



Case Study: Optimizing Data Security and Collaboration- Enterprise Content Management with Box

Twopir provided Salesforce customization services to help the client develop a robust and an efficient [third party integration](#) along with helping in [data management system](#)

Tech Stack for Project Success



TASKRAY

{ REST:API }



sales cloud

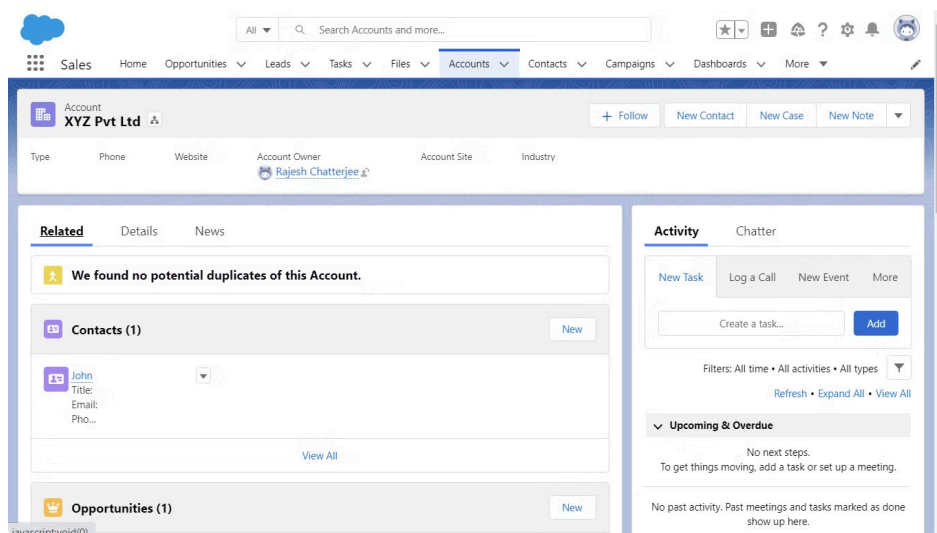


About the client

Our client is a premier tax advisory services provider, specializing in helping private individuals find tailored solutions in the context of tax advice. Their corporate services are grounded in a reliable, legally compliant, and sustainable consulting approach, offering comprehensive support across a range of complex topics. To enhance their advisory capabilities, they frequently collaborate with tax advisors and lawyers based abroad

For this client, we implemented Box for Salesforce to centralize content management, enhance team collaboration, and ensure data protection and regulatory compliance. Automated monthly folder creation saved time and reduced errors. Integration with Salesforce, Slack, and TaskRay streamlined collaboration and productivity. Using Process Builder and custom validation logic, we automated project and task management, while tailored solutions improved Annual Return and VAT task automation and email communication, significantly boosting overall efficiency.

Account And Contact management



🎯 Challenge : Efficient Management of Account and Contact Data

Our client faced significant challenges in managing account and contact data, especially for shareholders, directors, Ultimate Beneficial Owners (UBOs), identification documents, and TaskRay projects. Manual processes were time-consuming and error-prone, leading to inefficiencies and difficulties in maintaining accurate records, which hindered quick access to critical information for decision-making and compliance.

🔧 Solution : Enhancing Account and Contact Management through Automation and Integration

To address these challenges, we automated the management of contact data. Salesforce validation rules ensured accurate data entry, reducing errors. TaskRay integration streamlined project management for shareholders, directors, and UBOs. Box for Salesforce centralized document storage for secure access and compliance. Automated workflows improved communication and timely task completion, significantly reducing manual workload and enhancing data accuracy and accessibility.

