Phase 7: Integration & External Access

👉 **Goal:** Enable customers and external systems to interact with SSRS through secure integrations and access points.

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1. Email-to-Case

- Configure **Email-to-Case** so that when a customer sends an email, it automatically creates a Service Request record in Salesforce.

- Route the request to the appropriate staff queue based on subject or priority.

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2. Web-to-Case

- Create a **public-facing web form** that allows customers to submit requests directly.

- The submitted form populates fields like Request Type, Priority, and Contact.

- Add **reCAPTCHA** for spam protection.

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3. REST API Integration

- Expose SSRS data using **Salesforce REST API** so external apps (e.g., customer portals, mobile apps) can push or pull request data.

- Use **OAuth 2.0** for secure authentication.

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4. Experience Cloud Portal

- Set up an **Experience Cloud site** for customers.

- Customers can log in to view their service request history, track status, and communicate with staff.

- Managers can monitor feedback and request activity through the portal.

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5. External System Integration

- Integrate with external systems like a **knowledge base** or third-party support platform.

- For example, requests can link to relevant knowledge articles to help staff resolve issues faster.

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6. Security for Integrations

- Implement **OAuth 2.0 and Named Credentials** for API security.

- Use **Profiles, Permission Sets, and Sharing Rules** to control what external users can access.

- Enable **audit trails** to monitor external access activity.

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7. Testing & Validation

- Test Email-to-Case and Web-to-Case with sample submissions.

- Verify API requests and responses using tools like **Postman**.

- Ensure external portals show correct data without exposing sensitive information.

✅ With Phase 7, SSRS is no longer limited to internal users — customers and external systems can securely create, track, and resolve requests, making the system more powerful and flexible.