

Phase 7: Integration & External Access (Declarative)

Objective: Connect Salesforce with external systems and provide real-time notifications using declarative tools without writing code.

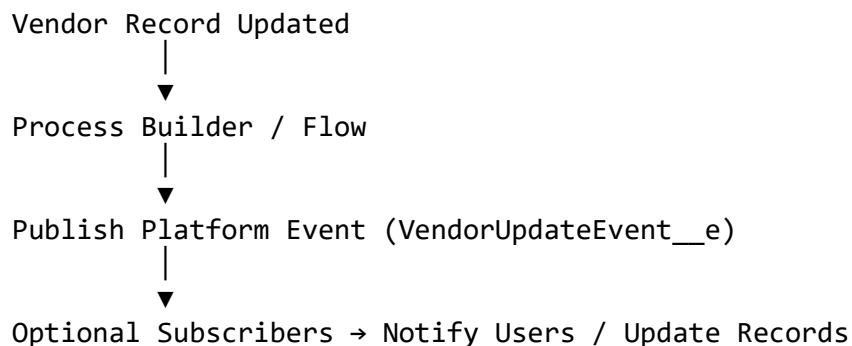
Deliverable: Integrated vendor ecosystem with internal notifications, change tracking, and external-like data access.

Step 1: Platform Events

Purpose: Simulate real-time notifications internally without APIs.

Steps: 1. Setup → Platform Events → New Platform Event 2. Fill in details: - Label: Vendor Update Event - Plural Label: Vendor Update Events - API Name: VendorUpdateEvent__e - Publish Behavior: Publish Immediately 3. Add Fields: - Vendor__c → Lookup → Vendor__c - Message__c → Text (255) 4. Publish Events using Process Builder or Flow: - Trigger: When Vendor__c record is updated - Action: Create VendorUpdateEvent__e - Map fields: Vendor__c → Vendor Id, Message__c → “Vendor record updated” 5. Optional: Subscribe to events to notify users or update records.

Process Flow:

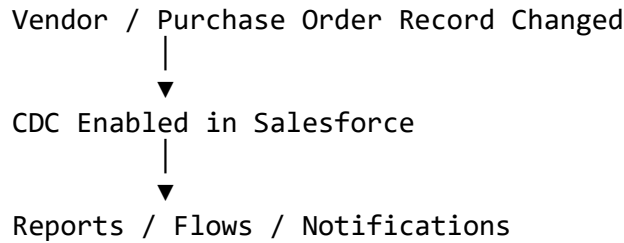


Step 2: Change Data Capture (CDC)

Purpose: Track real-time changes on Vendor__c and Purchase_Order__c without code.

Steps: 1. Setup → Change Data Capture 2. Enable CDC for Vendor__c and Purchase_Order__c 3. Use Reports or Flows to monitor changes and notify users or update records automatically.

Process Flow:

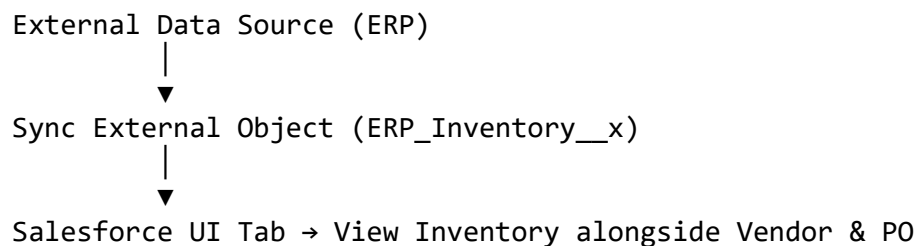


Step 3: Salesforce Connect (Declarative Data Linking)

Purpose: Access external-like data in Salesforce UI without APIs.

