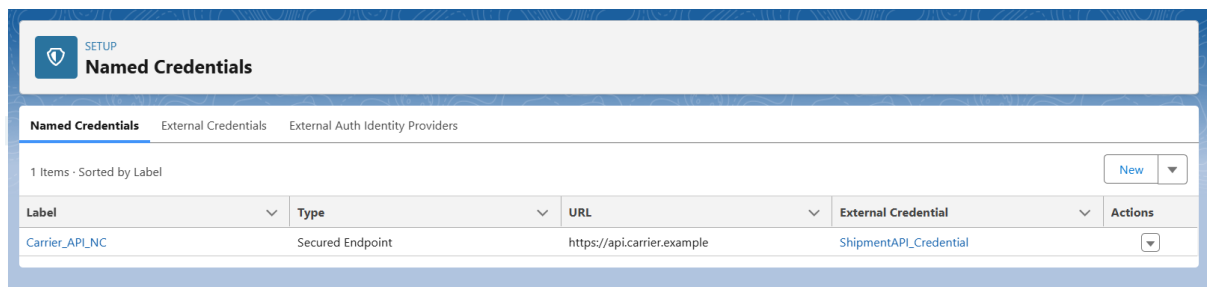


Phase 7: Integration & External Access

1. Named Credentials

- **Named Credentials** securely store endpoint URLs and authentication details, avoiding hard-coded credentials in Apex or Flows.
- They simplify external callouts by linking with **External Credentials** (e.g., ShipmentAPI_Credential) for secure and reusable integrations.

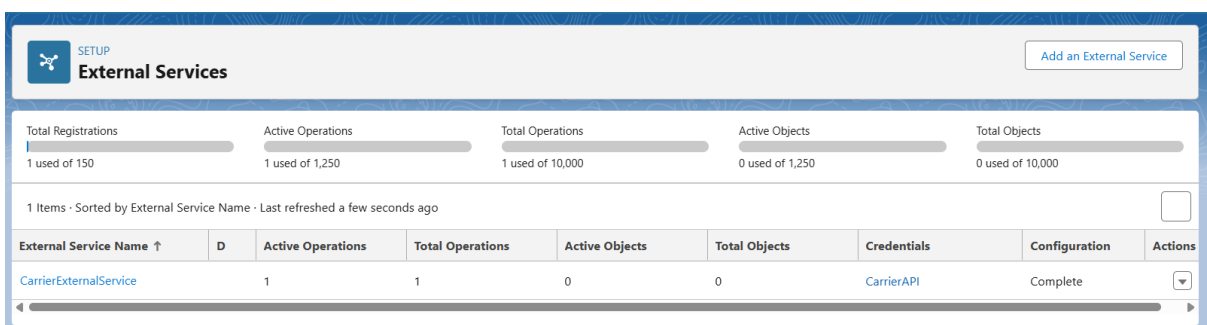


The screenshot shows the 'Named Credentials' setup page in Salesforce. It includes a 'New' button and a table with one item: 'Carrier_API_NC' of type 'Secured Endpoint' with URL 'https://api.carrier.example' and external credential 'ShipmentAPI_Credential'.

Label	Type	URL	External Credential	Actions
Carrier_API_NC	Secured Endpoint	https://api.carrier.example	ShipmentAPI_Credential	

2 External Services

- **External Services** connect Salesforce to external APIs by registering a schema (Swagger/OpenAPI) and exposing API operations inside Flows and Apex without custom code.
- They use **Named Credentials** (e.g., CarrierAPI) for authentication, making integrations secure and reusable.



The screenshot shows the 'External Services' setup page. It features five progress bars for Total Registrations (1/150), Active Operations (1/1,250), Total Operations (1/10,000), Active Objects (0/1,250), and Total Objects (0/10,000). Below is a table with one item: 'CarrierExternalService' with 1 active operation, 1 total operation, 0 active objects, 0 total objects, and 'CarrierAPI' as the credential.

External Service Name	D	Active Operations	Total Operations	Active Objects	Total Objects	Credentials	Configuration	Actions
CarrierExternalService		1	1	0	0	CarrierAPI	Complete	

3 Web Services (REST/SOAP)

- **External Client App Setup** – The *Logistics_Integration_App* is enabled in Salesforce to allow secure access for REST/SOAP web service integrations.
- **Authorization & Connectivity** – The app authorization is configured so that users can self-authorize, enabling smooth connectivity for consuming Salesforce web services.

Manage External Client Apps

Logistics_Integration_App

Help for this Page
Disable

Contact Email
sgongshe@gmail.com

App Authorization
All users can self-authorize

Type
Local

App Status
Enabled

Policies
Settings
Package Defaults

Configure basic settings for the external client app and plugins.
Edit

Basic Information

* External Client App Name
Logistics_Integration_App

* Contact Email
sgongshe@gmail.com

Contact Phone
Enter a phone number...

