



OMAHA NATIONAL AUTOMATES PROCESSES THROUGH SALESFORCE

Improving reporting and minimizing manual work.

About the Client

An insurance provider based in Omaha, Nebraska, Omaha National provides workers compensation insurance and payroll services to small and medium-sized companies through a network of agencies and brokers, serving as a liaison between the end customer and the insurer.

Each insurance agency receives a commission on premium payments made by its policyholders. Through Salesforce integration tools and custom development, Omaha National was able to easily access agency commission statements and checks and track payment data all within Salesforce.

Challenge

After implementing Salesforce, Omaha National wanted to automate its agency commission payments and reporting. The client stores agency policy details and commission rates in a third-party industry-specific application and monitors policyholder payments in Accounting Seed. To automate the calculation of commission and generate monthly statements, Salesforce needed to integrate with these two applications. PK achieved this with Dell Boomi, a middleware tool on the AppExchange that minimizes custom coding and eases the process of integrating third-party apps into Salesforce.

Omaha National also needed to bring critical data from monthly payments made by policyholders into Salesforce. It chose Accounting Seed, which integrates natively with Salesforce. With the integration configured, agency data began to surface inside Salesforce. The bi-directional integration brought premium payment data into Salesforce while pulling commission calculations into Accounting Seed. The team could review all commission payments made to agency accounts in their Accounting Seed reports.

How PK Helped

PK developed a custom Salesforce object, Commissions, to house the data from Accounting Seed and the third-party insurance platform. This allowed the team to review policyholder payments and agency commissions without leaving the CRM.

PK also built custom functionality to automate the calculation of commissions, referencing the data stored in this object. Triggers and workflows were used to generate a commission statement PDF and payable check.

Results

At the end of the month, the team could quickly download these documents out of Salesforce and send them to agency employees. This functionality cut out a lengthy and manual process, freeing up more time for the team to dedicate to business development and customer satisfaction.

With some custom development, Omaha National turned Salesforce into an all-in-one solution. The custom functionality not only helped the company minimize manual work, but it also improved its reporting on commission payments. Omaha National could drill into the numbers behind each calculation. If it received a discrepancy claim from an agent, its team would have no problem pointing out exactly how much commission it received, for which premium payments and at what percentage.

