

Phase 7: Integration & External Access

Goal: Connect Membership Manager with outside systems.

Named Credentials

Store external API credentials securely.

Example: Payment Gateway API or Notification Service credentials.

External Services

Connect with external subscription verification or payment systems.

Example: Verify if a member's payment went through outside Salesforce.

Web Services (REST/SOAP)

REST callout: Get subscription status from an external system.

Example: Check membership eligibility or renewal status from a partner system.

Callouts

Triggered when a Subscription is created or updated.

Example: Send member info to payment API to activate subscription automatically.

Platform Events

Publish an event if a subscription payment fails or membership is cancelled.

Other systems can subscribe to these events.

Change Data Capture (CDC)

If a Subscription record is updated → external system is notified.

Example: Membership type upgrade triggers partner system update.

Salesforce Connect

Connect external database if members or subscription plans are managed outside Salesforce.

Example: Pull historical membership data from central database.

API Limits

Monitor API calls per day to avoid hitting Salesforce limits when integrating multiple services.

OAuth & Authentication

If members log in via a portal → OAuth ensures secure access.

Example: Member portal login to check subscription status.

Remote Site Settings

Allow callouts to external domains.

Example: <https://paymentapi.example.com> or <https://notificationapi.example.com>