

## **Phase 7 : Integration & External Access**

**Goal:** Prepare the Student Success Hub to handle integration and data change tracking. Even though our current system is self-contained, we reviewed Salesforce integration capabilities and implemented features that are useful for internal event handling and monitoring.

### **1. Named Credentials**

- Not implemented in the project
- As no external systems or APIs to connect now.
- Will be required if we integrate with external portals like university APIs or scholarship systems in future.

### **2. External Services**

- No OpenAPI/Swagger files or external services currently.
- External Services let Salesforce automatically generate actions from external REST APIs for use in Flows or Processes.

### **3. Web Services & Callouts (REST/SOAP Callouts)**

- The project Student Success Hub does not pull data from outside systems.
- Callouts are used to send or request data from other systems.

### **4. Platform Events**

- Platform Events let Salesforce apps communicate changes inside the system in real time. We used this to notify other automations when important records change.
- Steps Followed:
  - Setup → Platform Events → New Platform Event
  - Label: Session\_Event
  - Fields:
    - Session\_Id\_\_c (Text)
    - Action\_\_c (Text — e.g., Cancelled, Rescheduled)
  - Saved the event and deployed.

**Platform Events**

Use platform events to define the data to be delivered in custom notifications. Monitor the publishing and delivery usage for platform events and change events.

| Item  | Usage | Allocation |
|---|-------|------------|
| High-Volume Platform Event Hourly Publishing Allocation               | 4     | 50,000     |
| High-Volume Platform Event and Change Event Daily Delivery Allocation | 2     | 10,000     |

| Action                                     | Label         | Deployed                 | Description |
|--|---------------|--------------------------|-------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Session_Event | <input type="checkbox"/> |             |

## 5. Change Data Capture

- Track changes to critical records so other processes can react or admins can monitor updates in real-time.
- Steps Followed:
  - Setup → Change Data Capture
  - Enabled CDC for:
  - Application\_\_c
  - Mentorship\_Session\_\_c
  - Created a CDC-Triggered Flow to log or act when an application or session is updated.
  - Tested by editing an Application record and verified events were captured.

**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)

**Selected Entities**

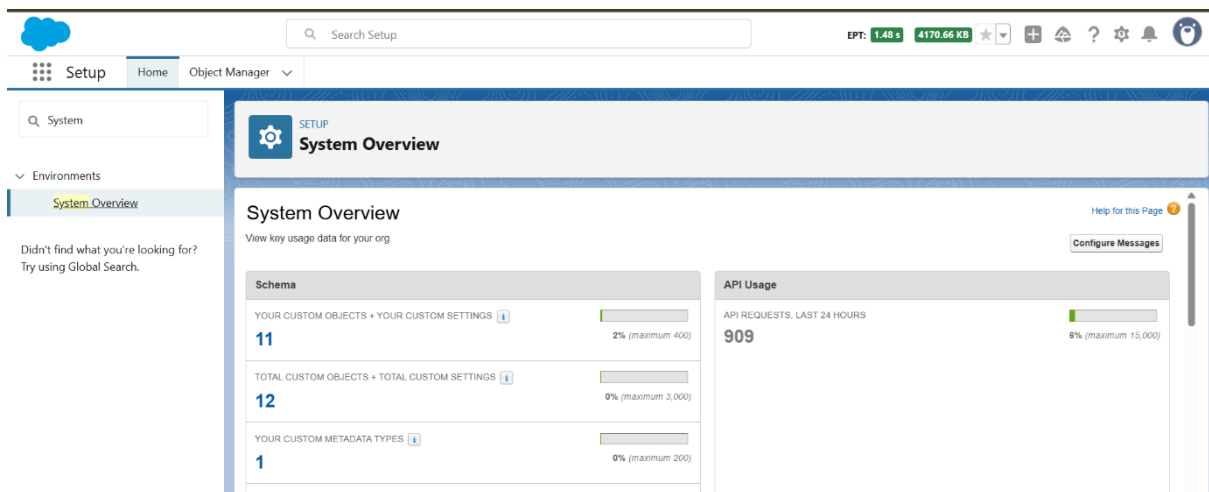
- Application (Application\_\_c)
- Mentorship Session (Mentorship\_Session\_\_c)

## 6. Salesforce Connect

- Not implemented in the project.
- As no external database is needed, all data is in Salesforce.
- Salesforce Connect lets you access external data without storing it in Salesforce.

## 7. API Limits Monitoring

- Monitor and control daily API usage even though we are not integrating with external APIs yet. This ensures we don't exceed limits if we add integrations in future.
- Steps Followed:
  - Setup → System Overview
  - Checked API Requests, Last 24 Hours.
  - Documented current usage (minimal, since the system is internal).



## 8. OAuth & Authentication

- Not implemented in the project
- Our system uses internal Salesforce user access.
- No student/mentor portal requiring Google or external login now.
- OAuth allows secure login via other identity providers

## **9. Remote Site Settings**

- Not implemented in the project
- Not making callouts to external domains.
- Remote Site Settings whitelist domains for safe callouts.