

Phase 7 – Integration & External Access

In this phase, we explored how the Investment Tracker could connect with external financial systems. While we did not build heavy integrations in this version, we identified future enhancements such as:

- **Live Stock & Mutual Fund Prices:** Using **Named Credentials** and **Remote Site Settings** to connect Salesforce with financial market APIs and automatically update the *Current Value* of investments.
- **External Data Access:** Allowing investors to export their portfolio data in CSV/Excel format for use in other tools.
- **Future Scope:** Advanced integrations via REST APIs and Salesforce Connect can be added later for real-time data synchronization.