Providing customers with product training made easier for Upland Software

Company overview

Upland Software helps global organizations accelerate digital transformation and solve for unique business challenges found within the enterprise with a powerful cloud software library of 30+ specialized products.

Industry
Computer software

Headquarters
Texas, USA

Employees
1,000+

Founded
2010
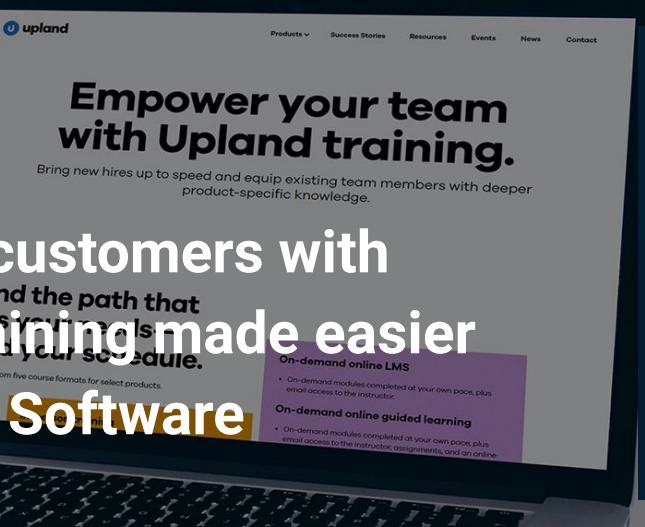
Challenges & Goals

Upland was aiming to:

- enhance their customer experience by setting up an online storefront for customers to purchase training courses and to complete and pay for their renewals,
- streamline internal operations for order and payment processing.

As a company that has products for and broad experience with Salesforce, Upland needed an implementation partner who can:

- offer exceptional knowledge of the Salesforce platform,
- ensure seamless integration of the new B2B Commerce storefront with Upland's complex IT ecosystem,
- meet the high project management, communication, and knowledge transfer standards.

Solution

Upland partnered with Forte for Salesforce Commerce implementation in this project. Working together, our teams built a brand-new B2B storefront where customers can purchase training courses for select Upland products.

Key features

- Tailored registration flows for different customer groups.
- Personalized catalogs based on products purchased by a customer.
- Viewing, requesting changes, and paying quotes for product training.
- Automated tax calculation with Avalara.
- Credit card processing and payments routing with Stripe.
- Complex logic for internal order processing.

Integration with existing IT systems

The store is flawlessly connected to a complex ecosystem incl. Salesforce (Sales Cloud, CPQ) and non-Salesforce apps, and supports Upland's existing business processes.

Detailed knowledge transfer

Forte provided a broad-scope knowledge transfer for Upland team to ensure a confident understanding of how to manage the storefront and how it is built from a technical standpoint.

What we did

Forte set up a B2B Commerce portal for Upland where their corporate customers can find and pay for product-specific training services.

Powered by
Salesforce

Launched in
2022

View live
Upland Software

Integrations

Third-party products
- NetSuite ERP
- Avalara
- Stripe

Salesforce products
- Commerce Cloud - B2B Commerce
- Sales Cloud
- Service Cloud
- Experience Cloud
- CPQ

"Forte team is always on top of things and are genuinely experts in building an eCommerce platform. I am impressed by the quality and reliability of their work. Their knowledge and talent have far exceeded my expectations."

— **Varun Mathur,** Director, Business Systems Analysis, Upland Software

Results

Delivered in 6 months

Improved access to product training for customers

Reduced efforts for order processing

Seamless integration with complex IT ecosystem

In just six months' time, we've launched the new B2B Commerce portal where Upland customers can purchase training courses for select products. The storefront integrates seamlessly with business management and finance systems, making it easy to handle order and payment processing. The collaboration goes on, Upland uses our post-launch support service to add updates and enhancements to the system.