

Client

Provides world-class service and innovative water treatment solutions for the last 80 years, from the simplest filtration system to complex industrial water solutions.

Solution

Salesforce, Sales Cloud:
Price Book Automation, Auto-response, A Visualforce PDF Template.
Field Service Lightning:
Picklists, Integration with 3rd party systems

Industry

Manufacturing

Challenge

The client was not satisfied with the standard functionality of adding quotas and that's why place an order for a solution to manage and configure lead's opportunities with the quote's custom development. Also, the client asked for the solution to improve field service processes. After communicating with business users, the Routine Automation team suggested implementing Sales Cloud with customized solutions.

Solutions

Based on the client's business needs, SALES PROCESSES were configured to track and manage opportunities and quotes in CRM.

The client raised the question of how to make prices more flexible. In this case, the RA team configured PRICE BOOK automation to let products exist with different associated prices in Salesforce.

To deliver improved loyalty to customers an AUTO-RESPONSE solution was implemented. When a prospect leaves a request, a special email will be sent, such as "thank you for the message, your request has been submitted".

The client's idea was to implement a solution to create custom PDF development for quotes. A VISUALFORCE PDF TEMPLATE, a user interface framework, was delivered.

FIELD SERVICE LIGHTNING solution optimization with PICKLISTS implementation. A widget that shows a list of selectable options was configured to facilitate and speed up data entry guiding field service agents in the right direction.

The RA team configured a field service lightning platform INTEGRATION with a 3rd party system to power integration with another business's app or web service.

Results

- **Sales improvement**

With the help of the web-to-lead form, the client collected more relevant data to manage it in Salesforce.

- **Reduced workload**

The client obtained cost-effective tools to increase up-sales & cross-sales volume, and the budget for customer support expenses was also optimized due to provided automation.

- **Boosted customer engagement**

Boosted customer experience through multi-channel customer service solutions.

- **Accelerated field service**

The field service agents can close cases faster and therefore upgrade customer experience.

"While the work is ongoing, Routine Automation has been successful in delivering the client's projects. The client is impressed with their exceptional Salesforce knowledge and technical skills. The team's solid communication and project management skills are key to their ongoing success."