

Phase 7: Integration & External Access

(There is no utility of integration and external access in my project)

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.