

Boosting Business Process Automation by Salesforce Sales Cloud

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Who Are We?



SP Tech is a Salesforce success partner, helping businesses across the globe-to Develop, Sustain, and Manage the digital ecosystem for years now.



We were established in 2015, currently working across the USA & India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.



Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

Project Description

SP Tech developed a Salesforce Sales Cloud solution for a Medical Device Company, drastically reducing manual Business Process and data entry efforts and seamlessly connecting different stakeholders on a single platform.



Industry
Healthcare Services



Products
Salesforce Sales Cloud

About Our Client

Our Client is Boston-based medical technology company bringing disruptive innovation to minimally invasive surgical devices. They set the highest standards in design engineering and smart manufacturing to deliver breakthrough technologies to market.

Challenges

➤ **Product and Order Management**

Our client needed robust and Integrated tool for managing products, product price, products kits and orders. As they were dealing with multiple customer from different regions, they had different price for products. So, they wanted to manage it and at the same time they also wanted solution for the order management. Sometimes they were selling products in a kit instead of single product with special discount(s).

➤ **A Real time Product Usage Management from Field worker.**

Our client wanted Real-time Product usage logging solution which should let them know the market of the product and competitor products. As they were extensively using Salesforce as their primary business process management solution, the new solution should seamlessly connect with SFDC and at the same time ease the process of data entry in Salesforce.

Challenges

➤ **Reports and Dashboard for Products Usage**

Our client wanted a Business intelligent tool to perform data analysis and create reports, summaries, dashboards, graphs and charts to look with detailed intelligence about the nature of the business.

➤ **Automated Invoice Processing from beginning-to-end**

Our client wanted to have Invoice process automated. Earlier they were sending invoices manually, manual emails to customers and were keeping track of it manually. So, they were ready to move manual invoice processing to the automated one.

➤ **Product Order Management in Salesforce Sales Cloud**

Considering the client's use case, our team designed and developed data base for the products and order management, then with the use of Visualforce pages and apex, our team implemented solution for Products and Order management. As we designed solution in a way, so they can select different price book for the customer and can manage order by adding product or Kit with discount. So, now order and product management with accounting no longer remained a challenge.

➤ **Salesforce Sales cloud base web portal**

Considering the client's extensive use of Salesforce, we suggested them to leverage Salesforce products itself to create the final solution. Our team designed, developed, and deployed a Salesforce Sales Cloud-based web portal to allow field worker to log a usage of product in SFDC. We developed Visual Force pages-based application and using lightning components. Because the solution was built on Salesforce itself, updating data in Salesforce no longer remained a challenge.

➤ **Reports, graphs, charts and dashboard with real time data.**

To look on real time nature of Business, we created reports, charts, graphs & dashboard that answered business question like Top 5 surgeon, Top 5 hospital, Top products used in Surgery, Monthly usage of Products etc. So, these solutions helped getting fresh insights to develop unique business strategies and helping organization's decision makers get an overall bird's eye view through typical dashboards and graphs.

➤ **Automated Invoice process**

We created Solution using Visualforce and apex programming for Making Invoice process automatic. Based on Order & invoice we generated emails and sent them to customers. We created 3 types of Emails – Invoice Email, Overdue Reminder Email & Notification Reminder Email before due date. These solutions came with many advantages such as not much need of time to generate invoice & send email to customer manually (it was automated), no scope of error and more.

Results

- **Cost reductions through order accuracy**

Bringing real-time order status for better customer service.

- **Reduced paperwork by automating invoice**

Automation of invoices saved around 25-man hours a week

- **Better Customer Feedback**

User friendly portal and ease of information access garnered positive user feedback across all channels

- **Revenue increased by 30%**

The portal helped client land bigger deals resulting in increase of business by around 30%.

THANK
YOU!

