

FitCRM — Phase 7: Integration & External Access

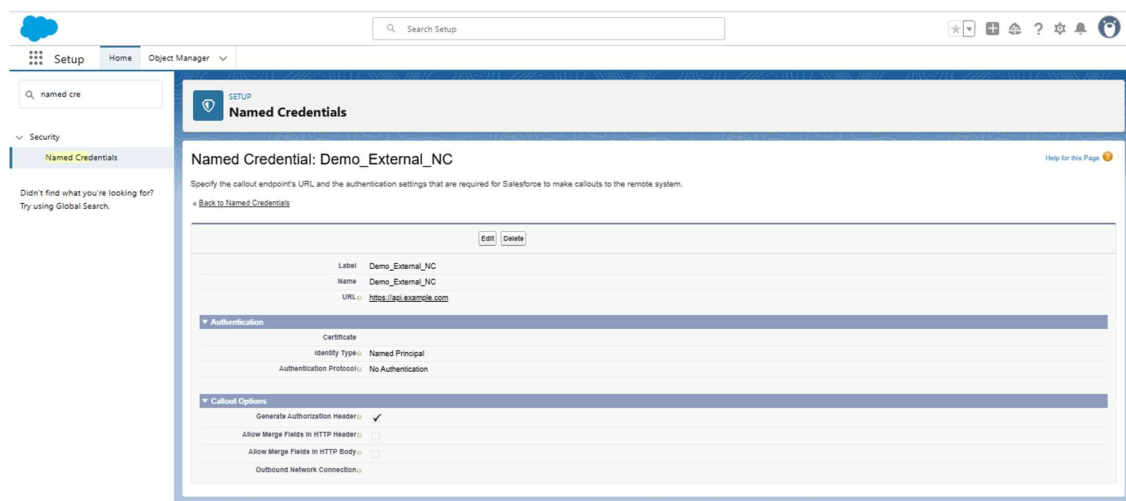
Introduction

Phase 7 focused on enabling integration and external access capabilities for the FitCRM application. This ensures that the system can communicate with external applications, provide notifications, and expose data securely when required.

Step 1 — Named Credentials

Enhanced Named Credentials were explored to connect Salesforce with external services. However, due to limitations in the project org, Identity Type and Authentication Protocol options were not available. Therefore, this step was noted but not implemented fully in FitCRM.

Named Credential: Demo_External_NC



Step 2 — Platform Events

Platform Events were created to support real-time event-driven communication inside Salesforce. This helps broadcast important system events across the application.

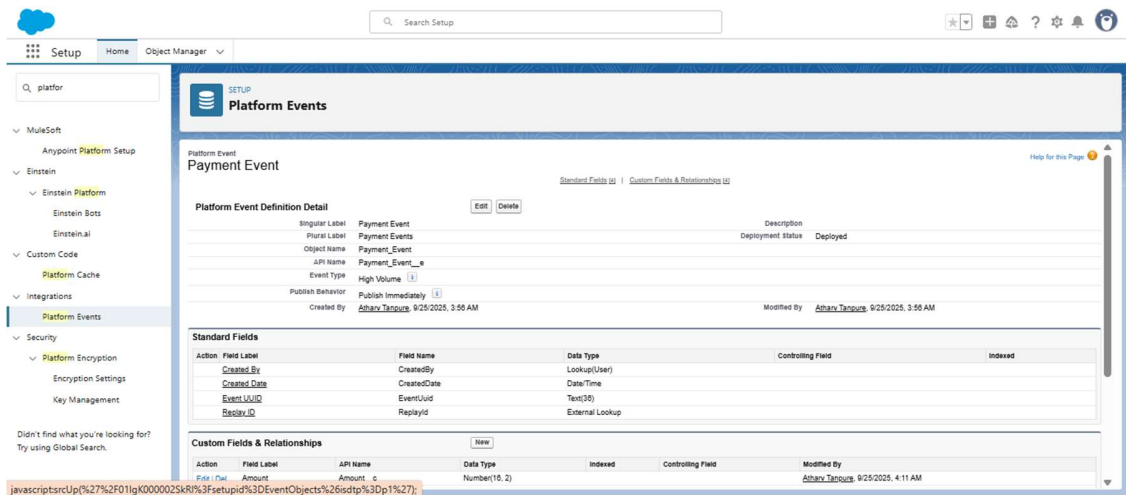
Implemented Example:

- Event: PaymentEvent__e
 - Field: Member__c (Lookup → Member)
 - Field: Amount__c (Number)

