

Project Title: Sales Performance Reporting

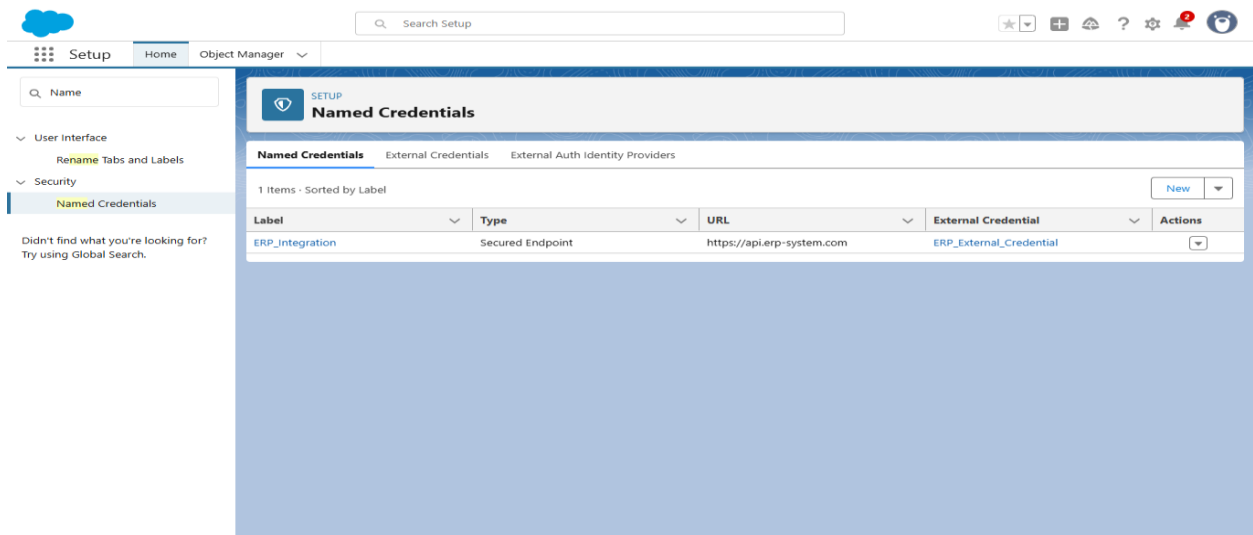
Phase 7: Integration & External Access

Objective:

The goal of this phase was to extend Salesforce's capability by integrating it with external systems (e.g., ERP/Finance system) to enable **real-time data sharing, secure communication, and external access**. This ensures that sales teams in Salesforce always have updated information without manual uploads.

1. Named Credentials & External Credentials

- Created an **External Credential** named ERP_External_Credential.
- Configured authentication protocol (Password Authentication for demo).
- Added a **Named Principal (ERP_User)** with username/password details.
- Assigned access via a Permission Set (ERP_Integration_Access) so only authorized users can use it.
- Created a **Named Credential** ERP_Integration pointing to the external system's API base URL.

