

## Phase 7: Integration & External Access

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

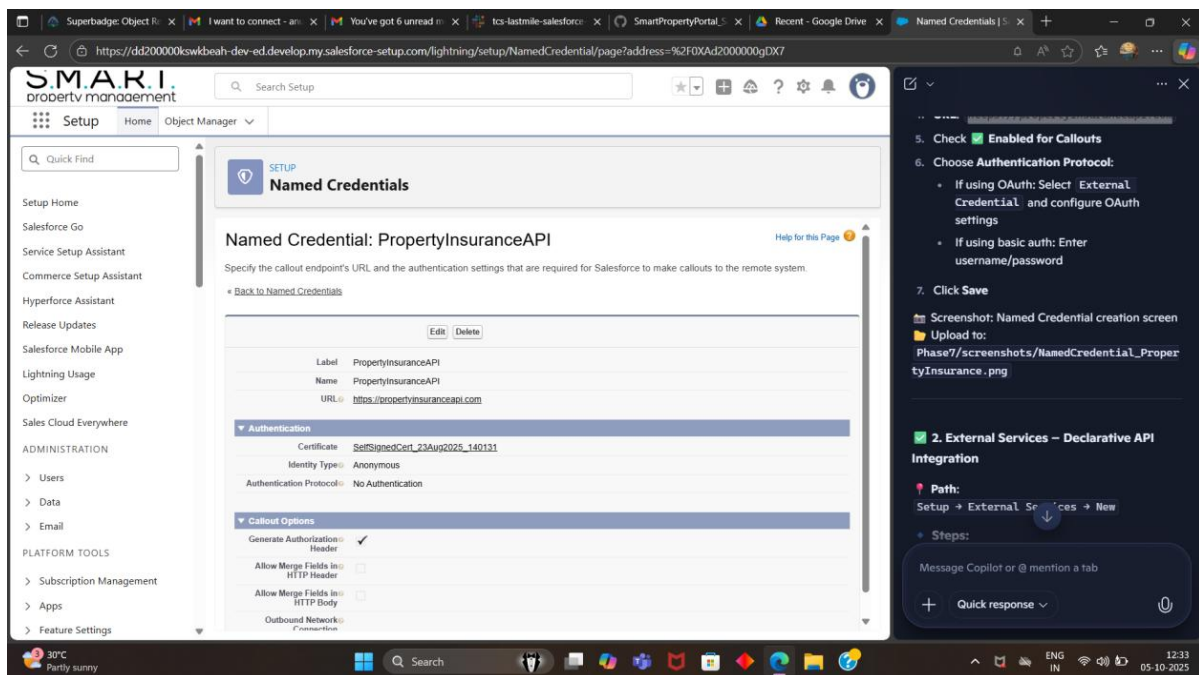
### ◆ Named Credentials

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](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

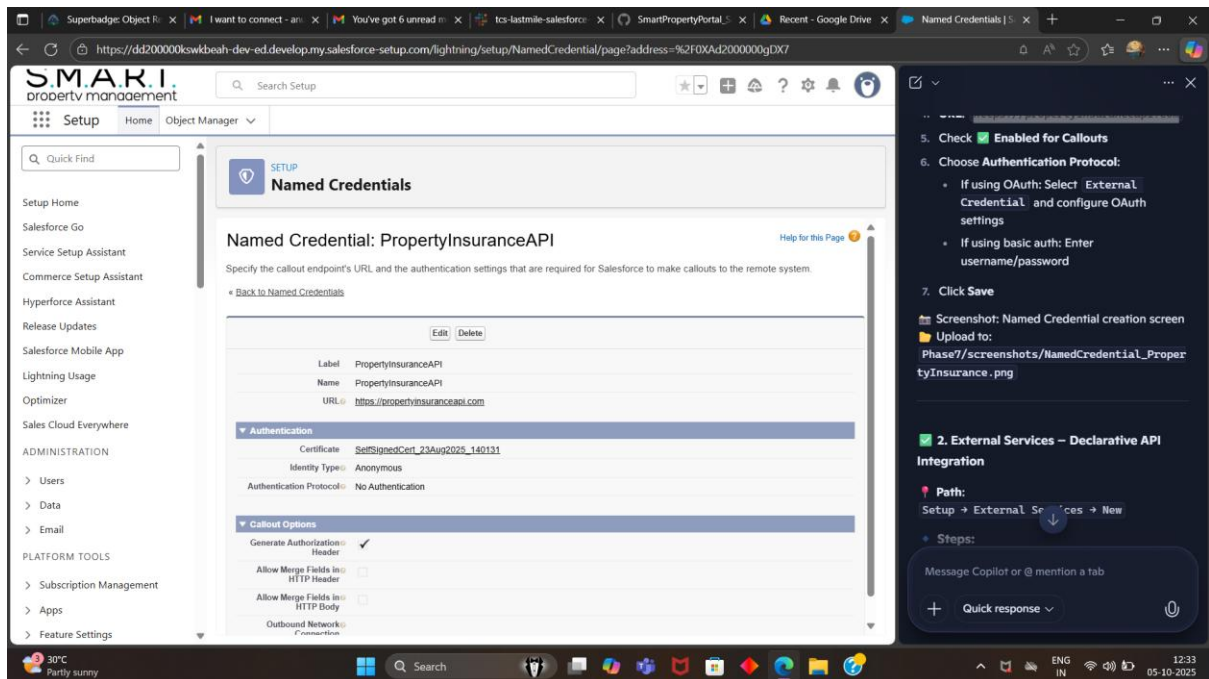


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#### ◆ Web Services (REST Callout)

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.”