

# Phase 7: Integration & Internal Access

## 1.Platform Events

- Setup-> Platform Events-> New Platform Events
  - Payment\_Received\_e

The screenshot shows the Salesforce Platform Events configuration page for the event 'Payment\_Received\_e'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Platform Events' and shows the event definition details, standard fields, and custom fields & relationships.

**Platform Event Definition Detail**

Field Label	Field Name	Description
Singular Label	Payment_Received_e	
Plural Label	Payment_Received_es	
Object Name	Payment_Received_e	
API Name	Payment_Received_e__e	
Event Type	High Volume	
Published Behavior	Publish Immediately	
Created By	Ayush Sanyal	
Modified By	Ayush Sanyal	

**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	Invoice Id	Invoice_Id__c	Text(18)			Ayush Sanyal 9/21/2025, 11:46 PM
Edit   Del	Payment Amount	Payment_Amount__c	Number(16, 2)			Ayush Sanyal 9/21/2025, 11:47 PM
Edit   Del	Payment Date	Payment_Date__c	Date			Ayush Sanyal 9/21/2025, 11:47 PM
Edit   Del	Payment Status	Payment_Status__c	Text(10)			Ayush Sanyal 9/21/2025, 11:49 PM

- Custom Objects

The screenshot shows the 'Custom Fields & Relationships' page for the 'Payment\_Received\_e' event. It displays a table of custom fields and their relationships, including a section for 'Deleted Fields'.

**Custom Fields & Relationships**

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Invoice Id	Invoice_Id__c	Text(18)			Ayush Sanyal 9/21/2025, 11:46 PM
Edit   Del	Payment Amount	Payment_Amount__c	Number(16, 2)			Ayush Sanyal 9/21/2025, 11:47 PM
Edit   Del	Payment Date	Payment_Date__c	Date			Ayush Sanyal 9/21/2025, 11:47 PM
Edit   Del	Payment Status	Payment_Status__c	Text(10)			Ayush Sanyal 9/21/2025, 11:49 PM

