



Industry: Logistics
Products Used: Sales Cloud
Integration: S3/Conga/DocuSign

The Logistic Company would like to track their Customer's Orders as well as their key contacts. The Pricing Model was created manually based on each and every Customer and there was no approval mechanism to manage the same. As per customer expectations, anticipated solution was supposed to be scalable and cater their business requirements.

Challenges

Solution required for a Logistic Company which can

- Automate the process of capturing the Customer's data which leads to the data redundancy
- Ensuring that a Single screen manages the information across the board
- Missing Automation process for Customer onboarded once the Contact is signed by the Customer at Opportunity level
- Manage Discounting approval process in terms of Services offered as it was pain for business users
- Region based pricing was required as every region has their own Pricing
- Missing Contractual Management system leads to delays and loss of Clients and business.
- Business process was not streamlined and information for the Customers was inadequate

Solution

- Custom solution developed based on through Business Process understanding.
- Customer Onboarded Process was prepared so that it follows a protocol and set the foundations for long term objective.
- Automation of Region based pricing module developed for tracking the information correctly
- Custom discounting engine functionality was developed which ensure that discounts are provided correctly
- Integration for Conga/DocuSign was created so that PDF can be generated and signed from the Customer.
- Taxation process was streamlined to ensure the adherence across all the customer.

Result

- Business team were able to take the right decision in terms of discounting quickly.
- Information is available 24x7, up-to-date and Real-Time.
- Complete 360-degree information for the Customer, Contracts as well as their related information is available
- Application was later on migrated from "Classic" to "Lightning" and user appreciate the effort done by our team.