

Phase 7: Integration & External Access

Goal: Connect SmartPropertyPortal with external systems for insurance verification, appointment sync, and customer access.

Named Credentials

Stored Property Insurance API credentials securely using Named Credentials.

Authentication: OAuth 2.0

Header: Content-Type: application/json

Screenshot: Named Credential setup with OAuth and headers

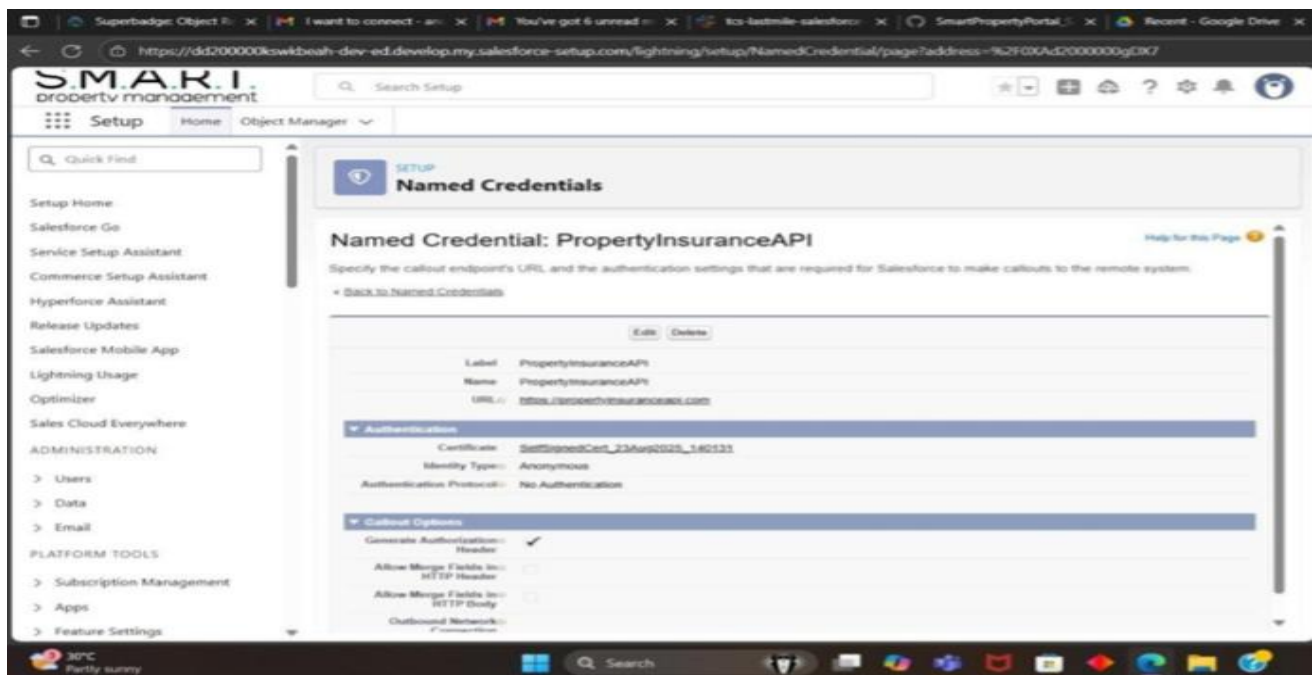


Image:

https://drive.google.com/file/d/1byhZlv-DIWZVAmhO70CYL3FP4KpAmhyq/view?usp=drive_link

External Services

Connected with external insurance verification service using OpenAPI schema.

