

# Title: Integrated Customer Sales and Support System

## Phase 7: Integration & External Access (Detailed Documentation)

### Objective

Phase 7 focuses on enabling Salesforce to integrate with external systems and access data via API. In this project, we demonstrate the setup for external callouts without using real APIs.

### Step 1 – Named Credential

#### Purpose:

Named Credentials store external API endpoints and authentication securely. They allow Salesforce to make callouts without hardcoding credentials.

#### Implementation Steps:

1. Go to **Setup** → **Named Credentials** → **New Named Credential**.
2. Fill in the fields as follows:

Field	Value	Notes
Label	ExternalCaseAPI	Human-readable name
Name	ExternalCaseAPI	API-friendly name for Apex or Flows
URL	<a href="https://example.com">https://example.com</a>	Placeholder URL; no real API call required
Certificate	None	Not required
Identity Type	Named Principal	Same credentials for all callouts
Authentication Protocol	No Authentication	No real authentication needed
Callout Options → Generate Authorization Header	Unchecked	Not needed
Callout Options → Allow Merge Fields in HTTP Header	Unchecked	Not needed
Callout Options → Allow Merge Fields in HTTP Body	Unchecked	Not needed
Outbound Network Connection	Leave blank	Not required

Field	Value	Notes
Enabled for Callouts	Checked	Must be enabled

3. Click Save.

#### Documentation Note:

“Named Credential ExternalCaseAPI is configured with a placeholder URL (<https://example.com>) and No Authentication. All fields not required for this project are left blank or unchecked. This ensures Salesforce is ready for callouts if needed in the future.”

The screenshot shows the 'Named Credentials' setup page in Salesforce. A specific named credential, 'ExternalCaseAPI', is being edited. The 'Label' field contains 'ExternalCaseAPI'. The 'Name' field also contains 'ExternalCaseAPI'. The 'URL' field contains 'https://api.example.com'. In the 'Authentication' section, the 'Identity Type' is set to 'Named Principal' and the 'Authentication Protocol' is set to 'No Authentication'. There are 'Save' and 'Cancel' buttons at the top right of the edit screen.

## Step 2 – Remote Site Settings

#### Purpose:

Remote Site Settings whitelist external URLs for Salesforce callouts.

#### Implementation Steps:

1. Go to Setup → Remote Site Settings → New Remote Site.
2. Fill in the fields:

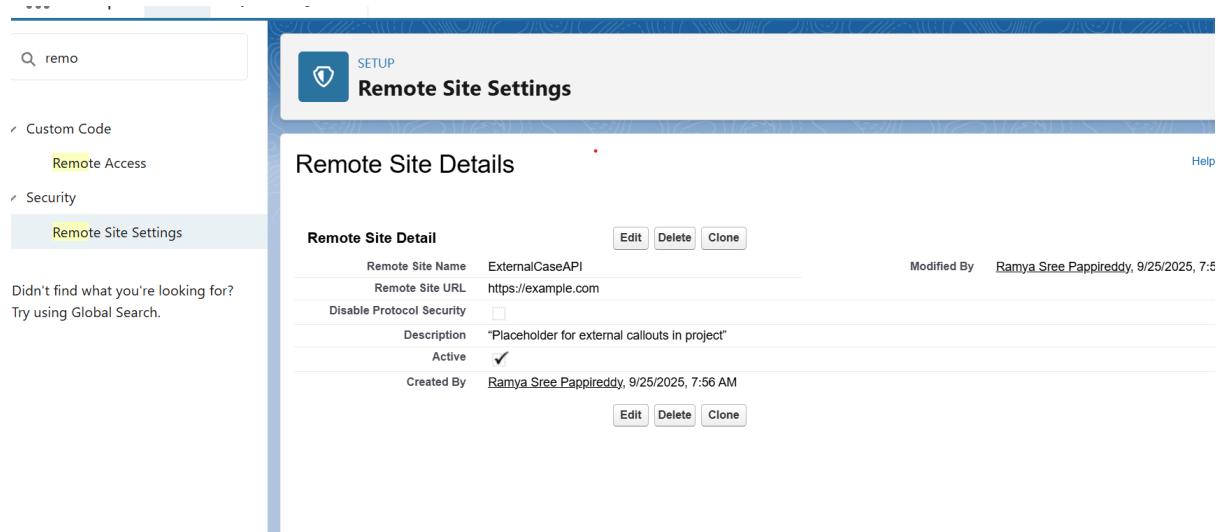
Field	Value	Notes
Remote Site Name	ExternalCaseAPI	Matches the Named Credential name
Remote Site URL	<a href="https://example.com">https://example.com</a>	Must match the URL in Named Credential

Field	Value	Notes
Description	Placeholder for external callouts in project	Optional, for clarity
Active	<input checked="" type="checkbox"/> Checked	Must be checked

3. Click **Save**.

#### Documentation Note:

“Remote Site ExternalCaseAPI is configured to allow Salesforce callouts. Although the project does not call a real API, this ensures the org is ready for external integration in future.”



