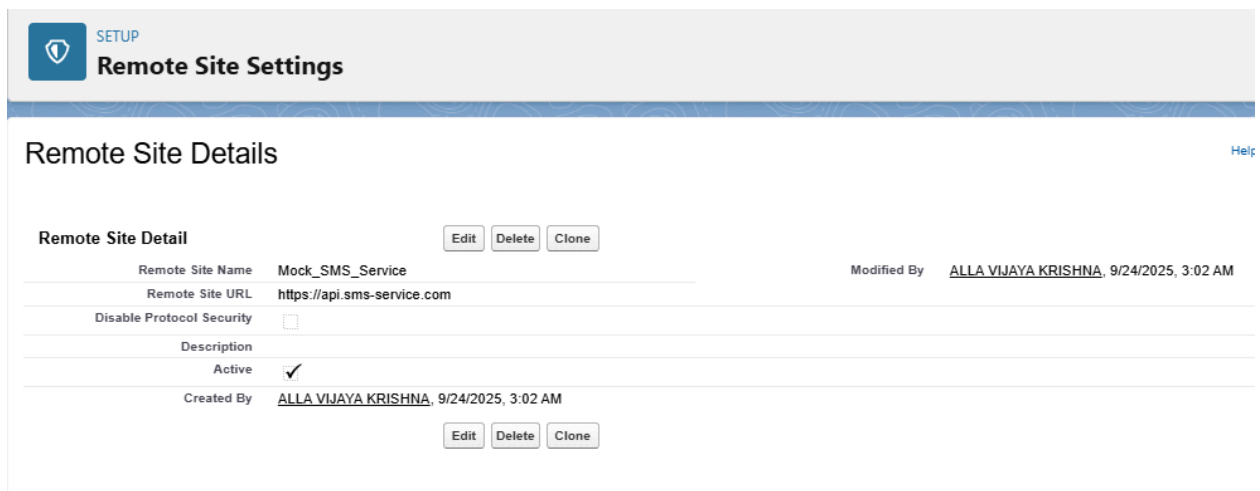

Phase 7 Summary: Integration & External Access

Project: Residential Maintenance Request Portal

This phase focused on performing the key administrative setup tasks required for an integration and then simulating the integration process using a Flow.

1. Remote Site Setting: Mock_SMS_Service

- **Purpose:** To securely authorize Salesforce to make future connections to a specific external website or API endpoint.
- **Key Actions:** An entry was created to add a mock URL to Salesforce's list of approved external sites. This is a mandatory security step required before any real API callout code can be written.



The screenshot displays the 'Remote Site Settings' page in Salesforce. At the top, there is a 'SETUP' button and the title 'Remote Site Settings'. Below this, the 'Remote Site Details' section is visible, including a 'Help' link. The main content area shows the details for the 'Mock_SMS_Service' remote site. It includes fields for 'Remote Site Name' (Mock_SMS_Service), 'Remote Site URL' (https://api.sms-service.com), 'Disable Protocol Security' (unchecked), 'Description' (empty), 'Active' (checked), and 'Created By' (ALLA VIJAYA KRISHNA, 9/24/2025, 3:02 AM). There are also 'Modified By' details (ALLA VIJAYA KRISHNA, 9/24/2025, 3:02 AM) and buttons for 'Edit', 'Delete', and 'Clone'.

Remote Site Detail		Edit	Delete	Clone
Remote Site Name	Mock_SMS_Service			
Remote Site URL	https://api.sms-service.com			
Disable Protocol Security	<input type="checkbox"/>			
Description				
Active	<input checked="" type="checkbox"/>			
Created By	ALLA VIJAYA KRISHNA, 9/24/2025, 3:02 AM			

2. Custom Field: Sent for SMS Notification

- **Purpose:** To create a checkbox on the Maintenance Request object to visually track whether the simulated integration process has run for a given record.
- **Key Actions:** A new **Checkbox** field was added to the Maintenance Request object.

Step 4. Add to page layouts

Step 4 of 4

Previous

Save & New

Save

Cancel

Field Label

Sent for SMS Notification

Data Type

Checkbox

Field Name

Sent_for_SMS_Notification

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

☒ Maintenance Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous

Save & New

Save

Cancel

3. Flow: Send SMS on Completion

- **Purpose:** To simulate an integration by automatically updating a record when it meets the business criteria for an external action.
- **Key Actions:** A **Record-Triggered Flow** was created that runs whenever a Maintenance Request record is **updated** and its Status field equals "Completed". The flow's only action is to update the record and check the Sent for SMS Notification checkbox to True.

Flow Builder

Send SMS on Completion - V1

Select Elements

Auto-Layout

Last saved on 9/24/2025, 03:39 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: Maintenance Request

Trigger: A record is updated

Conditions: 1

Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Maintenance Request

Run Immediately

Mark as Sent for SMS

Update Records

End

Update Records

Description

How to Find Records to Update and Set Their Values

☒ Use the maintenance request record that triggered the flow
 ☐ Update records related to the maintenance request record that triggered the flow
 ☐ Use the IDs and all field values from a record or record collection
 ☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Maintenance Request Record

Field

Sent for SMS Notification

Value

True

+ Add Field