

CASE STUDY: SALESFORCE RESET AND ONLINE STORE/ ACCOUNTING SOFTWARE INTEGRATION



BACKGROUND

The company is a non profit organizing and conducting religious, charitable and social welfare work in the US and abroad. It migrated from an existing sales/accounting tracking app in Salesforce to a more mature sales process in Salesforce CRM aided by accounting in Quickbooks. It needed assistance to setup the sales process in Salesforce to track orders/subscriptions, to migrate existing data from online shop to Salesforce/Quickbooks and to setup ongoing integration between Salesforce, Quickbooks and Shopify



VARASI CONTRIBUTION

Varasi team designed and built a sales process to track institutional opportunities. Varasi also enabled tracking the various institutional and individual orders from sales channel as well as from online shop in a systematic way inside Salesforce. The new setup enabled a complete view of the customer in Salesforce with information about customers, orders, invoices and payments in one place. Varasi team also migrated historical data from previous online shop to Salesforce. An ongoing integration was also setup using a cloud-based integration platform to keep the order, customer and invoice/payment information in sync across CRM (Salesforce), Accounting System (Quickbooks) and the new online shop (Shopify)

Sales Process

Customer View

Data Migration

Multi System Integration



VALUE REALIZED

Enabled institutional sales process on Salesforce and put in place structure to track orders, invoices, payments for institutional as well as individual customers

- Able to move from paid sales order tracking app on Salesforce to leveraging Salesforce platform for CRM functionality with accounting moved to Quickbooks
- Over 100K customers and more than 300K orders data migrated from existing online store
- Multi system integration saved time and resources to keep the data in sync across CRM, online store and accounting systems