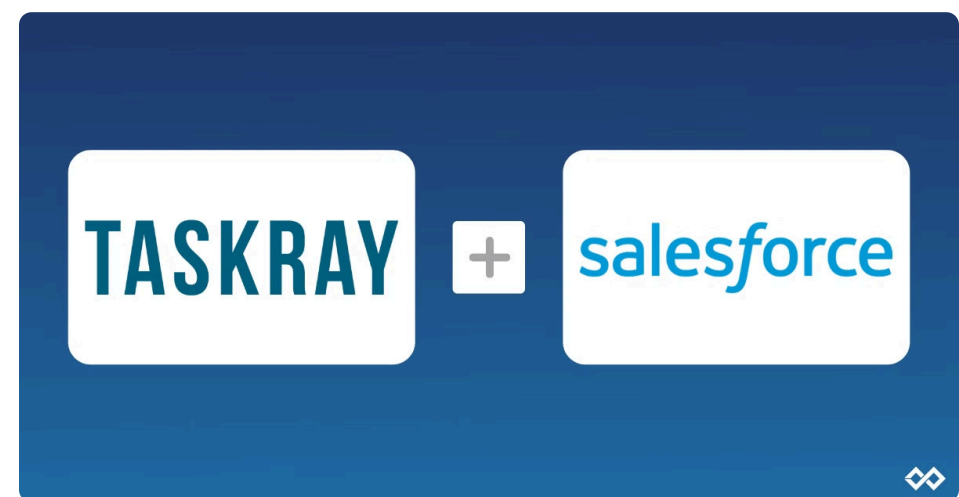
Project and Task Creation with TaskRay Integration

🎯 Challenge : Meticulous Planning for Accurate Project and Task Creation

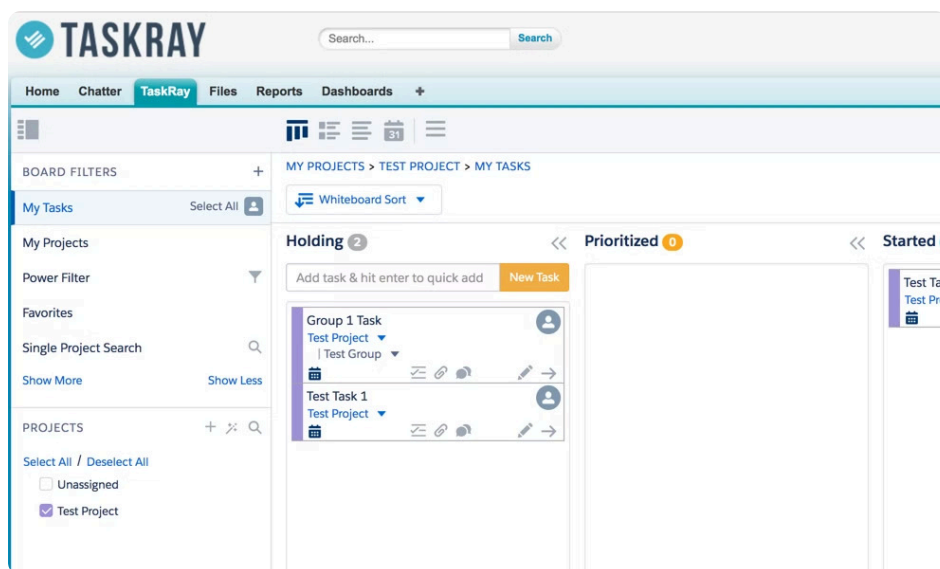
Before the introduction of TaskRay, our client faced a significant challenge in managing projects and tasks. There was no centralized system in place, leading to scattered information, duplicated efforts, and communication gaps across teams. The absence of a unified platform made it difficult to track progress, assign tasks, and maintain consistent workflows, ultimately hindering productivity and collaboration.

🔧 Solution : Implementation of TaskRay for Centralized Project and Task Management

To overcome this challenge, we implemented TaskRay as a centralized solution for project and task creation. TaskRay's robust features and user-friendly interface allowed us to integrate it seamlessly into the client's existing processes, creating a cohesive and efficient workflow. This strategic implementation facilitated better collaboration, clear communication, and streamlined project management. By leveraging TaskRay, we ensured all project data was centralized, easily accessible, and up-to-date, significantly enhancing overall productivity and teamwork within the organization.



