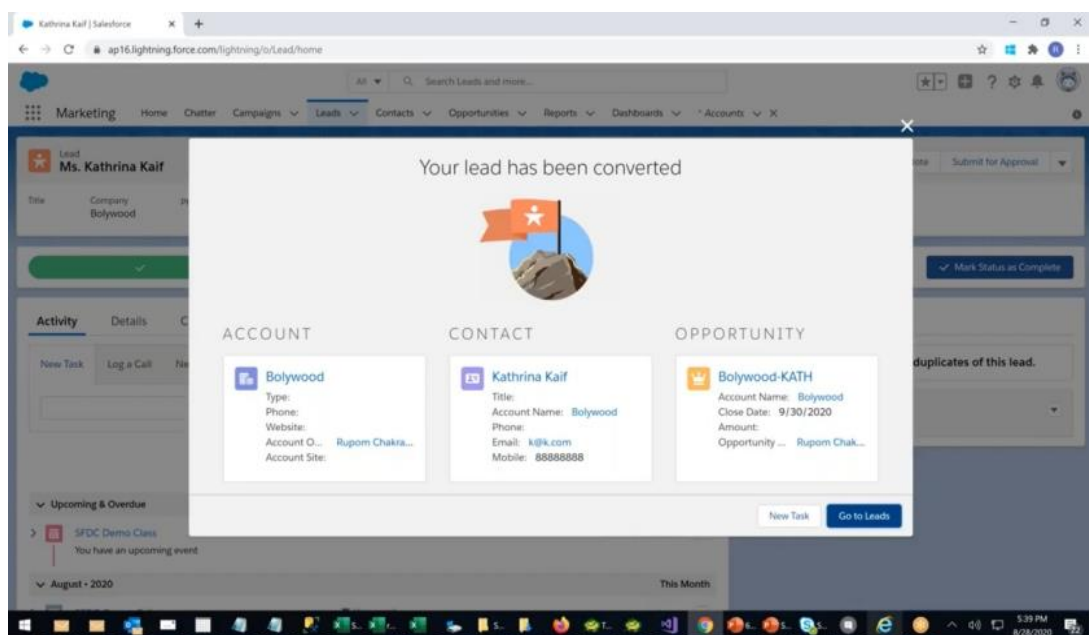**Phase 7: Integration & External Access**

Goal

To understand how the **Lead Management System** can connect with external systems or services to enhance functionality, while ensuring secure and controlled access.

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1. Named Credentials

- Used to securely store login credentials for external systems.
- **Example:** If integrating with a marketing platform to import leads automatically.

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2. External Services

- Salesforce can connect to **external APIs** using declarative tools.
- **Example:** Pull leads from a web form or marketing tool into Salesforce automatically.

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3. Web Services (REST/SOAP)

- Salesforce can call **REST or SOAP web services**.
- **Example:** Fetch lead scoring or enrichment data from an external service.

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4. Callouts

- Automated calls triggered when a lead is created or updated.
- **Example:** Send new lead data to an external CRM or analytics platform.

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5. Platform Events

- Can be used to notify other systems when important lead events occur.
- **Example:** Publish an event when a high-value lead is assigned, so other systems or dashboards can react in real-time.

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6. Change Data Capture

- Salesforce can automatically notify external systems when a record is updated.
- **Example:** Notify an external reporting system when a lead is converted to an opportunity.

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7. Salesforce Connect

- Allows Salesforce to access external data without storing it in Salesforce.
- **Example:** If customer or lead information is maintained in an external database, it can be viewed in Salesforce in real-time.

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8. API Limits

- Monitor and manage Salesforce API usage to avoid hitting daily limits when integrating with external systems.

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9. OAuth & Authentication

- Secure access for external users or portals.
- **Example:** If leads submit information via a customer portal, OAuth ensures authentication before creating records in Salesforce.

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10. Remote Site Settings

- Required to allow Salesforce to make callouts to trusted external domains.
- Ensures that only authorized external systems can exchange data with Salesforce.