Phase 7: Integration & External Access

In modern enterprise applications, systems rarely operate in isolation. Integration enables the Customer Support Ticket Management System to communicate with external applications such as email systems, CRM tools, messaging platforms, and third-party service applications. External access ensures that customers, support agents, and managers can securely interact with the system beyond the Salesforce platform, enabling flexibility and real-time responsiveness.

1. Integration with External Systems

Purpose

- Enable seamless data exchange between Salesforce and external systems.

- Reduce manual effort in ticket creation, updates, and notifications.

- Ensure real-time synchronization of customer issues and ticket status.

- Improve collaboration between customer support and external communication tools.

Integration Methods

1. **REST API Integration**

- Salesforce exposes REST APIs that allow external systems to push or retrieve ticket data.

- Example: An external customer support portal sends ticket details to Salesforce using REST APIs.

- External systems can fetch ticket status updates for real-time monitoring.

- **Security:** OAuth 2.0 is used for secure authentication and authorization.

2. **Outbound Messaging**

- Salesforce can send XML-based outbound messages to external systems when a support ticket is created or updated.

- Useful for notifying external applications such as notification services or monitoring tools.

- Enables automatic communication without manual intervention.

3. **Platform Events**

- Platform Events can be published when critical ticket events occur, such as ticket creation, escalation, or resolution.

- External applications subscribed to these events receive real-time updates.

- Improves responsiveness and system scalability.

Third-Party Integrations

- Integration platforms such as **MuleSoft**, **Zapier**, or **Workato** can be used to connect Salesforce with external systems.

- Examples include:

    1. Slack notifications for high-priority tickets

    2. Email alerts through external messaging services

    3. Integration with external CRM or helpdesk tools

2. External Access

- External access allows users to interact with the Customer Support Ticket Management System securely outside the Salesforce internal environment..

Methods of External Access

1. **Salesforce Experience Cloud (Portal)**

    o Customers can raise support tickets through a branded portal.

    o Customers can track ticket status and view resolution updates.

    o Support agents and managers can respond to tickets through the portal interface.

2. **Salesforce Mobile App**

    o Support agents and managers can access the system using the Salesforce mobile app.

    o Enables mobile ticket updates, status changes, and notifications.

    o Enhances response time and operational efficiency.

3. **API Access**

    o External applications can read and update ticket information through Salesforce APIs.

    o Ensures seamless communication between Salesforce and external customer service tools.

4. **Single Sign-On (SSO)**

    o Users can log in using corporate credentials such as Google Workspace or Active Directory.

    o Eliminates the need for separate Salesforce login credentials.

    o Improves security and user convenience.

3. Security Considerations

- **Profiles and Permission Sets:** Ensure only authorized users can access or update leave requests.

- **Field-Level Security:** Sensitive employee data (emails, leave balances) is restricted to HR

or managers.

- **IP & Login Restrictions:** External access is allowed only from trusted networks or devices.

- **OAuth Tokens & API Security:** External integrations use secure authentication and encrypted connections.

4. Benefits

- Seamless interaction with payroll, HRMS, and messaging systems.

- Enhanced employee satisfaction due to easy portal/mobile access.

- Reduced errors and administrative overhead.