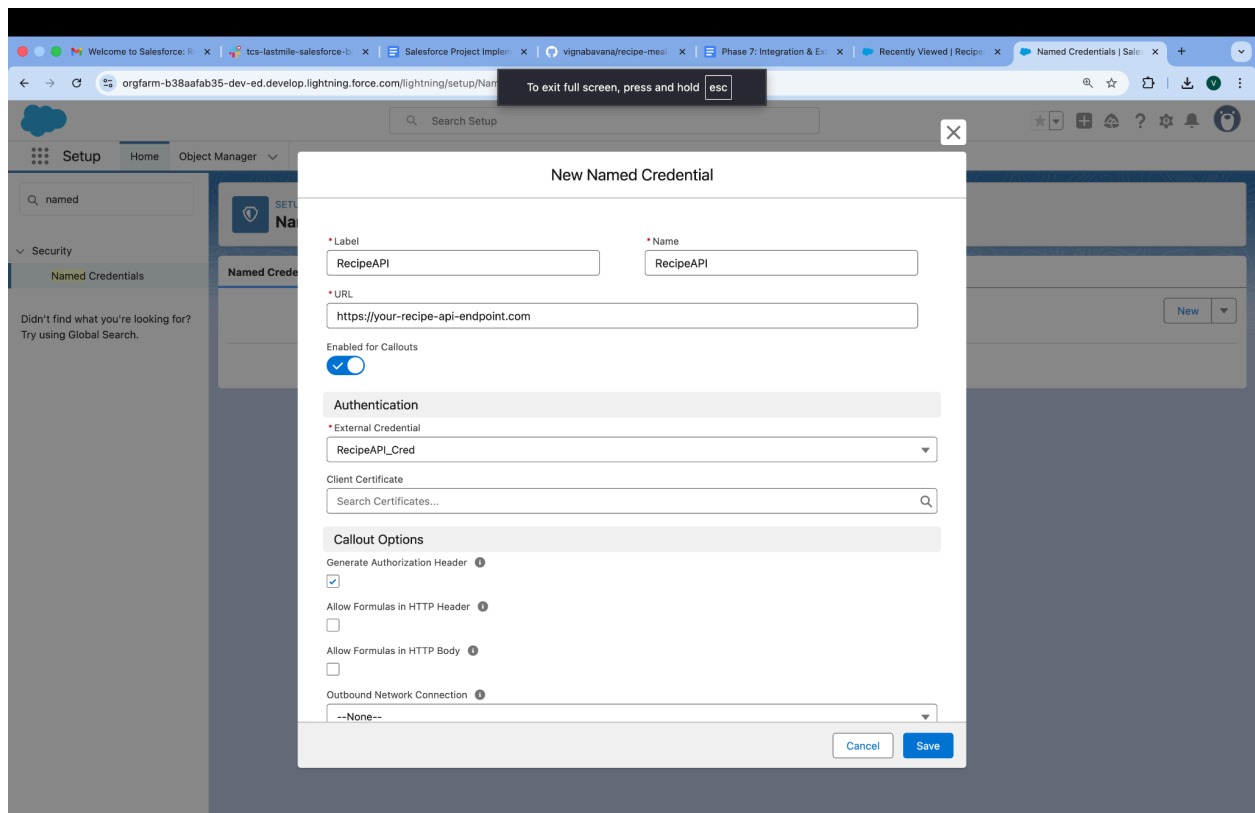


## Phase 7: Integration & External Access

- Named Credentials
- External Services
- Web Services (REST/SOAP)
- Callouts
- Platform Events
- Change Data Capture
- Salesforce Connect
- API Limits
- OAuth & Authentication
- Remote Site Settings

