



Salesforce PropertyHub

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Phase 7 – Integration & External Access

Named Credentials

Purpose: Securely store authentication and endpoint details for external systems.

Key Features:

- Supports OAuth, Basic Authentication, and API key management.
- Centralized configuration → no credentials in code.

Business Impact:

- Simplifies integration setup.
- Enhances security and reduces admin overhead.

The screenshot shows the Salesforce Setup interface for creating a Named Credential named 'PropertyAPI'. The page includes fields for Label, URL, and various configuration options like Authentication and Callout Options.

Label	Name
PropertyAPI	PropertyAPI

URL: <https://api.propertylistings.com/v1>

Enabled for Callouts:

Authentication:

External Credential: [PropertyAPI_ExtCred](#)

Client Certificate: (Empty)

Callout Options:

Generate Authorization Header:

Allow Formulas in HTTP Header:

Allow Formulas in HTTP Body:

Remote Site Settings

Purpose: Allow Salesforce to connect with external domains.

Key Features:

- Whitelists external URLs for API callouts.
- Prevents unauthorized callouts by default.

Business Impact:

- Ensures compliance and safe data exchange.
- Reduces risk of unapproved integrations.

The screenshot shows the 'Remote Site Settings' page in the Salesforce setup. A single record is displayed:

Remote Site Detail		Actions
Remote Site Name	PropertyAPI	Edit Delete Clone
Remote Site URL	https://api.propertylistings.com	
Disable Protocol Security	<input type="checkbox"/>	
Description		
Active	<input checked="" type="checkbox"/>	
Created By	Sushmita Katariya, 9/23/2025, 8:57 PM	

External Services & Callouts

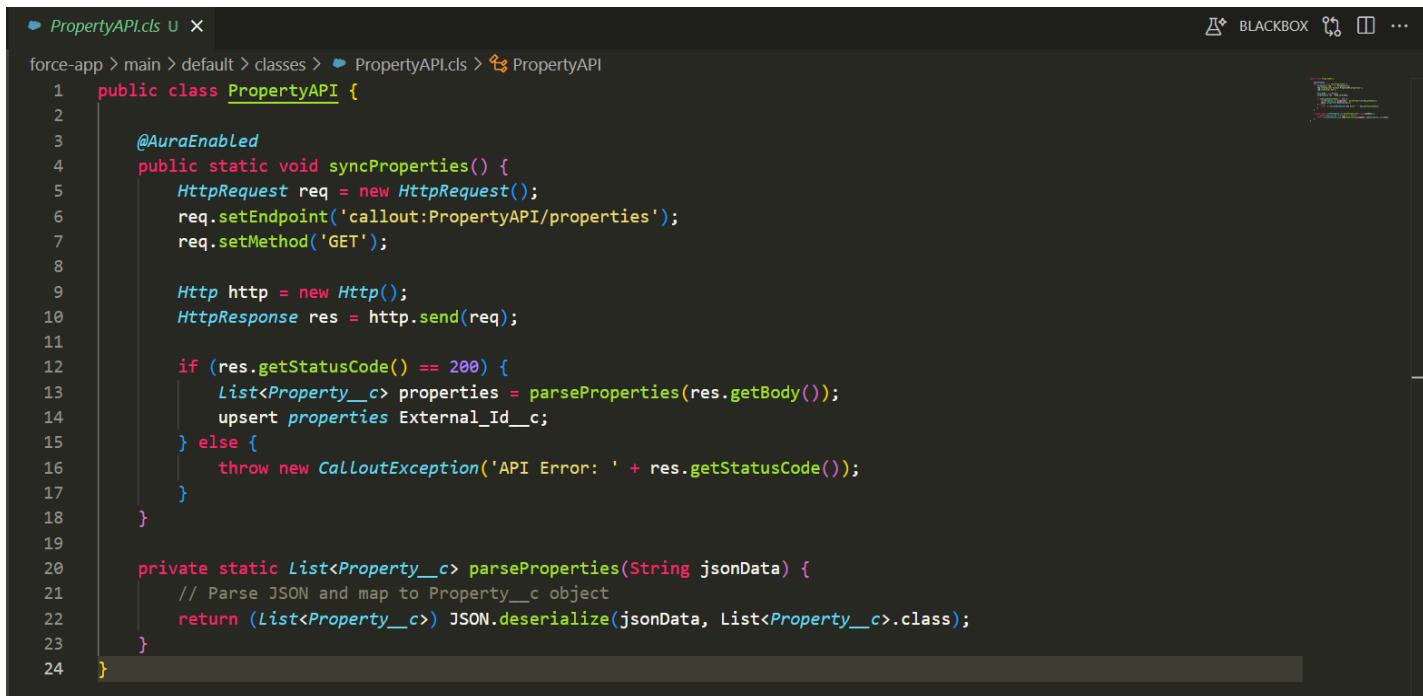
Purpose: Connect Salesforce with external REST/SOAP APIs.

