

A decorative graphic consisting of a network of interconnected nodes and lines, transitioning from orange on the left to blue on the right, framing the central text.

**CASE STUDY**  
**BIOLOGISTICS COMPANY INTEGRATING SALESFORCE  
WITH ORDER MANAGEMENT**

## CLIENT OVERVIEW

The company provides medical research, medical services and medical staff to develop solutions for clinical, surgical and therapeutic patient treatment.

## CLIENT PROFILE



**LOCATION:**  
Atlanta, GA



**EMPLOYEES:**  
100+



**INDUSTRY:**  
Medical and Material  
Science

# CASE STUDY: BIOLOGISTICS COMPANY INTEGRATING SALESFORCE WITH ORDER MANAGEMENT

## CHALLENGE

The client came to CleanSlate for creative solutions within Salesforce which included:

- ◇ There was no distribution process in place to help with new orders, leading to **poor customer service**.
- ◇ The legacy management system was **not supported** by the product team anymore.
- ◇ Sales personnel had **inaccurate** pricing for each product and no visibility into **unpaid** invoices.
- ◇ There was no standardized order fulfillment processes, resulting in **unfulfilled** orders.



## PAIN POINTS

- ◇ Native Management System no longer supported
- ◇ Inaccurate Pricing & Unpaid Invoices
- ◇ Unfulfilled Orders
- ◇ Poor Quality Customer Care

## SOLUTION

- ◇ CleanSlate implemented **Price Books** and Products to give the users the ability to choose the correct pricing for each of their products.
- ◇ By leveraging Scribe, Quickbooks was **integrated** with Salesforce to make key financial data visible to necessary personnel.

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### RESULTS

- ◇ The integration created a **seamless process** for the Sales Team to offer products at different prices to different market segments, regions, or other subsets of customers.
- ◇ The integration **streamlined the workflow**, prevented duplication of data, ensured accurate revenue and ensured that customers are paying prior invoices before allowing new orders.
- ◇ By using **Service Cloud**, queues were used to evenly distribute customer orders to the Support Team, allowing customers to get the care they need.

### CUSTOMER SATISFACTION



All of the integrations together position Salesforce to be a true Customer 360 view and allow sales teams to view and respond to trends in different segments of the market and across product lines.

### TECHNOLOGIES

- ◇ Sales
- ◇ Service
- ◇ Cloud
- ◇ Quickbooks

### FEATURES

- ◇ Flow
- ◇ Process Builder
- ◇ Declarative Configuration
- ◇ Custom Apex Development