## Named Credentials

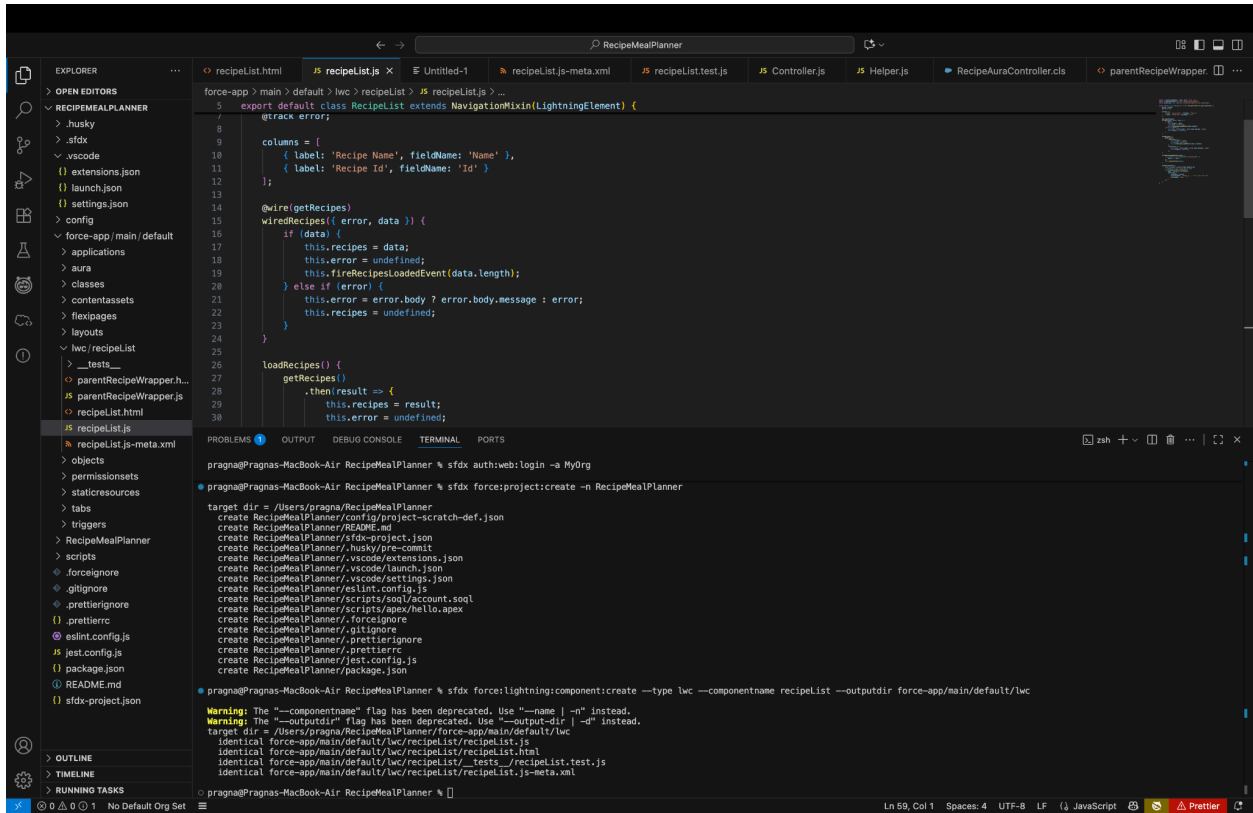
Named Credentials allow Salesforce to **securely store authentication details** for external services (like APIs) and simplify callouts. You don't need to manually manage username/password or OAuth tokens in Apex — Salesforce handles it for you.



The screenshot displays the Salesforce Setup interface with the 'New Named Credential' dialog box open. The dialog box contains the following fields and options:

