

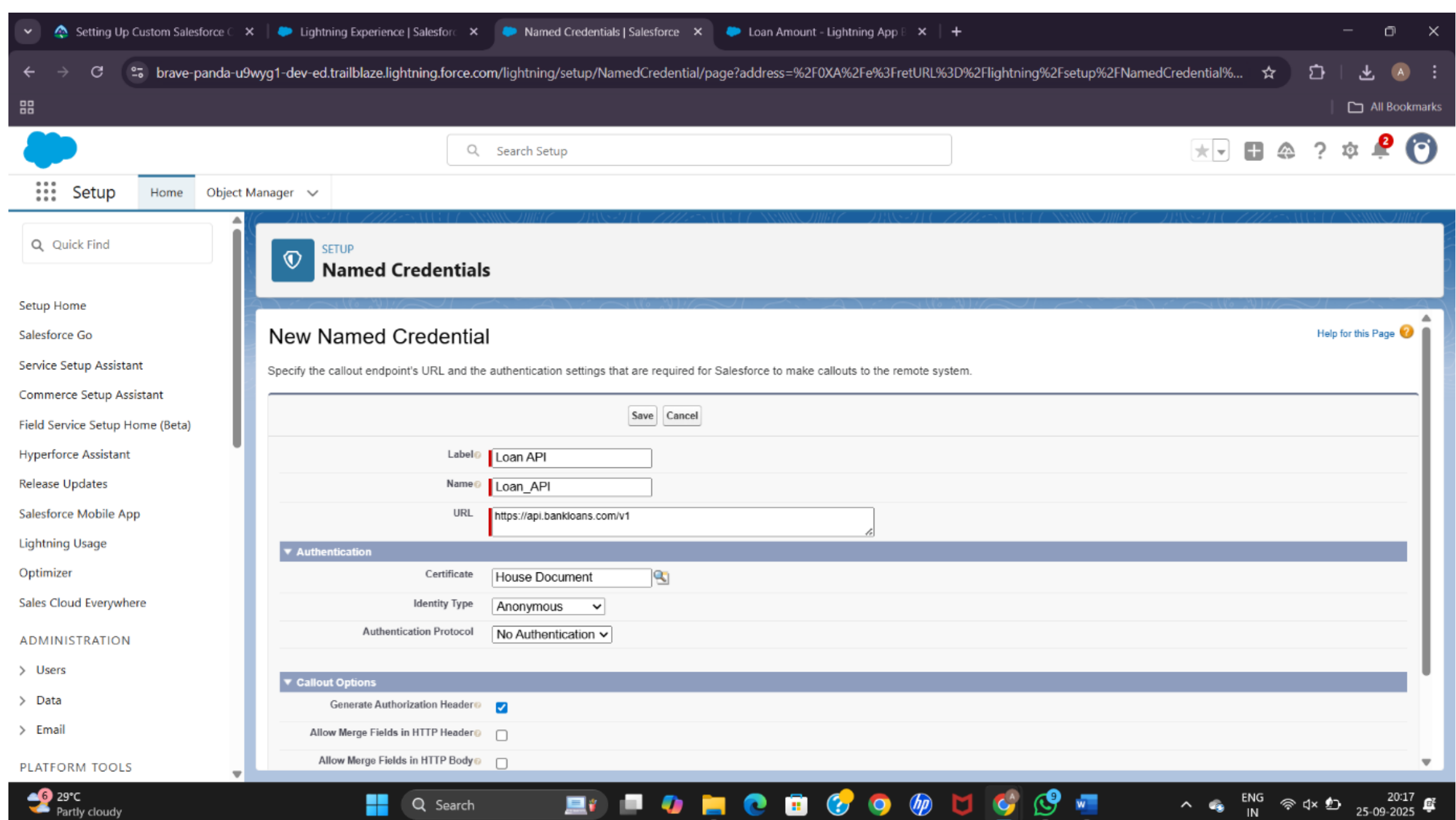
Phase 7 : Integration & External Access

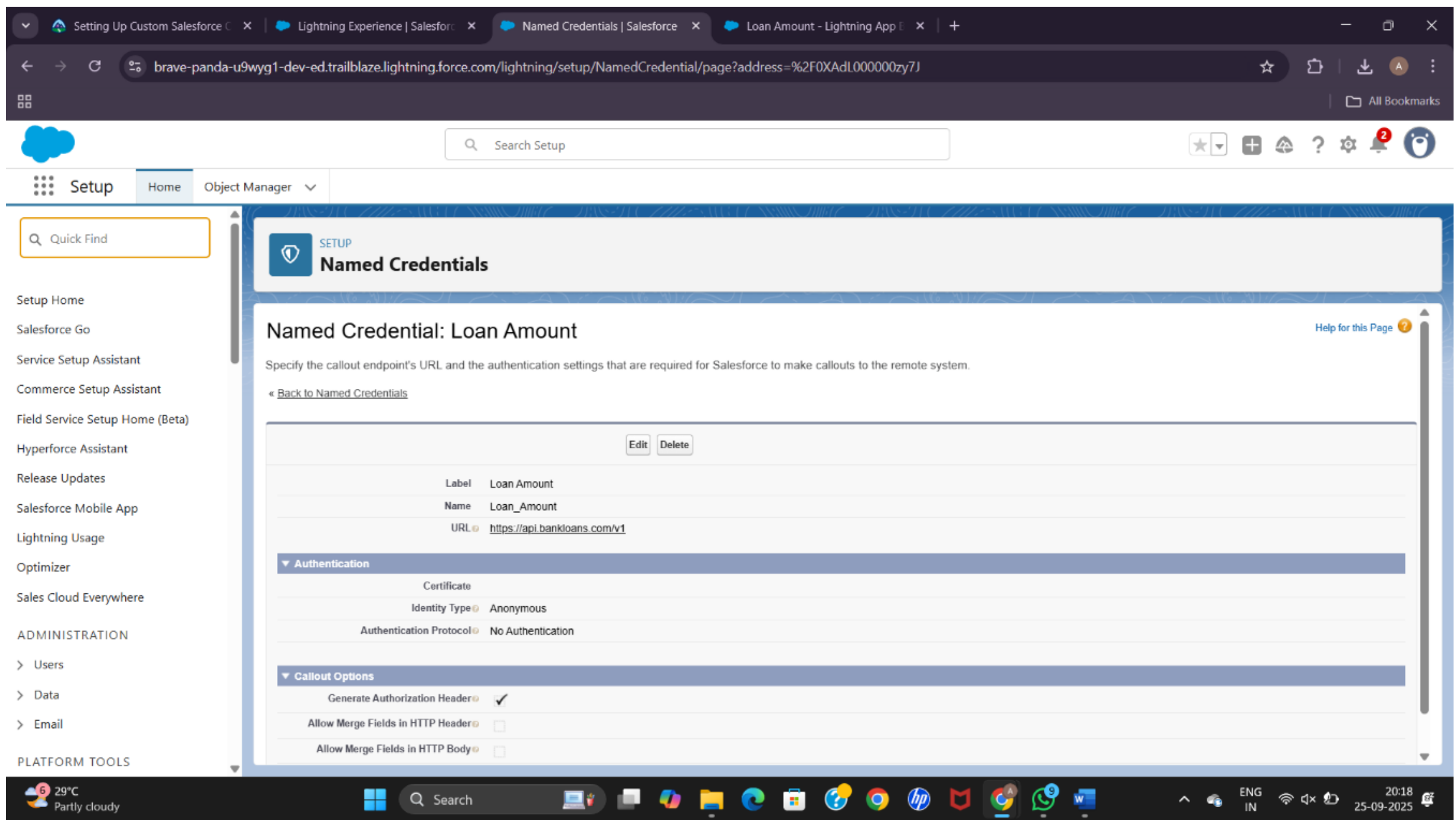
Problem Statement:

Our banking CRM built on Salesforce needs to work closely with external systems. Right now, loan officers and agents have to switch between Salesforce and third-party portals to check loan eligibility, calculate EMI, or submit approvals. This wastes time, increases errors, and breaks the customer experience.

