

Case Study

Transform Your Business with Our Innovative API Interface Solution



Overview

A global American financial services company struggled with delayed incident resolutions due to manual workflows between their ServiceNow platform and a provider's Salesforce Service Cloud. To improve the interaction between their systems, they partnered with Tech Mahindra. We built an API interface for the client, enabling real-time case exchange, feed updates, and file transfers. This reduced case aging, streamlined operations, and introduced scalable API capabilities for future client onboarding.

Client Background and Challenges

The client is a leading American multinational payment company with global operations. They facilitate payment processing primarily between merchant banks and card-issuing institutions. With a worldwide presence and \$25.69B in revenue, it serves both B2B and B2C markets in the BFSI industry.

- ▶ Among its banking customers, one of the Canadian payment processing organizations posed a unique challenge:
- ▶ The client relied on ServiceNow for managing customer incidents. The service provider, however, used Salesforce Service Cloud for customer support.
- ▶ When issues involving the provider arose, the client would manually escalate incidents via phone or email, depending on urgency.
- ▶ Incident status updates were tracked manually using internal templates.
- ▶ The lack of integration between ServiceNow and Salesforce Service Cloud created a disconnect between the two teams.

Our Approach and Solution

Tech Mahindra developed an API interface that allowed seamless communication between ServiceNow and Salesforce Service Cloud. This API interface additionally –

- ▶ Enabled POST, PUT, and GET operations for cases between ServiceNow and Salesforce.
- ▶ Supported both real-time single case transactions and bulk requests/responses with configurable time intervals.
- ▶ Allowed clients to retrieve cases, feeds, and attachments created/uploaded by providers.
- ▶ Enabled feed updates, file uploads, and downloads against cases in Service Cloud.
- ▶ Established a roadmap for expanding the integration to include problem management and change request management.
- ▶ Developed a generic architecture allowing rapid extension to other clients of the provider with simple configurations.
- ▶ Designed the API interface to support multiple customer entitlements with scalable configurations.
- ▶ Implemented dedicated queue routing for client-specific case handling.

Business and Community Impact

- **Reduced Case Age:** Faster resolution and incident closure in ServiceNow.
- **Operational Effectiveness:** Automated case routing to specific queues for dealing with client cases. The automated case routing has reduced idle time in identifying the source, criticality, and corresponding ownership of cases.
- **Innovation:** The generic API interface created is highly scalable for future client onboarding, requiring only a few metadata records in Service Cloud.
- **Real-Time Tracking:** The client can now track case statuses in Service Cloud directly from ServiceNow. Additionally, the client can view and upload files related to incidents in Service Cloud, which are linked to ServiceNow.

About Tech Mahindra

Tech Mahindra (NSE: TECHM) offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 150,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consulting, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, AI & analytics, and cloud & infrastructure services. It is the first Indian company in the world to have been awarded the Sustainable Markets Initiative's Terra Carta Seal, which recognises global companies that are actively leading the charge to create a climate and nature-positive future. Tech Mahindra is part of the Mahindra Group, founded in 1945, one of the largest and most admired multinational federation of companies. For more information on how TechM can partner with you to meet your Scale at Speed™ imperatives, please visit <https://www.techmahindra.com/>.

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