

Project Title: Employee Wellness & Productivity Tracker

Phase 7 : Integration & External Access

Reason for Internal Focus:

This Employee Wellness & Productivity Tracker project is currently designed as an internal system within Salesforce. All employee and wellness data is stored and processed internally, and no integration with external HR or wellness systems is required at this stage. However, understanding integration concepts is important for future scalability, when the organization might want to connect Salesforce with external applications or services for real-time updates or enhanced reporting.

Key Topics and Internal Context

1. Named Credentials

- Purpose: Store authentication details for external systems securely.
- Internal Status: Not implemented because there are no external API connections.
- Future Use: Will be useful if we need to fetch or push data to an external HR or wellness system without hardcoding credentials.

2. External Services

- Purpose: Integrate external APIs declaratively using OpenAPI schemas.
- Internal Status: Not implemented; all processes are internal.

- Future Use: Allows Salesforce to call external services without writing complex Apex code.

3. Web Services (REST/SOAP)

- Purpose: Expose Salesforce functionality as APIs or consume external REST/SOAP services.
- Internal Status: Not used for this internal project.
- Future Use: Can be used to expose wellness data to other systems or to integrate with external dashboards.

4. Callouts

- Purpose: Make HTTP requests from Salesforce Apex to external systems.
- Internal Status: Not needed, as data is internal.
- Future Use: Useful for retrieving HR data or sending wellness metrics to other applications.

5. Platform Events

- Purpose: Enable real-time event-driven communication between Salesforce and external systems.
- Internal Status: Optional; not required for internal-only notifications.
- Future Use: Can trigger automated processes or notifications when wellness records change.

6. Change Data Capture (CDC)

- Purpose: Track and capture changes to Salesforce records for external consumption.
- Internal Status: Not implemented; no external consumers.
- Future Use: Allows external applications to be notified automatically when wellness data is updated.

7. Salesforce Connect

- Purpose: Access external data in real-time without storing it in Salesforce.
- Internal Status: Not required; all wellness data is stored internally.
- Future Use: Useful if external HR or wellness data needs to be viewed in Salesforce without duplicating it.

8. API Limits

- Purpose: Monitor and manage Salesforce API usage to avoid hitting governor limits.
- Internal Status: Minimal relevance because the project is internal.
- Future Use: Will be important when integrating with external systems to prevent exceeding daily limits.

9. OAuth & Authentication

- Purpose: Securely authorize external apps to access Salesforce via OAuth 2.0.
- Internal Status: Not implemented; no external access is required.

- Future Use: Critical for secure integrations with third-party applications.

10. Remote Site Settings

- Purpose: Whitelist external endpoints to allow callouts from Salesforce.
- Internal Status: Not needed for internal-only processes.
- Future Use: Required for making HTTP callouts to approved external systems.

Conclusion

For the current phase, all integration-related topics are **not implemented**, since the Employee Wellness project is fully internal. The system efficiently handles employee wellness tracking, reporting, and automation within Salesforce.

In the future, if the organization requires integration with external HR systems or wellness platforms, all these components—**Named Credentials, Callouts, External Services, Platform Events, and CDC**—can be implemented to enable secure, real-time, and scalable integrations.