Salesforce Project Phase-7: Integration & External Access

Title :- Dairy Management System Private Limited Using Salesforce CRM

Named Credential: SMS_API_Credential

• URL (Base Endpoint):

https://api.smsprovider.com/v1

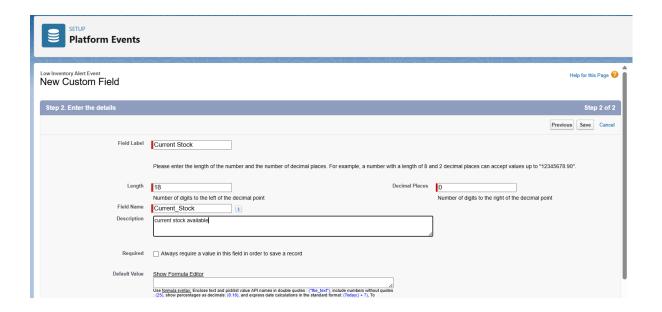
(Replace smsprovider.com with the actual SMS gateway provider you are using.)

- Authentication:
 - o If using API Key: set in Named Credential header or as "Password" in Basic Auth.
 - o If using OAuth 2.0: configure the OAuth settings with client ID/secret and token URL.

Platform Events

Create the Platform Event

• Go to Setup \rightarrow Platform Events \rightarrow New Platform Event

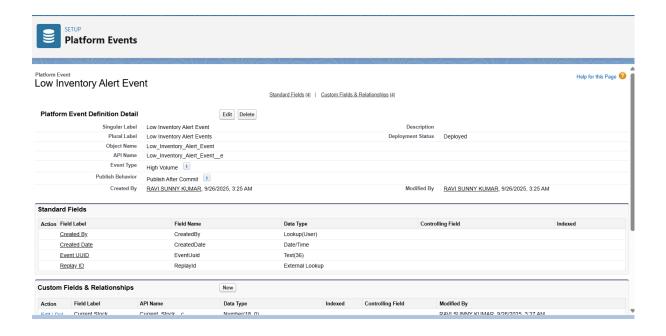


• Define:

- Label: Low Inventory Alert Event
- o API Name: Low_Inventory_Alert__e
- Publish Behavior: Publish After Commit (ensures event is fired only after successful DML transaction)

• Add Custom Fields:

- o Product c (Text) \rightarrow which product is low (e.g., Milk, Feed, Ghee)
- o Current Stock c (Number) → current stock available
- o Reorder_Level_c (Number) → threshold for replenishment
- Message c (Text Area) → user-friendly alert message



Publish the Event (Apex or Flow)

Option A: Record-Triggered Flow

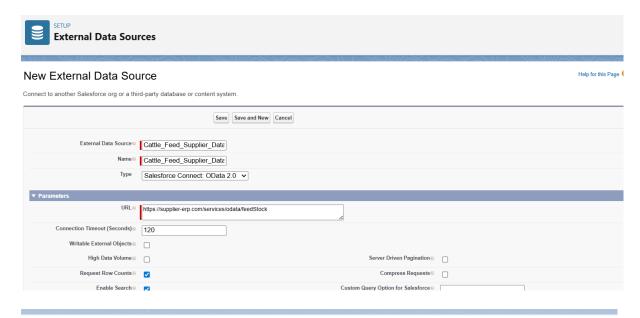
- Create a Record-Triggered Flow on the Inventory c object.
- Trigger condition: Stock_Quantity_c < Reorder_Level_c.
- Action: Create a Platform Event Record (Low_Inventory_Alert__e).
- Map fields accordingly.

Salesforce Connect

Configure External Data Source

- Go to Setup → External Data Sources → New External Data Source
- Enter details:
 - Name: Cattle_Feed_Supplier_Data
 - o Type: Salesforce Connect: OData 2.0 or 4.0 (depending on supplier system)
 - Authentication: Named Credential (OAuth / Password Authentication)
 - o URL: Supplier's OData/REST endpoint

Example: https://supplier-erp.com/services/odata/feedStock



Validate External Data Source: Cattle_Feed_S

Confirm that you can connect to the external system, and synchronize its schema with your Salesforce org.

« Back to External Data Source: Cattle_Feed_Supplier_Data

Name	Cattle_Feed_Supplier_Data
External Data Source	Cattle_Feed_Supplier_Data
Status	Server URL: https://supplier- erp.com/services/odata/feedStock/\$metadata

Remote Site Settings

- 1. Go to Setup \rightarrow Security \rightarrow Remote Site Settings \rightarrow New Remote Site.
- 2. Provide details:

- Remote Site Name → (e.g., SMS_API, MilkLab_API, PaymentGateway_API).
- o **Remote Site URL** → The base URL of the external API (e.g., https://api.smsprovider.com).
- \circ Active \rightarrow Checked.
- 3. Save the setting.
- 4. Now, when writing **Apex callouts** (e.g., HttpRequest), Salesforce validates the domain against these Remote Site Settings.

