

Phase 7: Integration & External Access

Objective

Enable your Salesforce org to securely interact with **external systems** and allow external systems to interact with Salesforce. This includes REST/SOAP services, platform events, and real-time integrations.

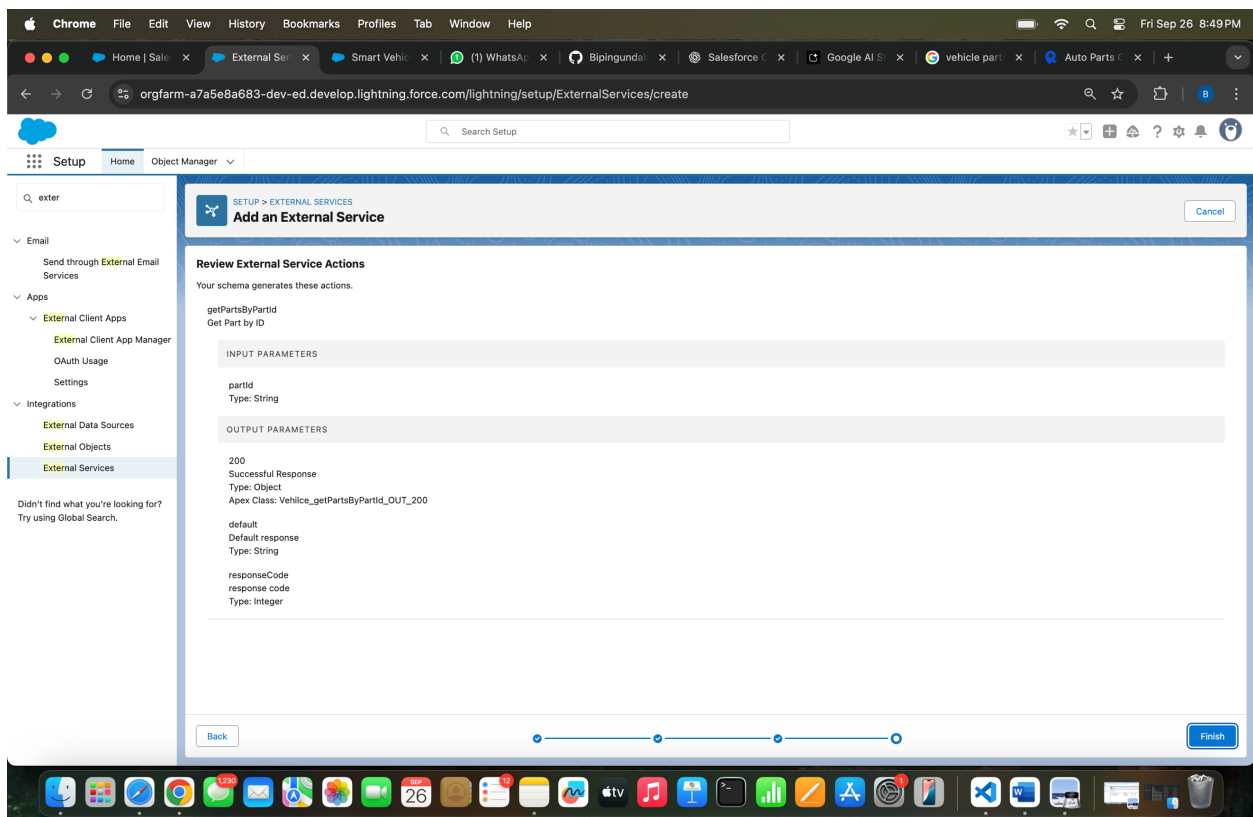
1 Named Credentials

- **Purpose:** Store authentication settings for external services in a secure, reusable way.
- **Implementation Steps:**
 1. Go to **Setup** → **Named Credentials** → **New Named Credential**.
 2. Fill details:
 - **Label / Name:** e.g., `VehiclePartsAPI`
 - **URL:** Base URL of the external API
 - **Authentication:** Choose OAuth 2.0, Password Authentication, or No Authentication
 3. Save and test connection.
- **Use case in project:** Call external parts inventory API to fetch stock levels.

The screenshot shows the Salesforce Setup interface for a Named Credential. The browser address bar displays the URL: `orgfarm-a7a5e8a683-dev-ed.develop.lightning.force.com/lightning/setup/NamedCredential/0XAgL00000098eHWAQ/view`. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'SETUP > NAMED CREDENTIALS' and 'VehiclePartsAPI'. It includes fields for 'Label' (VehiclePartsAPI), 'Name' (VehiclePartsAPI), and 'URL' (`https://auto-parts-catalog.p.rapidapi.com/types/type-id/1/list-vehicles-types/5626/lang-id/4/country-filter-id/63`). There is a toggle for 'Enabled for Callouts'. The 'Authentication' section shows 'External Credential' selected, with 'VehicleParts' as the credential name. The 'Callout Options' section includes checkboxes for 'Generate Authorization Header' (checked), 'Allow Formulas in HTTP Header' (unchecked), 'Allow Formulas in HTTP Body' (unchecked), and 'Outbound Network Connection'. The 'Managed Package Access' section includes fields for 'Created By Namespace' and 'Allowed Namespaces for Callouts'.

2 External Services

- **Purpose:** Integrate external APIs declaratively using **Flows** and **Apex actions**.
- **Steps:**
 1. Go to **Setup** → **External Services** → **New External Service**.
 2. Provide **API Schema (OpenAPI/Swagger)** URL.
 3. Register the service.
 4. Use in **Flows** or **Apex** to automate external requests.
- **Project use case:** Trigger preventive maintenance reminders using external scheduling service.



Remaining steps were not required for my project