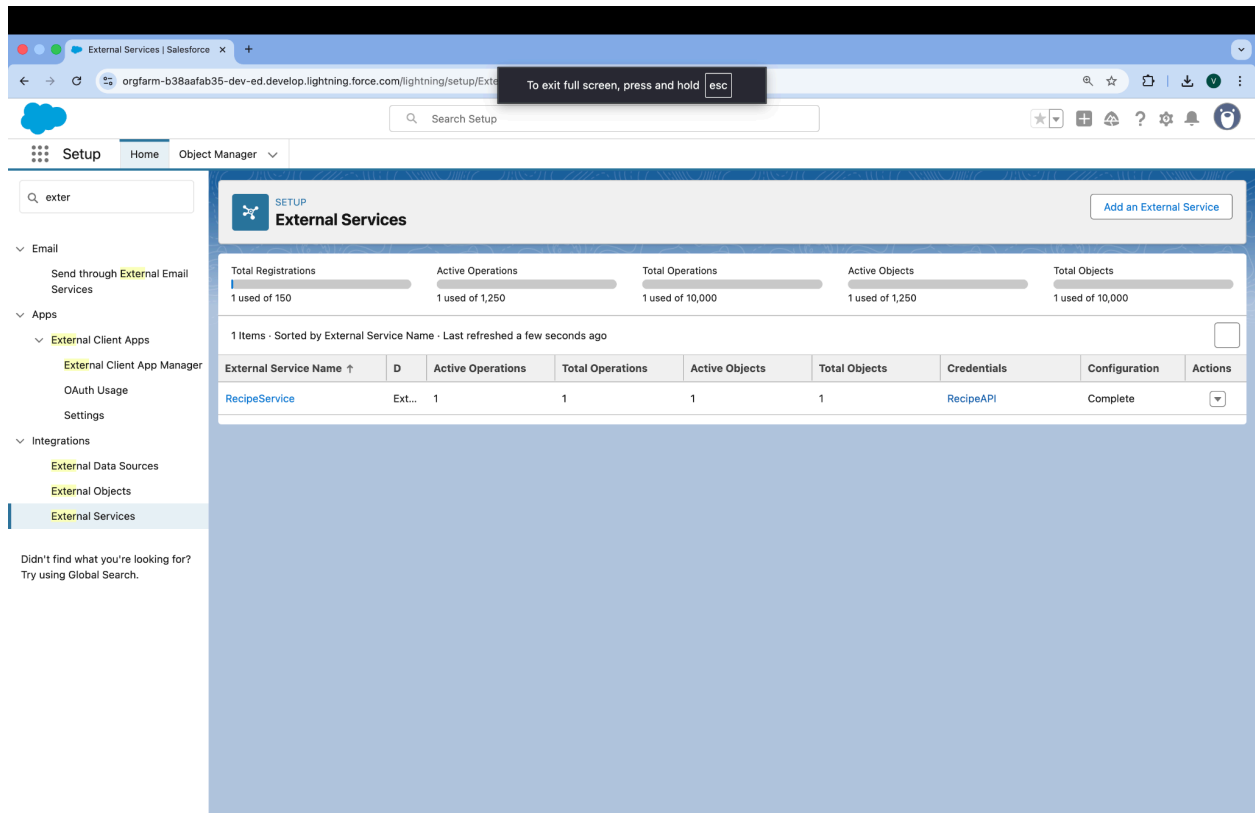
- Label:** RecipeAPI
- Name:** RecipeAPI
- URL:** https://your-recipe-api-endpoint.com
- Enabled for Callouts:** ☒
- Authentication:**
  - External Credential:** RecipeAPI\_Cred
  - Client Certificate:** Search Certificates...
- Callout Options:**
  - Generate Authorization Header:** ☒
  - Allow Formulas in HTTP Header:** ☐
  - Allow Formulas in HTTP Body:** ☐
  - Outbound Network Connection:** --None--

At the bottom of the dialog box are 'Cancel' and 'Save' buttons. The background shows the Salesforce Setup menu with 'Named Credentials' selected under the 'Security' section.

