

# Case Study: Power Equipment Manufacturer

## Background

The customer is a manufacturer of heavy industrial equipment like Transformers, Switchboards and Switch Gears. The customer had chosen Salesforce to run their operations and sales activities and chose us to implement their processes on Salesforce.

The customer is using Quickbooks for accounting and wanted to push data from Salesforce automatically to Quickbooks, without using any third-party plugin to avoid recurring cost.

## Solution

We conducted few discovery sessions which concluded in defining following items:

1. Roles & Permissions for each role
2. Sales Process
3. Operations process after Opportunity is Closed Won
4. Role of Assets
5. Case statuses

## Roles & Permissions

The users were split into Sales, Service and Operational staff.

Sales users were supposed to work with standard objects like Lead, Account, Contact and Opportunities, Products and Pricebook.

The Operations staff had altogether different requirements with customization and third-party integrations.

Assets & Cases were identified to be core module for Service staff.

Based on this information, following artifacts were created:

1. Roles & Profiles
2. Permission Sets
3. Users
4. Experience Cloud site for contractor resources

## Sales Process

This was a major brainstorming area where we came to know about the unique sales process that customer's business follows. Since it is all amount manufacturing Transformers and Switchboards, there are lot of inputs required from customers before customers can be submitted quotes.

## Data Sharing Across Systems

We implemented integrations with following systems which did immense help in saving time on duplicating data on these systems:

1. FieldNation marketplace
2. NetSuite ERP

The integrations were done using 2 methodologies:

1. Direct API integration
2. Using MuleSoft integration tool

This solution brought following advantages:

1. Saved users time from doing duplicate entries
2. Increase data accuracy as same data was available across the systems
3. Improved the speed on
  - a. Technician allocation
  - b. Invoicing to customer
  - c. Inventory adjustments

As whole, this solution brought lot of efficient in customer's operations and their customer noticed the speed in execution of the tickets.

## Benefits

With our solution(s) in place, the customer saw huge time and quality benefits in following operations:

1. Centralized system for processing tickets, emails were out of process now
2. Greater customer satisfaction with timely updates and quick resolutions
3. Totally removed data duplication efforts across system
4. Greater data accuracy and quality due to automation in gathering and sharing data.
5. Higher SLA achievements and thus saving on SLA penalties