Steps: 1. Setup → External Objects → New External Data Source - Type: Salesforce Connect (OData 2.0) - Name: ERP_Inventory__x Source - URL: Placeholder or internal endpoint 2. Click Validate & Sync - Select External Object: ERP_Inventory__x 3. Define Fields: - Item Name → Text - Quantity → Number - Vendor → Lookup → Vendor__c 4. Create Tab: - Setup → Tabs → New → Custom Object Tab → ERP_Inventory__x - Add tab to VendorConnect App

Process Flow:



Screenshots to Capture

Screenshot	Description
Platform Event	Event definition and fields
Change Data Capture	Enabled objects list
External Data Source	Data source creation
External Object	Fields mapping for ERP_Inventory__x

Outcome: - Real-time internal notifications via Platform Events - Change tracking on Vendor and Purchase Order records via CDC - Declarative external data access using Salesforce Connect - Fully integrated vendor ecosystem without APIs or code

<https://orgfarm-3da1f75533-dev-ed.lightning.force.com/lightning/setup/EventObjects/home>

Setup

Home

Object Manager

Q platf

MuleSoft

Anypoint Platform Setup

Einstein

Einstein Platform

Einstein Bots

Einstein.ai

Custom Code

Platform Cache

Integrations

Platform Events

Security

Platform Encryption

Encryption Settings

Key Management

Setup

Platform Events

Plural Label

Object Name

API Name

Event Type

Publish Behavior

Created By

Vendor Update Events

Vendor_Update_Event

Vendor_Update_Event_e

High Volume

Publish Immediately

Om Pote, 9/24/2025, 8:06 AM

Deployment Status

Deployed

Modified By

Om Pote, 9/24/2025, 8:06 AM

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Created Date	CreatedDate	Date/Time		
	Event UUID	EventUuid	Text(36)		
	Replay ID	ReplayId	External Lookup		

Custom Fields & Relationships

New

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	Message	Message__c	Text(255)			Om Pote, 9/24/2025, 8:07 AM
Edit Del	Vendor	Vendor__c	Text(16)			Om Pote, 9/24/2025, 8:07 AM

Triggers

New

No triggers defined

Subscriptions

+

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Setup

Home

Object Manager

Q change

Apps

AppExchange Marketplace

Integrations

Change Data Capture

Identity

Token Exchange Handlers

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SETUP

Change Data Capture

Select the entities that generate change event notifications on the default standard channel. Change Data Capture sends notifications for created, updated, deleted, and undeleted records. All custom objects and a subset of standard objects are supported.

Available Entities

Type to filter list...

Account (Account)

Account Clean Info (AccountCleanInfo)

Account Contact Role (AccountContactRole)

Agent Work (AgentWork)

Asset (Asset)

Asset Relationship (AssetRelationship)

Assigned Resource (AssignedResource)

Associated Location (AssociatedLocation)

Authorization Form (AuthorizationForm)

Selected Entities

Purchase Order (Purchase_Order__c)

Vendor (Vendor__c)

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

ERP inventory

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

6 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
ERP inventory Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Vendor	Vendor__c	Lookup(Vendor)		✓

tab

Feature Settings

Analytics

Tableau

Tableau Embedding

Tableau UAF Claims Definition

User Interface

Console Settings

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
<a>Edit <a>Del	ERP_Inventory	Credit card	
<a>Edit <a>Del	Purchase Orders	Building	
<a>Edit <a>Del	Vendors	Bridge	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

Setup

Home

Object Manager

exter

Email

Send through External Email Services

Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Integrations

External Data Sources

External Objects

External Services

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

SETUP

External Objects

External Objects

Help for this Page

Use external objects to virtually represent external data as Salesforce objects. External objects map to a table in a data source outside the Salesforce org and enable access to that data via custom tabs and search. Each external object requires an `external_data_source` definition for connection details.

New External Object

Action	Label	Deployed	External Data Source	Description
<a>Edit <a>Erase	External Inventory	✓	ERP_Inventory_Source	

https://org/arm-3da1f75533-dev-ed.develop.lightning.force.com/lightning/setup/ExternalObjects/home