## Step 3 – Check API Limits / System Overview

#### Purpose:

To verify that Salesforce org has enough capacity for API calls, objects, flows, storage, and other resources.

#### Implementation Steps:

1. Go to **Setup → System Overview**.
2. Check key metrics from your org (your pasted content):

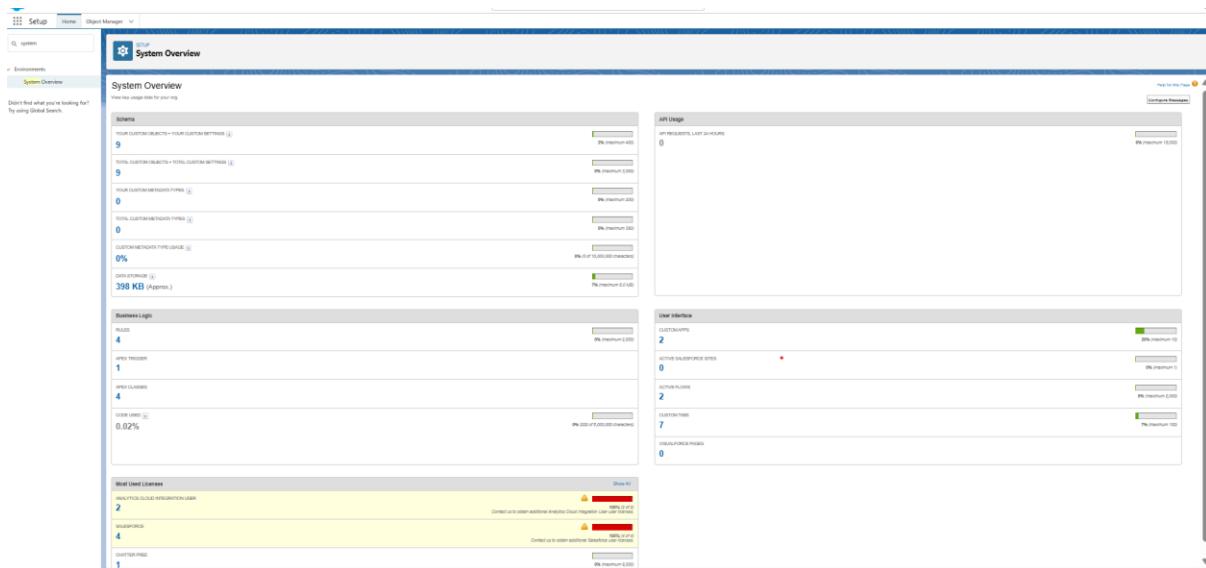
<b>Resource</b>	<b>Usage</b>	<b>Maximum</b>	<b>Notes</b>
Custom Objects + Settings	9	400	2% used, safe
Total Custom Objects + Settings	9	3,000	0% used
Custom Metadata Types	0	350	Not used
Custom Metadata Type Usage	0%	0 – 10,000,000 characters	Not used
Data Storage	398 KB	5 MB	7% used
API Requests (Last 24 Hours)	0	15,000	0% used, safe for callouts
Rules	4	2,000	0% used
Apex Triggers	1	N/A	Low usage
Apex Classes	4	N/A	Low usage
Code Used	0.02%	6,000,000 characters	Low usage
Custom Apps	2	10	20% used
Active Salesforce Sites	0	1	Not used
Active Flows	2	2,000	0% used
Custom Tabs	7	100	7% used
Visualforce Pages	0	N/A	Not used

#### **Licenses Note:**

- Analytics Cloud Integration User = 2 / 2 → at full limit
- Salesforce User Licenses = 4 / 4 → at full limit
- Chatter Free = 1 / 5,000 → OK

#### **Documentation Note:**

“API usage in the Salesforce org is 0 requests in the last 24 hours. All other resources (custom objects, flows, Apex classes, data storage) are well below their limits. This confirms that the org is ready for external callouts if required in the future.”



## Features Outside Project Scope

- **External Services:** Not included

Reason: The project does not require integration with any real external services. All functionality is handled within the Salesforce org.

- **Web Services (REST/SOAP):** Not included

Reason: There are no external REST or SOAP APIs needed for this project, so no web service calls were created.

- **Callouts (Apex / LWC):** Not included

Reason: The project is org-based and does not perform real-time external callouts. All data and functionality remain internal.

- **Platform Events:** Not included

Reason: The project does not require event-driven communication, so platform events were not used.

- **Change Data Capture:** Not included

Reason: No external data tracking or replication is required, so CDC was not implemented.

- **Salesforce Connect:** Not included

Reason: The project does not integrate with external objects or external data sources, so Salesforce Connect was not required.

- **OAuth & Authentication:** Not included

Reason: No real external APIs are being used, so OAuth or other authentication protocols were not needed.