Key Features:

- Apex callouts with HTTP methods (GET, POST, PUT, DELETE).
- Schema-based service registration for declarative integration.

Business Impact:

- Automates property sync from listing platforms.
- Expands CRM capabilities without duplicating systems.



```

1  public class PropertyAPI {
2
3      @AuraEnabled
4      public static void syncProperties() {
5          HttpRequest req = new HttpRequest();
6          req.setEndpoint('callout:PropertyAPI/properties');
7          req.setMethod('GET');
8
9          Http http = new Http();
10         HttpResponse res = http.send(req);
11
12         if (res.getStatusCode() == 200) {
13             List<Property__c> properties = parseProperties(res.getBody());
14             upsert properties External_Id__c;
15         } else {
16             throw new CalloutException('API Error: ' + res.getStatusCode());
17         }
18     }
19
20     private static List<Property__c> parseProperties(String jsonData) {
21         // Parse JSON and map to Property__c object
22         return (List<Property__c>) JSON.deserialize(jsonData, List<Property__c>.class);
23     }
24 }

```

Platform Events

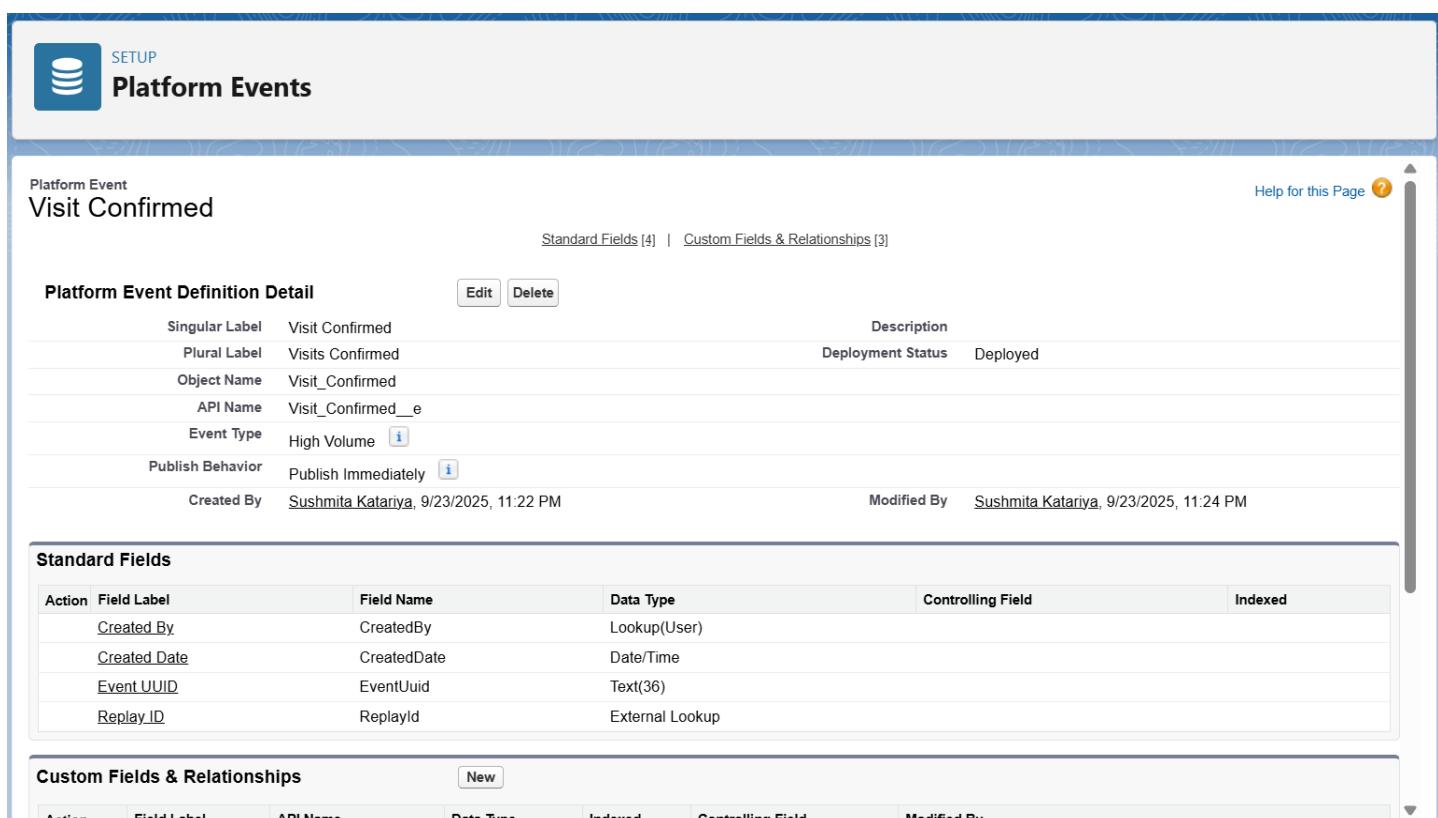
Purpose: Enable event-driven communication inside and outside Salesforce.

