL' text boxes.
- OAuth Policies:** Includes 'Permitted Users' (dropdown menu), 'IP Relaxation' (dropdown menu), 'Enable Single Logout' (checkbox), and 'Refresh Token Policy' (radio button).
- Session Policies:** Includes 'Timeout Value' (dropdown menu) and 'High assurance session required' (checkbox).
- Custom Connected App Handler:** Includes 'Apex Plugin Class' and 'Run As' text boxes.
- User Provisioning Settings:** Includes 'Enable User Provisioning' (checkbox).

At the bottom of the configuration area, there are 'Save' and 'Cancel' buttons. A red box highlights the 'Save' button with the text '1. Click 'Save''.

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for a Connected App named "Postman". The page is titled "Connected App" and "Postman". The "Connected App Detail" section shows a version of 1 and a description. The "System Info" section displays installation details: Installed By: Harish Kumar Shankar, Installed Date: 11/11/2021, 2:14 AM, Last Modified By: Harish Kumar Shankar, Last Modified Date: 11/11/2021, 2:48 AM. The "Basic Information" section includes fields for Info URL, Start URL, and Mobile Start URL. The "OAuth Policies" section shows Permitted Users (Admin approved users are pre-authorized), Usage (View OAuth Usage), Single Logout (Single Logout disabled), Application Permissions (Full access), IP Relaxation (Enforce IP restrictions), and Refresh Token Policy (Immediately expire refresh token). The "Session Policies" section is partially visible. A red box with a callout arrow points to the bottom right of the page with the text "1. Scroll down".

Home | Salesforce | Reset My Security Token | Salesforce | Lightning Experience | Salesforce | Your new Salesforce security token | +

asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F_ui%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2FforceConnectedApplicationPage%2Fd%3Fapp...

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

Search Setup

Setup Home | Home | Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Apps
 - App Manager
 - AppExchange Marketplace
 - > Connected Apps
 - Connected Apps OAuth

Connected App

Postman

Help for this Page

Connected App Detail

Edit Policies

Version 1

Description

System Info

Installed By	Harish Kumar Shankar	Installed Date	11/11/2021, 2:14 AM
Last Modified By	Harish Kumar Shankar	Last Modified Date	11/11/2021, 2:48 AM

Basic Information

Info URL	Start URL
	Mobile Start URL

OAuth Policies

Permitted Users	Admin approved users are pre-authorized	IP Relaxation	Enforce IP restrictions
Usage	View OAuth Usage	Refresh Token Policy:	Immediately expire refresh token
Single Logout	Single Logout disabled		
Application Permissions:	Full access		

Session Policies

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for configuring a Connected App. The browser tabs include 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'Lightning Experience | Salesforce', and 'Your new Salesforce security token | Salesforce'. The URL is 'asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F_ui%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2FforceConnectedApplicationPage%2Fd%3Fapp...'. The user is logged in as 'Guest'. The page title is 'Setup' and the search bar contains 'Search Setup'. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'SETUP' and contains several sections: 'Session Policies' (Timeout Value), 'Custom Connected App Handler' (Apex Plugin Class, Run As), 'User Provisioning Settings' (Enable User Provisioning), 'Trusted IP Range for OAuth Web Server Flow' (No application-defined IP ranges), 'Profiles' (No profiles associated with this app, with a 'Manage Profiles' button), 'Permission Sets' (No permission sets associated with this app, with a 'Manage Permission Sets' button), and 'Custom Attributes' (No Custom Attributes, with a 'New' button). A red box highlights the 'Manage Profiles' button with the text '1. Click 'Manage Profiles''. A yellow callout box at the bottom right contains the text 'Now we will enable only specific profiles to be able to connect through this Connected App'.

Home | Salesforce x Reset My Security Token | Salesforce x Lightning Experience | Salesforce x Your new Salesforce security token | Salesforce +

asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F_ui%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2FforceConnectedApplicationPage%2Fd%3Fapp... Guest

Ashish Agarwal
Salesforce Architect, Trainer & Blogger

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth

SETUP

Session Policies

Timeout Value

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

Enable User Provisioning

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles

Manage Profiles

No profiles associated with this app.

Permission Sets

Manage Permission Sets

No permission sets associated with this app.

Custom Attributes

New

No Custom Attributes

1. Click 'Manage Profiles'

Now we will enable only specific profiles to be able to connect through this Connected App

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface. The browser tabs include 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'Lightning Experience | Salesforce', and 'Your new Salesforce security token...'. The address bar shows the URL: 'asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ManageProfiles/page?address=%2F_ui%2Fplatform%2Fconnectedapp%2FprofileConnectedAppAssign%3FretURL%3D%252F_ui%252Fcore...'. The user is logged in as 'Guest'. The page title is 'Setup' and the breadcrumb is 'Home > Object Manager > Profiles'. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the 'Users' section is expanded. The main content area shows a list of user profiles with checkboxes. The 'System Administrator' profile is selected with a blue checkmark. A red callout box points to this profile with the text: '1. Select the Profile of the user who will be connecting through REST API'. At the bottom right, there are 'Save' and 'Cancel' buttons. A second red callout box points to the 'Save' button with the text: '2. Hit 'Save''.

Profile Name	Selected
Force.com - Free User	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>
High Volume Customer Portal	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Identity User	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>
Read Only	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>
Standard User	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>
Work.com Only User	<input type="checkbox"/>

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface for configuring a Connected App. The browser tabs include 'Home | Salesforce', 'Reset My Security Token | Salesforce', 'Lightning Experience | Salesforce', 'Profiles | Salesforce', and 'Your new Salesforce security token | Salesforce'. The address bar shows the URL: 'asagarwal-msapi-dev-ed.lightning.force.com/lightning/setup/ConnectedApp/page?address=%2F_ui%2Fcore%2Fapplication%2Fforce%2Fconnectedapp%2FforceConnectedApplicationPage%2Fd%3Fapp...'. The user is logged in as 'Guest'. The page title is 'Setup' and the current page is 'Home' under 'Object Manager'. The left sidebar contains a 'Quick Find' search bar and a navigation menu with categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps, App Manager, AppExchange Marketplace, Connected Apps). The main content area is titled 'Run As' and contains several sections: 'User Provisioning Settings' with an 'Enable User Provisioning' checkbox; 'Trusted IP Range for OAuth Web Server Flow' with a text area containing 'No application-defined IP ranges'; 'Profiles' with a 'Manage Profiles' button and a table listing 'System Administrator' as the selected profile; 'Manage Permission Sets' with a text area; 'Custom Attributes' with a 'New' button and a text area containing 'No Custom Attributes'; and 'OAuth Custom Scopes' with a 'Manage OAuth Custom Scopes' button and a text area containing 'No OAuth custom scopes associated with this app'. A red callout box highlights the 'System Administrator' profile in the Profiles section with the text '1. Click 'System Administrator''. At the bottom of the page, there is a 'Back To Top' link and a note 'Always show me more records per related list'.

