



# Building a Secure Self-Service Portal for Seamless Support Management

How Milestone developed a self-service platform to automate ticket management, streamline access control, enhance security, and improve customer experience for a global financial services client.

## The Background

The client is a prominent global financial services organization operating in a highly regulated environment. It specializes in providing secure cross-border payment services tailored for banks, foreign exchange businesses, money transfer organizations, payment aggregators, and e-commerce enterprises.

Focusing on ensuring compliance and safety in international financial transactions, the client plays a vital role in facilitating seamless and secure payment flows across global markets.

## The Business Problem

The client faced challenges in offering a self-service platform for their end customers to raise support cases independently.

Additionally, the client needed to streamline access to multiple applications within their network and improve the management of user access for various services. Ensuring that the system met high standards of security and compliance, and providing a seamless user experience was crucial to achieving these goals.

## The Objective

The objective was to develop a self-service platform to automate support ticket management, minimizing manual intervention throughout the process. This solution aimed to reduce the manual effort required for case resolution by automating the entire lifecycle – case creation, assignment, processing, and closure – ensuring a more efficient and seamless support experience for users.

### In summary:

- Develop a self-service platform to automate support ticket management.
- Minimize manual intervention throughout the case resolution process.
- Automate the entire lifecycle: case creation, assignment, processing, and closure.
- Reduce manual support efforts to enhance efficiency and improve the user experience.

## The Milestone Solution

Milestone developed a self-service Client Support Portal using Experience Cloud, enabling customers to raise cases for transactions, cancellations, refunds, and more. The portal was integrated with the client's Identity Access Management (IAM) tool to ensure seamless user access management, security, and compliance through Salesforce's Single Sign-On (SSO).

The portal was customized with the client's branding using Bootstrap and other libraries for front-end elements. The JIT (Just-in-Time) user provisioning feature allowed automated user creation based on SSO login. Additionally, user deactivation and role changes were reflected in Salesforce through integration with the User Entitlement API, which ensured real-time updates.

Security was enhanced with Message Level Encryption (MLE) to protect PII data during API communication, adhering to organizational policies. Key rotation and derivation processes were semi-automated, requiring minimal manual intervention to maintain security compliance.

### In summary:

- Developed a self-service Client Support Portal with custom branding using Experience Cloud.
- Integrated the portal with the client's IAM platform for SSO-based user management.
- Enabled JIT user provisioning for automated user creation upon login.
- Reflected user deactivation and role changes in Salesforce via the IAM User Entitlement API.
- Secured data transfer with MLE to protect PII and ensure compliance.
- Implemented semi-automated key rotation and derivation to maintain security standards.



## The Result

In the first three months following the launch of the Client Support Portal, the client received 2,240 cases, 80% of which were resolved automatically, saving approximately 160 hours of manual effort for the support team. The portal recorded 950 users in Salesforce, with 741 active users, of which 684 were successfully onboarded to the IAM system. Additionally, the portal empowered customers to check the status of refunds, cancellations, and transaction updates independently, eliminating the need for calls or emails to customer support.

### In summary:

- 2,240 cases received through the portal, 80% of them resolved automatically, saving 160 hours of work.
- 950 users registered in Salesforce, with 741 active users, and 684 onboarded to IAM.
- Improved customer experience by enabling self-service status updates for refunds, cancellations, and transactions.

## Key Learning

The Client Support Portal significantly improved operational efficiency by enabling customers to raise cases and request cancellations or refunds independently, reducing reliance on support staff. Security compliance was ensured through Message Level Encryption (MLE), protecting Personally Identifiable Information (PII) during user management via the IAM platform's REST API. Automation reduced manual effort, saving time and enhancing productivity. High user engagement and seamless onboarding demonstrated strong adoption of the platform. Real-time updates on refunds, cancellations, and transactions improved customer transparency and satisfaction.

### In summary:

- **Self-Service Efficiency:** Reduced dependency on support staff and improved the customer experience.
- **Security Compliance:** Protected PII with MLE in compliance with policies during IAM platform operations.
- **Automation and Time Savings:** Streamlined processes, reducing manual effort.
- **User Engagement and Onboarding:** Achieved high adoption and efficient user management.
- **Improved Customer Experience:** Provided real-time updates, enhancing transparency and customer satisfaction.



## Why Milestone

Milestone was selected for its ability to design a secure, scalable solution that addressed the client's need for a streamlined self-service platform. Leveraging expertise in Salesforce and Experience Cloud, Milestone developed a Client Support Portal that automated support ticket management, reducing manual effort and improving efficiency.

The seamless integration with the client's IAM system ensured secure user access and compliance, while advanced encryption safeguarded sensitive data. Milestone's focus on automation, security, and real-time data updates enabled the client to enhance the customer experience, optimize processes, and achieve significant time savings.

## About Milestone

Milestone Technologies is a leading global IT services and digital solutions provider that collaborates with organizations worldwide to revolutionize their technology infrastructure and digital capabilities.

With a strong commitment to innovation and customer satisfaction, we empower businesses to accelerate their digital transformation journey and unlock new opportunities for growth and success.

By leveraging our extensive expertise in cutting-edge technologies, we provide companies with the agility and scalability needed to stay ahead in today's rapidly evolving digital landscape.

## CONTACT US

Contact Milestone today to take your business to the next level.

Know More [➤](#)