**Deleted Fields (1)**

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By

**Triggers**

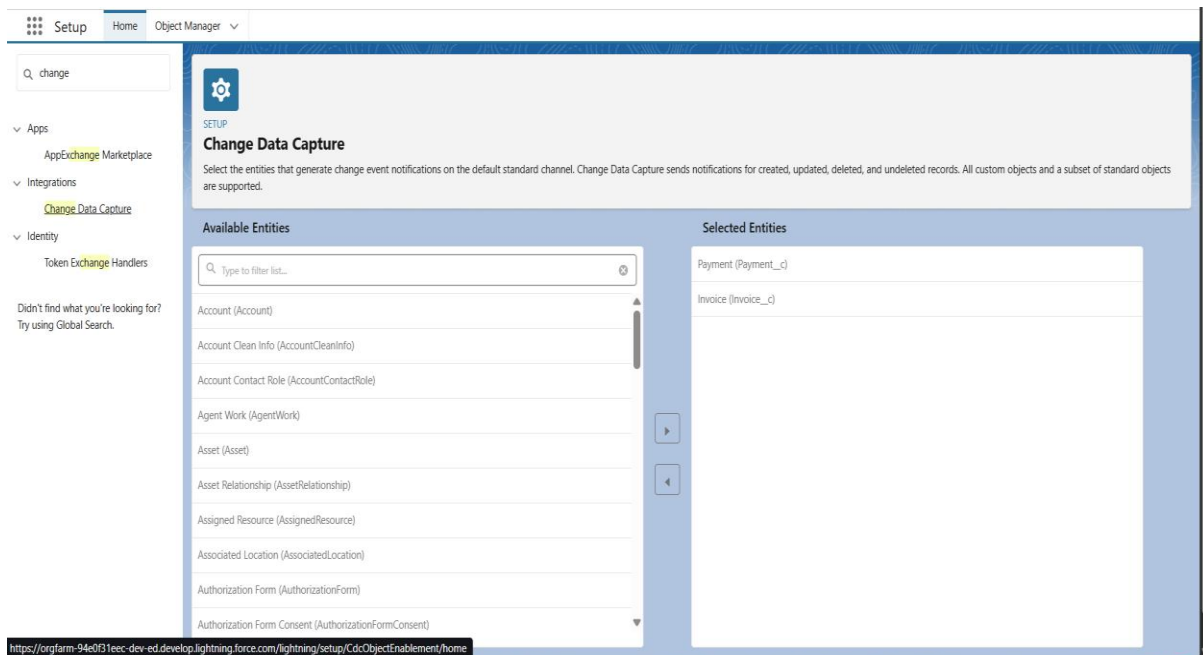
No triggers defined

**Subscriptions**

Subscriber	Last Processed Id	Last Published Id	State	Batch Size	User
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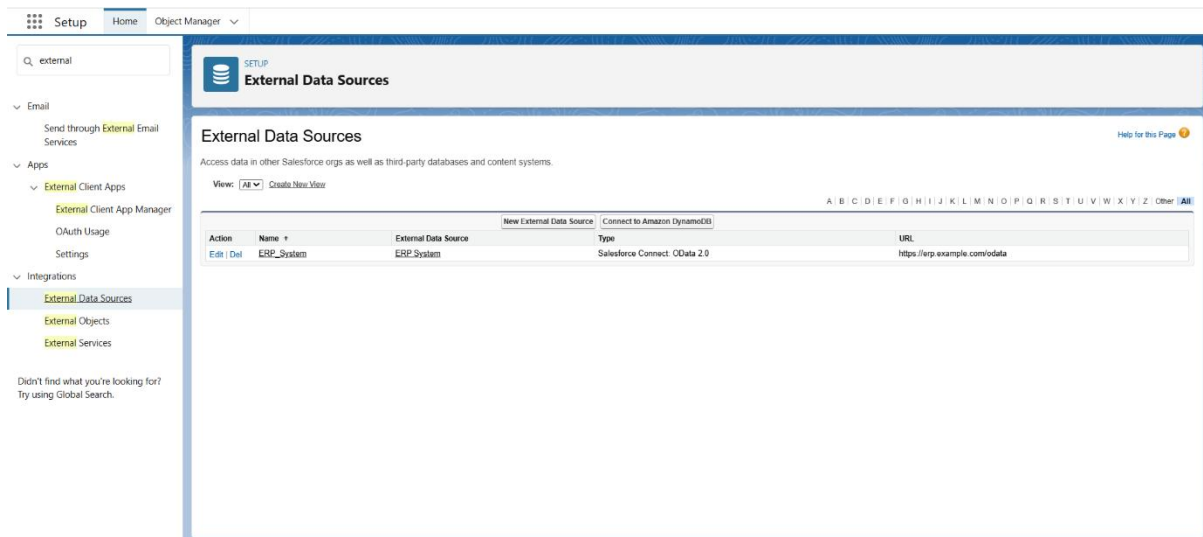
## 2.Change Data Capture

- Setup->Change Data Capture->Available Entity>Selected Entity



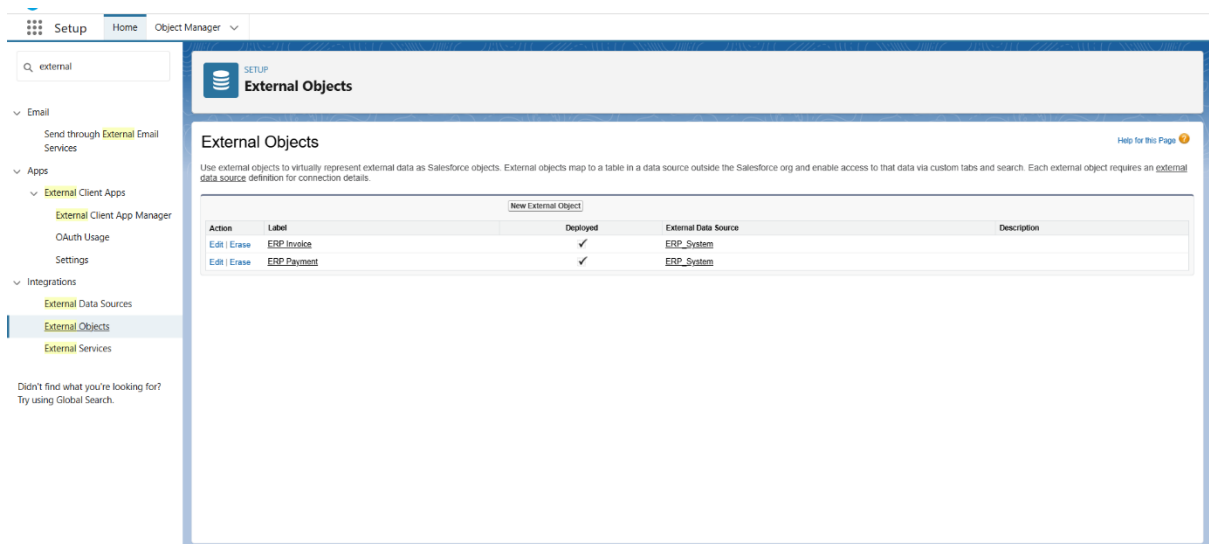
### 3. External Services/Salesforce Connect