1. Click 'System Administrator'

Create Connected App In Salesforce

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Profiles' selected. The main content area displays the 'Profiles' configuration page, which is divided into two columns of permissions. A red box highlights the 'API Enabled' permission in the left column, which is checked. A text box is overlaid on the screenshot, providing instructions on this permission.

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

SETUP

Profiles

Administrative Permissions

Macro	Work Type Groups
Macro Actions	Work Type Group Members
Macro Instructions	
Access Conversation Entries <input checked="" type="checkbox"/>	Manage Package Licenses <input checked="" type="checkbox"/>
Access Experience Management <input type="checkbox"/>	Manage Password Policies <input checked="" type="checkbox"/>
Access Libraries <input checked="" type="checkbox"/>	Manage Profiles and Permission Sets <input checked="" type="checkbox"/>
Add People to Direct Messages <input checked="" type="checkbox"/>	Manage Promoted Search Terms <input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI <input type="checkbox"/>	Manage Prompts <input type="checkbox"/>
Allow user to modify Private Connections <input type="checkbox"/>	Manage Public Classic Email Templates <input checked="" type="checkbox"/>
Apex REST Services <input checked="" type="checkbox"/>	Manage Public Documents <input checked="" type="checkbox"/>
API Enabled <input checked="" type="checkbox"/>	Manage Public List Views <input checked="" type="checkbox"/>
Assign Permission Sets <input checked="" type="checkbox"/>	Manage Release Updates <input checked="" type="checkbox"/>
Create and Customize Dashboards <input checked="" type="checkbox"/>	Manage Reports <input checked="" type="checkbox"/>
Create and Customize List Views <input checked="" type="checkbox"/>	Manage Roles <input checked="" type="checkbox"/>
Create and Customize Reports <input checked="" type="checkbox"/>	Manage Content <input checked="" type="checkbox"/>
	Manage Knowledge <input checked="" type="checkbox"/>
	Manage Center <input type="checkbox"/>
	Manage Permission Sets <input type="checkbox"/>
	Manage Applications <input type="checkbox"/>
	Manage Sharing <input checked="" type="checkbox"/>
	Manage Synonyms <input checked="" type="checkbox"/>
	Manage Tableau CRM Subscriptions <input checked="" type="checkbox"/>

1. Ensure that the profile of the user with which you want to connect using REST API has the 'API Enabled' permission checked. If you are connecting with the user whose profile is 'System Administrator', this is checked by default

Objectives



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer

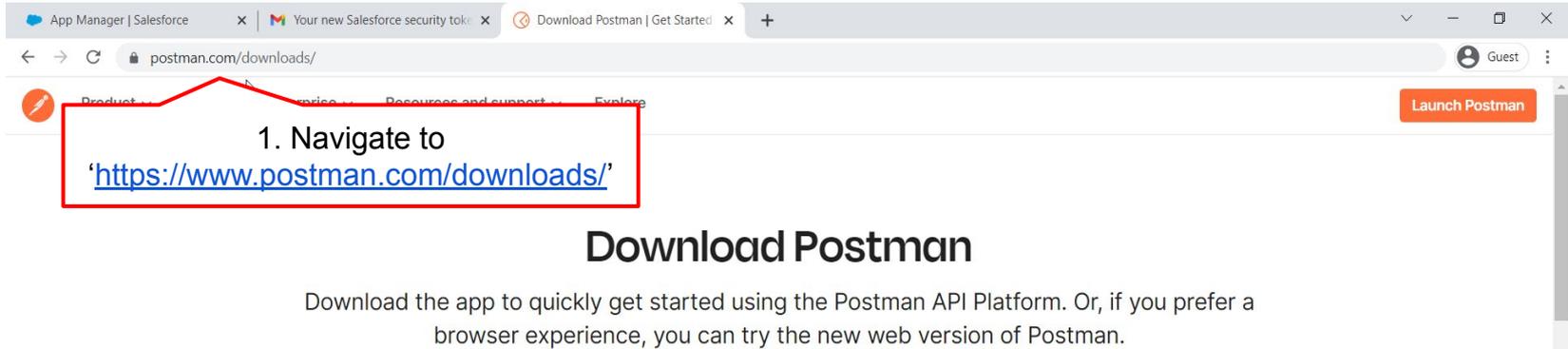


Basics Of Postman

Postman

- Postman is application which aids in development and testing of API
- It has a **Graphical User Interface** (GUI) that makes it simple and easy to make API calls
- In the context of this training, where we will be learning Salesforce APIs, Postman will make it easier for you to work across different Salesforce Orgs
- It has both desktop and cloud version. We will be using the desktop version for this course. You can choose the version as per your preference

Install Postman On Your Computer



1. Navigate to ['https://www.postman.com/downloads/'](https://www.postman.com/downloads/)

Download Postman

Download the app to quickly get started using the Postman API Platform. Or, if you prefer a browser experience, you can try the new web version of Postman.

The Postman app

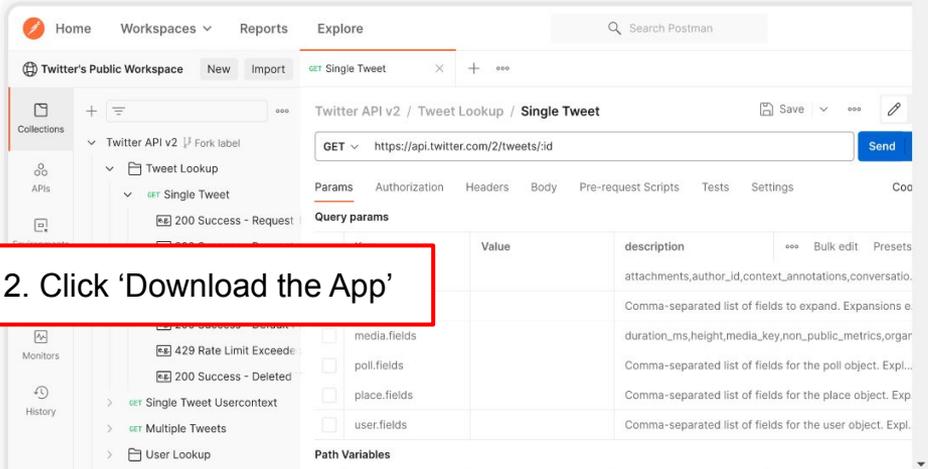
The ever-improving Postman app (a new release every two weeks) gives you a full-featured Postman experience.

