



Industry: Legal and Compliance
Products Used: Sales Cloud, Experience Cloud
Integration: Third Party

The firm deals in Legal Consultancy by providing their services to their Customers for Audit management as well as policy regulation. In this Legal consulting, the needs is to ensure that Compliance are adhered and every piece of information for their legal processes are captured diligently. Finally the fee associated with the Consulting charges need to be generated which can be paid by the Customer.

Challenges

Based on multiple customer's and their legal documentations, a solution was required that can manage:

- Compliance management that includes their documentations, Audit management
- All Existing customer's and their Contacts information as Legal and formal documents need to be captured as Central Repository.
- Multiple Checklist need to be performed that are correlated to the business process which are linked to their customers
- A Platform that can provide their customers to track the status of their policies
- Flexibility of generating Invoice from the System so that appropriate payment can be paid online with respect to the services rendered by them.
- Functionality of adding Compliance based on the business use cases
- Needed a CRM solution for end-to-end process from Account Creation to Internal Policy creation followed by Invoice and Payment.

Solution

- Sales Cloud solution along with Experience Cloud (Customer's Community) was designed and customized to cater to business requirement.
- Quote on the Services opted by the Customers are generated and emails are sent to the Customers for their record.
- Information is maintained at a single place and available for every user based on their roles they belong to.
- Compliance, Audit, Policies regulation, etc. are captured under the Single Page application in Lightning and necessary documents can be attached in terms of Legal documents.
- Integration with the Third Party in terms of generation of receipts using Experience Cloud and sending the notification via email was very helpful for the Customer's experience.

Result

- Customer Satisfaction on the basis of Solution provided.
- Management has real time Information and can evaluate the progress
- Response time is the key for the Legal/Advisory consultant and increases the Clientele inputs.

Process Snapshots (Using Experience Cloud on Salesforce) of Customers

A login form with a blue border. It contains two input fields: 'Username' and 'Password', each with a small circular icon to its right. Below the fields is a green 'Log in' button.



A screenshot of the 'Compliance Checklist' page in the K V Associates portal. The page has a navigation menu with 'Home', 'Compliance Checklist', 'Internal Policy', 'Audit', 'Invoice', and 'Report & Dashboard'. Below the menu is a table with 8 rows of compliance items. The table has columns for Title, Deal, Group of Co., Legislation/Act, Compliance/..., Compliance..., Applicability, Compliance..., Status, St., Freque..., and Ris... The first row is 'Child Labour' with a status of 'Not Compliant'. The second row is 'Annual Leaves' with a status of 'NA'. The third row is 'Annual Leaves' with a status of 'Non Compliant'. The fourth row is 'Annual Leaves' with a status of 'NA'. The fifth row is 'Annual Leaves' with a status of 'Compliant'. The sixth row is 'Collective Contr...' with a status of 'NA'. The seventh row is 'Collective Contr...' with a status of 'Partial Compliant'. The eighth row is 'Collective Contr...' with a status of 'NA'. There is a 'Printable View' button in the top right corner of the table area.

| Title | Deal | Group of Co. | Legislation/Act | Compliance/... | Compliance... | Applicability | Compliance... | Status | St. | Freque... | Ris... |
|------------------------|------|-------------------|---------------------|----------------------|----------------------|---------------------|---------------------|-------------------|-----|-----------|--------|
| 1. Child Labour | ABC | Employment & L... | Labour Law of IS... | Article 15 | Employment of ... | All Employers | No employin g... | Not Compliant | NA | High | |
| 2. Annual Leaves | ABC | Employment & L... | Labour Law of IS... | Article 45 (a) ab... | Leave Entitlement | All Employers & ... | Employees, who ... | NA | NA | High | |
| 3. Annual Leaves | ABC | Employment & L... | Regulations on P... | Article 3 & Artic... | Rules of Statutor... | All Employers & ... | Employees are e... | Non Compliant | NA | High | |
| 4. Annual Leaves | ABC | Employment & L... | Regulations on P... | Article 4 | Rules of Statutor... | All Employers & ... | Under any of the... | NA | NA | Low | |
| 5. Annual Leaves | ABC | Employment & L... | Regulations on P... | Article 5 | Rules of Statutor... | All Employers & ... | An employer ma... | Compliant | NA | High | |
| 6. Collective Contr... | ABC | Employment & L... | Regulations on C... | Article 11 | Subjects under r... | All Enterprises | Subjects to be n... | NA | NA | Medium | |
| 7. Collective Contr... | ABC | Employment & L... | Regulations on C... | Article 12 | Subjects under 1e... | All Enterprises | Subjects to be n... | NA | NA | Medium | |
| 8. Collective Contr... | ABC | Employment & L... | Regulations on C... | Article 13 | Subjects under 1... | All Enterprises | Subjects to be n... | Partial Compliant | NA | Medium | |
| | | Employment & L... | Regulations on C... | Article 14 | Subjects under p... | All Enterprises | Subjects to be n... | NA | NA | Medium | |

New Internal Policy

Information

| | |
|---------------------------------------|-----------------------|
| * Internal Policy Name Test Policy | Owner C66 Salunkhe |
| Amount ₹100.00 | Status Active |
| Compliance Standard | HSN/SAC |
| Compliance Description | Remark |

Cancel Save & New **Save**

K V Associates

Invoice INV - 0110

Details Activity

Basic Details

Invoice Name
INV - 0110

Contact
Anshu Prakash Salunkhe

Amount
₹236

System Details

Created By
Dharmesh . 2/23/2021, 11:55 AM

mandatz Payment Transaction

₹ 236

English

+91 [redacted] [redacted]

PREFERRED PAYMENT METHODS

Netbanking - State Bank of L.

CARDS, UPI & MORE

Card
Visa, MasterCard, RuPay, and Maestro

UPI / QR
Instant payment using UPI App

Details (1)

Invoice.pdf
2/23/2021 • 9:24 • pdf

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Share

Accounting | Wholesale
Technology | Retail | Services