- **Setup-> External Data Sources->New External Data Source**
  - **ERP System**



- **Setup-> External Objects->New External Objects**

- **ERP Invoice**
- **ERP Payment**

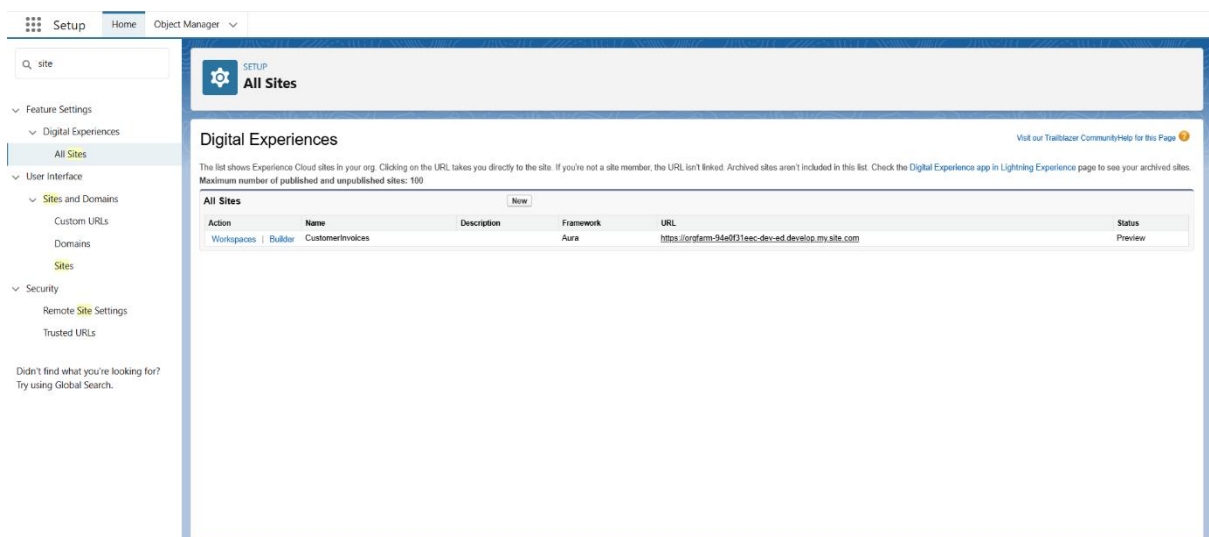


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'external' and a list of navigation items: Email, External Client Apps, External Data Sources, External Objects (highlighted), and External Services. The main content area is titled 'External Objects' and includes a 'New External Object' button. Below this is a table with columns: Action, Label, Deployed, External Data Source, and Description. The table contains two rows: 'ERP Invoice' and 'ERP Payment', both marked as 'Deployed' and linked to 'ERP\_System'.

