



Industry

Consumer Goods, Healthcare, Manufacturing



Product

Community Cloud, Conga Composer, Integrations, Sales Cloud

Challenge

- The client received a massive spike in demand for their products during COVID-19
- High Volume of leads coming in through the website that needed to get routed to sales teams and distributors/resellers
- They had limited processes in place to handle and follow up on distributor requests

Solution

- Created custom screen flow to optimize the order entry process, setup products, and price books for more pricing control, automated Quote Generation into a template and integrated with e-signature solution
- Setup Partner Community so their distributors could receive leads through auto-assignment rules and submit support requests for Warranty or General Support needs
- Integrated the website with Salesforce to capture better information and route to the Sales team automatically

Results

- They can now easily associate opportunities with products, create quotes, and manage pricing at a per-product level
- Over 1,000 Leads / month auto-assigned to Sales reps and distributors / resellers