 Download the App

By downloading and using Postman, I agree to the [Privacy Policy](#) and [Terms](#).

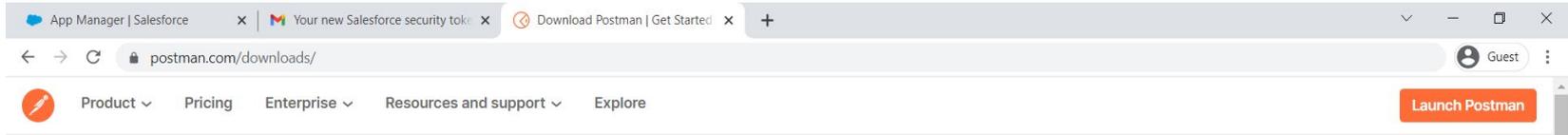
Version 8.12.4 · [Release Notes](#) · [Product Roadmap](#)

Not your OS? Download for Mac ([macOS](#)) or Linux ([x64](#))



2. Click 'Download the App'

Install Postman On Your Computer

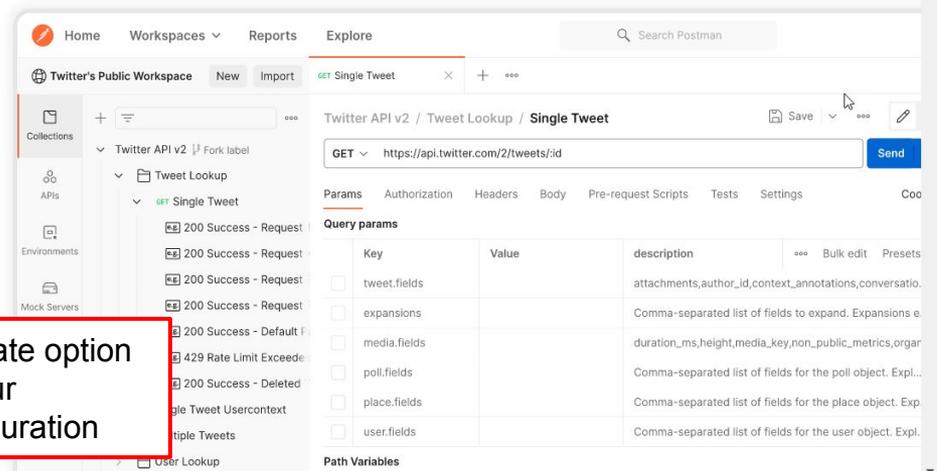
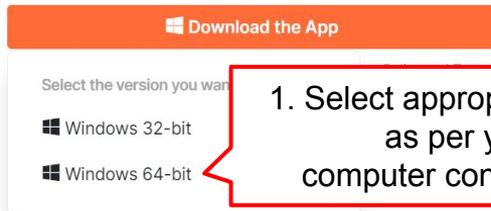


Download Postman

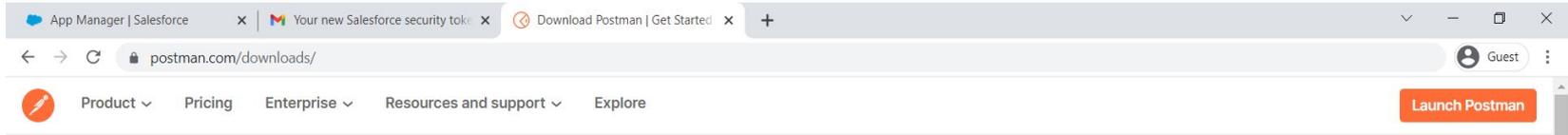
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The Postman app

The ever-improving Postman app (a new release every two weeks) gives you a full-featured Postman experience.



Install Postman On Your Computer



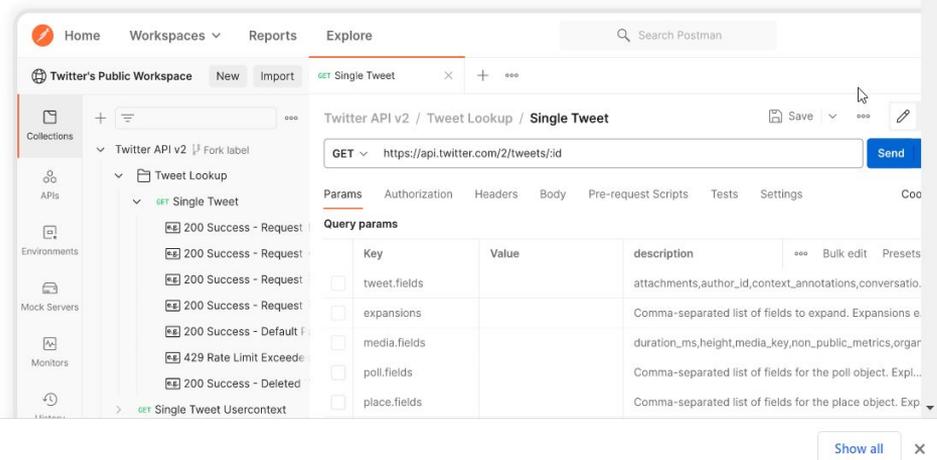
Download Postman

Download the app to quickly get started using the Postman API Platform. Or, if you prefer a browser experience, you can try the new web version of Postman.

