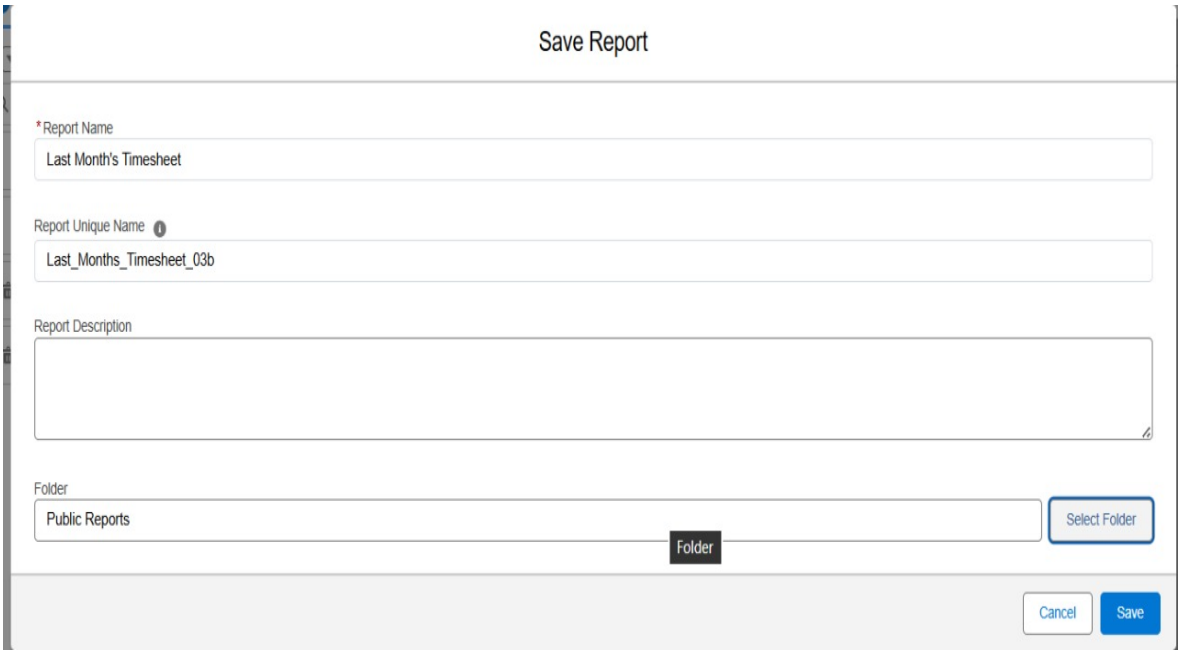
PROJECT MANAGEMENT APP

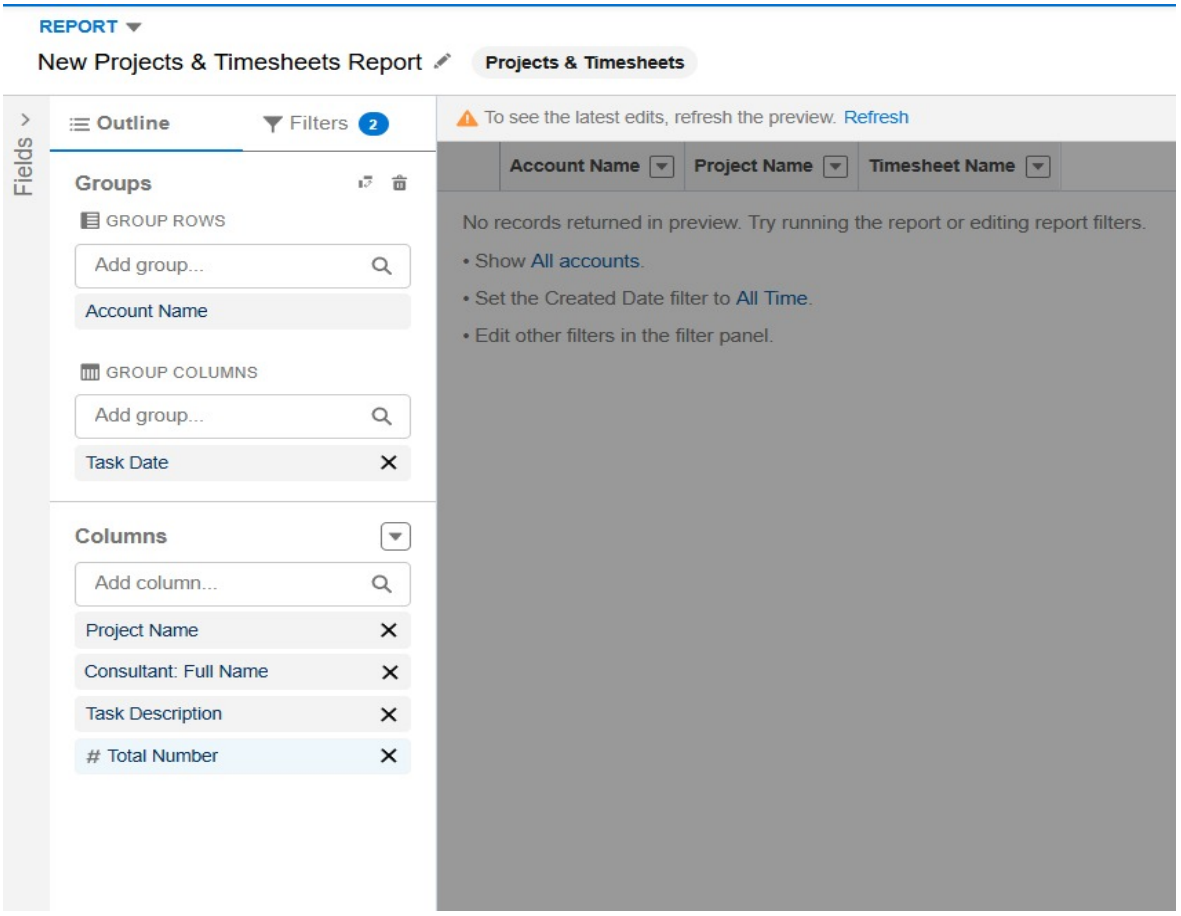
KULDEEP UPADHYAY

Phase 7: Integration & External Access

Goal: Connect Salesforce with external tools and systems.

- Set up Named Credentials for secure API authentication.
- Integrate REST APIs to sync data with tools like Jira or Trello.
- Use platform events for real-time updates across systems.
- Enable Change Data Capture for syncing external systems.
- Use Salesforce Connect to access external databases directly.
- Configure Remote Site Settings for secure callouts.
- Monitor API limits and optimize API usage.
- Set up OAuth for client login through portals.
- Build error-handling mechanisms for integration failures.




