

Phase 7: Integration & External Access

Objective

To enable the system to connect with **external platforms and users outside Salesforce** for future scalability — such as **customer portals, notifications, or mobile access** — while maintaining **security and reliability**.

Current Implementation

- No third-party integrations in **Version 1.0**.
- The system runs fully within **Salesforce native tools**: Cases, Accounts, Contacts, Flows, Email Alerts, Dashboards.
- **External access** is limited to **email communication** with customers and agents (via automated Flows).

Planned Integrations (Future Scope)

1. Customer Self-Service Portal

- **Need:** Allow customers to create, view, and track their cases online.
- **Tools:**
 - Salesforce **Experience Cloud (Community Portal)**
 - Role-based access: Customer Portal profile
- **Expected Benefit:** Improves engagement and reduces manual case entry by support staff.

2. Online Payment / Billing Integration

- **Need:** Collect payments for services or subscriptions directly into Salesforce (if applicable).
- **Tools:**
 - REST API integration with Stripe or Razorpay
 - Apex HttpRequest & HttpResponse classes for API calls
- **Expected Benefit:** Auto-create payment records and link them to Accounts or Cases.

3. Mobile Accessibility

- **Need:** Support agents or field staff can access cases on the go.
- **Tools:**

- Salesforce Mobile App (Lightning Experience)
- Lightning Web Components (LWC) for mobile-responsive UI
- **Expected Benefit:** Real-time updates on case status, customer interactions, and escalations.

4. External Calendar / Email Sync (Optional)

- **Need:** Sync case-related activities with Gmail or Outlook calendars for agents.
- **Tools:** Salesforce Calendar Integration & Einstein Activity Capture
- **Expected Benefit:** Automatic reminders for follow-ups, meetings, and SLA deadlines.

Security & Access Considerations

- Profiles, Permission Sets, and Field-Level Security (FLS) enforce controlled external access.
- OAuth 2.0 authentication for API integrations.
- IP restrictions & session settings applied for portal access.
- Sensitive data (like payment or customer info) stored securely and compliant with Salesforce best practices.

Tabular Summary

Integration Area	Tool/Method	Purpose	Status
Customer Portal	Experience Cloud	Self-service for customers to create/view cases	Planned (Future)
Payment / Billing	REST API (Stripe/Razorpay)	Capture payments & link to records	Planned (Future)
Mobile Access	Salesforce Mobile App / LWC	Agents access cases on the go	Partially Ready
Calendar / Email Sync	Einstein Activity Capture	Sync case activities with Gmail/Outlook	Optional / Future
External Notifications	Email Alerts via Flows	Automated acknowledgments & status updates	Implemented (v1.0)

Benefits

- Streamlines **customer interaction and self-service**.
- Increases **transparency and trust** via portal access.
- Reduces **manual work** for support staff.
- Ensures **system scalability** for larger operations and future enhancements.