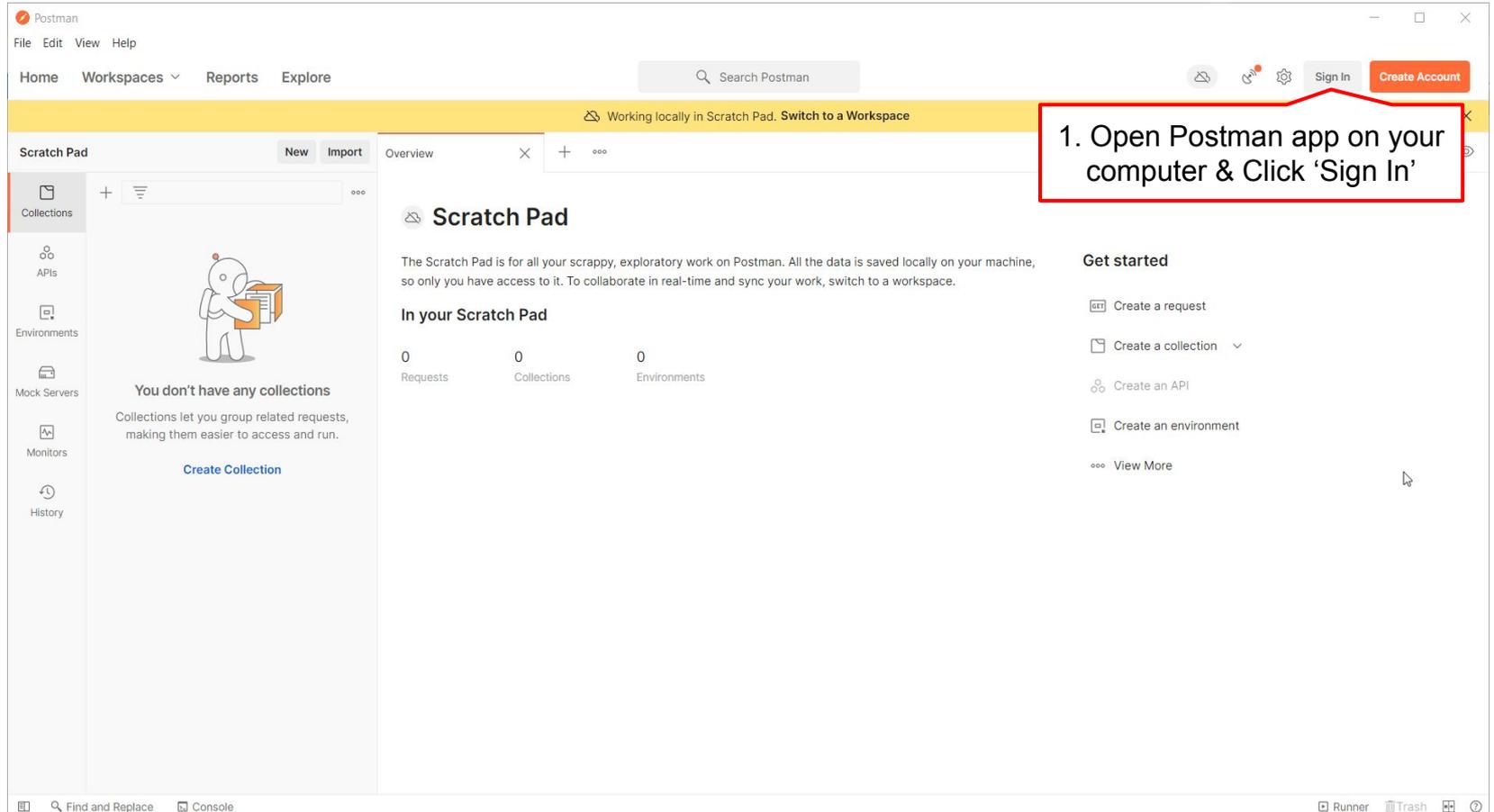
The Postman app

The ever-improving Postman app (a new release every two weeks) gives you a full-featured Postman experience.

1. Click '.exe' file and follow the instructions to install Postman on your computer



Install Postman On Your Computer



Install Postman On Your Computer

The screenshot shows a web browser window with the URL `identity.getpostman.com/login`. The page features a central login form with the Postman logo at the top. The form includes fields for 'Email or Username' and 'Password', a 'Sign In' button, and a 'Sign in with Google' button. A link for 'Create Account instead?' is positioned next to the 'Sign In' button. Two red callout boxes are overlaid on the page: one pointing to the 'Create Account' link and another pointing to the 'Sign in with Google' button. The browser's address bar shows several tabs, including 'App Manager | Salesforce', 'Your new Salesforce security token', and 'Postman - Sign In'. The page footer contains the text '©2021 Postman, Inc. All rights reserved.' and links for 'Terms of use' and 'Privacy Policy'.

1. Click 'Create Account'

2. You can also sign up using a Google account

Install Postman On Your Computer

The screenshot shows the Postman sign-up page. On the left, a dark vertical banner features the Postman logo and the heading "Why Sign Up?". Below the heading is a list of three bullet points: "Organize all your API development within Postman Workspaces", "Sync your Postman data across devices", and "Backup your data to the Postman cloud". At the bottom of the banner is an illustration of two astronauts in space. The main content area is titled "Create Postman Account" and includes a "Sign In instead?" link. It contains three input fields: "Email" (with the value "ashish@asagarwal.com"), "Username" (with the value "asagarwal"), and "Password" (with masked characters "*****" and a "SHOW" link). Below the fields are two checkboxes: "Sign up to get product updates, news, and other marketing communications." (unchecked) and "Keep me signed in" (checked). A line of text states "By creating an account, I agree to the Terms and Privacy Policy." Below this are two buttons: an orange "Create free account" button and a blue "Sign up with Google" button. At the bottom, a small note says "You're redirected from the Postman desktop app on win32 10.0.19043 to sign in." Three red callout boxes with white text are overlaid on the page: the first points to the input fields, the second points to the "Create free account" button, and the third points to the "Sign up with Google" button.

App Manager | Salesforce | Your new Salesforce security toke | Postman - Sign Up

identity.getpostman.com/signup?auth_challenge=335e7ec568f7f95e62cbb924c239651acdf7ec90089053f5d997fa8bc6449&auth_device=app_native&auth_device_version=9.1.3&email=ashish%40asa... Guest

Sign in with Single Sign-On (SSO)

POSTMAN

Why Sign Up?

- Organize all your API development within Postman Workspaces
- Sync your Postman data across devices
- Backup your data to the Postman cloud
- It's free!

Create Postman Account [Sign In instead?](#)

Email
ashish@asagarwal.com

Username
asagarwal

Password SHOW

Sign up to get product updates, news, and other marketing communications.

Keep me signed in

By creating an account, I agree to the [Terms](#) and [Privacy Policy](#).

