Phase-7: Integration & External Access (Revised for Internal-Only Project)

1. Named Credentials

- **Not Required**

- Reason: These are only used to store authentication/endpoint details securely for external systems (like a Patent Registry API). Since our project uses only Salesforce internal data, no external endpoint is needed.

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2. External Services

- **Not Required**

- Reason: External Services are used to connect declaratively to outside REST APIs and expose them in Flow. Our project does not consume external services, so this is skipped.

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3. Web Services (REST/SOAP)

- **Not Required**

- Reason: Web services are for exposing Salesforce data to external systems or consuming data from external APIs. Since our project is self-contained and doesn't need to connect with outside apps, we don't set up REST/SOAP integrations.

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4. Callouts

- **Not Required**

- Reason: Callouts are used when Salesforce needs to send a request to an external system (like fetching patent details). Our project only uses internal objects (`Patent`

`Tracker`, `Phase`, `Progress`, etc.), so no callouts are required.

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5. Platform Events

- **Not Required**

- Reason: Platform Events are for event-driven communication between Salesforce and external systems. Since our solution doesn't broadcast events outside, this is not needed.

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6. Change Data Capture (CDC)

- **Not Required**

- Reason: CDC streams real-time changes from Salesforce to external consumers. As no external sync is required, this is unnecessary.

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7. Salesforce Connect

- **Not Required**

- Reason: Used for connecting external databases/ERP systems virtually. Not applicable because our data is managed inside Salesforce only.

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8. API Limits

- **Applicable (Knowledge Only)**

- Even though we're not integrating, it's good to understand API limits. If later you decide to connect Salesforce data with other systems (like Python scripts or Tableau), these limits will matter. For now, **no setup required**, just awareness.

9. OAuth & Authentication

- **Not Required**

- Reason: This is needed when authenticating external apps. Since we don't expose or consume APIs, this is not needed.

10. Remote Site Settings

- **Not Required**

- Reason: Required only if Salesforce makes HTTP callouts to external systems. Since we're not making any, this is unnecessary.

"Phase-7 was explored, but not implemented as the project scope required only internal Salesforce data, with no external integrations."