

Integration & External Access – Phase 7

Named Credentials

Named Credentials simplify authenticating external service calls by securely storing the endpoint URL and credentials in Salesforce. This avoids hardcoding secrets and eases setup for REST/SOAP callouts.

External Services

External Services allow declarative integration of external REST APIs by importing OpenAPI schemas. This enables admins to configure API calls without code but using Salesforce Flows or Apex.

Web Services (REST/SOAP) & Callouts

Web Services facilitate exposing Salesforce functionality to external apps via REST or SOAP APIs, while callouts enable Salesforce Apex to invoke external services for data and workflows.

Platform Events & Change Data Capture

These features allow event-driven architecture within Salesforce, supporting asynchronous communication. Platform Events enable custom pub-sub messaging, while Change Data Capture tracks record changes in real-time.

Salesforce Connect

Salesforce Connect lets external data sources be accessed directly from Salesforce as external objects without copying data, enabling seamless integration and real-time access to external systems.

API Limits

Salesforce enforces API usage limits to protect platform resources. Managing API limits involves monitoring usage and optimizing integration strategies to avoid hitting thresholds.

OAuth & Authentication

OAuth is the preferred protocol for authenticating between Salesforce and external systems, enabling secure token-based access for API integrations and user authentications.

Remote Site Settings

Remote Site Settings whitelist external endpoints to secure Salesforce callouts, preventing unauthorized requests and enhancing security in integrations.