

Success Story

American Payment Processor Implements Advanced Self-Service Case Management



Overview

The client, an American payment processor, required a modern, self-service case management interface. They partnered with us to move away from their manual issue reporting. We extended the provider's Salesforce customer community portal with custom metadata-driven components. This enabled real-time case tracking, access to FAQs, intelligent routing, and a scalable framework for future clients.

Client Background and Challenges

The client is a leading American multinational financial services corporation with a global footprint and \$25.69B in revenue. Operating in the BFSI industry, it processes payments between merchant banks and card issuers, serving both B2B and B2C markets.

One of the client's European partners, P27, lacked a digital case management platform and relied on calls and emails to report incidents. With a 27 million customer base across the Nordics, this offline system caused delays, reduced transparency, and increased operational friction. P27 needed a scalable, secure interface to:

- ▶ Create and track support cases.
- ▶ Access FAQs from the provider's knowledge base.
- ▶ Ensure seamless integration without affecting other customers.

Client Background and Challenges

We extended the provider's Salesforce customer community portal with tailored enhancements for P27:

- ▶ When a customer is identified as P27, additional P27-specific fields are shown during case creation.
- ▶ This change has been implemented without disrupting the existing PTS customer experience.
- ▶ Providing the provider with a scalable and reusable solution, these components can also be configured using custom metadata.
- ▶ The customer-specified fields can be maintained in custom metadata, along with their data type and whether they are mandatory or optional.
- ▶ P27 can access case management by creating and tracking new cases from the customer community.
- ▶ A separate article category is created for P27, under which a knowledge article can be created. P27 can then access this article from the customer community as a suggested article.
- ▶ P27 cases are routed to a separate support queue via omnichannel routing and Einstein recommendations.

Business and Community Impact

- **Reduced Case Age:** Defined a SLA matrix for P27 customers, scalable for future clients, maintaining some metadata records.
- **Operational Effectiveness:** Enabled users to create, track, update, close, and escalate cases from the community portal, leading to better turnaround time.
- **Innovation:** Delivered reusable and scalable components easily configurable for future customer onboarding without any code change.
- **Real Time Tracking:** Clients now have complete transparency on case status and can interact with Salesforce objects directly from ServiceNow.

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