

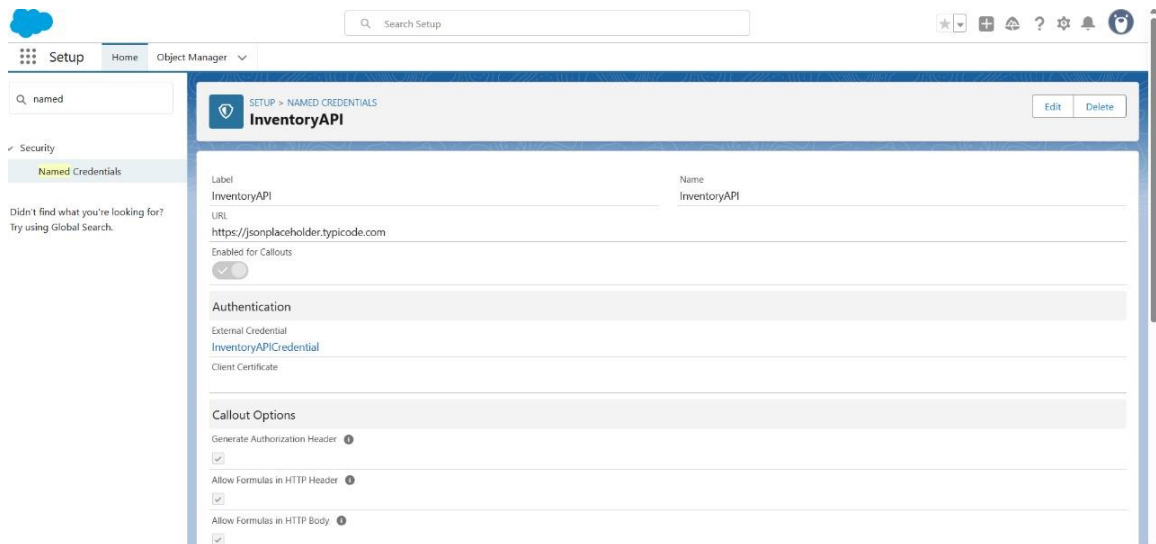
INVENTORY AND ORDER TRACKING DASHBOARD

PHASE-07: Integration & External Access

1. Named Credentials

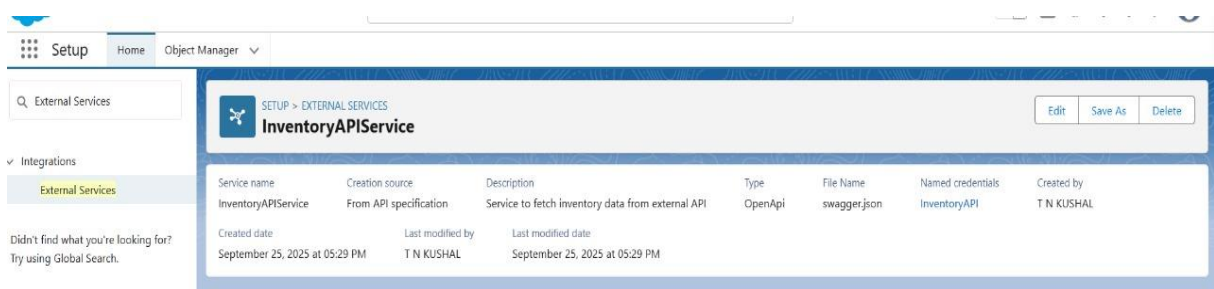
- Purpose: Store external API endpoints and credentials securely; simplify Apex callouts.
- Steps:
 - Go to Setup → Named Credentials → New Named Credential
- Fill in:
 - Label & Name: InventoryAPI
 - URL: External API URL (demo <https://jsonplaceholder.typicode.com>)
 - Authentication: Use No Authentication for demo or link an External Credential
 - Check Enabled for Callouts
 - Save.
- Usage in Apex:

```
HttpRequest req = new HttpRequest();
req.setEndpoint('callout:InventoryAPI/posts/1');
req.setMethod('GET');
Http http = new Http();
HttpResponse res = http.send(req);
System.debug(res.getBody());
```



2. External Services

- Purpose: Connect to REST APIs using OpenAPI (Swagger) definitions; Salesforce generates Apex actions automatically for Flows/LWCs.
- Steps:
 - Setup → External Services → New External Service
- Fill:
 - Name: InventoryService
 - Schema URL: Swagger JSON of external API
 - Named Credential: InventoryAPI
 - Save → Apex actions are generated.
 - Use the actions in Flows or LWC to fetch external data.