Action	Label	Deployed	External Data Source	Description
<a href="#">Edit</a>   <a href="#">Erase</a>	ERP Invoice	✓	ERP_System	
<a href="#">Edit</a>   <a href="#">Erase</a>	ERP Payment	✓	ERP_System	

## 4. All Sites Settings

- **Setup->All Sites**



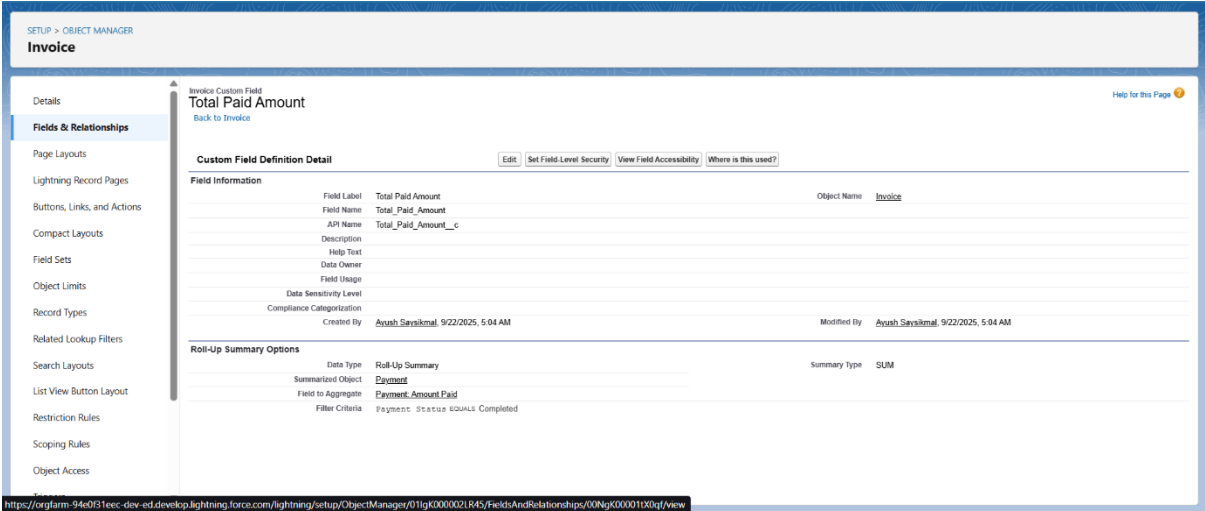
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'site' and a list of navigation items: Feature Settings, Digital Experiences, All Sites (highlighted), Sites and Domains, and Security. The main content area is titled 'All Sites' and includes a 'New' button. Below this is a table with columns: Action, Name, Description, Framework, URL, and Status. The table contains one row: 'CustomerInvoices' using the 'Aura' framework, with a URL pointing to a development site and a 'Preview' status.

Action	Name	Description	Framework	URL	Status
<a href="#">Workspaces</a>   <a href="#">Builder</a>	CustomerInvoices		Aura	<a href="https://orgfarm-34e071eac-dev-ed.develop.my.site.com">https://orgfarm-34e071eac-dev-ed.develop.my.site.com</a>	Preview

