

Pletra Technologies

Tailored Salesforce solutions for your business success.

About Us

Pletratech's certified Salesforce specialists deliver tailored solutions to maximize ROI and streamline workflows. From setup to optimization, we have the experts to drive your success.

Why Us?

Pletra has a strong presence in multiple countries, with a focus on India. The company prides itself on delivering the best solutions to its clients while creating a friendly work environment for its employees. Pletra's team of experienced developers and designers work closely with clients to understand their unique needs and provide tailored solutions to meet their specific business requirements.

Technology Partners



servicenow

Our Client

Auto creation of the PriceBookEntry to reduce the workload for Sales personnel

Challenges

- Sales personnel must verify that each product has the correct PriceBookEntry before adding it to the cart.
- If no PriceBookEntry exists, the product will be unavailable for selection.
- This process can delay deal closures with customers.

Solution

- Gather detailed requirements about the data structure in the external system that houses the client's price book data, ensuring seamless integration with Salesforce.
- Analyze the time frame needed to complete the product data update from the client's third-party database into Salesforce.
- Develop an Apex Batch class to handle the complex requirement of automatically creating PriceBookEntries for each new product registered in Salesforce.
- Ensure the Apex Batch class also updates

Result

- With the Apex Batch class in action, the batch job will execute daily to automatically create and update the PriceBookEntries.
- This automation facilitates seamless product selection within the Quote.
- Additionally, it alleviates the workload for Sales personnel, allowing them to focus on more critical tasks.