

# SALESFORCE B2B PLATFORM CENTRALIZATION

Integration & Data Store, Salesforce



We partnered with a leading global energy company. Their products are used by label printers and brand owners across a wide variety of industries ranging from food to pharmaceuticals.

## NEED: SALESFORCE B2B PLATFORM CENTRALIZATION & ENHANCEMENT

As a company committed to sustainability and innovation, our partner needed a platform that would allow the company to enhance its B2B customer experience globally, in eight languages, empowering customers to search and compare products, request quotes, make purchases, manage claims, and access an educational knowledge base across both desktop and mobile.

Additionally, they wanted to enhance sales communications with customers. Before partnering with us, they used telephone and email as their primary communication tools, however, they needed a platform where customers could interact with their products, place orders, and find additional information. They essentially wanted a Salesforce B2B Platform centralization.

## SOLUTION

We have worked with them to provide development for multiple projects. Throughout our partnership, we have also advised on technical architecture as well as helped guide product management and [UX design](#).

Some of the notable achievements we've launched with the team include:

### PROJECT 1 – QUESTIONS

To solve their sales communication problems we used [Salesforce](#) cases as the tool to connect their customers and customer service. This module involved the creation of a custom user interface to meet the company's needs, built using Salesforce Lightning Components in the front-end and Apex on the back-end. With this solution, users can create new cases, get information about their products, and ask for recommendations. These queries are tracked in [Service Cloud](#) and answered by the customer service team. We additionally built a knowledge base to educate customers on surplus material usage.

### PROJECT 2 – PRODUCTS

To create the front-end for this service, our developers used Lightning Components, product objects, and custom objects. On the back-end we used Apex. We created a portal for product objects where clients can access and view all products our partner offers. Access to these products is determined by geography and customer type. Currently, the site supports products and clients in South America, North America, and Europe. It allows users to view products, check their unique characteristics, and download a PDF with product specifications. It is also possible to filter products by features.

### PROJECT 3 – PERMISSION MANAGEMENT

Our developers built a permission management tool to control and restrict user access to portions of the website. This tool limits user access to different products and product features depending on geography and customer type.

This tool was created and customized uniquely for our partner using Lightning Components and custom objects.

### PROJECT 4 – QUOTES

This project created functionality that permits customers to request quotes for different products. This tool allows customers to download the list of the different quotes they have requested as well as view the status of their quotes. To create this tool our developers used Lightning Components, Apex, product objects, and custom objects.

### PROJECT 5 – ORDER ENTRY

This project built shopping cart functionality to enable customers to place online orders. Using Apex, Lightning Components, Javascript, HTML, CSS, and Community Cloud products, we created a form for customers to create and submit orders directly from within their community. We created two methods for ordering to make the process more efficient using Netwidth and Trimmed. These two methods provide different fields to complete depending on the service required.

We are in the process of enabling customers to submit orders for multiple product types, which involves complex attribution in terms of product type (e.g. rolls vs. sheets), measurements, and quantities. For this, we are using the Lightning Platform and all product data will be stored in Salesforce. When released, this will also enable customers to not only store products in their shopping cart, but also check out and pay through third-party integration.

To deliver this entirely new customer experience, our Uruguay-based team collaborated with the distributed partner team across multiple timezones (Finland, France, and the USA). With so many developers collaborating on this project, the team utilized the Agile project management framework and scrum software development methodology to stay on track.

## RESULTS

This new Salesforce community-based approach and reimagined UX has provided a whole new experience for their customers worldwide. It has empowered customers to search and compare products, request quotes, make purchases, manage claims, and access an educational knowledge base across both desktop and mobile.

## TAGS

Custom Development