1.Named Credentials:

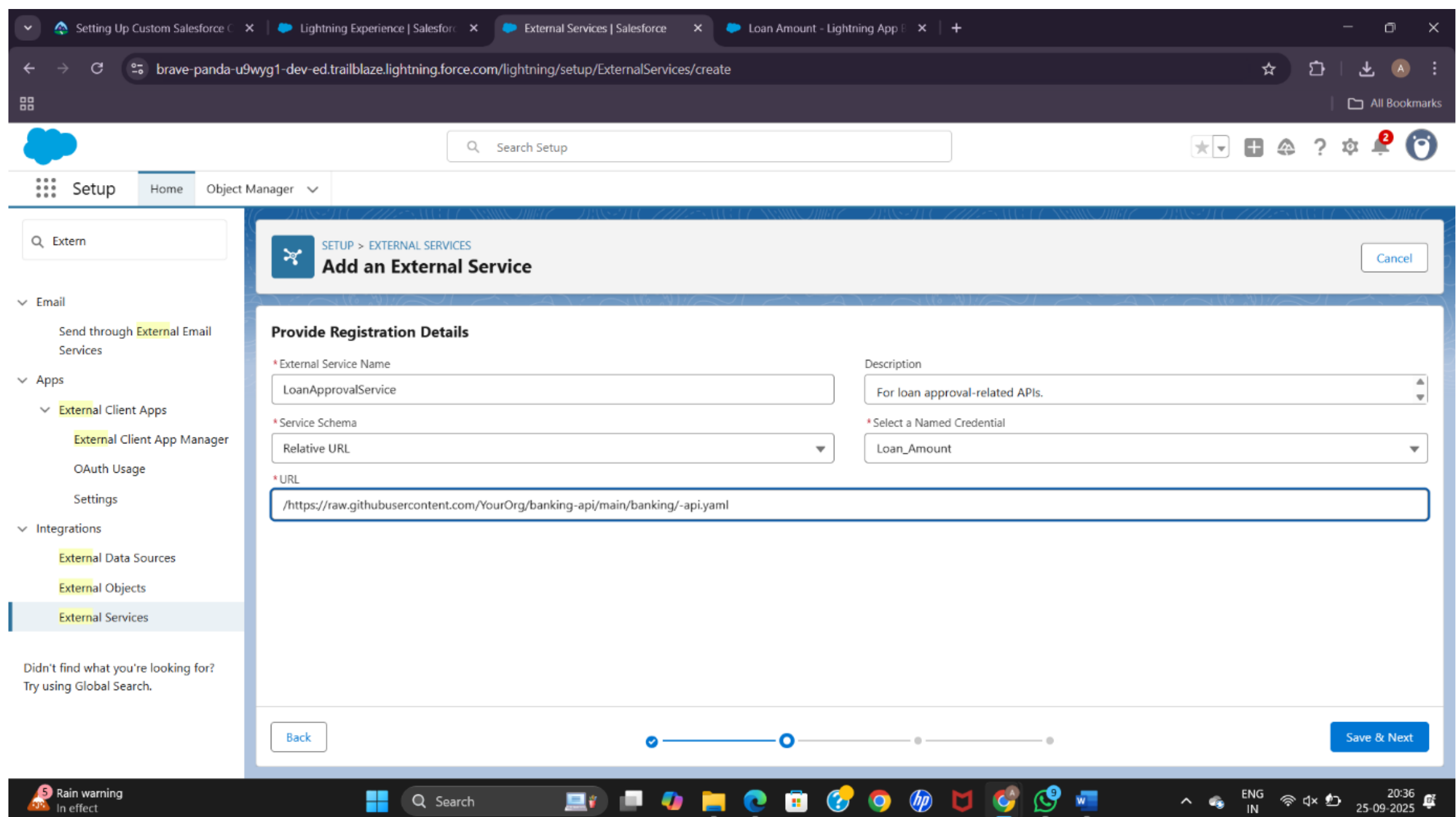
- . Remote Site Settings → needed for direct Apex callouts.
- . Named Credentials → best practice for storing API base URL + authentication.





