

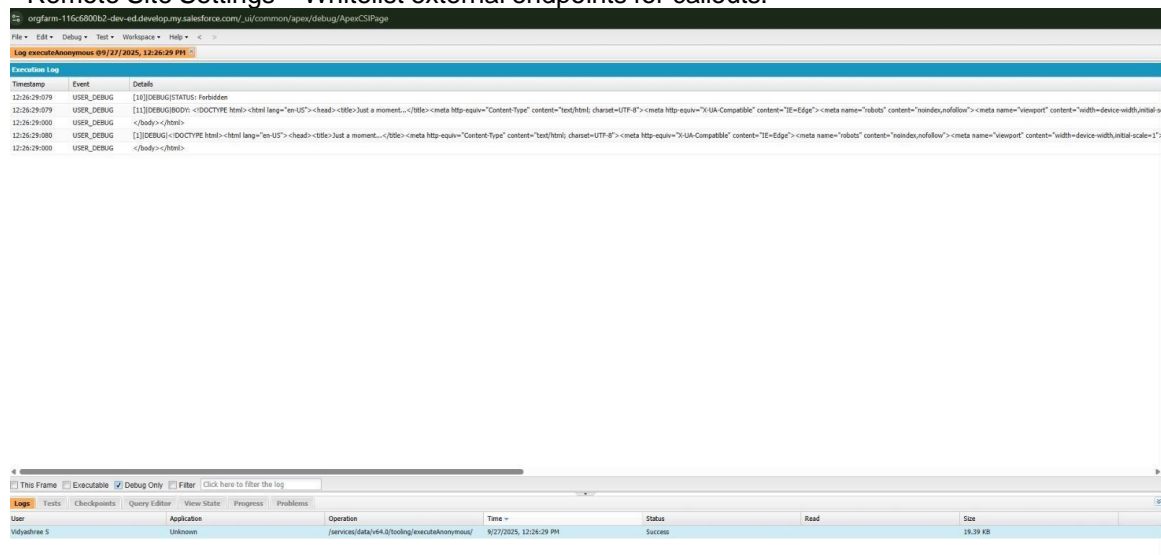
# AI Career Coach

## Phase 7: Integration & External Access

- Named Credentials – Secure authentication storage for APIs.
- External Services – Connect Salesforce to external APIs (OpenAPI schema).
- Web Services (REST/SOAP) – Consume or expose Salesforce data.

```
Http http = new Http();
HttpRequest request = new HttpRequest();
request.setEndpoint('callout:FakeStoreEC
/products');
request.setMethod('GET');
HttpResponse response =
http.send(request);
```

- Callouts – Trigger external APIs from Apex or Flows.
- Platform Events – Event-driven routing in real-time.
- Change Data Capture – Keep Salesforce and external data in sync.
- Salesforce Connect – Access external databases without duplication.
- API Limits – Monitor and optimize API consumption.
- OAuth & Authentication – Secure Connected Apps for integrations.
- Remote Site Settings – Whitelist external endpoints for callouts.



The screenshot displays the Salesforce Developer Console interface. The top section shows the 'Execution Log' for an anonymous Apex callout. Below this, a table lists the execution details for a user named 'Vidyahee S'.

User	Application	Operation	Time	Status	Read	Size
Vidyahee S	Unknown	/services/data/v44.0/tooling/executeAnonymous/	9/27/2025, 12:26:29 PM	Success		19.39 KB

## Phase 8: Data Management & Deployment

- Data Import Wizard – Simple CSV imports for test/training data.
- Data Loader – Bulk uploads/exports for historical cases.
- Duplicate Rules – Prevent duplicate cases affecting routing.
- Data Export & Backup – Regular exports for disaster recovery.

## Data Import Wizard

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### Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Contact	0	0	0	09-28-2025 03:33	199
Closed	Contact	0	2	0	09-28-2025 03:27	288
Closed	Account	0	0	0	09-28-2025 03:27	214
Closed	Product	2	0	0	09-28-2025 03:23	76
Closed	Contact	2	0	0	09-28-2025 03:11	401

Bulk Api Monitoring

- Change Sets – Deploy routing automation between environments.
- Unmanaged vs Managed Packages – Choose packaging for reuse.
- ANT Migration Tool – Automate metadata deployments.
- VS Code & SFDX – Modern CI/CD and source control integration.

### SETUP Duplicate Rules

#### Account Duplicate Rule Prevent Duplicate Account Names

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##### Duplicate Rule Detail

Edit Delete Clone Activate

Rule Name	Prevent Duplicate Account Names	Order	2 of 2 [ Reorder ]
Description			
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Merged	Matching Criteria	Matching rule for account records. <a href="#">More info</a>
Conditions			

Edit Delete Clone Activate

## Phase 9: Reporting, Dashboards & Security Review

- Reports – Tabular, Summary, Matrix, and Joined for routing analysis.
- Report Types – Custom report types for routing metrics.
- Dashboards – Visualize routing performance and SLA compliance.
- Dynamic Dashboards – Personalized dashboards for managers/agents.
- Sharing Settings – Configure case record visibility.

Setup Home Object Manager

Q sha

Security

Guest User Sharing Rule Access Report

Sharing Settings

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## Sharing Settings

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Private	Private	✓
Contact	Private	Private	✓
Order	Private	Private	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

https://orgfarm-4case46b63-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

- Field Level Security – Protect sensitive case fields.
- Session Settings – Enforce secure login/session behavior.
- Login IP Ranges – Restrict access for admins/integration users.
- Audit Trail – Track changes to routing logic and integrations.



## Session Settings

### Session Settings

Set the session security and session expiration timeout for your organization.

#### Session Timeout

Timeout Value

- ☐ Disable session timeout warning popup
- ☒ Force logout on session timeout

#### Session Settings

- ☐ Lock sessions to the IP address from which they originated
- ☒ Lock sessions to the domain in which they were first used
- ☐ Terminate all of a user's sessions when an admin resets that user's password [i](#)
- ☒ Force relogin after Login-As-User
- ☐ Require HttpOnly attribute
- ☐ Use POST requests for cross-domain sessions
- ☐ Enforce login IP ranges on every request [i](#)
- ☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

#### Extended use of IF11 with Lightning Experience