Schema URL: <https://propertyinsuranceapi.com/openapi.json>

Registered via Absolute URL

Screenshot: External Service registration with schema and Named Credential

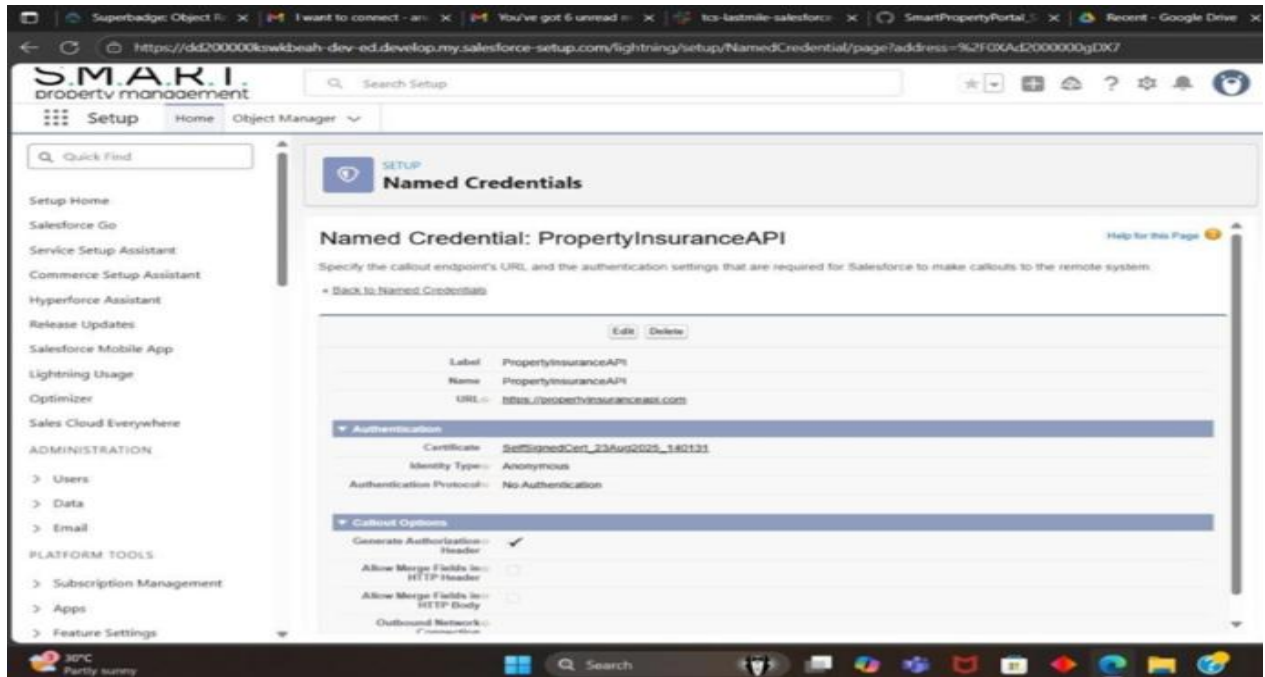


Image:

Web Services (REST Callout)

Used REST callout to fetch insurance status of a property.

Endpoint: /API/property/insurance Status

Response: JSON with coverage details and expiry date Apex Class: InsuranceCallout.cls

Screenshot: Apex class in Developer Console

Callouts

Triggered when a new appointment is created.

Trigger: Appointment Trigger

Sends property ID to insurance API → receives verification status

Screenshot: Trigger logic in Developer Console Image: tFYA4yFP9VeZQ26zeD6oh

Platform Events

Published event if a property issue or damage is reported.

Event: PropertyIssueReported__e

Subscribed by external maintenance system

Change Data Capture (CDC)

Enabled CDC on Appointment__c object.

Syncs updates with external calendar service

Salesforce Connect

Connected external database where property listings are managed by third-party agents.

Used OData connector to sync external data into Salesforce

API Limits

Monitored daily API usage via System Overview.

Alerts set if usage exceeds 80% of daily limit Screenshot: System Overview with API usage OAuth & Authentication

Enabled OAuth login for buyers accessing the portal.

Authenticated via Google or LinkedIn

Setup via Connected App

Screenshot: Connected App OAuth settings

Remote Site Settings

Added trusted domains for callouts:

<https://propertyinsuranceapi.com> <https://externalcalendar.com>

Screenshot: Remote Site Settings list showing trusted domain

“Integrated SmartPropertyPortal with external systems using Named Credentials, REST callouts, Platform Events, CDC, and OAuth. Registered insurance APIs via External Services and automated appointment verification using Apex triggers. Enabled secure login and synced external property data using Salesforce Connect.”