CASE STUDY
BIOLOGISTICS COMPANY INTEGRATING SALESFORCE WITH ORDER MANAGEMENT
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

◊ 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.

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TECHNOLOGIES

◊ Sales
◊ Service
◊ Cloud
◊ Quickbooks

FEATURES

◊ Flow
◊ Process Builder
◊ Declarative Configuration
◊ Custom Apex Development