Key Features:

- Publish/subscribe model for real-time updates.
- Works with Flows, Apex, and external apps.

Business Impact:

- Enables instant notifications (e.g., visit confirmations).
- Improves system responsiveness and customer experience.



SETUP

Platform Events

Platform Event

Visit Confirmed

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Platform Event Definition Detail		Edit	Delete
Singular Label	Visit Confirmed	Description	
Plural Label	Visits Confirmed	Deployment Status	Deployed
Object Name	Visit_Confirmed		
API Name	Visit_Confirmed_e		
Event Type	High Volume i		
Publish Behavior	Publish Immediately i		
Created By	Sushmita Kataria, 9/23/2025, 11:22 PM	Modified By	Sushmita Kataria, 9/23/2025, 11:24 PM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

Action	Field Label	API Name	Date Type	Indexed	Controlling Field	Modified By

Change Data Capture (CDC)

Purpose: Track and sync Salesforce record changes to external systems.

Key Features:

- Supports inserts, updates, deletes, and undeletes.
- Streams events for near real-time sync.

Business Impact:

- Keeps external apps (e.g., websites, portals) in sync.
- Reduces manual re-entry of property or lead data.

The screenshot shows the Salesforce Setup interface with the title "Change Data Capture". It displays two lists: "Available Entities" on the left and "Selected Entities" on the right. A central area contains a search bar with placeholder text "Type to filter list..." and two navigation buttons: a right-pointing arrow between the lists and a left-pointing arrow below the "Selected Entities" list. The "Available Entities" list includes: Account, Account Clean Info, Account Contact Role, Agent Work, Appointment, Asset Relationship, Assigned Resource, and Associated Location. The "Selected Entities" list includes: Agent Territory, Agent, Asset, Case, Commission, Contact, Customer, File, and Contract. The "Selected Entities" list has a vertical scroll bar.

Salesforce Connect

Purpose: Access external data in real time without storing it in Salesforce.

Key Features:

- OData connector for external databases.
- Virtual objects appear as Salesforce objects.

Business Impact:

- Reduces storage costs.
- Provides unified view of customer + property data.



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External Data Sources

External Data Source: Property_API

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Connect to another Salesforce org or a third-party database or content system.

[« Back to External Data Sources](#)[Edit](#) [Validate and Sync](#) [Delete](#)

External Data Source Property_API

Name PropertyAPI_Ext

Type Amazon DynamoDB

Parameters

Named Credential [PropertyAPI](#)Connection Timeout (Seconds) Writable External Objects [Edit](#) [Validate and Sync](#) [Delete](#)

External Objects

None

OAuth & Authentication

Purpose: Standardize secure access to external systems.

Key Features:

- Supports OAuth 2.0 for external APIs like Google Calendar, Twilio.
- Centralized revocation and token refresh.

Business Impact:

- Strengthens security.
- Simplifies agent workflows with single sign-on integrations.



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Auth. Providers

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Auth. Provider

[Edit](#) [Delete](#) [Clone](#)

Auth. Provider ID OS0gL000000s7yz

Provider Type Salesforce

Name Salesforce Calender Integration

URL Suffix Salesforce_Calender_Integration

Consumer Key

Consumer Secret

Authorize Endpoint URL <https://login.salesforce.com/services/oauth2/authorize>Token Endpoint URL <https://login.salesforce.com/services/oauth2/token>Use Proof Key for Code Exchange (PKCE) Extension