Automating Annual Return and VAT Task Management with TaskRay



🎯 Challenge : Inefficiencies and Errors in Managing Annual Return and VAT Tasks

Without automation, managing Annual Return and VAT tasks manually is cumbersome and error-prone. Manual tracking of deadlines, data entry, and compliance checks consume significant time and increase the likelihood of human error. This can lead to missed deadlines, inaccurate data, and regulatory non-compliance, negatively impacting the client's efficiency and legal standing.

🔧 Solution : Automating Annual Return and VAT Tasks with TaskRay

To address these challenges, we automated the creation and management of Annual Return and VAT tasks using TaskRay and Salesforce. Automated task creation and validation rules ensure accurate data entry, while TaskRay integration facilitates efficient task tracking and management. Centralized document storage via Box enhances data accessibility and security. Automated notifications and reminders keep stakeholders informed, ensuring timely task completion and compliance. Monthly VAT requests are automatically sent, ensuring timely and accurate submissions. This streamlined approach significantly reduces errors and improves operational efficiency.

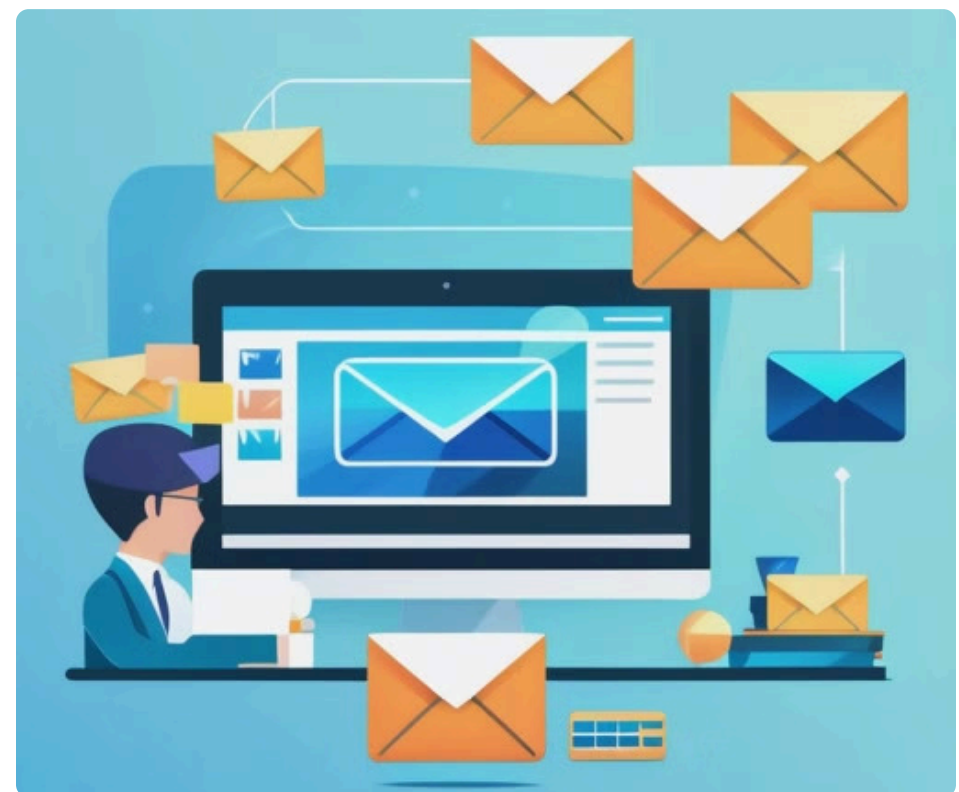
Enhancing Email Communication Efficiency with Automated Solutions

🎯 Challenge : Streamlining Client Communication Channels

In the realm of client engagement, effective communication is the cornerstone of building strong relationships and delivering exceptional service. However, our client faced a significant challenge—the need to streamline email communication across diverse roles within client accounts. The complexity of managing communication required robust solutions to ensure proactive support and seamless interaction.

