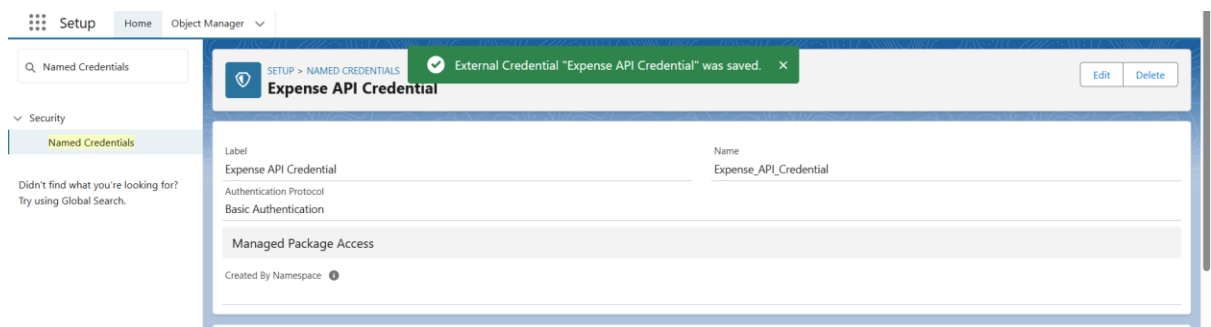


Phase 7: Integration & External Access

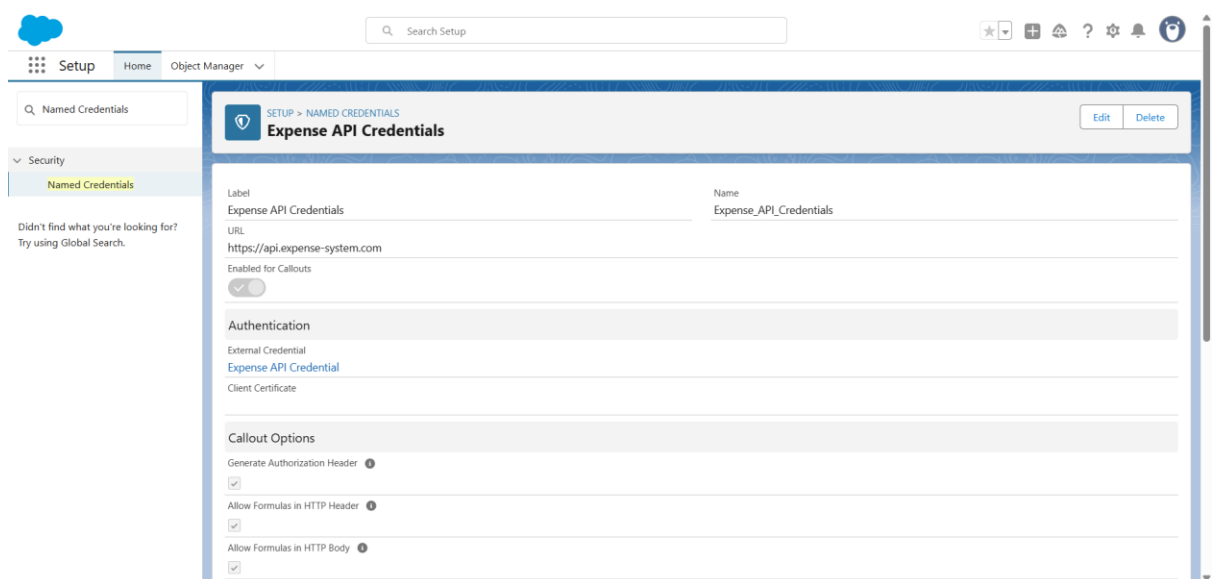
1. Named Credentials

- Securely store external API URLs and authentication.
- Avoid hardcoding credentials in Apex or Flows.
- Example: Expense_API_Credentials connects Salesforce to Expense Management System.
- Can be used in **Apex callouts**, Flows, or External Services.



2. External Services

- Declarative way to integrate REST APIs into Salesforce without code.
- Example: Expose Flight Booking API as a named service; employees select flights directly in Travel Request Flow.
- Generates **invocable actions** usable in Flows.



3. Web Services (REST/SOAP)

- Provide Travel Approval data to external systems.
- Example: HR portal can **create, update, or fetch Travel Requests** via Salesforce REST API.
- Enables integration with **ERP, Finance, or custom portals**.

4. Platform Events

- Asynchronous notifications for real-time integrations.
- Example: Travel_Approval_Event__e triggers when a request is submitted, notifying Finance to allocate funds.
- Can be subscribed by **Flows, Apex triggers, or external subscribers**.


The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like MuleSoft, Einstein, Custom Code, Integrations, and Security. The 'Platform Events' link under 'Integrations' is selected. The main content area is titled 'Platform Events' and shows the 'New Platform Event' form. A yellow banner at the top of the form states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Don't show this message again.' The form fields include: 'Label' (Travel Approval Event), 'Plural Label' (Travel Approval Events), 'Starts with vowel sound' (checkbox), 'Object Name' (Travel_Approval_Event), 'Description' (text area), 'Event Type' (High Volume), and 'Publish Behavior' (Publish Immediately).

5. OAuth & Authentication

- Secure, token-based authentication for external apps.
- Example: Finance portal uses OAuth tokens via a **Connected App** to fetch travel approvals.
- Scopes and access can be controlled without sharing passwords.

6.Remote Site Settings

- Whitelist external URLs to allow Salesforce callouts.
- Example: Hotel_API and Expense_API URLs added in setup.
- Prevents unauthorized connections and ensures security.

 SETUP

Remote Site Settings

Remote Site Details

[Help for this Page](#)

Remote Site Detail

EditDeleteClone

Remote Site Name

ApexDevNet

Remote Site URL

http://www.apexdevnet.com

Disable Protocol Security

☐

Description

Active

☒

Created By

Ningaraj Gani, 11/07/2025, 7:17 pm

Modified By

Ningaraj Gani, 11/07/2025, 7:17 pm

EditDeleteClone