Icon URL

* API Name
Logistics_Integration_App

* Distribution State
Local

Info URL
Enter a URL...

Logo Image URL

4 Platform Events

- Platform Event Definition** – Created *Shipment_Status__e* as a high-volume event for publishing shipment updates in real-time.
- Custom Fields & Replay Support** – Added custom fields (e.g., Location, Status) along with standard fields like ReplayId to support event tracking and reliable message delivery.

SETUP

Platform Events

Platform Event
Shipment_Status__e

Help for this Page

Standard Fields (4)
Custom Fields & Relationships (4)

Platform Event Definition Detail

Edit
Delete

Singular Label	Shipment_Status__e	Description	
Plural Label	Shipments Status	Deployment Status	Deployed
Object Name	Shipment_Status__e		
API Name	Shipment_Status__e__e		
Event Type	High Volume		
Publish Behavior	Publish After Commit		
Created By	Shrawani Gongshe, 9/25/2025, 12:27 AM	Modified By	Shrawani Gongshe, 9/25/2025, 12:27 AM

Standard Fields

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

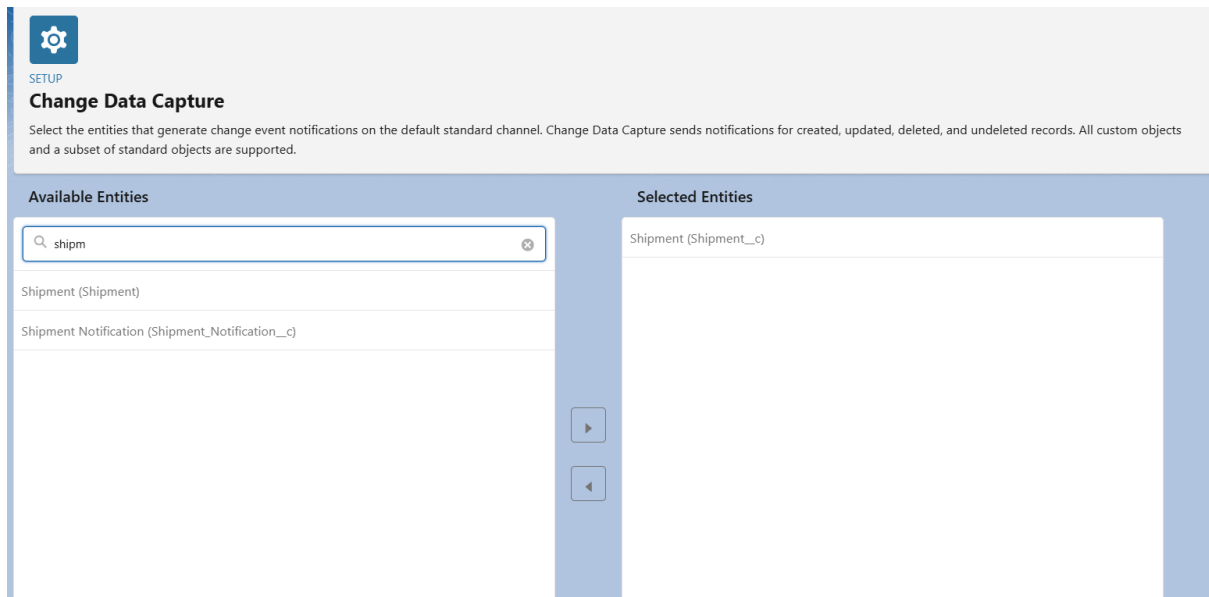
Custom Fields & Relationships

New

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
	Location	Location__c	Text(100)			Shrawani Gongshe, 09/25/2025 10:44 AM

5 Change Data Capture

- CDC Configuration** – Enabled Change Data Capture for the *Shipment__c* object to track create, update, delete, and undelete events.
- Real-time Notifications** – Configured CDC to publish change events, allowing external systems to subscribe and stay updated with shipment record modifications.



6 *Salesforce Connect*

- **External Data Integration** – Salesforce Connect enables real-time access to external system data (like ERP or logistics databases) without storing it in Salesforce.
- **OData/External Objects** – External objects are used to represent external data sources via OData, allowing seamless use in reports, lookups, and relationships.

7 *API Limits*

- **Optimization** – Implement strategies like bulk API, composite requests, and event-driven architecture (Platform Events/CDC) to reduce API consumption and stay within limits.

8 *Remote Site Settings*

- **Remote Site Creation** – Configured a remote site named *CarrierAPI* with the URL `https://api.carrier.example` to allow external API calls from Salesforce.
- **Secure Integration** – Enabled remote site settings to whitelist external endpoints, ensuring secure communication with carrier systems for shipment tracking.