Default Scopes

Include Consumer Secret in SOAP API Responses

Custom Error URL

Custom Logout URL

Registration Handler Type None

Portal

Icon URL

API Limits & Governance

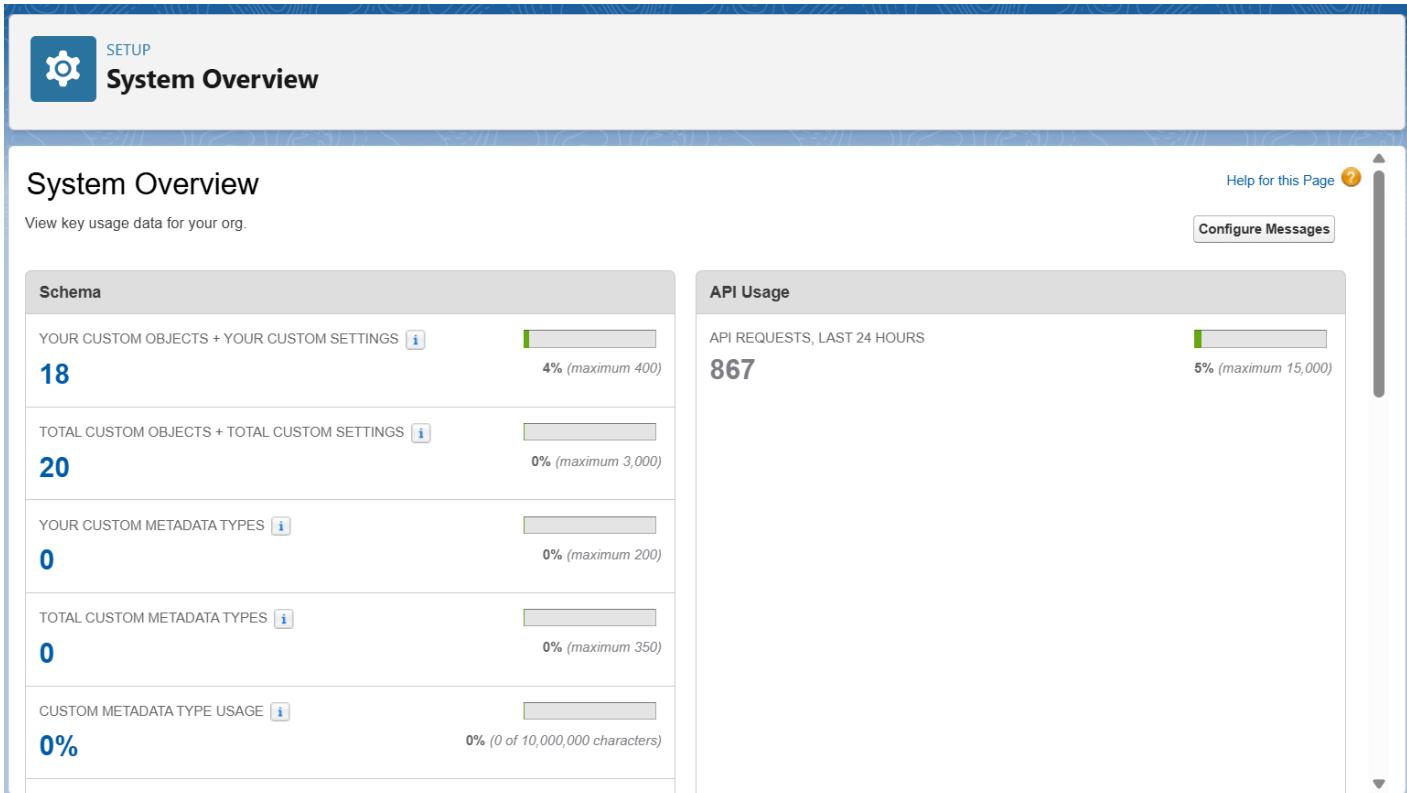
Purpose: Ensure integrations remain within Salesforce limits.

Key Features:

- Daily per-org and per-user callout limits.
- Monitoring via Setup → System Overview.

Business Impact:

- Prevents service interruptions.
- Encourages efficient, scalable integration design.



🏆 Outcomes of Phase 7

- Secure integration setup with Named Credentials & Remote Site Settings.
- Automated property sync and SMS notifications via API callouts.
- Real-time updates with Platform Events & Change Data Capture.
- Extended CRM capabilities with Salesforce Connect.
- Improved customer engagement through external services (Twilio, Google, etc.).

➡️ Next Steps: Phase 8 – Data Management & Deployment

- Data import/export for leads & properties.
- Backup strategies.
- Deployment tools (Change Sets, SFDX, Packages).