

# Phase 7 – Integration & External Access


## 1. Introduction

This phase integrates the Punjab Flood Relief CRM with external services and APIs. It enables real-time communication with outside systems such as maps or demo APIs, ensures volunteers and NGOs get accurate data, and allows external users (donors) to interact through portals.

## 2. Named Credential Setup

**Purpose:** Provides a secure connection to an external API.

**Steps:**

- Navigate: **Setup** → **Quick Find** → **Named Credentials** → **New Named Credential**
- Fill details:
  - **Label:** DemoAPI
  - **Name:** DemoAPI
  - **URL:** [https://raw.githubusercontent.com/chinmay20cc/Disaster\\_Relief\\_CRM\\_Salesforce/main](https://raw.githubusercontent.com/chinmay20cc/Disaster_Relief_CRM_Salesforce/main)
  - **Enabled for Callouts** 
  - **Authentication:** No Authentication (via External Credential if required).
- Save.

SETUP > NAMED CREDENTIALS  
PetstoreAPI

Edit Delete

Label: PetstoreAPI Name: PetstoreAPI

URL: https://petstore.example.com/api

Enabled for Callouts: ☒

Authentication

External Credential: [PetstoreExt](#)

Client Certificate:

Callout Options

Generate Authorization Header: ☒

Allow Formulas in HTTP Header: ☐

Allow Formulas in HTTP Body: ☐

Outbound Network Connection: ☐

SETUP  
Named Credentials

Named Credentials External Credentials External Auth Identity Providers

1 Items - Sorted by Label [New](#)

Label	Authentication Protocol	Actions
<a href="#">PetstoreExt</a>	No Authentication	<a href="#">⌵</a>

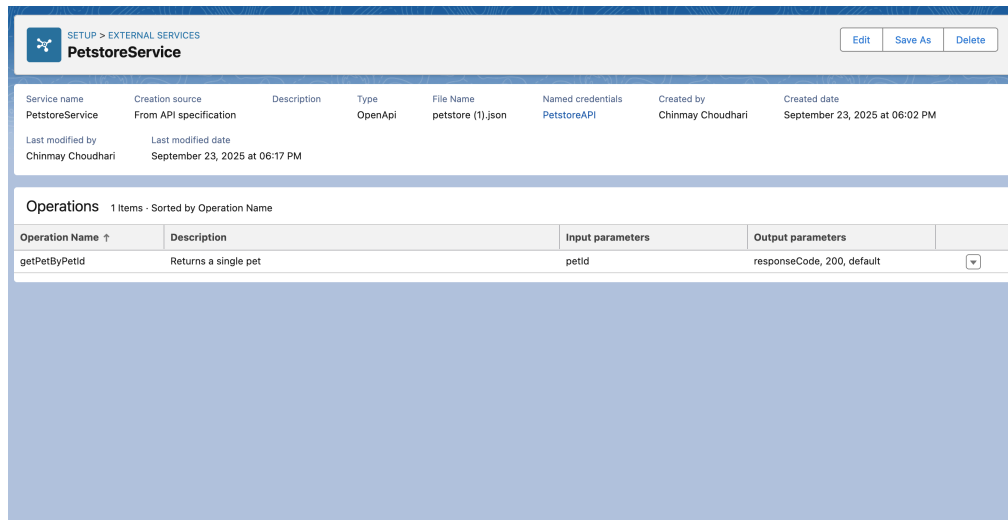
### 3. External Service Registration

**Purpose:** Registers the schema (API contract) so Salesforce can use it in Flow without Apex.

**Steps:**

- Navigate: **Setup** → **External Services** → **New External Service**
- Fill details:
  - **External Service Name:** DemoService
  - **Description:** Demo API connected to Salesforce for Flood Relief CRM testing
  - **Named Credential:** Select **DemoAPI**

- **Relative URL:** /demo-service.json
- Click **Save**.

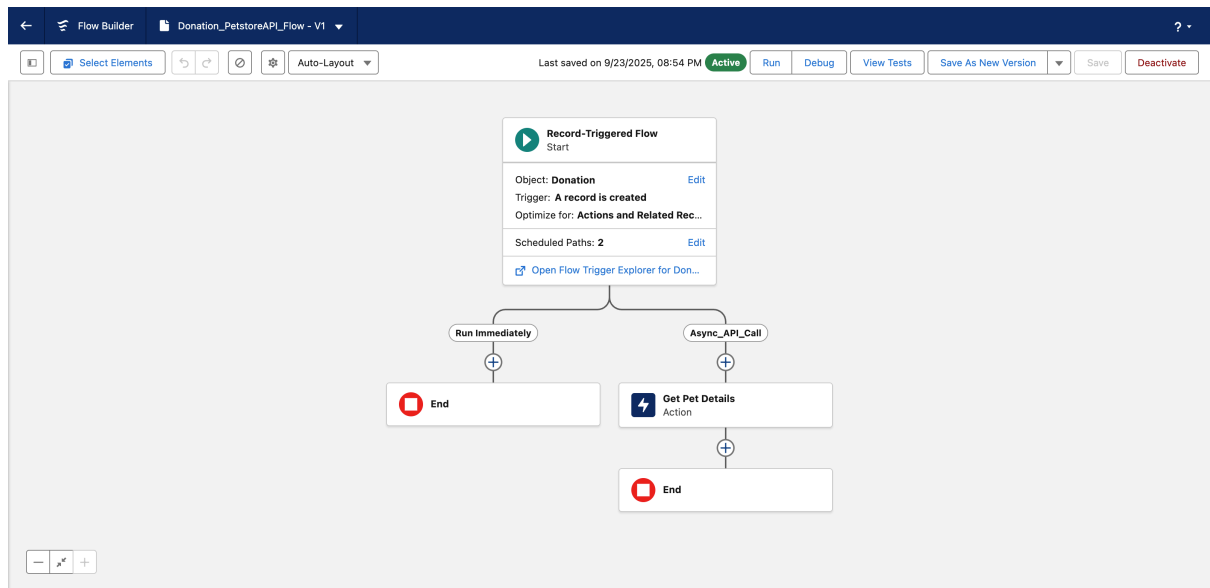


## 4. Flow Integration (Using External Service)

**Purpose:** Demonstrates how external APIs can be called from Salesforce Flows.

**Steps:**

- Navigate: **Setup** → **Flows** → **New Flow**
- Select **Screen Flow** → **Create**
- Add a **Screen Element** → Text/Number input for “Enter ID”
- Add **Action** → Search for DemoService → Select operation (e.g., hello)
- Map input variable to operation parameter
- Add **Screen Element** → Display Text → Show API Response ({{!hello.message}})
- Save & Activate the Flow



## 5. Conclusion

This phase connected Salesforce CRM with external APIs using **Named Credentials** and **External Services**.

It showed how a simple demo service can be called in a Flow, and how donors/volunteers could also access information through an external portal.

These integrations lay the foundation for adding real APIs (e.g., Google Maps, Payment Gateways) in the future.