

PHASE - 7

Integration & External Access

Introduction

Phase 7 of a typical Salesforce project usually involves **integration with external systems** and enabling external access. This may include connecting Salesforce with third-party APIs, performing callouts, using Named Credentials, and handling authentication via OAuth.

Reason for Skipping Integration

For the **Automated Task Manager** project, integration features were **not required**. All use cases such as **task reminders, overdue escalations, approvals, and notifications** were achieved entirely within Salesforce using declarative tools.

There was no business requirement to connect with external systems, consume or expose APIs, or perform real-time data exchange with outside platforms.

Declarative Features Used Instead

Instead of integrations, the project relied solely on Salesforce's internal declarative features:

- **Flow Builder** → for reminders, escalations, and approvals.
- **Validation Rules & Process Builder** → for enforcing data quality and simple automation.
- **Approval Processes & Custom Notifications** → for user sign-offs and alerts.

Project Alignment

By skipping Phase 7, the project stayed lightweight, demo-friendly, and focused on **internal task automation**. This aligns with the academic/demo objectives and avoids unnecessary complexity in integration.

If in the future the project needs to connect with **external email/SMS systems, payment gateways, or third-party CRMs**, Phase-7 concepts such as **Named Credentials, Callouts, or Platform Events** can be applied.