

# CASE STUDY



Salesforce CRM "EXPERIENCE CLOUD" & INTEGRATION



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## Business Challenge & Requirements

- Client technology provider of Identity & Access Management solutions. Providing businesses with the relevant reporting and analytics to improve IT security, maintain compliance and eventually minimize business risk.
- Client was looking to setup Experience cloud to store the order information and customer & database in salesforce.
- Along with the setup the client is also looking to integrate the Salesforce with their existing cloud where user will be selecting the product and completing the order.
- The order information will be flowing in salesforce via the SDFC integration.



Technology: Salesforce CRM (Experience Cloud)  
Engagement Model: Offshore/Support  
Methodology: Agile & Scrum

## Solution & Benefits

- InfoDrive conducted the scoping sessions as well as sessions for mapping their business requirements in salesforce.
- InfoDrive established the two-way connectivity from Client Cloud platform to salesforce.
- Client is now able to store the opportunities along with order, product and quotes information in salesforce.
- InfoDrive also provided the SFDC training to the client resources.
- InfoDrive also helped creating different customer accounts in salesforce with successful Data Migration.



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