Development of a Custom App for Salesforce Sales Cloud – Website Integration

Case Study

Customer

The Customer is a US-based startup, whose clients are mid-market and enterprise-level companies. The Customer helps its clients' sales teams to advance in the sales process, formalizing their marketing materials with the templates from the Customer's website. The Customer's clients can upload their marketing materials (case studies, success stories) into this website and adjust them to a predesigned format, which allows them to reduce design costs.

Challenge

The Customer commissioned ScienceSoft to develop a Salesforce custom app for Sales Cloud integration with the website for their clients to formalize marketing content and later have access to it in Salesforce. The app should make the Customer's clients' success stories available right in Salesforce. The Customer also wanted to place the app in AppExchange to make it available for the Customer's current clients and enlarge the client base with other mid-market and enterprise-level sales teams with accounts in Salesforce.

Solution

ScienceSoft's team created a single-page web application with the Lightning Component framework to address the Customer's need to ensure access to his website right from Salesforce solutions of his clients. The application was designed for both Salesforce Classic and Lightning Experience UIs. The integration of Salesforce Sales Cloud and the Customer's website was performed with REST API callouts using OAuth 2.0 for user authentication.

The application enabled access to the functionality of the Customer's website on automated designing of the case studies and success stories of his clients and made this formatted content appear in a separate section of the Account and Opportunity records in Salesforce solutions of their clients. The application enabled the search of marketing materials right in Salesforce Sales Cloud with the possibility to tune search fields based on the account name and size, deal size, industry, etc. Due to this functionality, the content describing a deal similar to the Account/ Opportunity a sales rep is working with appeared in these Account/Opportunity records.

Results

The Customer got a tailor-made single-page web application for Salesforce Sales Cloud integration with his website. The application can help the customer's clients to enhance the performance of sales teams engaged in complex sales providing them with relevant case studies and success stories of the unified format. The application appeared in AppExchange, which was the Customer's main benefit since they got revenue from the application's downloads.

Technologies and Tools

Salesforce Sales Cloud, Lightning Component, REST API, OAuth 2.0, Apex Code.