CLOUDSHARKS

CASE STUDY

Maxxima Streamlines Support with Freshdesk-Salesforce Integration

A real-time integration now delivers full context, faster resolutions, and smarter support analytics.

Project Overview

Maxxima Style, a division of Panor Corp., manufactures energy-efficient LED lighting for consumer and commercial applications. To streamline customer support operations, the company aimed to integrate Freshdesk support tickets with Salesforce Service Cloud. The goal was to create a seamless, automated flow of ticket data into Salesforce, improving agent visibility and facilitating faster issue resolution.

Challenges

- **Disjointed Systems:** Customer support tickets were logged in Freshdesk, while customer data and 360° views existed in Salesforce, leading to system-switching and inefficiencies.
- **Manual Processes:** Freshdesk tickets had to be re-entered into Salesforce manually, increasing the risk of errors and duplication.
- **Limited Visibility:** Updates and comments in Freshdesk didn't sync with Salesforce, resulting in lost context during case handling.
- **Analytics Gaps:** Incomplete data prevented the generation of reliable KPIs and reports in Salesforce.
- **Scalability Concerns:** Growing ticket volume risked overwhelming support staff without automation.

Solutions Implemented:

- **API Integration:** Developed a ticket-to-case sync using Freshdesk webhooks and Salesforce Apex REST services.
- **Automated Record Matching:** Implemented logic to link cases with the correct Accounts and Contacts via email/domain matching; new Contacts are auto-created when necessary.

- **Context Preservation:** Synced all Freshdesk comments as time-stamped notes or feed items within Salesforce.
- **Data Governance:** Used field-level mapping and duplicate-prevention rules to ensure data quality.
- **Error Handling & Security:** Built-in error logging and admin alerts, with security via OAuth, Named Credentials, and IP whitelisting.
- **Phased Implementation:** Included discovery, sandbox testing, UAT, deployment, and post-go-live training and handoff.

Outcome

- **Unified Support View:** Agents now work entirely within Salesforce, eliminating the need for system toggling.
- **Faster Resolutions:** Synced comments and case updates ensure teams stay aligned and responsive.
- **Data-Driven Operations:** Real-time dashboards surface key KPIs such as SLA compliance and case resolution metrics.
- **Scalable Support:** Automation reduces manual work and supports future ticket volume growth.

Conclusion

The integration of Freshdesk and Salesforce enabled Maxxima Style to unify its support operations, improve data accuracy, and deliver faster customer service. With a fully automated ticket-to-case process and comprehensive analytics, the organization is now positioned to scale support while maintaining high service standards.