

CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

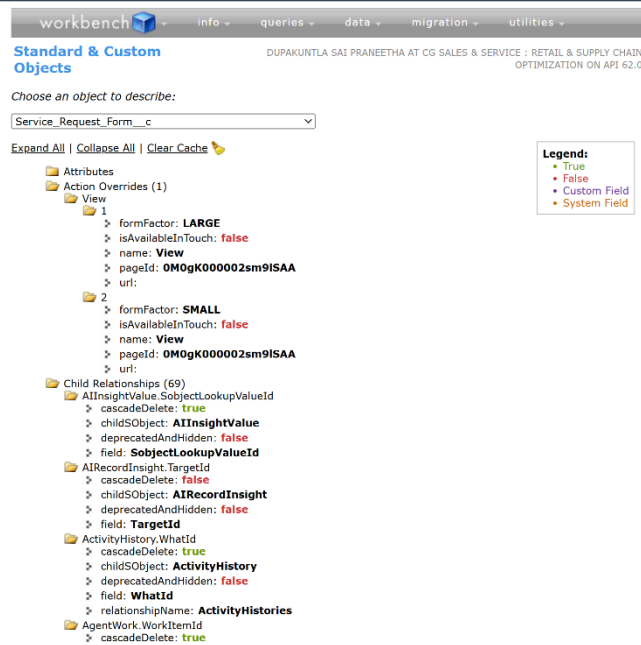
Phase 7: Integration & External Access

1. Named Credentials

- **Named Credentials** store authentication details for external systems in Salesforce.
- Simplifies callouts by managing endpoints and authentication in a centralized location.
- Example: Used Named Credentials to connect Salesforce with an external payment system securely.

2. External Services

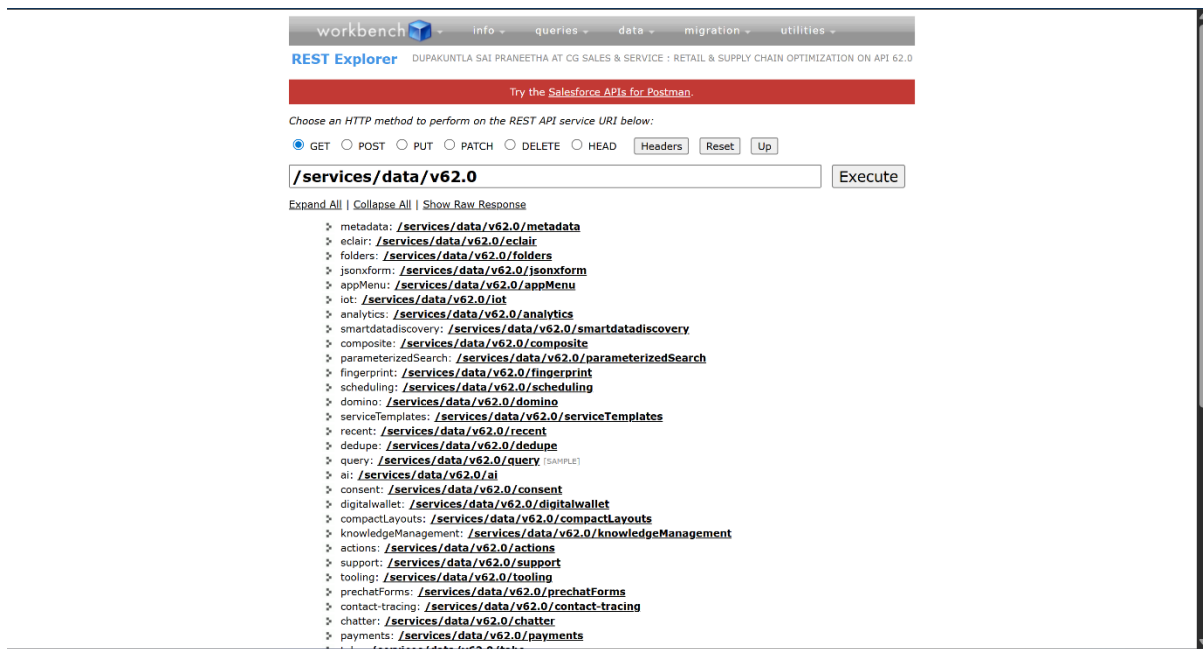
- **External Services** allow Salesforce to connect with external APIs declaratively.
- In my project, I used **Workbench** to explore and test external APIs before integrating them into Salesforce.
- Example: Tested API endpoints via Workbench to fetch data for **Service Request Forms** and verify responses before using them in Flows or Apex.
- This approach ensured that the integration was accurate and reduced errors during implementation.



3. Web Services (REST)

- REST Web Services allow Salesforce to expose or consume APIs using standard HTTP methods (GET, POST, PUT, DELETE).

- In my project, I created REST endpoints in Salesforce to allow external systems to create or update Service Request Form records.
- Example: An external application can send a POST request to create a new Service Request Form in Salesforce automatically.
- Also, used GET requests to allow external systems to fetch details of transactions and service requests in real time.
- Ensures smooth integration with third-party systems and supports real-time data exchange.



4.Remote Site Settings

- **Remote Site Settings** are required to whitelist external endpoints for Apex callouts.
- In my project, I configured **Remote Site Settings** to allow Salesforce to communicate securely with the **payment gateway API**.
- This ensures that Apex callouts to external systems are authorized and prevents runtime errors during integration.

The screenshot shows the Salesforce Setup interface for Remote Site Settings. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Remote Site Settings' and displays a table of 'All Remote Sites'. The table has columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active status, Created By, Created Date, Last Modified By, and Last Modified Date. Two sites are listed: ApexDevNet and Facebook. The URL for ApexDevNet is http://www.apexdevnet.com and for Facebook is https://www.facebook.com. Both sites are active and were created by EPIG_OrgFarm and SAI PRANEETHA, DUPAKUNTALA respectively.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓	EPIG_OrgFarm	9/9/2025, 12:58 AM	EPIG_OrgFarm	9/9/2025, 12:58 AM
Edit Del	Facebook	-	https://www.facebook.com	✓	SAI PRANEETHA, DUPAKUNTALA	9/25/2025, 8:19 AM	SAI PRANEETHA, DUPAKUNTALA	9/25/2025, 8:19 AM

5.Salesforce Connect

- **Salesforce Connect** allows Salesforce to access data stored in external systems **in real time** without importing it into Salesforce.
- It works by creating **External Objects**, which act like Salesforce objects but map directly to external data.
- You can perform standard operations like viewing, reporting, and querying external data, although some limits apply.
- **Benefits:**
 - Eliminates the need to replicate large datasets in Salesforce.
 - Provides up-to-date information directly from the source system.
 - Simplifies integration with ERP, inventory, or other third-party systems.
- **Example in Project:** Connected Salesforce to an external inventory system so users can see **real-time product availability** while managing **Transactions** or **Service Request Forms**.