Phase 7: Integration & External Access – Customer Complaint CRM

Purpose:
Phase 7 covers the integration of Salesforce with external systems and managing access through APIs. For the **Customer Complaint CRM project**, the system is entirely internal, so most external integration features are **not required**. However, this phase ensures you are aware of potential integration points and how to configure them if needed in the future.

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1. Remote Site Settings

Purpose:

- Remote Site Settings allow Salesforce to make secure HTTP callouts to external systems.
- In this project, no external callouts are required, so this step is **optional**.

Steps (if needed in future):

1. Go to **Setup → Remote Site Settings → New Remote Site**
2. Enter a **Remote Site Name** (e.g., `External_API`)
3. Enter the **Remote Site URL** (e.g., `https://api.example.com`)
4. Click **Save**

Note: Only needed if your CRM needs to connect to external APIs (for example, validating customer data from another system).

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2. Named Credentials

Purpose:

- Named Credentials securely store authentication details for external systems.
- For the internal CRM, this is **not required**.

Steps (if future integration is needed):

1. Setup → **Named Credentials → New Named Credential**
2. Fill in: Name, URL, Identity Type (Named Principal or Per User), Authentication Protocol (OAuth 2.0, Password)
3. Save

3. OAuth & Authentication

Purpose:

- OAuth allows external applications (like mobile apps) to authenticate and access Salesforce data.
- Not required for the internal Lightning CRM app.

4. API Limits

Purpose:

- Monitor Salesforce API usage for external integrations.