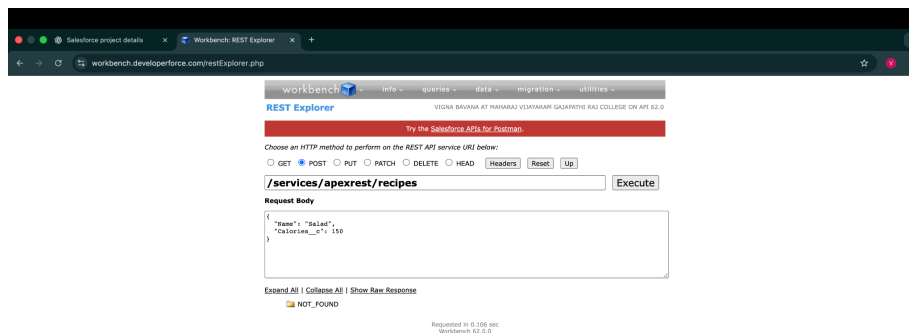


## External Services:

External Services let Salesforce **connect to external APIs declaratively**, without writing complex code. You can **import API definitions** (via OpenAPI or WSDL) and use them in **Flows, Process Builder, or Apex**.

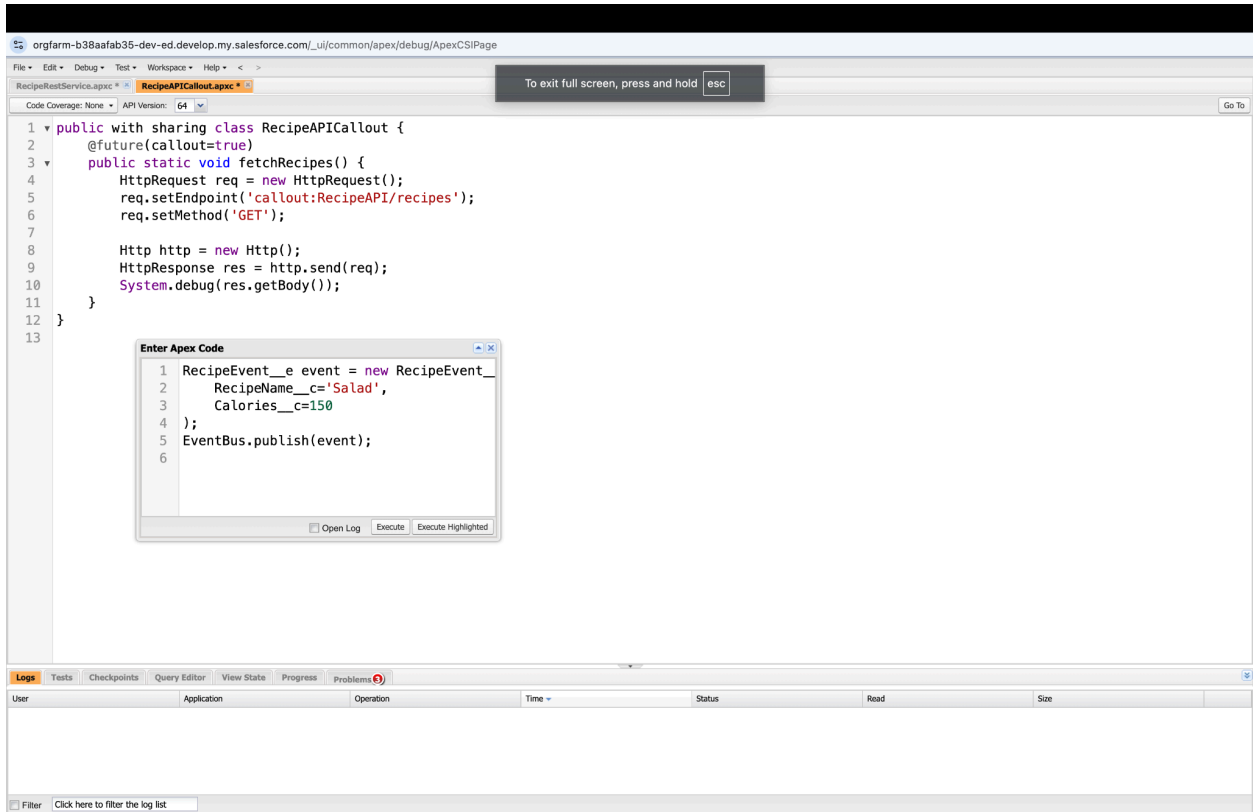


## Web Services (REST/SOAP)



# Callouts

Used to Call external APIs to fetch or send data.



