

# PROJECT MANAGEMENT APP

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## Phase 7: Integration & External Access

Goal: Connect Salesforce with external tools and systems.

- Set up Named Credentials for secure API authentication.
- Integrate REST APIs to sync data with tools like Jira or Trello.
- Use platform events for real-time updates across systems.
- Enable Change Data Capture for syncing external systems.
- Use Salesforce Connect to access external databases directly.
- Configure Remote Site Settings for secure callouts.
- Monitor API limits and optimize API usage.
- Set up OAuth for client login through portals.
- Build error-handling mechanisms for integration failures.

Save Report

\* Report Name

Last Month's Timesheet

Report Unique Name ⓘ

Last\_Months\_Timesheet\_03b

Report Description

Folder

Public Reports


Folder

Select Folder

Cancel

Save

REPORT ▾

New Projects & Timesheets Report  **Projects & Timesheets**


Fields >

Outline

Filters 2


Groups


GROUP ROWS

Add group... 


Account Name


GROUP COLUMNS


Add group... 


Task Date 


Columns

Add column... 

Project Name 

Consultant: Full Name 

Task Description 

# Total Number 


To see the latest edits, refresh the preview. [Refresh](#)

Account Name ▾Project Name ▾Timesheet Name ▾

No records returned in preview. Try running the report or editing report filters.

- Show [All accounts](#).
- Set the Created Date filter to [All Time](#).
- Edit other filters in the filter panel.

REPORT ▾


New Projects & Timesheets Report 

Fields >

Outline


Filters 2

Filters

Add filter... 

Show Me [All accounts](#)

Created Date [All Time](#)

Project ID equals "" 

Task Date equals [LAST MONTH](#) 