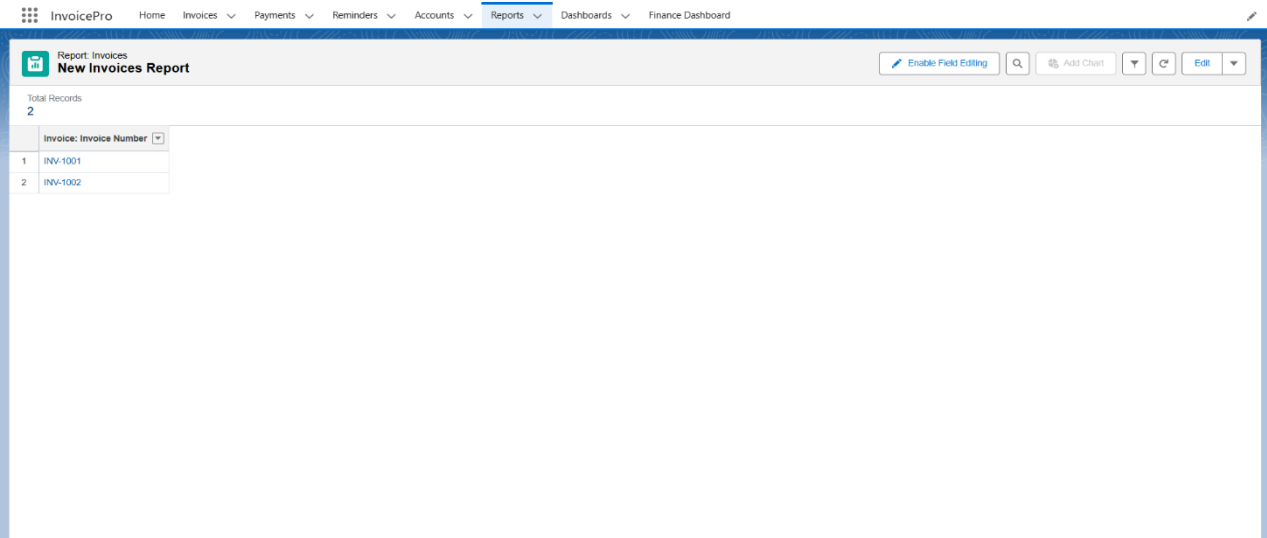
# 5.Process Builder To Skip Flows

## 1. Total Paid Amount

- Setup->Object Manager->invoice->Field and Relationship



- Report Subscriptions



## 2.Overdue Invoice Reminder

### 1.Create an Email Template

- **Setup → Email → Classic Email Templates**

The screenshot shows the Salesforce Setup page for Classic Email Templates. The left sidebar has a search bar with 'email temp' and a navigation menu with 'Email' expanded, showing 'Classic Email Templates' and 'Lightning Email Templates'. The main content area is titled 'Classic Email Templates' and shows the details for a 'Text Email Template' named 'Overdue Invoice Reminder'. The template is available for use, created by Ayush Sayakmal on 9/22/2025 at 5:18 AM, and modified by the same user at 5:18 AM. The 'Email Template Detail' section shows the template's name, unique name, encoding, author, and description. The 'Email Template' section shows the subject line 'Invoice [Invoice Number] is Overdue' and the plain text preview: 'Hello [ContactName], Invoice [Invoice\_\_c Name] for Amount [Invoice\_\_c Amount\_\_c] was due on [Invoice\_\_c Due Date\_\_c]. Please take necessary action.'

## 2 . Create a Workflow Rule

- **Setup → Workflow Rules → New Rule**

The screenshot shows the Salesforce Setup page for Workflow Rules. The left sidebar has a search bar with 'workflo' and a navigation menu with 'Process Automation' expanded, showing 'Workflow Actions' and 'Workflow Rules'. The main content area is titled 'Workflow Rules' and shows the details for a 'Workflow Rule' named 'Email Status'. The rule is active, created by Ayush Sayakmal on 9/22/2025 at 5:21 AM, and modified by the same user at 5:23 AM. The 'Workflow Rule Detail' section shows the rule's name, status, object, evaluation criteria, description, rule criteria, and creation/modification details. The 'Workflow Actions' section shows the immediate workflow actions, including an 'Email Alert' for alert email. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

### 3. Add Workflow Action – Email Alert

The screenshot shows the SAP Email Alerts configuration interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Email Alerts' and shows the configuration for an alert named 'For alert email'. The configuration details include: Description (For alert email), Unique Name (Email\_alert), From Email Address (Current User's email address), Recipients (Invoice Owner), and Email Template (Overdue Invoice Reminder). The alert is created by Ayush Sayakmal on 9/22/2025 at 5:22 AM and is currently active. Below the details, there are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The 'Rules Using This Email Alert' section shows a table with one rule named 'Email Status' which is active.

Setup Home Object Manager

Q workflow

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

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

Email Alert

For alert email

Rules Using This Email Alert (1) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

Edit Delete Clone

Description For alert email

Unique Name Email\_alert

From Email Address Current User's email address

Recipients Invoice Owner

Additional Emails

Created By Ayush Sayakmal 9/22/2025, 5:22 AM

Modified By Ayush Sayakmal 9/22/2025, 5:22 AM

Edit Delete Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

Action	Rule Name	Description	Object	Active
Edit   Del   Deactivate	Email Status		Invoice	✓

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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So This is for phase 7 now ready to go phase 8....