

Phase 7: Integration & External Access

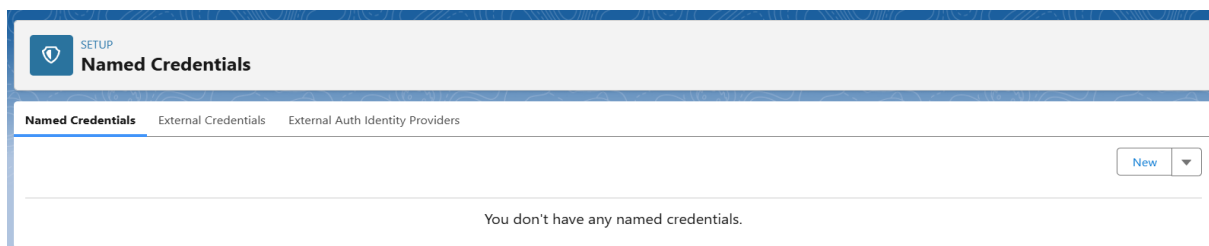
Integration and external access features in Salesforce provide mechanisms to connect with external systems, manage data securely, and automate workflows across platforms. This phase demonstrates awareness of these capabilities while implementing the Loan CRM – Loan & Customer Relationship Management System.

Named Credentials

Named Credentials store authentication information for external systems securely. They simplify making callouts to external services by managing endpoints, usernames, passwords, and OAuth tokens in a single location.

Application in this project:

- All loan application and customer data are managed internally within Salesforce.
- Customers submit loan requests via the portal, and loan officers process and verify them in Salesforce.
- No external system connections are required, so Named Credentials are not needed.

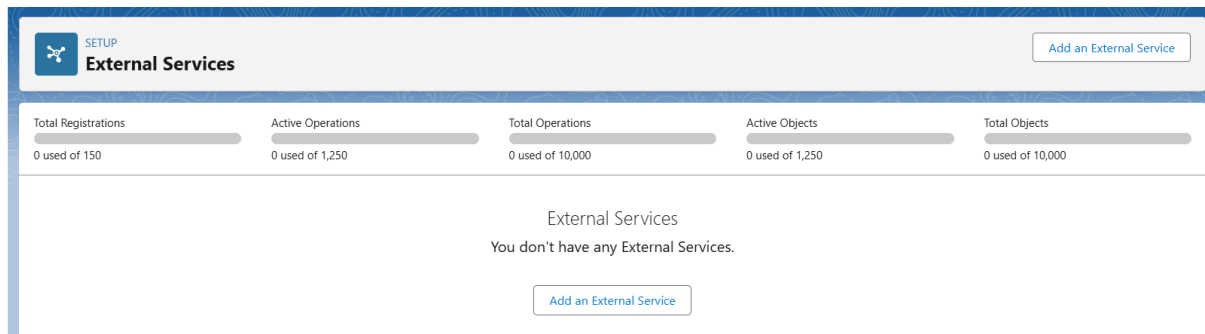


External Services

External Services enable Salesforce to consume external APIs declaratively. By importing OpenAPI specifications, Flows and automation can call external services without writing Apex code.

Application in this project:

- No external APIs are being used.
- All data handling (loan applications, approvals, notifications) is done within Salesforce.



Web Services (REST/SOAP)

Salesforce can act as both a consumer and provider of web services for data exchange with external systems.

Application in this project:

- The project operates solely within Salesforce.
- Customers submit loan applications, officers verify them, and all records remain internal.
- No external data exchange is required.

Callouts

Callouts are outbound requests from Salesforce to an external system, either synchronous or asynchronous.