# Platform Events

**Purpose:** Send real-time events within Salesforce.

orgfarm-b38aafab35-dev-ed.develop.lightning.force.com/lightning/setup/EventObjects?page?address=%2F01ffj000002uP13%3Fsetuid%3DEventObjects

Setup Home Object Manager

platt

- MuleSoft
- Anypoint Platform Setup
- Einstein
  - Einstein Platform
  - Einstein Bots
  - Einstein.ai
- Custom Code
  - Platform Cache
- Integrations
  - Platform Events
- Security
  - Platform Encryption
    - Encryption Settings
    - Key Management

Didn't find what you're looking for?  
Try using Global Search.

## Platform Events

Platform Event: RecipeEvent

Standard Fields (1) | Custom Fields & Relationships (0)

**Platform Event Definition Detail** [Edit](#) [Delete](#)

Singular Label	RecipeEvent	Description	
Plural Label	RecipeEvents	Deployment Status	Deployed
Object Name	RecipeEvent		
API Name	RecipeEvent__e		
Event Type	High Volume		
Publish Behavior	Publish Immediately		
Created By	yigna.baviana	Modified By	yigna.baviana
	9/26/2025, 7:01 AM		9/26/2025, 7:01 AM

**Standard Fields**

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

**Custom Fields & Relationships** [New](#)

No custom fields defined

**Triggers** [New](#)

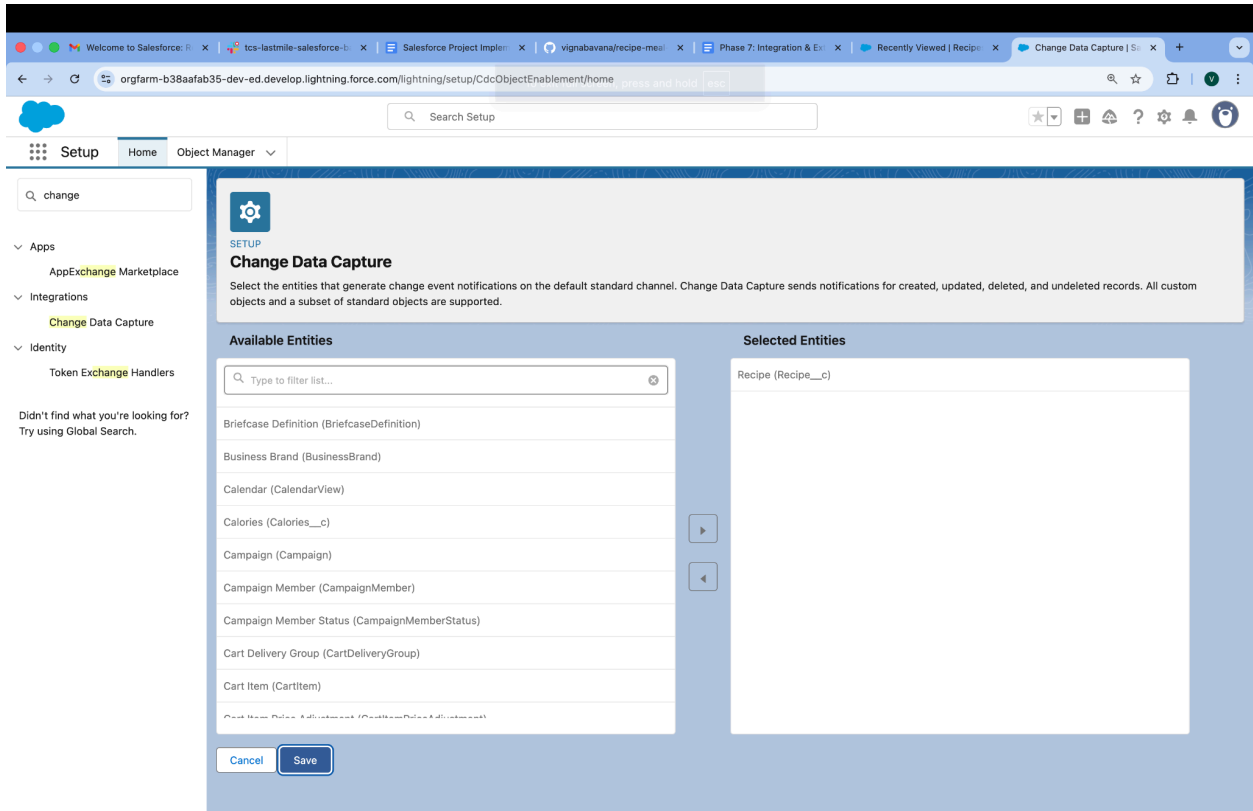
No triggers defined

**Subscriptions** [1](#)

Subscriber	Last Processed Id	Last Published Id	State	Batch Size	User
------------	-------------------	-------------------	-------	------------	------

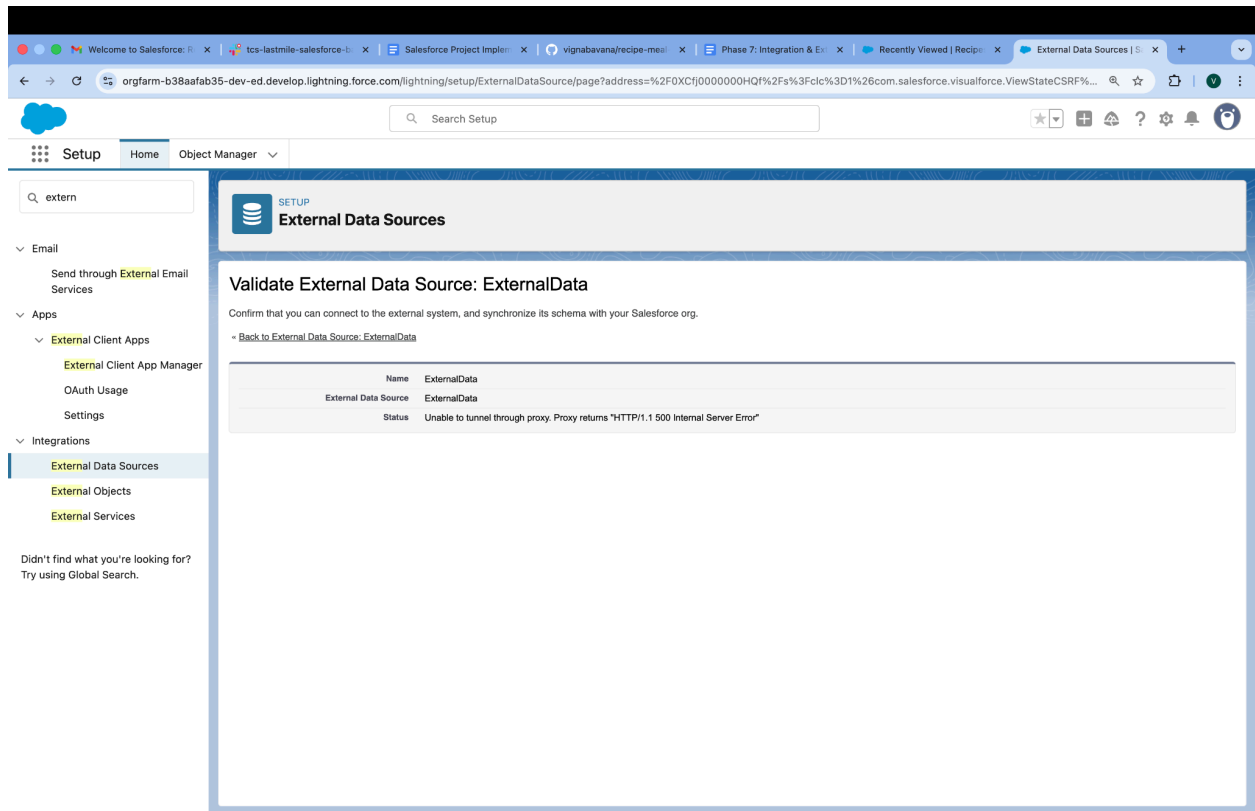
## Change Data Capture (CDC)