Create free account

or

Sign up with Google

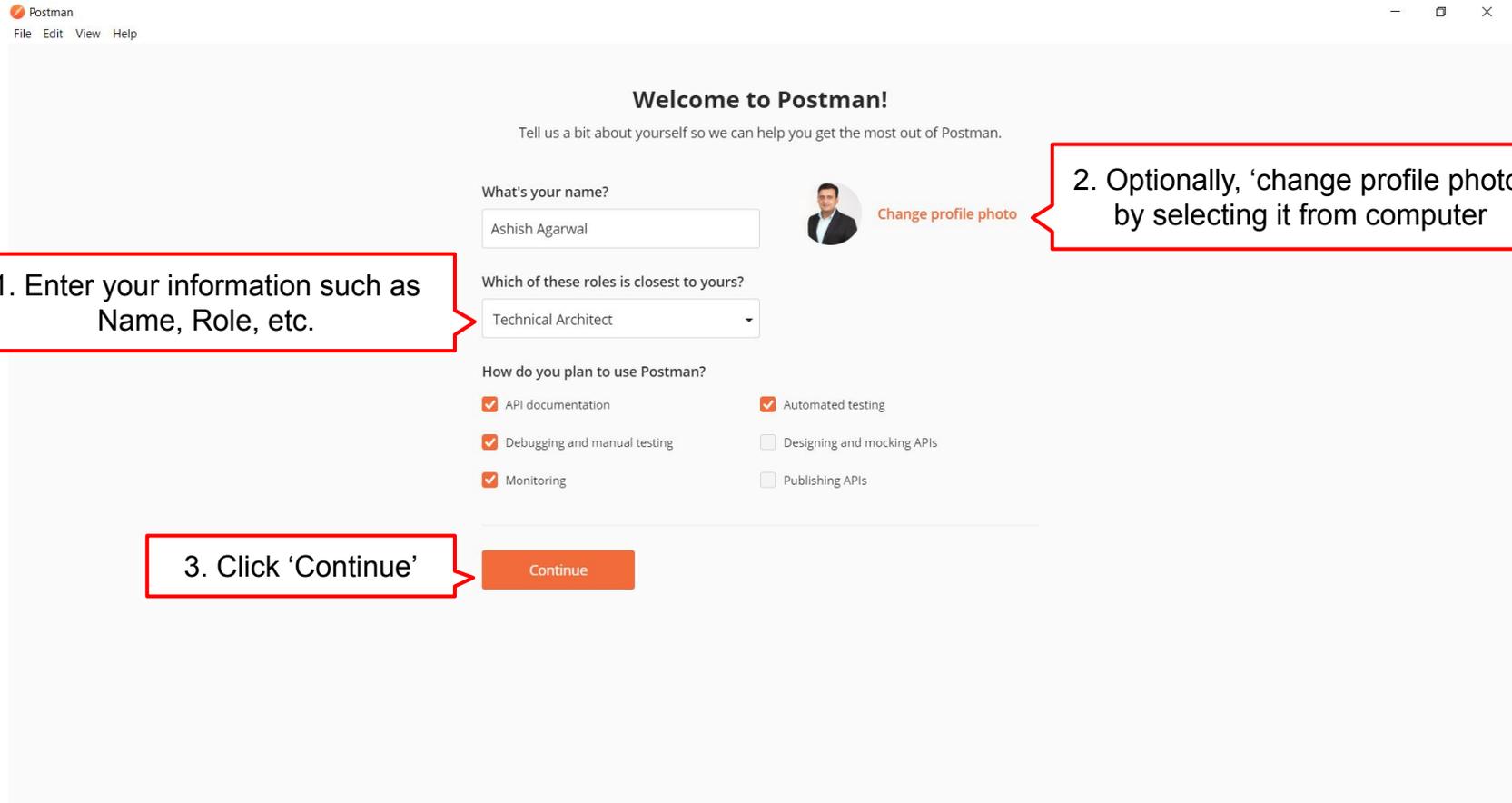
You're redirected from the Postman desktop app on win32 10.0.19043 to sign in.

1. Enter your email, username & password

2. Click 'Create free account'

3. Alternatively sign up with your Google account

Install Postman On Your Computer



The screenshot shows the Postman application window with a title bar containing 'Postman', 'File', 'Edit', 'View', and 'Help'. The main content area displays a 'Welcome to Postman!' message and a form for user registration. The form includes a name input field with 'Ashish Agarwal', a role selection dropdown set to 'Technical Architect', and a section for usage preferences with several checked options. A 'Continue' button is at the bottom.

Postman
File Edit View Help

Welcome to Postman!

Tell us a bit about yourself so we can help you get the most out of Postman.

What's your name?
Ashish Agarwal

Which of these roles is closest to yours?
Technical Architect

How do you plan to use Postman?

- API documentation
- Debugging and manual testing
- Monitoring
- Automated testing
- Designing and mocking APIs
- Publishing APIs

Change profile photo

Continue

1. Enter your information such as Name, Role, etc.

2. Optionally, 'change profile photo' by selecting it from computer

3. Click 'Continue'

Install Postman On Your Computer

Collaborate with teams

Join an existing team, create a new one or just explore on your own.

Bring your team to Postman and supercharge your API development

- ✓ Create a single source of truth for all your team's APIs
- ✓ Review and manage changes to an API using version-control and API versioning
- ✓ Monitor your API's health and get notified about any issues
- ✓ Make your APIs discoverable for faster onboarding



Create your own team

Team Name

Team URL

.postman.co

URL must have 6 - 64 characters, begin with a letter, and use only letters, numbers, and hyphens.

Continue

→ Continue Without a Team

1. Click 'Continue Without a Team' for now.

Install Postman On Your Computer

The screenshot shows the Postman web application interface. At the top, there is a navigation bar with the Postman logo, a menu (File, Edit, View, Help), and a search bar. Below the navigation bar, there are tabs for Home, Workspaces, API Network, Reports, and Explore. The main content area is divided into several sections:

- Left Sidebar:** Contains a 'Postman works best with teams' section with a 'Create Team' button, and a 'Help' section with links to Learning Center, Support Center, Bootcamp, and Community.
- Center:** Greeting 'Good afternoon, Ashish Agarwal!' with a 'Take a look around, get started when you're ready.' message. Below this is a 'Take a shortcut to sending requests' section with a 'Send a request' button. A modal window shows a GET request to 'https://postman-echo.com/get' with a table for Query Params.
- Right Sidebar:** Contains 'Announcements' and 'Activity Feed' sections. Below these is a 'Your team's activity will show up here' section with a 'Create Team' button.

Take a shortcut to sending requests

Send an HTTP request to any endpoint.

GET `https://postman-echo.com/get` [Send](#)

Params Auth Headers (7) Body Pre-req. Tests Settings [Cookies](#)

Query Params

KEY	VALUE	DESCRIPTION	...	Bulk Edit
Key	Value	Description		

[Send a request](#)

