

## **Phase 7: Integration & External Access**

**(This Phase is not implemented as the project works fully with internal Salesforce data)**

### **1. Named Credentials**

- Stores endpoint URLs and authentication details for external systems.
- Simplifies Apex callouts by handling authentication automatically.
- Eliminates the need for Remote Site Settings for callouts.

### **2. External Services**

- Allows registration of external APIs via OpenAPI/Swagger specification.
- Generates invocable actions for Flow or Apex.
- Enables integration without writing custom HTTP callouts.

### **3. Web Services (REST/SOAP)**

- REST: Apex Http Request/Http classes are used for callouts.
- SOAP: Use WSDL2Apex to generate Apex classes from WSDL.
- Enables sending/receiving data between Salesforce and external systems.

### **4. Callouts**

- Apex can make HTTP requests to external APIs.
- Use Named Credentials to secure endpoints.
- Can be synchronous (immediate) or asynchronous (future/queueable).

### **5. Platform Events**

- Event-driven messaging system within Salesforce.
- Used to notify internal or external systems in real-time.
- Supports triggers, Flow, and external subscribers.

### **6. Change Data Capture**

- Tracks record changes (create, update, delete) in real-time.
- External systems can subscribe to changes via Streaming API.
- Useful for data synchronization without polling.

## **7. Salesforce Connect**

- Access external data as if it were Salesforce objects.
- Uses OData or other connectors with Named Credentials.
- Eliminates need to copy external data into Salesforce.

## **8. API Limits**

- Salesforce enforces limits on number of callouts and API requests.
- Monitoring limits prevents exceeding allowed usage.
- Helps plan batch or integration operations efficiently.

## **9. OAuth & Authentication**

- Used to securely access external APIs with tokens.
- OAuth 2.0 provides authorization without exposing credentials.
- Can be integrated via Named Credentials or Connected Apps.

## **10. Remote Site Settings**

- Legacy method to allow callouts to external URLs.
- Required if Named Credentials are not used.
- Configures external domains for Salesforce security compliance.