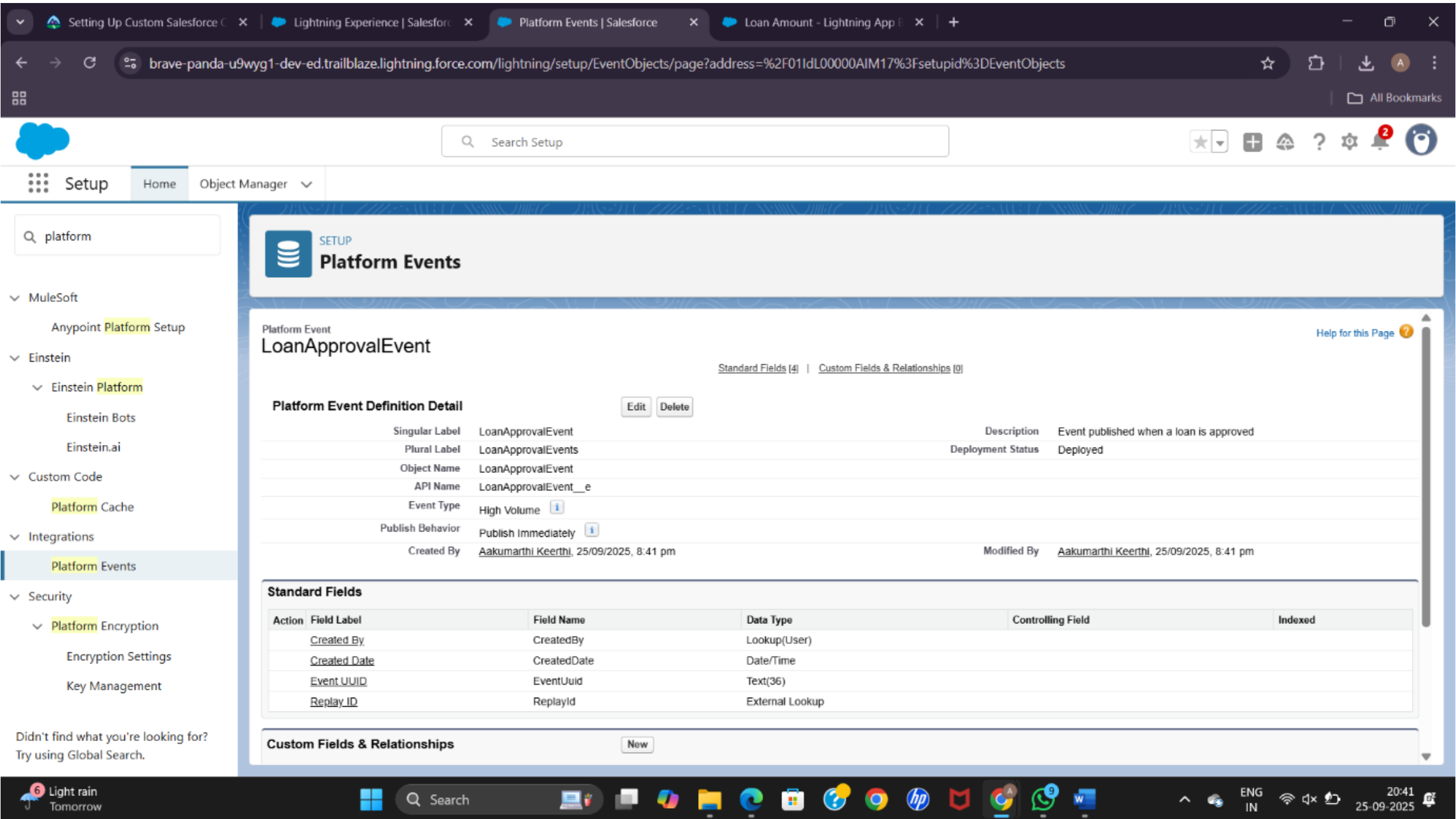
