

# LegalAid Connect – Phase 7: Integration & External Access (Developer) Report

**Project Title:** LegalAid Connect – Legal Case Management CRM

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

**Date:** 28 September 2025

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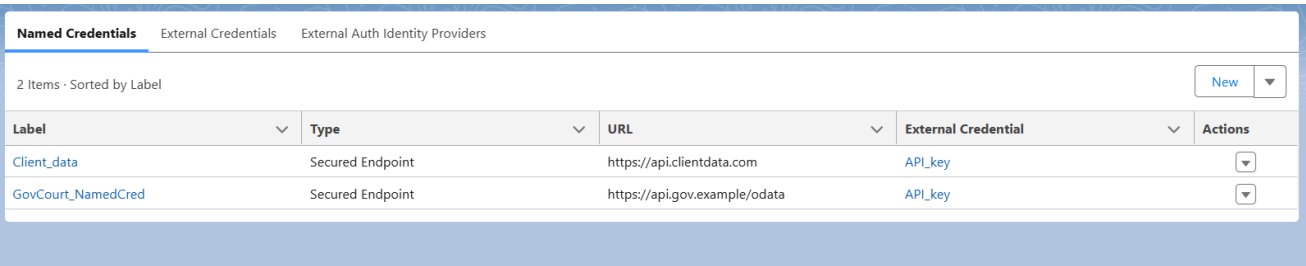
## 1. Introduction

Phase 7 focused on enabling LegalAid Connect to interact securely with external systems, transforming it from a standalone CRM into an integrated platform. This phase prioritized secure, scalable, and real-time integration for both outbound (Salesforce → external systems) and inbound (external systems → Salesforce) data exchange. The goal was to improve case management, client communication, and collaboration with government/legal databases.

## 2. Outbound Integrations (Salesforce → External)

The purpose of outbound integrations was to push updates, notifications, and related legal information from Salesforce to external applications.

- A **Named Credential** called CourtAPI was created to securely store endpoint URLs and authentication credentials for external court and notification systems, avoiding hardcoding sensitive information in Apex code.
- An **Apex Callout** class, CourtNotificationService.cls, was implemented with the `@future(callout=true)` annotation. This class uses the CourtAPI Named Credential to send case status updates to external systems and automatically logs notifications in Notification\_\_c records within Salesforce.
- A **Platform Event** object, Case\_Update\_Event\_\_e, was defined with key fields such as Case ID, Status, and Updated Date. An Apex trigger on the Legal\_Case\_\_c object publishes these events whenever a case is updated, enabling external legal systems to receive real-time notifications.



Named Credentials				
2 Items · Sorted by Label				
Label	Type	URL	External Credential	Actions
Client_data	Secured Endpoint	https://api.clientdata.com	API_key	
GovCourt_NamedCred	Secured Endpoint	https://api.gov.example/odata	API_key	

## 3. Inbound Integrations (External → Salesforce)

**Purpose:** To allow external applications to securely access and retrieve data from Salesforce.

- An **Apex REST Service**, ClientAPI.cls, was created using the `@RestResource` annotation. This exposes a custom endpoint (`/services/apexrest/clients/*`) that allows authenticated external systems to retrieve or update Client\_\_c records in JSON format.
- Additionally, **webhook processing** was implemented to capture incoming requests from government legal databases or partner organizations. These requests are automatically mapped to Salesforce objects such as Legal\_Case\_\_c and Client\_\_c, ensuring seamless data integration.

## Platform Events

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Use platform events to define the data to be delivered in custom notifications. Monitor the publishing and delivery usage for platform events and change events.

Event Allocations		
Item	Usage	Allocation
High-Volume Platform Event Hourly Publishing Allocation	0	50,000
High-Volume Platform Event and Change Event Daily Delivery Allocation	0	10,000

Custom Events			
Action	Label	Deployed	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ClientDataAPI</a>	✓	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Legal_Case_Update</a>	✓	

## 4. Security & Governance

**Purpose:** To ensure all integrations are secure, authenticated, and comply with platform limits.

- Security and governance were central to this phase. OAuth 2.0 protocol was established for server-to-server authentication, and Named Credentials were used to securely manage all authentication details for outbound integrations.
- Remote Site Settings were configured to whitelist the domains of external systems, providing an added layer of security. Profiles and permission sets were used to control access to API endpoints and data objects.
- All integrations were designed with Salesforce governor limits in mind. Bulkification and efficient query practices were applied to avoid exceeding API call limits, and monitoring mechanisms were implemented to detect errors and retries in real time.

## 5. Alternative Patterns Explored

In addition to the implemented patterns, the following technologies were evaluated for future use:

- For potential future enhancements, **Change Data Capture (CDC)** was evaluated as a high-volume alternative to Platform Events for broadcasting updates in Legal\_Case\_\_c or Client\_\_c to external systems.
- **Salesforce Connect** was also considered as a solution to access external legal databases as External Objects, which would allow the system to use external data without storing it directly in Salesforce.

## 6. Phase 7 Outcome

- Secure outbound and inbound API integrations were successfully implemented.
- Notifications to external legal systems are now automated whenever case updates occur.
- Real-time synchronization with external systems was enabled through Platform Events.
- A robust security framework was established using Named Credentials and OAuth 2.0.
- LegalAid Connect can now act as both a consumer and provider of legal case and client data, enabling integration with partner organizations, government databases, and other external systems.