CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization
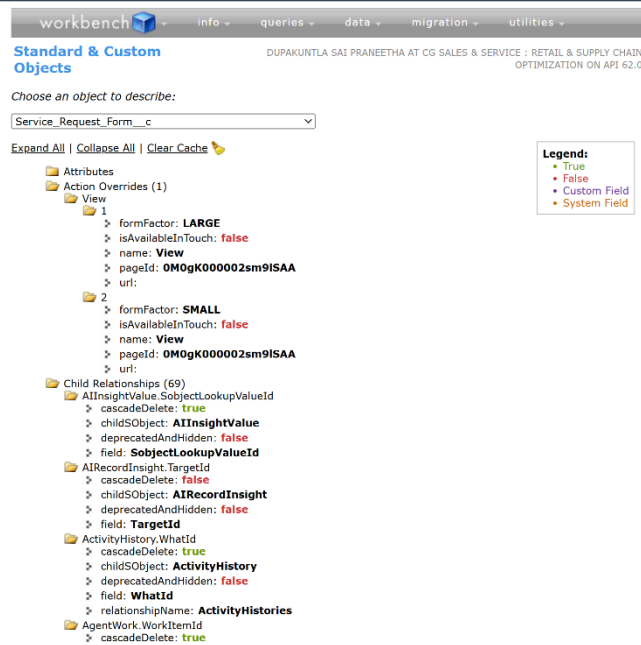
Phase 7: Integration & External Access

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.
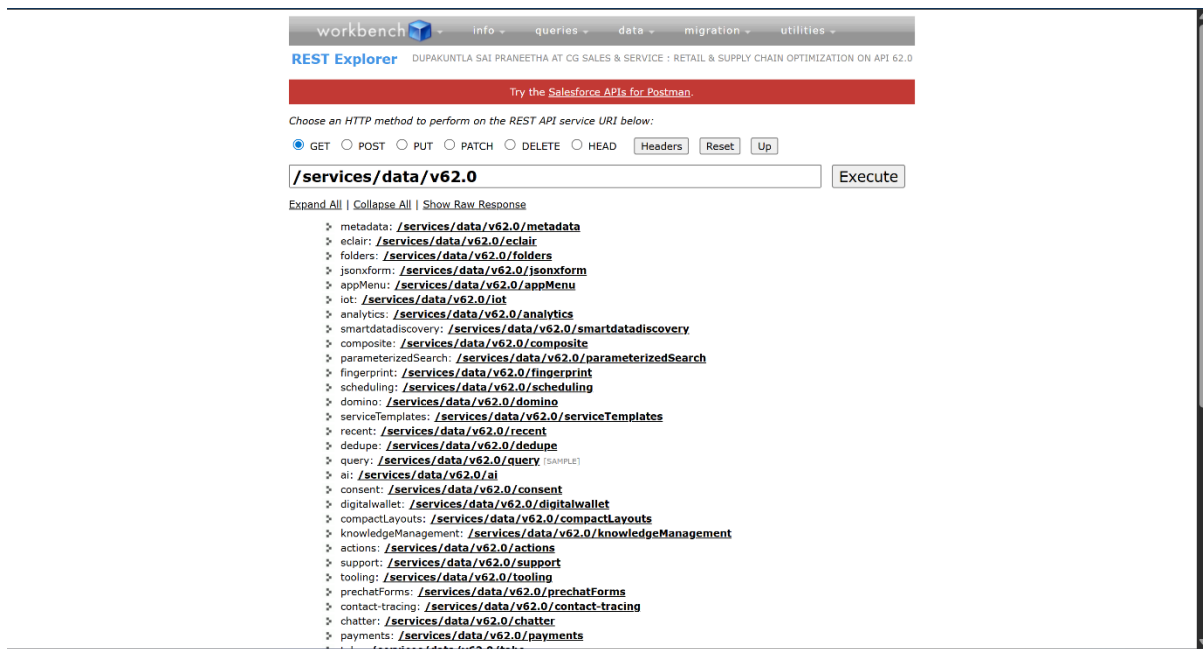
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2. External Services

- **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.

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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.

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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**.