Case Study 3

CLIENT:
Retail Company, USA

BUSINESS:
Sales Cloud and Service Cloud

Overview of Client & Project:

Our client has prominence in selling emergency essential products selling with 500+ products through various Shopify portals. The back-end system is as much as complicated to handle from Order processing, Customer support and Manufacturing of fast selling products.

Key Challenges:

» Our client is encountering challenges in efficiently processing orders for their wholesale vendors. Orders are received from multiple wholesale vendors through their application, which are then received as emails.

» Internally, our client has a system in place to verify product stock availability, manage shipping for available products, and maintain stock levels. However, this process demands significant manual effort.

» The primary challenge they face is automating the entire wholesale order process while integrating it with their existing systems.

Solutions Provided:

● We provide technical support for our client translating its vision into actionable missions. Our focus lies in the development and maintenance of automation processes across various domains.

● Upon receiving wholesale vendor orders, we initiate a case creation process within the Salesforce org. Subsequently, we dispatch an outbound message to our client internal order processing system, which then generates an order.

● The internal system conducts a thorough check of product availability. If all items are in stock, an order is created and transmitted to ShipStation. This internal process is already established and operational.

● Whenever ShipStation receives order information, it sends an inbound message to the Salesforce org. This triggers the creation of a status check task or alarm based on the message received from ShipStation.

● These status check tasks or alarms continuously monitor the status updates from ShipStation and ensure that they are accurately reflected within the org.

● Once the status changes to "Shipment," the Salesforce org initiates monitoring of the Tracking API to track delivery statuses.

● The entire functionality of the Salesforce org has been implemented and is supported by our team.

Reports

We developed the following reports:

Order Status Report: Provides a summary of the status of all wholesale orders received and processed by our client, including order creation, product availability, shipping status, and delivery tracking.

Inventory Availability Report: Shows the current availability of products in our client's inventory, indicating which items are in stock and ready for fulfillment.

ShipStation Integration Report: Offers insights into the integration between our client's internal order processing system and ShipStation, including the frequency of order transmissions and any errors encountered during the process.

Tracking API Performance Report: Monitors the performance of the Tracking API in retrieving delivery statuses for orders, highlighting any delays or issues in obtaining real-time tracking information.

Automation Efficiency Report: Evaluates the efficiency gains achieved through the automation of the wholesale order processing system, including reductions in manual effort, order processing time, and error rates.

These reports provide valuable insights into the performance and effectiveness of our client's wholesale order management processes, helping to identify areas for improvement and optimization.

Results:

The solution results in a streamlined wholesale order processing system for our client:

● Orders are seamlessly integrated into our client's Salesforce org.

● Product availability is checked and orders are forwarded to ShipStation.

● Real-time updates from ShipStation are monitored within Salesforce.

● Delivery statuses are tracked using the Tracking API.

The entire process is automated, reducing manual effort and improving order accuracy.