

TourFlow: Real Estate Tour and Feedback Automator

Phase 7: Integration & External Access

Objective

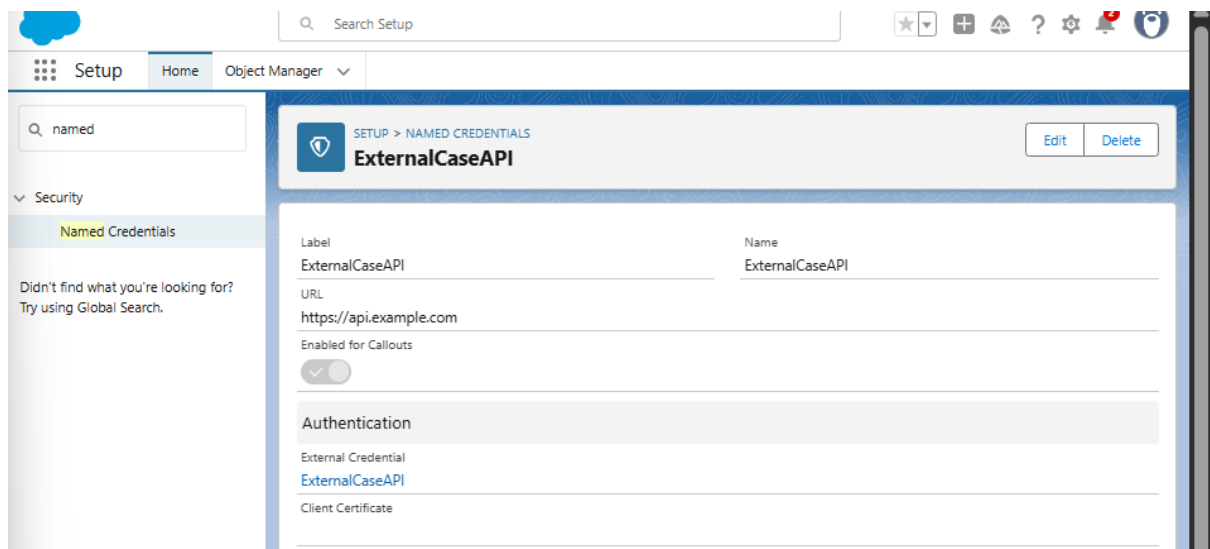
This phase focuses on enabling Salesforce to integrate with external systems and access data via API, specifically demonstrating the setup for external callouts without using real APIs.

Step 1 - Named Credentials

Purpose: Named Credentials securely store external API endpoints and authentication details. They allow Salesforce to make callouts without hardcoding credentials in Apex.

Implementation Steps:

1. Go to **Setup** → **Named Credentials** → **New Named Credential**.
2. Fill in the fields as follows:
 - **Label:** ExternalCaseAPI
 - **Name:** ExternalCaseAPI
 - **URL:** https://api.example.com (Placeholder URL)
 - **Authentication Protocol:** No Authentication
 - **Enabled for Callouts:** Checked



Step 2 - Remote Site Settings

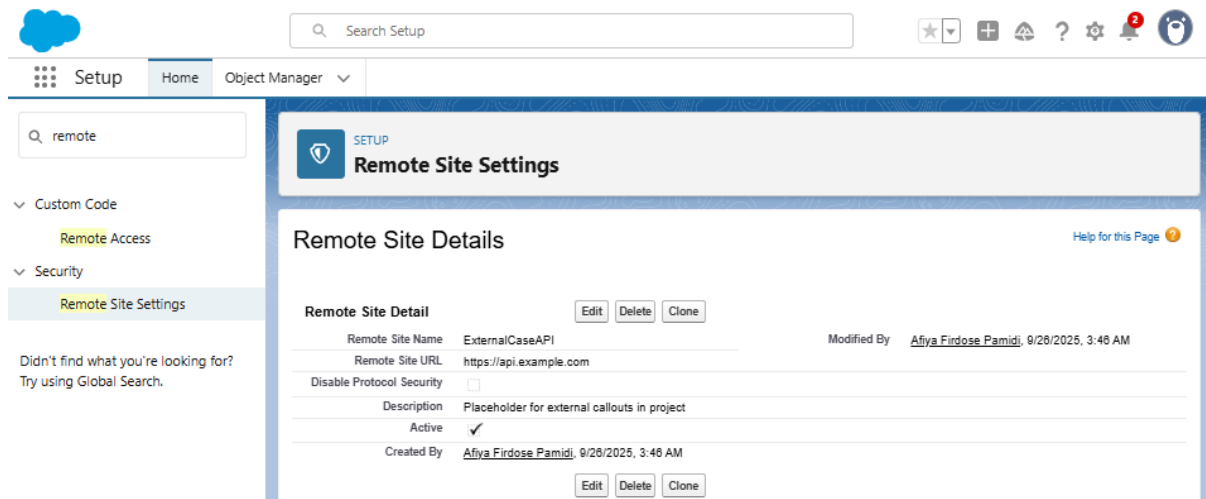
Purpose: Remote Site Settings are required to whitelist external URLs, allowing Salesforce Apex to make callouts to those external systems.