REPORT
New Projects & Timesheets Report
Projects & Timesheets
Fields
Outline
Filters 2
To see the latest edits, refresh the preview. Refresh
Groups
GROUP ROWS
Add group...
Account Name
GROUP COLUMNS
Add group...
Task Date
Columns
Add column...
Project Name
Consultant: Full Name
Task Description
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No records returned in preview. Try running the report or editing report filters.
• Show All accounts.
• Set the Created Date filter to All Time.
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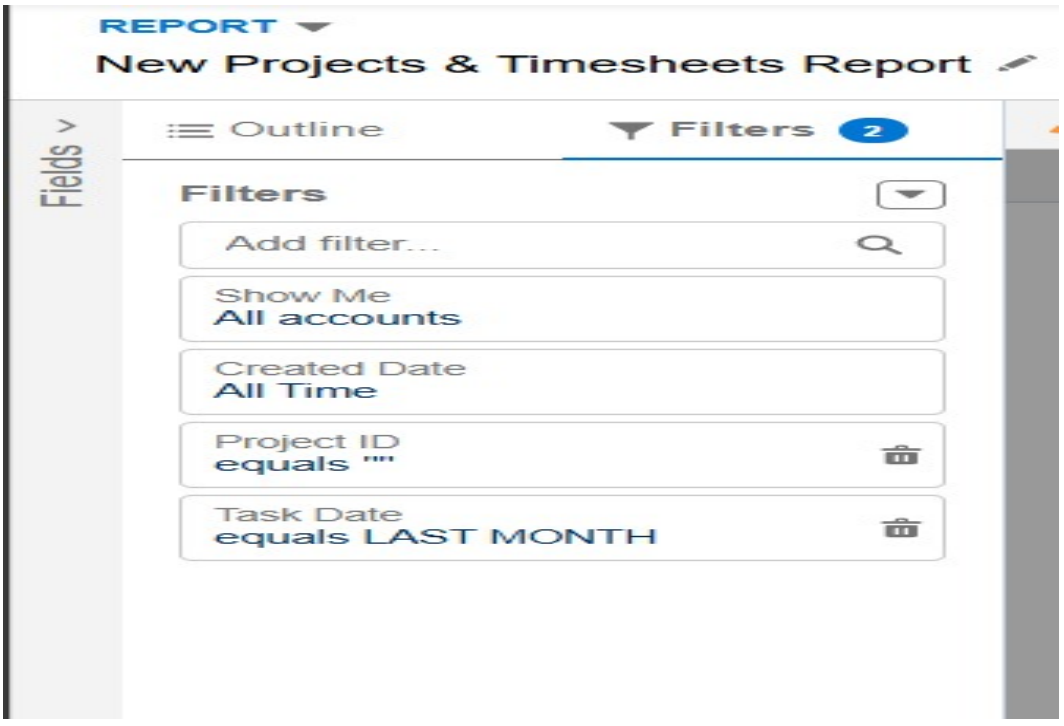
REPORT
New Projects & Timesheets Report
Fields
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Filters
Add filter...
Show Me
All accounts
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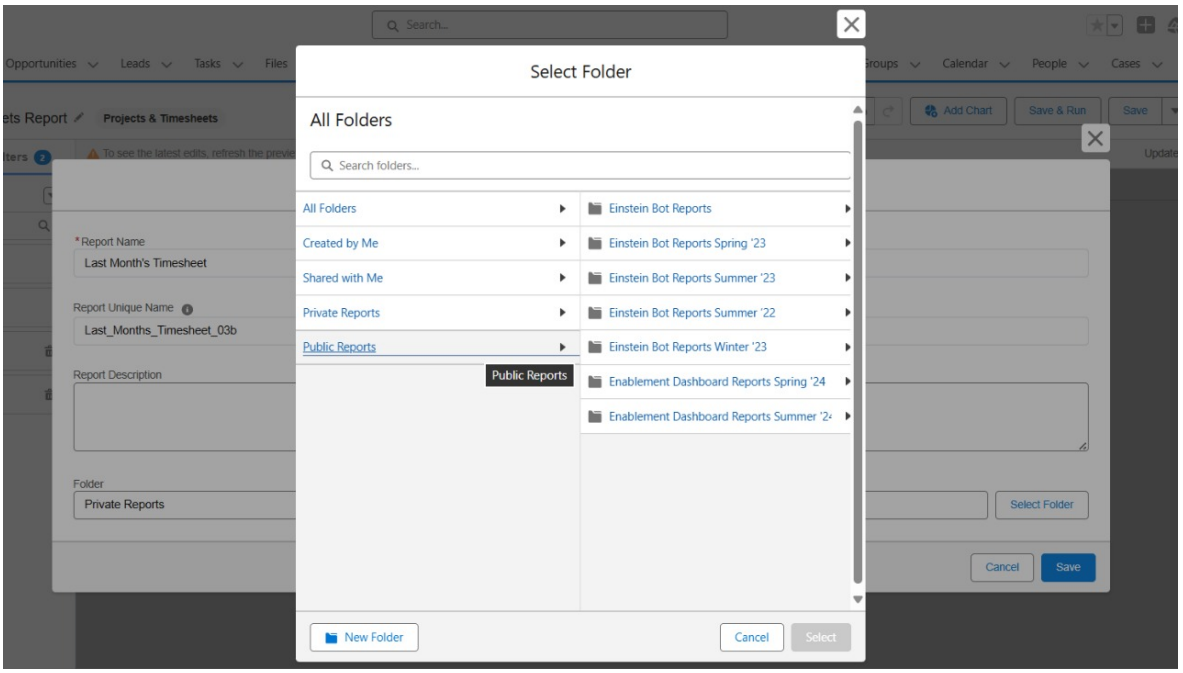
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Last_Months_Timesheet_03b
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All Folders
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Public Reports
Einstein Bot Reports
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Einstein Bot Reports Summer '23
Einstein Bot Reports Summer '22
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Enablement Dashboard Reports Summer '2
New Folder
Cancel
Select