- Field: Status__c (Text)

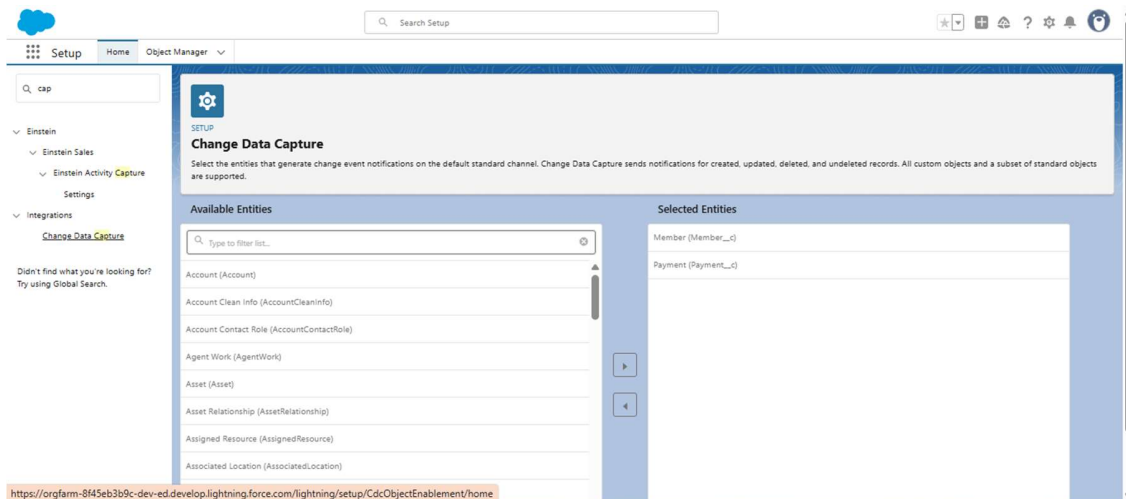
- Field: PaymentID__c (Text)

Purpose: Notify internal systems when a payment is processed.



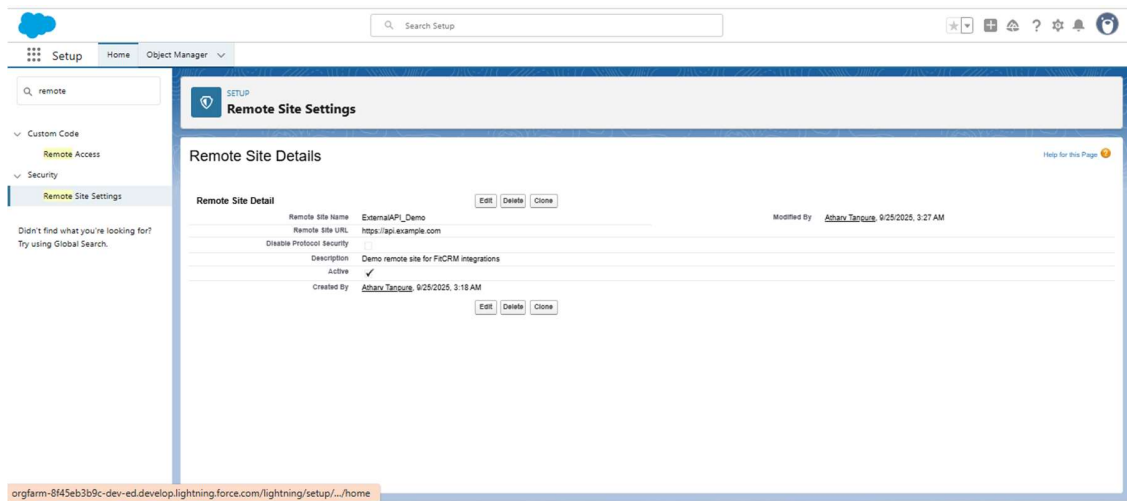
Step 3 — Change Data Capture

Change Data Capture was considered to track changes in key objects like Member__c or Payment__c. This was not implemented but documented as a future enhancement.



Step 4 — Remote Site Settings (Optional)

Remote Site Settings were noted as required for making external callouts. This step was acknowledged but not required as no callouts were implemented.



Conclusion

Phase 7 documented the external access and integration possibilities of FitCRM. Platform Events were successfully implemented to demonstrate event-driven integration. Other features such as Named Credentials, External Services, and OAuth were explored but not implemented, since they were not required for the project scope.