**Purpose:** Track changes in Salesforce records.



## Salesforce Connect

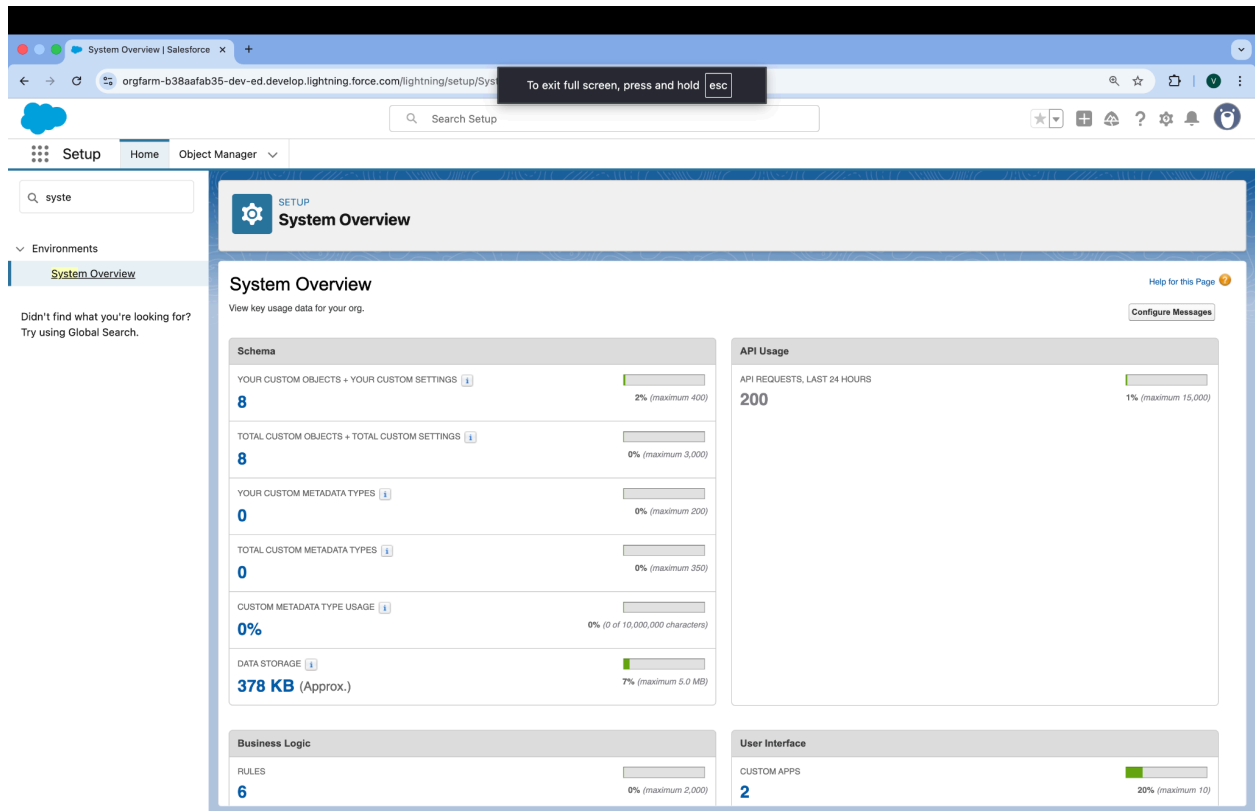
**Purpose:** Access external objects without copying data.



## API Limits

Salesforce imposes limits on the number of API calls per 24 hours.

- **Check limits:** Setup → System Overview → API Requests.
- **Monitor usage:** Use Workbench → REST Explorer → /services/data/vXX.0/limits.
- **Purpose:** Prevent exceeding allowed API usage during integrations or frequent callouts.



