

# Modernizing Support Escalation with Salesforce and Slack Integration



## Overview

See how a contact center reimagined its customer service by moving from email-based coordination to a real-time, shared support workspace using Salesforce and Slack.

## Why This Matters for Other Businesses

When urgent cases depend on email threads or manual follow-ups, delays are inevitable. A Slack–Salesforce connection gives support teams live updates, faster escalations, and tighter queue control.

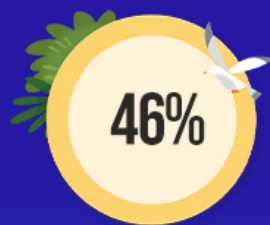
# How Synexc Helped

Synexc delivered Salesforce–Slack integration that enabled the support team to track high-priority cases in real time, get visibility into queue status, and collaborate across tiers, all within Slack.

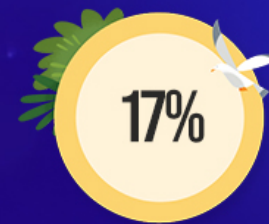
## Key Improvements



fewer internal handoff delays



reduction in time to escalate Tier 1 issues



improvement in SLA compliance in the first quarter



## About the Client

Our client, a technology support provider with enterprise clients across the US, manages hundreds of customer cases per week. High-value contracts and SLA-driven support meant that timely escalation and internal alignment were critical.

# Challenges Faced by the Client

## Challenge 1



### No Real-Time Notification System

Escalations and high-priority cases were often missed or delayed because agents had to manually flag them via email or Chatter.

## Challenge 2



### Siloed Tools and Manual Handoffs

Support reps worked in Salesforce, but internal collaboration happened in Slack, with no connection between them.

## Challenge 3



### Managers Had No Quick View into Urgent Issues

Team leads had to log into Salesforce dashboards or run reports to understand what needed attention.





# Solutions Offered



## Installation of Salesforce App in Slack

- Synexc began by installing the Salesforce App for Slack to allow data sharing, search, and automation triggers.
- This enabled support agents to preview and share case records directly from Slack.



## Configuration of the Slack App in Salesforce

Next, we also installed the Slack App from Salesforce AppExchange to complete the connection.



## Creation of Case Escalation Alerts Using Notification Builder

Set up Salesforce Notification Builder to push alerts to Slack when:

- A new case was marked "Priority 1."
- A case remained in "Waiting for Internal" for over 12 hours
- Escalation checkbox was ticked by the support agent



## Implemented Slash Command for Live Case Lookup

Set up the Slack slash commands, enabling agents to use `/casestatus` to check case status from Slack without logging into Salesforce.

# Results



All escalations  
now hit Slack  
in real time



Faster responses  
prevent SLA  
breaching





Better  
collaboration  
without toggling  
platforms



Improved  
Customer  
satisfaction due  
to shorter TATs.

```
slack_api_url = "https://slack.com/api/apps.install"
payload = {
  "app_id": "SalesforceApp",
  "workspace_id": "client_workspace_id",
  "user_token": "slack_token"
}
response = requests.post(slack_api_url, json=payload)
```

 **Swarm Assistance Request** 

Case #

Assistance Type

Review

Urgency of your request

In the next hour

Close

Submit

```
javascript
fetch("https://api.salesforce.com/install", {
  method: "POST",
  headers: {
    "Authorization": "Bearer salesforce_token",
    "Content-Type": "application/json"
  },
  body: JSON.stringify({ appName: "Slack Integration" })
})
```



## Client testimonial

"Synexc's great communication and pragmatic approach to problem-solving helped us slash escalation rates and deliver consistent customer experiences."

**Neil R.**

Director of Customer Support

## About Synexc

Synexc is a new-age Salesforce consulting company specializing in CRM implementation, custom development, system integration, and AI-powered solutions. With clients across the US, Europe, and APAC, we are fast emerging as a global hub for delivering scalable, secure, and business-aligned Salesforce solutions tailored to industry-specific needs.

**Reach out to us for a  
Free Consultation Now!**

