

CASE STUDY



Salesforce CRM "Enterprise Edition" Enhancements/Customizations



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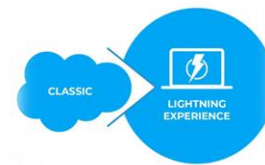


Business Challenge & Requirements

- Hydrafil Filtration Products is one of America's most trusted names in hydraulic filter equipment. Hydrafil has their Shopify website with 175K SKU's and other business process followed by other different systems.
- Client implemented Salesforce and Integrated the system with many other systems like QuickBooks, Shopify, Eshop and others to automate the business process.
- Unable to use the system because the systems were not Integrated properly & unable to use the system for their business process
- Not getting right order, opportunities, invoices from any of the systems
- Required a team who understand all these systems and help Hydrafil to fix the broken pieces and customize the system as per Hydrafil business process to get most of their Salesforce system and Salesforce to act as the central system for their entire business process.



salesforce



Technology: Salesforce CRM (Enterprise Edition)
Integration: QuickBooks, Shopify, Eshop
Engagement Model: Offshore/Support
Methodology: Agile & Scrum

Solution & Benefits

- InfoDrive did the initial discovery to know more about the existing systems and business process by providing Certified team of professionals.
- Tasks include:
 - SKU to be synced with Salesforce
 - Order sync from Salesforce to Shopify along with Opportunities
 - Automate Orders & Opportunities (2-Way)
 - Classic to Lightning migration
 - QuickBooks Integration & Customize withing Salesforce for Account & Invoices

Still work in Progress



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INFODRIVE SOLUTIONS