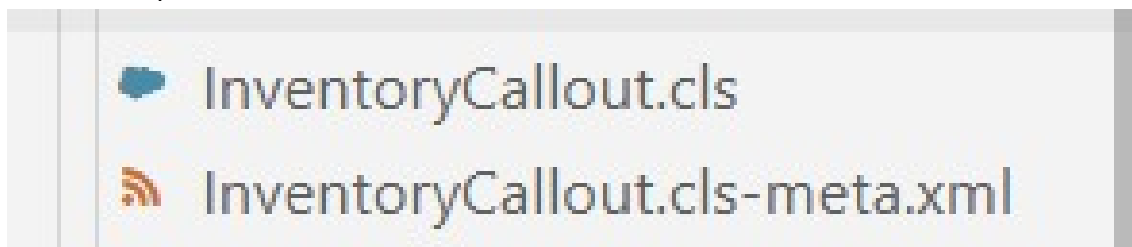
3. Web Services (REST / SOAP) in Salesforce

- Purpose:
 - Allow Salesforce to send data externally (REST/SOAP API) or serve data to external systems.
- Example: Your Inventory Dashboard can expose Product or Order data to another system via REST API.
- Step-by-Step: REST Web Service
 - Create an Apex Class in Salesforce (VS Code or Developer Console).
 - Use `@RestResource` annotation to define endpoint.
- Define methods using `@HttpGet`, `@HttpPost`, etc.



4. Callouts

- Purpose: Fetch or send data from/to external APIs.



5. Platform Events

- Purpose: Real-time notifications of system events or record changes.

- Steps:
 - Setup → Platform Events → New Platform Event
 - Name: StockUpdate__e
 - Fields: ProductId_c (Text), NewQuantity_c (Number)



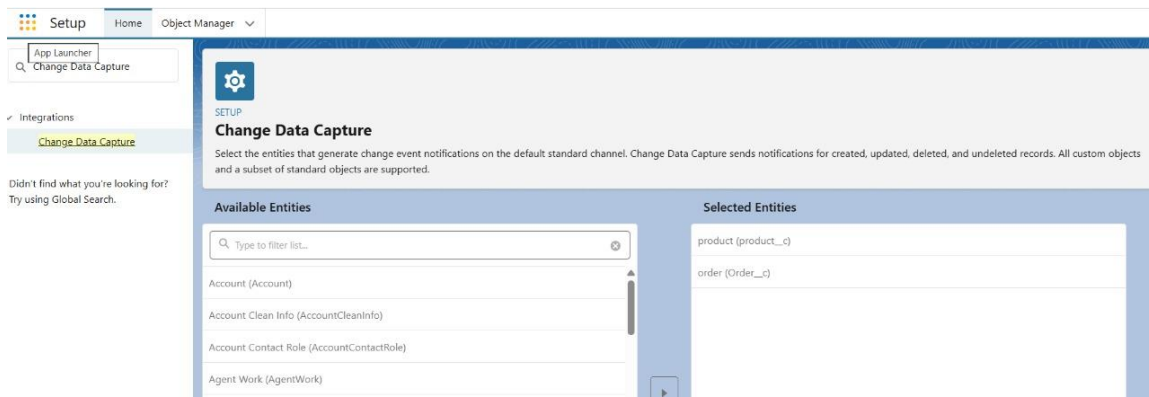
6. Change Data Capture (CDC)

- Purpose: Detect record changes in real-time; similar to Platform Events.
- Steps:
 - Setup → Change Data Capture → Select Objects (Product_c, Order_c)
- What is Change Data Capture?

CDC allows you to track changes to Salesforce records in real-time.

Similar to Platform Events, but it's automatically tied to objects like Product_c or Order_c.

Types of changes captured: create, update, delete, undelete.



7. Salesforce Connect

- Purpose: Access external database tables as Salesforce objects (External Objects).
- Steps:
 - Setup → External Data Sources → New External Data Source
 - Label: ExternalInventory
 - Type: OData 4.0
 - URL: External OData endpoint
 - Authentication: Named Credential (InventoryAPI)
 - Validate & Sync → Salesforce fetches tables



8. Remote Site Settings

- Purpose: Whitelist external endpoints for Apex callouts (required if not using Named Credentials).

- Steps:
 - Setup → Remote Site Settings → New Remote Site

Setup

Home

Object Manager

Remote Site Settings

Security

Remote Site Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Remote Site Settings

Remote Site Details

Help for this Page

Remote Site Detail

EditDeleteClone

Remote Site Name

InventoryAPI

Modified By

T N KUSHAL 9/25/2025 6:27 AM

Remote Site URL

https://jsonplaceholder.typicode.com

Disable Protocol Security

☐

Description

Active

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Created By

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EditDeleteClone