Salesforce Customization for a Roofing Services Provider

Case Study

Customer

The Customer is a US-based roofing services provider working with residential and commercial customers.

Challenge

The Customer commissioned ScienceSoft to perform Salesforce customization of their Sales Cloud-based solution. The Customer required to customize report types (like the report on additional services and the product reports) for better visibility into the distribution of teams' efforts and the use of materials for their projects. The Customer also needed to present the information about their revenues and expenses in a more convenient and user-friendly way. Other requirements were to streamline the processes of creating warranty emails, invoices and introducing the process of purchase orders' (POs) approval.

Solution

To customize the report on additional services and the product reports, ScienceSoft's specialists created a new object, which reflected the split of the teams' efforts and roofing materials spent on each project.

To ensure better *visibility into the Customer's revenue and expenses figures*, ScienceSoft's team created 5 revenue and expenses report types. The reports were designed to show the Customer's weekly expenses and their clients' weekly payments by type, as well as the revenue/expense ratio per week and month. Also, the specialists aggregated reports into a single dashboard with diagrams and a pie-chart to increase user convenience.

After that, ScienceSoft's team *customized the process of automated email sending*. When the Customer's project got a status "final check received," the system reviewed the correlation of revenue and expense amounts. If the amount of revenue in a project was smaller than that of an expense, the automated email to the Customer's clients was triggered with the demand to pay the shortfall. The Apex code instructions ensured that the emails would be automatically sent with a pre-set time interval and logged in the activity history.

To make creating warranty emails and invoices easier, ScienceSoft's team *enabled custom email templates* created with Visualforce page for Salesforce Classic UI. The page allowed better invoice and warranty email templates management due to the opportunities of previewing the final email version, sending mass emails, and reflecting the email response results. An email created with a pre-designed template could also have a PDF file attached.

ScienceSoft's team *created a custom PO form* adaptable for mobile view. The form allowed the Customer's employees to enter the data about roofing materials from different manufacturers used for the project and calculate their amount. For that, the developers used the Lightning Component framework in the Visualforce page for Classic UI. The page's functionality also enabled storing, previewing and editing POs before sending them for approval to a responsible employee.

Then ScienceSoft's developers created *a custom PO approval process*. Due to history tracking functionality introduced by the developers, the history of editing the record with POs became available. All the versions of the POs were automatically saved in Salesforce, which facilitated tracking changes to the record.

Upon completion of the Salesforce customization process, ScienceSoft's team suggested performing *a health check* of the Customer's automated processes to find out whether any of them required optimization. It turned out that the process of notifying a responsible employee about the stalled project was faulty. To replace this process initially created in Process Builder, ScienceSoft's developers introduced custom Apex triggers. Other problematic processes were distributing and calculating sales reps' commission, which

weren't working as required due to reaching Salesforce formula limits. To solve this problem, ScienceSoft's specialists replaced the faulty logic of the processes of commission calculation and distribution provided by formula fields, with Apex code, which accurately identified when the processes of commission calculation and distribution should run.

Results

The Customer got their Salesforce-based solution further tailored to their business needs. The customized reports on additional services and product reports ensured better visibility into the teams' performance and the amount of roofing materials used for different projects. New revenue and expenses report types enabled better transparency into the correlation of the Customer's revenues and expenses. Enabling the templates for warranty emails and invoices helped to create them faster and easier. Digitizing the PO approval process added to its transparency and made tracking changes to the POs easier. The additional health check of the Customer's Salesforce-based solution allowed exposing some inefficient processes and optimizing them.

Technologies and Tools

Salesforce Sales Cloud, Visualforce, Salesforce Lightning Component, Apex, Approval Process, Salesforce 1 Adaptive UI.