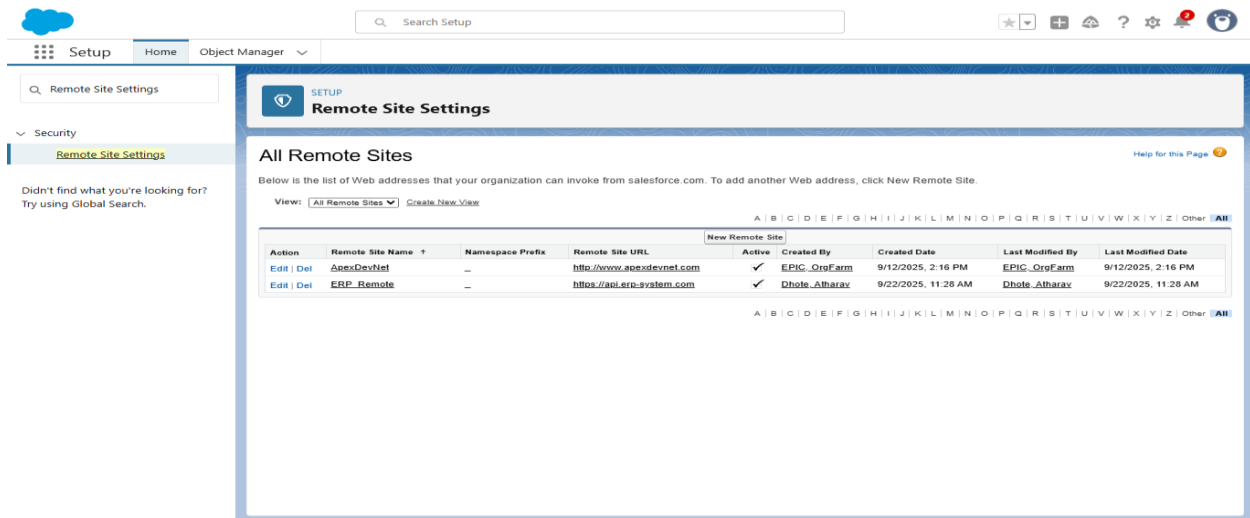


The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Named Credentials' and shows a table with one item, 'ERP_Integration'. The table columns are Label, Type, URL, External Credential, and Actions. The 'ERP_Integration' entry has a Type of 'Secured Endpoint', a URL of 'https://api.erp-system.com', and is linked to the 'ERP_External_Credential'.

Label	Type	URL	External Credential	Actions
ERP_Integration	Secured Endpoint	https://api.erp-system.com	ERP_External_Credential	

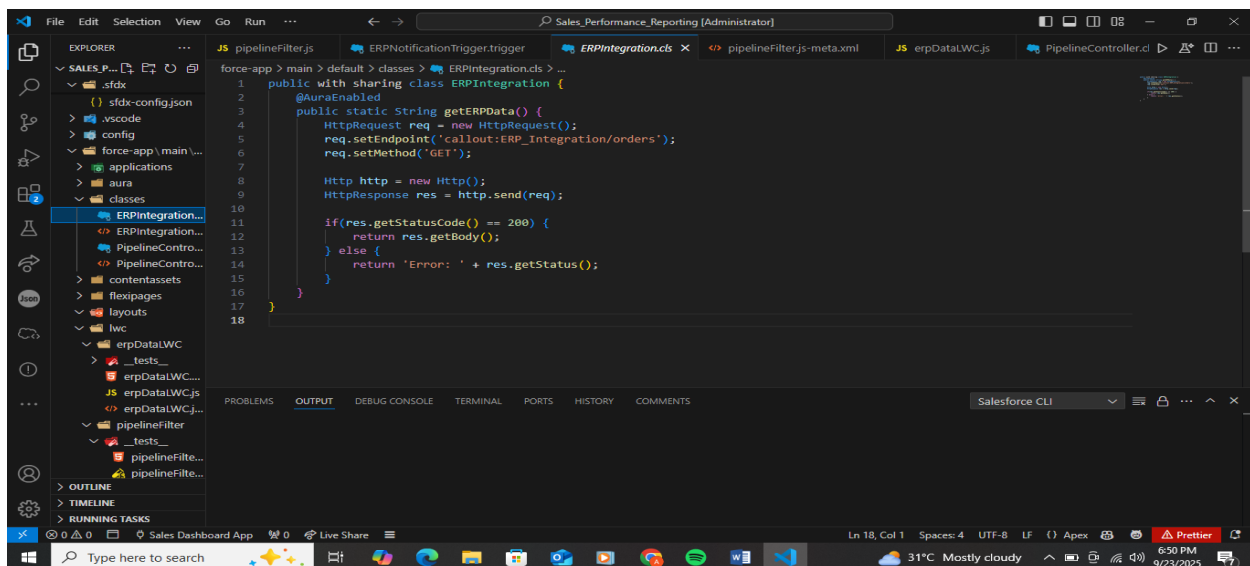
2. Remote Site Settings

- Configured **Remote Site Setting** ERP_Remote with the same external API URL.
- Ensures Salesforce can send callouts to trusted endpoints.



