

Case Study

Coalescence Cloud Consulting automated a High-Tech SaaS company's billing and accounting processes using Salesforce, FinancialForce, and Conga implementations.



COALESCENCE

Company Background



Industry

High Tech, For-Profit
Education, Energy &
Manufacturing



Growth Velocity

30% to 45%
year over
year revenue



Our client is a professional services firm. They have provided operator qualification training and testing for more than thirty years. With more than fourteen hundred clients throughout North and South America, the company leverages its proprietary software to help its clients create a more qualified workforce.



Business Challenge

- The company had a very manual and complex billing process
- The process consisted of a range of calculations and prices that varied on contract terms
- Productivity was down and the accounting team was unable to see the big picture

Impact

The CEO understood the impact automation would have on a company's growth and the ability to take on larger customers. The company needed was a streamlined process that allowed for faster billing processing and easier contract maintenance.

"It's been quite a journey, and the Coalescence team members were our partners throughout the process. Not only do I recommend them, but we have also initiated several new projects with them."

Accounting Manager | SaaS Company for the Energy and Manufacturing Industry

The Solution

Coalescence integrated the company's accounting system with automated billing, utilizing and customizing its partnered platforms: Salesforce, FinancialForce, and Conga.

By restructuring and harmonizing business operations. The accounting team was able to:

- Have the visibility of company assets which enables sales channels
- Reduces wasteful processes to increase profitability
- Eliminate user error
- Offer the best possible client experiences.

Client Testimonial

"When we brought Coalescence on board, we had big tasks ahead of us," said the account manager. "Thankfully, the Coalescence team spent about a month at our offices learning our business and processes so that they could have a complete understanding of what we do and how we do it."

"The Coalescence team went above and beyond to completely understand our billing to build a solution that correctly invoices our customers, ensuring scalability as our organization grows and changes."



Results and Benefits



Enhanced Contract Maintenance Capabilities

With the click of a button, users can easily handle contract renewals, revisions, and product additions mid-contract.



Integrated with Accounting System

The accounting system performs actions such as creating journals and accounts receivable transaction records for the transfer of funds between accounts after an invoice is paid.



Automated Pricing Engine

Automatically calculates the prices for any product, and also allows users to send quotes to the customer before the desired items are added to the contract.



Live Product Quantity Rollups

Allows for easy verification of records that have been automatically created. It also shows what has been billed and what has yet to be billed.



Automated Follow-Up Tasks

Triggered automated follow-up tasks, such as updating record statuses, creating journals, and sending notifications to the accounting team.

About Coalescence

We connect business processes through tailored solutions on the Salesforce platform.

Our consultants are Salesforce Certified Experts. We take a business-focused approach coupled with extensive technical expertise to solve our clients biggest challenges. We are thought leaders in emerging technology and deliver cutting edge solutions.

To connect every business process on the Salesforce Platform, we have strategic technology partnerships that support every aspect of your business.

Our client-centric approach ensures trust, support, and transparency.

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