Application in this project:

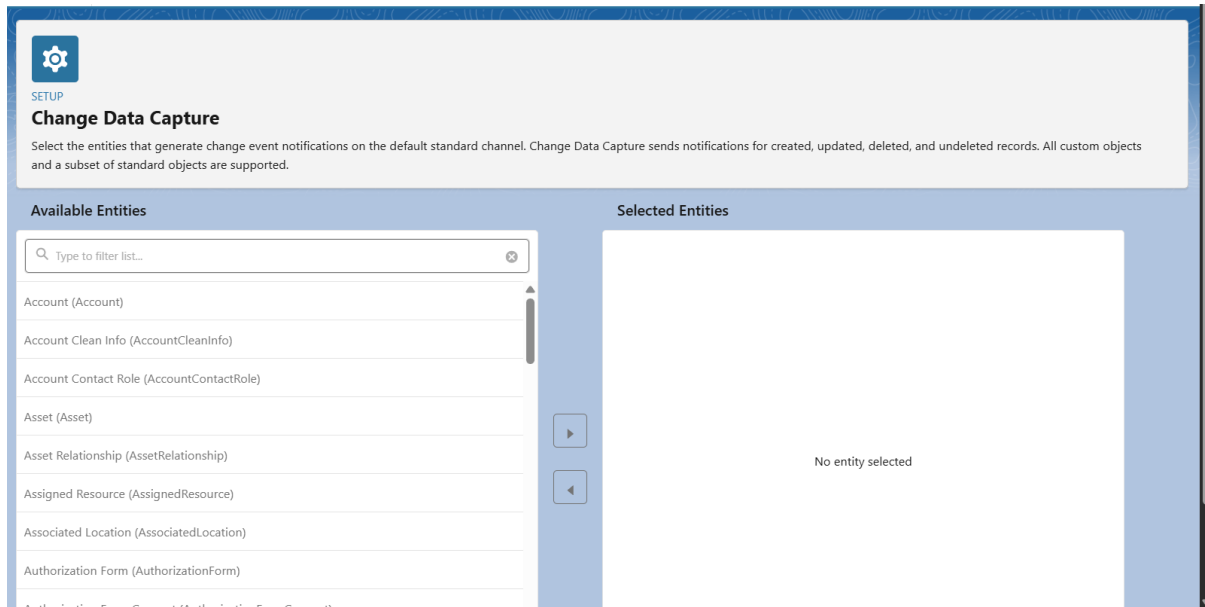
- No external data retrieval or updates are required.
- All interactions (submission, verification, notifications) are handled internally.

Platform Events

Platform Events allow asynchronous messaging and real-time communication between Salesforce and external systems.

Application in this project:

- No external data retrieval or updates are required.
- All interactions (submission, verification, notifications) are handled internally.



Change Data Capture (CDC)

Change Data Capture tracks changes in Salesforce records and publishes events in real-time, allowing external systems to react to updates.

Application in this project:

- CDC is not needed because all updates (like loan application submission, verification, or status changes) remain internal to Salesforce.
- Standard automation (Flows, Process Builder) manages notifications to customers and loan officers.

Salesforce Connect

Salesforce Connect allows Salesforce to access and display external data without storing it in Salesforce.

Application in this project:

- No external systems are used; all loan and customer data are stored within Salesforce objects.
- Salesforce Connect is not required.

API Limits

API Limits in Salesforce define the maximum number of API calls to external systems to prevent system overload.

Application in this project:

- The project does not use external APIs.
- API limits monitoring is not applicable.

OAuth & Authentication

OAuth provides secure authentication for external systems or applications connecting to Salesforce.

Application in this project:

- All users (Customers, Loan Officers, Admins) access the system internally via the Experience Cloud portal.
- No external OAuth authentication is required.

Remote Site Settings

Remote Site Settings ensure that Salesforce only communicates with pre-approved external endpoints for security purposes.

SETUP Remote Site Settings

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓	Sree Jyothirmal Kotha	15/09/2025, 11:48 am	Sree Jyothirmal Kotha	15/09/2025, 11:48 am

Application in this project:

- Since no external callouts are made, Remote Site Settings are not required.

Summary:

The Loan CRM – Loan & Customer Relationship Management System is fully internal to Salesforce. Customers submit loan applications, officers verify them, and all notifications and data handling are managed internally using Salesforce objects, Flows, and automation. No external integrations or APIs are needed in this project.