Get started with Postman

Start with something new

Create a new request, collection, or API in a workspace

[Create New](#) →

Import an existing file

Import any API schema file from your local drive or Github

[Import file](#) →

Objectives



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer



Basics Of Postman

Basics of Postman

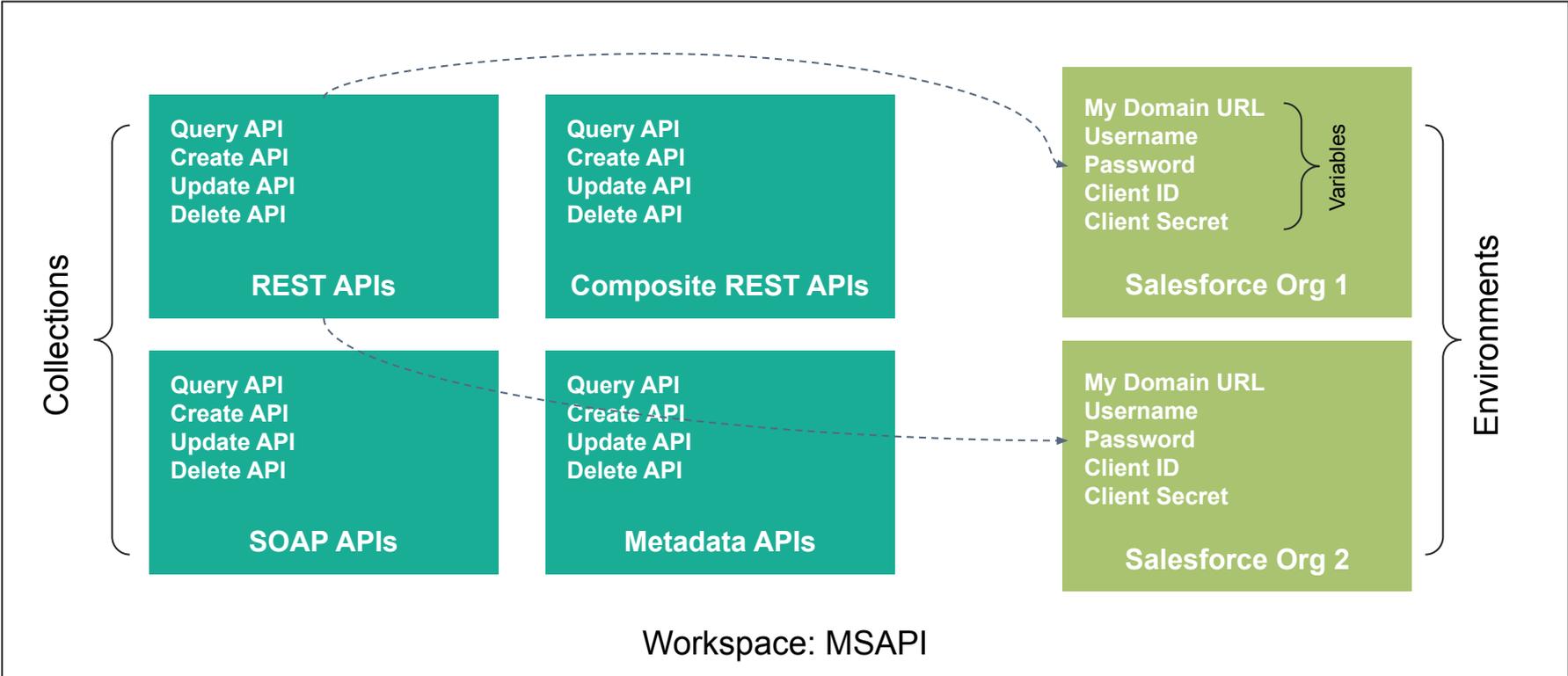
Let's understand some basic features in Postman to get started. Then we will also cover more useful features later in the course

- **Workspace** - Allows you to organize and collaborate on API projects with your team. Within each workspace you can share APIs, collections, environments, and other components of your work. For example, create different workspaces
 - when working on different projects or
 - when working for different clients
- **Collection** - Collections are like folders where you can save a group of API calls. They help you logically organize your API calls and will make it convenient to access. For example, create different collections
 - for different types of API request like REST API, SOAP API, Metadata API

Basics of Postman

- **Environment** - An environment is a set of variables you can use in your Postman requests. In Salesforce context, you can create different environments for different Salesforce Orgs and test your APIs against these different orgs
- **Variable** - Variables allow you to store and reuse values in your requests and scripts. By storing a value in a variable, you can reference it throughout your collections and requests. For example we will use variables to
 - Store the my domain URL, username, password, client id, client secret etc.

Basics of Postman



Basics of Postman

1. Click arrow besides 'Workspaces'

Good afternoon, Ashish Agarwal!

Take a look around, get started when you're ready.

Take a shortcut to sending requests

Send an HTTP request to any endpoint.

KEY	VALUE	DESCRIPTION	...	Bulk Edit
Key	Value	Description		

Send a request

Announcements

Activity Feed

Your team's activity will show up here

Get started by inviting people to your team.

Create Team

Let's create a workspace and collection to hold your requests for this course

Basics of Postman

The screenshot shows the Postman web application interface. At the top, there is a navigation bar with 'Home', 'Workspaces', 'API Network', 'Reports', and 'Explore'. A search bar is located in the top right. The main content area is divided into several sections: 'Announcements', 'Activity Feed', and a central workspace area. A red box highlights the 'Create Workspace' button in the 'Workspaces' section, with a text overlay that reads '1. Click 'Create Workspace''. Below this, there is a 'Send' button and a table for parameters. The table has columns for 'KEY', 'VALUE', 'DESCRIPTION', and 'Bulk Edit'. The 'KEY' column contains 'key' and the 'VALUE' column contains 'Value'. The 'DESCRIPTION' column contains 'Description'. Below the table, there is a 'request' button. On the right side, there is an illustration of two astronauts and a text box that says 'Your team's activity will show up here' and 'Get started by inviting people to your team.' Below this is a 'Create Team' button.

