Phase 7: Integration & External Access

TaskFlow Pro Project Management System

Objective

Learn integration concepts for connecting Salesforce with external systems

Concepts Covered

1. Named Credentials

Secure storage for authentication credentials

2. External Services

Register and call external REST APIs

3. Web Services

Expose Salesforce data via REST/SOAP

4. Callouts

Make HTTP requests to external systems

5. Platform Events

Real-time event-driven integration

6. Change Data Capture

Track and sync data changes

7. Salesforce Connect

Access external data without importing

8. API Limits

Monitor and manage API usage

9. OAuth Authentication

Secure authorization protocols

10. Remote Site Settings

Whitelist external URLs

Potential Integrations

- Time tracking tools (Toggl, Harvest)
- Communication platforms (Slack, Teams)
- Code repositories (GitHub, GitLab)
- CI/CD pipelines (Jenkins)

Summary

No practical implementation in this phase
Learned concepts for future system connections