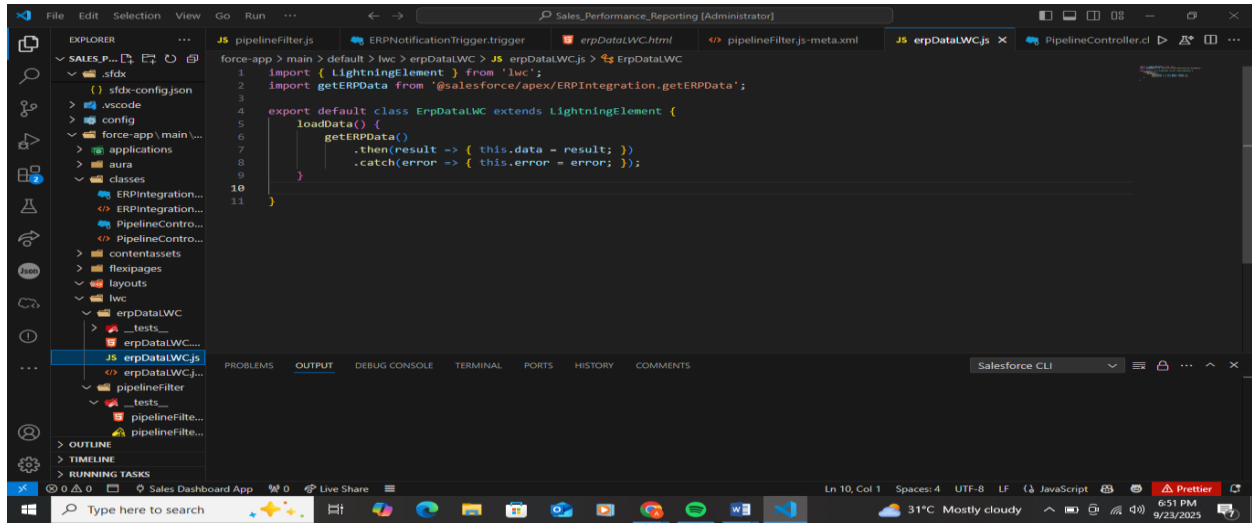
3. Apex Callouts

- Created an **Apex class ERPIntegration.cls** to fetch ERP data using Named Credential.
- Example method `getERPData()` performs an HTTP GET callout to fetch data.
- Response data is returned as JSON for use in LWCs.



4. Lightning Web Component (ERP Data LWC)

- Built a custom **LWC** `erpDataLWC`.
- Integrated it with the Apex callout method to display ERP order data inside Salesforce.
- Added the component into **Sales Dashboard App** using Lightning App Builder.



5. Platform Events (Real-Time Updates)

- Created **Platform Event** `ERP_Notification__e`.
- Added fields: `OrderId`, `Status`, `Amount`.
- Published test events using **Workbench** (REST Explorer) and **Anonymous Apex**.
- Subscribed to events via a **Flow** and an **Apex Trigger**.
 - Flow creates a Task when an ERP update is received.
 - Apex Trigger logs details into Salesforce for tracking.

Setup Home Object Manager

Platform Event

Integrations

Platform Events

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

Platform Events

Platform Event: ERP_Notification

Standard Fields (4) | Custom Fields & Relationships (3)

Platform Event Definition Detail

Singular Label	ERP_Notification	Description	
Plural Label	ERP_Notifications	Deployment Status	Deployed
Object Name	ERP_Notification		
API Name	ERP_Notification__e		
Event Type	High Volume		
Publish Behavior	Publish Immediately		
Created By	Atharav Dhote	Modified By	Atharav Dhote

Created: 9/22/2025, 12:15 PM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Amount	Amount__c	Number(16, 2)			Atharav Dhote
Edit Del	OrderId	OrderId__c	Text(20)			Atharav Dhote
Edit Del	Status	Status__c	Text(50)			Atharav Dhote

6. Change Data Capture (CDC)

- Enabled CDC for the **Opportunity** object.
- External systems can subscribe via Salesforce Streaming API to receive updates whenever Opportunities change.

Setup Home Object Manager

Change Data Capture

Integrations

Change Data Capture

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

Change Data Capture

Select the entities that generate change event notifications on the default standard channel. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

- Account (Account)
- Account Clean Info (AccountCleanInfo)
- Account Contact Role (AccountContactRole)
- Agent Work (AgentWork)
- Asset (Asset)
- Asset Relationship (AssetRelationship)
- Assigned Resource (AssignedResource)
- Associated Location (AssociatedLocation)
- Authorization Form (AuthorizationForm)

Selected Entities

- Opportunity (Opportunity)