## OAuth & Authentication

Used for secure access between external apps and Salesforce.

- **Create Connected App:** Setup → App Manager → New Connected App.
- **Enable OAuth Settings:** Provide Callback URL, select OAuth Scopes (e.g., Full Access).
- **Use in Named Credentials:** Select OAuth authentication for API callouts.



App Manager | Salesforce

orgfarm-b38aafab35-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

New Lightning App New External Client App

36 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
17	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/19/2025, 4:01 AM	Lightning	✓
18	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/19/2025, 4:01 AM	Classic	✓
19	My Service Journey	MSJApp	Discover new customer service capabilities.	9/19/2025, 4:01 AM	Lightning	✓
20	Platform	Platform	The fundamental Lightning Platform	9/19/2025, 4:01 AM	Classic	
21	Queue Management	QueueManagement	Create and manage queues for your business.	9/19/2025, 4:01 AM	Lightning	✓
22	Recipe & Meal Planning Manager	Recipe_Meal_Planning_Manager	App for managing recipes, ingredients, meal plans, and sho...	9/24/2025, 6:08 AM	Lightning	✓
23	Sales	Sales	The world's most popular sales force automation (SFA) sol...	9/19/2025, 4:01 AM	Classic	
24	Sales	LightningSales	Manage your sales process with accounts, leads, opportuni...	9/19/2025, 4:01 AM	Lightning	✓
25	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	9/19/2025, 4:01 AM	Lightning	✓
26	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple re...	9/19/2025, 4:01 AM	Lightning	✓
27	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles an...	9/19/2025, 4:01 AM	Classic	✓
28	Salesforce for Outlook	Salesforce_for_Outlook	A powerful Outlook integration application that lets you add...	9/26/2025, 6:48 AM	Connected (Managed)	
29	Salesforce Mobile Dashboards	Salesforce_Mobile_Dashboards	The Salesforce.com Analytics Mobile application lets you a...	9/26/2025, 6:48 AM	Connected (Managed)	
30	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	9/19/2025, 4:03 AM	Lightning	✓
31	Salesforce Touch	Salesforce_Touch	Salesforce Touch is Salesforce, optimized for mobile touch...	9/26/2025, 6:48 AM	Connected (Managed)	
32	Service	Service	Manage customer service with accounts, contacts, cases, ...	9/19/2025, 4:01 AM	Classic	✓
33	Service Console	LightningService	(Lightning Experience) Lets support agents work with multi...	9/19/2025, 4:01 AM	Lightning	✓
34	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-...	9/19/2025, 4:01 AM	Classic	
35	Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	9/19/2025, 4:01 AM	Lightning	✓
36	Workbench	Workbench	Workbench is a powerful, web-based suite of tools designe...	9/26/2025, 6:48 AM	Connected (Managed)	

## Remote Site Settings

Allows Salesforce to make callouts to external services.

- **Setup → Remote Site Settings → New Remote Site.**
- **Fill details:**
  - **Name:** RecipeAPI
  - **URL:** https://your-recipe-api-endpoint.com
  - **Active:** Checked
- **Purpose:** Authorizes Salesforce to communicate with external APIs securely.

Remote Site Settings | Salesf... X +

orgfarm-b38aafab35-dev-ed.develop.lightning.force.com/lightning/setup/SecurityRemoteProxy/page?address=%2F0rpfj0000015HXV

Search Setup

Setup Home Object Manager

remote

Custom Code

Remote Access

Security

Remote Site Settings

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Remote Site Settings

Remote Site Details

Help for this Page

Remote Site Detail

Edit Delete Clone

Remote Site Name

RecipeAPI

Remote Site URL

https://your-recipe-api-endpoint.com

Disable Protocol Security

Description

Callouts to Recipe API

Active

✓

Created By

yigna.bayana, 9/26/2025, 7:15 AM

Edit Delete Clone

Modified By

yigna.bayana, 9/26/2025, 7:15 AM

Remote Site Details - Salesforce - Developer Edition