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# Phase 7: Integration & External Access

□ **Goal:** Connect Salesforce Insurance Portal with external systems (Payments, Insurance DB, Customer Portal).

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## Named Credentials

Store API credentials securely for:

**Payment Gateway API** (to confirm premium payments).

**Insurance Regulatory DB API** (to validate policy/claim authenticity).

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## External Services

Import schema definitions (Swagger/OpenAPI) to connect with:

**Insurance Verification Service**

**Third-party Claim Processing Tools**

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## Web Services (REST/SOAP)

**REST API** → Fetch/update external customer insurance status.

**SOAP API** → Legacy integration with government insurance system.

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## Callouts

Trigger external callouts when:

Claim is submitted → verify with Insurance Regulatory API.

Payment is confirmed → sync with payment provider.

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## Platform Events

Publish/subscribe model:

When claim is approved, publish an event.

Notify external billing system to process refund or settlement.

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## Change Data Capture (CDC)

Track changes in **Policy\_\_c** and **Claim\_\_c** objects.

Sync updates to external systems in **real-time**.

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## Salesforce Connect

Virtualize external insurance databases without data migration.

Example: Fetch vehicle insurance history from external SQL DB.

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## API Limits

Monitor and optimize API usage:

REST API calls/day = 15,000 (per license).

Implement caching where possible.

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## OAuth & Authentication

Use OAuth 2.0 for secure access when customers log into self-service portal.

Example: Customer logs in → Salesforce fetches their active policies.

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## Remote Site Settings

Add trusted endpoints for:

Payment Gateway (Razorpay/Stripe).

Insurance Regulatory Authority DB.

SMS/Email Notification APIs.

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☐ With this phase complete, the **Insurance Portal** can:

Securely connect to payment/verification systems.

Sync real-time updates with regulators and external apps.

Provide a **seamless integration layer** between Salesforce and external services.

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