1. Click 'Create Workspace'

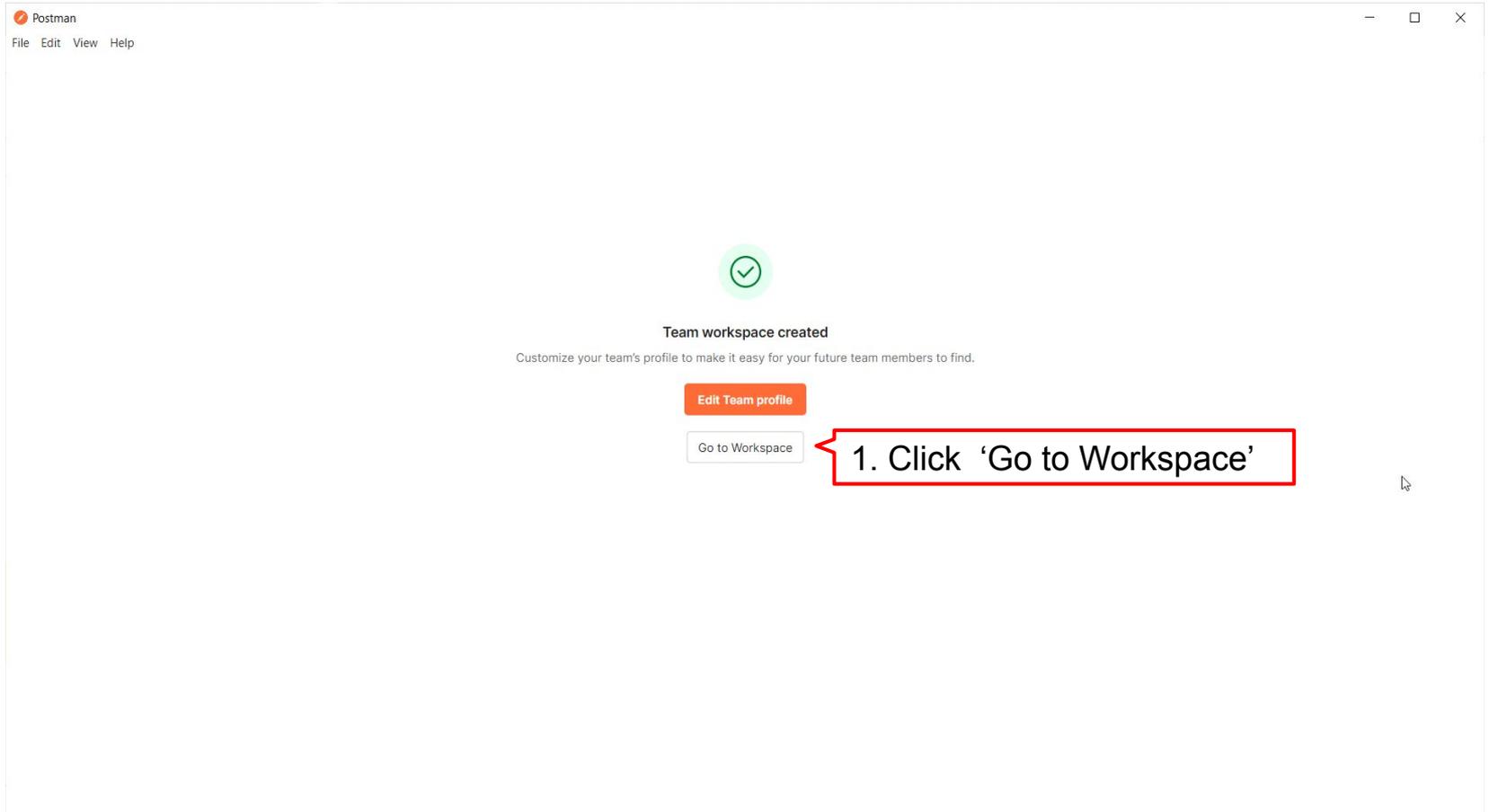
KEY	VALUE	DESCRIPTION	Bulk Edit
key	Value	Description	

Basics of Postman

The screenshot shows the Postman application interface with the 'Create workspace' dialog box open. The dialog box has a title bar with 'Postman' and window controls. Below the title bar is a navigation menu with 'Home', 'Workspaces', 'API Network', 'Reports', and 'Explore'. A search bar is located in the top right. The main content area of the dialog box is titled 'Create workspace' and contains the following fields and options:

- Name:** A text input field containing 'MSAPI'. A red callout box with the text '1. Add a Name 'MSAPI'' points to this field.
- Summary:** A text area containing 'Mastering Salesforce APIs request collections'. A red callout box with the text '2. A meaningful description' points to this field.
- Visibility:** A section with the heading 'Determines who can access this workspace.' and three radio button options:
 - Personal: Only you can access
 - Private: Only invited team members can access
 - Team: All team members can access
 - Public: Everyone can viewA red callout box with the text '3. Choose 'Team'' points to the 'Team' option.
- Information:** A blue box with an information icon and the text 'A team of your own will be created since you don't have one now.'
- Buttons:** Two buttons at the bottom: 'Create Workspace and Team' (highlighted in orange) and 'Cancel'. A red callout box with the text '4. Click 'Create Workspace and Team'' points to the orange button.

Basics of Postman



Basics of Postman

File Edit View Help

Home Workspaces API Network Reports Explore

Search Postman

Invite

Upgrade

MSAPI

New Import Overview

No Environment

Collections +

1. Click the '+' sign besides Collections

Media Authentication API

- POST Authentication
- POST Access Token
- GET User's Page
- GET Instagram Account
- GET New Request
- Sports team fixtures Sports Arena

Create a collection for your requests

A collection lets you group related requests and easily set common authorization, tests, scripts, and variables for all requests in it.

Create collection

Unwatch 1 Workspace Settings

In this workspace

- Requests
- Collections (0)
- APIs (0)
- Environments (0)
- Mock Servers (0)
- Monitors (0)

Recent contributors

People who contribute to this workspace will show up here.