Implementation Steps:

1. Go to **Setup** → **Remote Site Settings** → **New Remote Site**.

2. Fill in the fields:

- **Remote Site Name:** ExternalCaseAPI
- **Remote Site URL:** https://api.example.com (Must match the URL in Named Credential)
- **Description:** Placeholder for external callouts in project
- **Active:** Checked

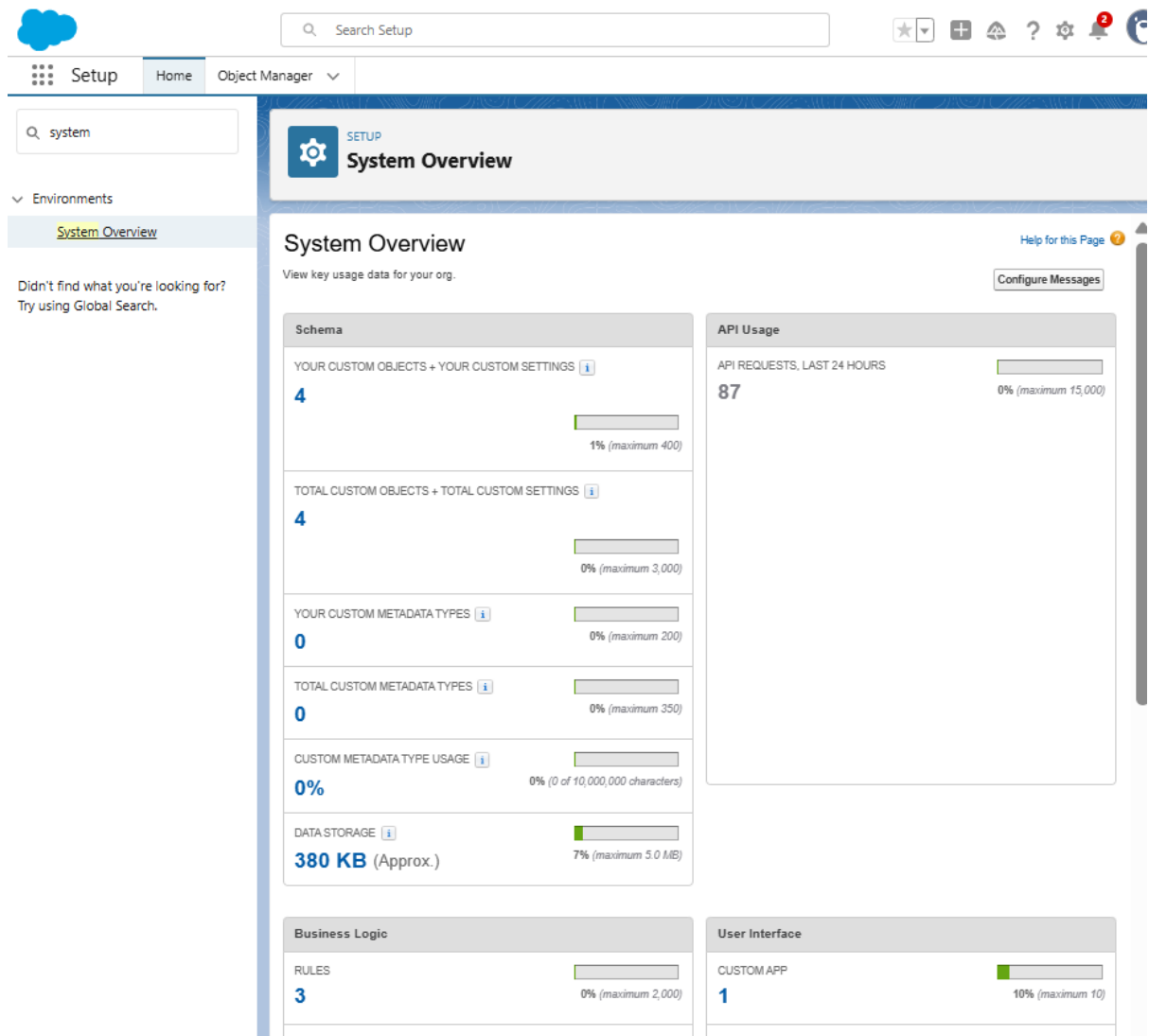


Step 3 - Check API Limits / System Overview

Purpose: To verify that the Salesforce org has enough capacity for API calls, objects, flows, storage, and other resources before implementing callouts.

Implementation Steps:

1. Go to **Setup** → **System Overview**.
2. Check key metrics such as **API Requests (Last 24 Hours)** and usage of **Custom Objects** and **Active Flows**.



Features Outside Project Scope

The following advanced integration features were not required for the core Tour Management System functionality:

Feature	Reason for Exclusion
External Services	The project does not require integration with any real external services.
Web Services (REST/SOAP)	No external REST or SOAP APIs were needed for this internal-focused project.
Callouts (Apex / LWC)	The project does not perform real-time external callouts, as all data and functionality remain internal.
Platform Events	The project does not require event-driven communication.
Change Data Capture	No external data tracking or replication is required.

Salesforce Connect	The project does not integrate with external objects or external data sources.
OAuth & Authentication	Since no real external APIs are being used, OAuth or other authentication protocols were not needed.