

## Phase 7: Integration & External Access

This phase connects Salesforce with external systems (payment gateway, property listings, email services, etc.) and ensures secure communication

### Step 1: Named Credentials

Go to Setup → Named Credentials.

Store authentication details (endpoint URL, username, password, OAuth token).

Makes external callouts secure & reusable.

### Step 2: External Services

Use External Services wizard to connect APIs without heavy coding.

Upload API schema (OpenAPI/Swagger).

Automatically generate Apex actions usable in Flows.

### Step 3: Web Services (REST/SOAP)

Expose Salesforce data via REST API or SOAP API.

Create custom Apex REST services for external apps to consume.

Example: External portal fetches property data using a Salesforce REST endpoint.

### Step 4: Callouts

Use Apex HTTP classes for outbound calls:

```
HttpRequest req = new HttpRequest();
```

```
req.setEndpoint('callout:PropertyAPI');  
req.setMethod('GET');  
Http http = new Http();  
HttpResponse res = http.send(req);
```

Useful for fetching property details, payment verification, etc.

### Step 5: Platform Events

Use Platform Events for event-driven integration.

Example: When a new Property is listed → Trigger event → External portal updates automation

### Step 6: Change Data Capture (CDC)

Enable CDC to notify external systems of Salesforce record changes.

Example: If a Property status changes → External system receives an update.

### Step 7: Salesforce Connect

Integrate external databases (OData, SAP, ERP) in real time.

Data is accessed virtually without storing in Salesforce.

Example: View property tax data from government DB without importing

### Step 8: API Limits

Monitor API usage in Setup → System Overview.

Respect Salesforce daily API request limits.

Optimize integrations using bulk APIs where possible.

#### Step 9: OAuth & Authentication

Use OAuth 2.0 for secure authentication between Salesforce and external apps.

Supports Single Sign-On (SSO) for external users.

Example: Buyers log in with Google/LinkedIn to access property portal.

#### Step 10: Remote Site Settings

Before making a callout, add the endpoint URL in Setup → Remote Site Settings.

Ensures Salesforce allows outbound requests to trusted external systems.