Activity

Filter by Elements People

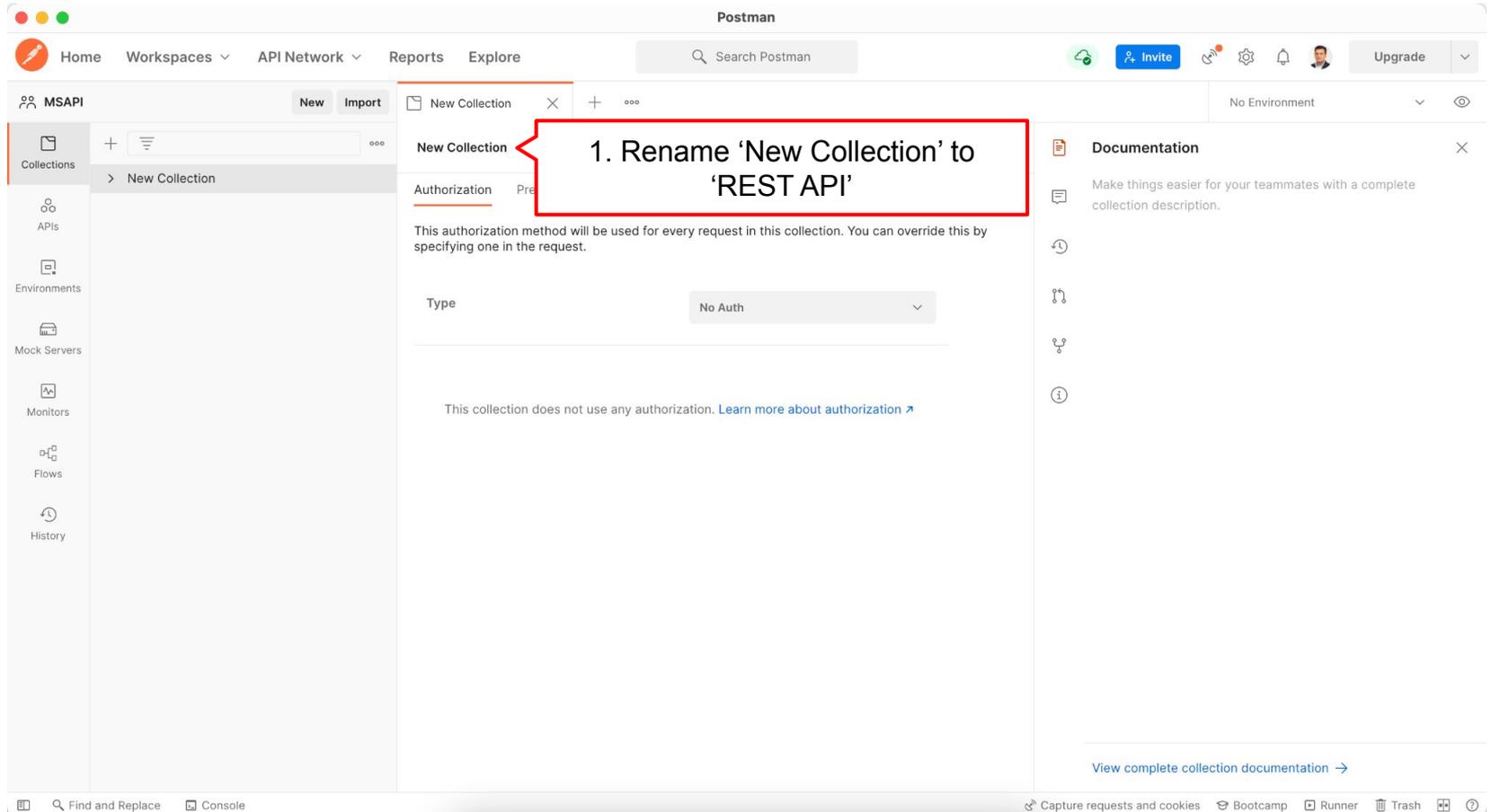
Today

Ashish Agarwal created this team workspace 3 mins ago

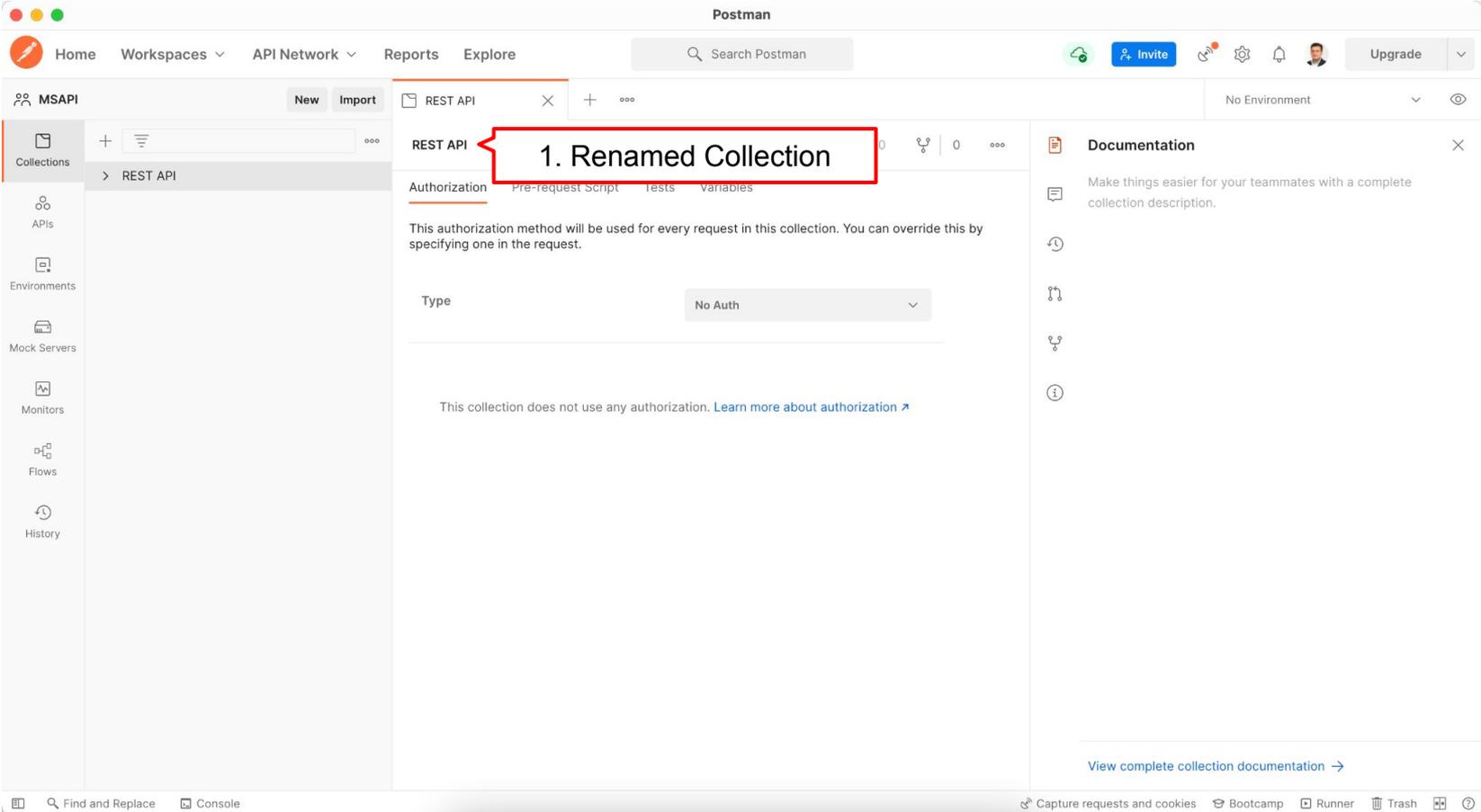
Find and Replace Console

Bootcamp Runner Trash

Basics of Postman



Basics of Postman



Basics of Postman

Postman

Home Workspaces API Network Reports Explore Search Postman

MSAPI New Import REST API Composite REST A... SOAP API Metadata API No Environment

Collections

- > Composite REST API
- > Metadata API
- > REST API
- > SOAP API

Environments

Mock Servers

Monitors

Flows

History

1. Follow the steps mentioned in the last 3 slides to create these 4 collections

Documentation

Make things easier for your teammates with a complete collection description.

This collection does not use any authorization. [Learn more about authorization](#)

Find and Replace Console Capture requests and cookies Bootcamp Runner Trash

Hurray !!! Now you are all set to explore the world of API's

Let's Recap



Sign Up For Developer Org



Edit/Validate My Domain



Get Your Security Token



Create Connected App In Salesforce



Install Postman On Your Computer



Basics Of Postman

It's Your Turn Now

- Sign Up For Developer Org
- Change My Domain
- Get Your Security Token
- Create Connected App In Salesforce
- Install Postman On Your Computer
- Create Workspace & Collections in Postman

Got Questions? Feedback?



Just post it as a comment in the discussion area below and we will get back to you!