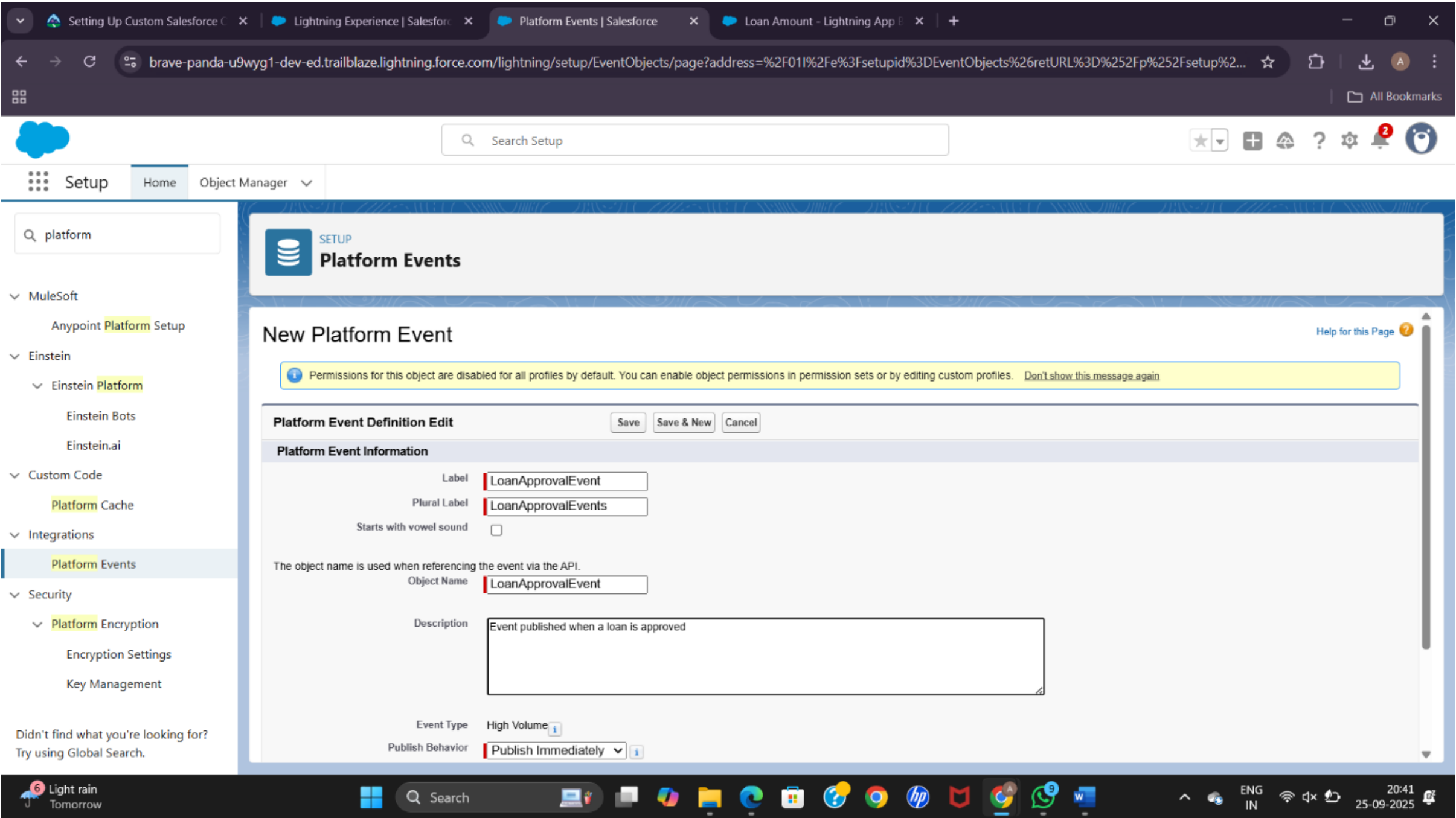
2.External Services:

- . External Services let Salesforce connect to an external API.
- . **No Apex required** for basic integrations.
- . **Secure authentication** via Named Credentials.



3.Platform Events:

- . Event-driven architecture inside Salesforce.
- . Think of them as messages that can be published by Salesforce or external systems, and subscribed to by Salesforce or external systems.
- . Used for real-time communication between apps.

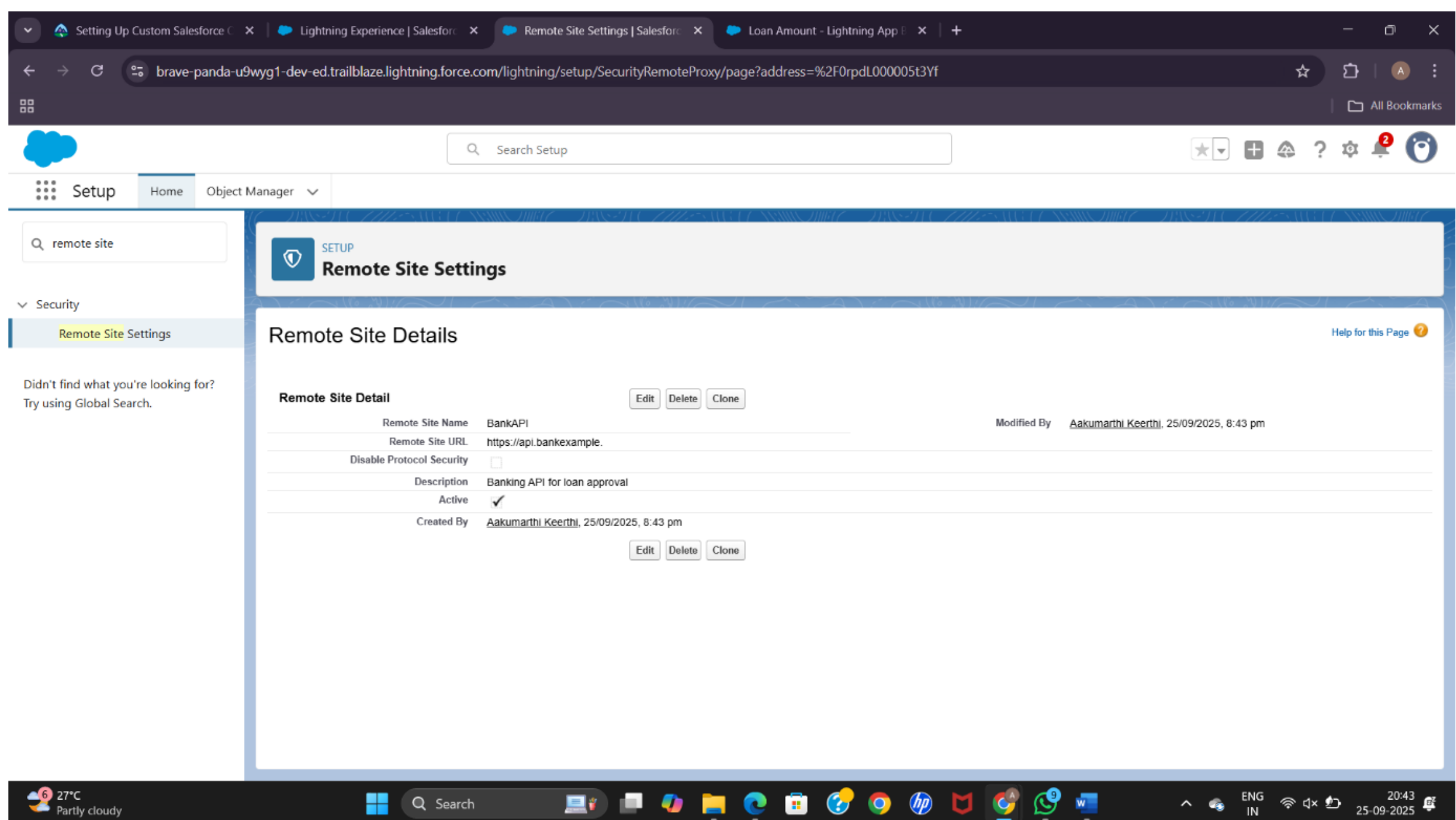


4.Callouts:

- A callout is an HTTP request made from Salesforce to an external service.
- They can be REST or SOAP requests.
- You can do them from Apex, Flow (via External Services), or Named Credentials.
- Example: Salesforce sends a loan request to an external banking API.

5.Remote Site Settings:

- . By default, Salesforce blocks outbound HTTP callouts for security.
- . Remote Site Settings (RSS) are used to whitelist external domains that Salesforce is allowed to call.



6.API Limits:

Transaction Volume Management: Banking and financial applications often have high-frequency API calls for account data, loan processing, or payment transactions. Salesforce API limits (daily and per-transaction) must be carefully monitored to avoid hitting the limit, which could block critical financial operations.