🔧 Solution : Elevating Client Communication—Automated Email Solutions

To address the challenge of email communication, we implemented robust solutions, integrating automated email processes and dynamic Visualforce email templates. Automation streamlined operations, ensuring prompt and consistent communication with clients. Furthermore, personalized Visualforce email templates standardized messages, enhancing professionalism and precision. This comprehensive approach significantly enhanced communication efficiency, reinforcing our dedication to proactive client support.



Transforming Productivity Through Unified Content Management With Box



Challenge : Scattered Content Hindered Productivity and Collaboration

Our client, a leading enterprise, faced significant challenges stemming from the fragmented nature of their content spread across various platforms. This dispersion made it arduous for teams to access and manage crucial content efficiently, ultimately impeding productivity and collaboration efforts across the organization.

Solution : Centralized Content Management with Box

To address these challenges, we proposed the implementation of Box for Salesforce, providing our client with a centralized platform for storing and managing critical content. By integrating Box seamlessly with Salesforce, we enabled our client to consolidate their content management efforts within a single platform. This integration not only simplified access to important documents but also enhanced content organization, facilitating seamless collaboration among teams.

Strengthening Data Security with Box

Challenge : Security Challenges– Balancing Protection and Collaboration

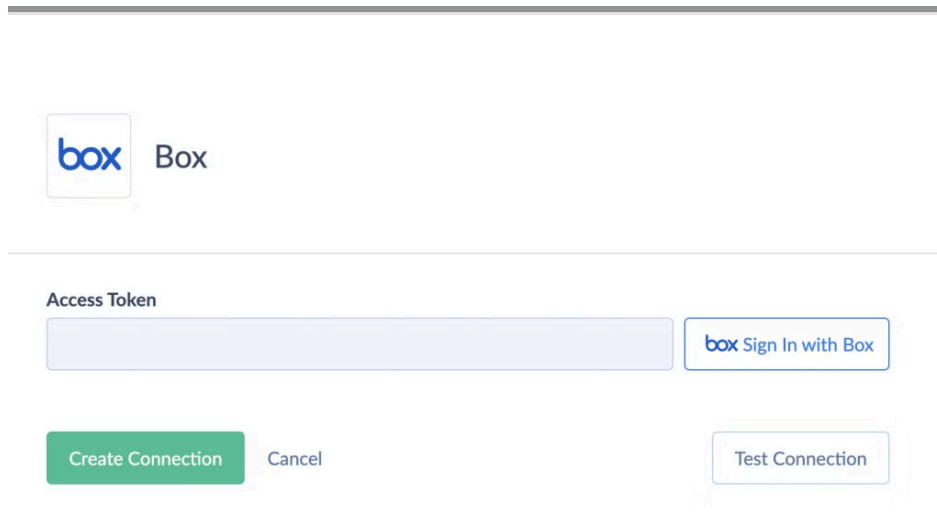
Our client, a leading enterprise, encountered critical security challenges concerning sensitive content. With the need for stringent protection and compliance measures when sharing externally, the client faced the daunting task of balancing security requirements with seamless collaboration. Ensuring the confidentiality and integrity of their data while facilitating efficient collaboration posed a significant hurdle, threatening both their data security and reputation.

Solution : Box Bolstered Security with Advanced Features

To address these challenges, we recommended the implementation of Box, leveraging its advanced security features to fortify data protection. By harnessing Box's robust encryption and access control capabilities, our client could effectively safeguard their sensitive content against unauthorized access and data breaches. Furthermore, Box's compliance certifications ensured regulatory adherence, providing our client with the confidence to securely collaborate and share files externally without compromising data security.



Transforming Collaboration and Integration with Box



The image shows a user interface for connecting to Box. At the top left is the Box logo. Below it is a horizontal line. Under the line, on the left, is the text 'Access Token' above a light blue rectangular input field. To the right of the input field is a button that says 'box Sign In with Box'. Below the input field, there are two buttons: a green 'Create Connection' button and a grey 'Cancel' button. To the right of these buttons is a button that says 'Test Connection'.

🎯 Challenge : Client Needed Seamless Collaboration and Integration

Our client, a dynamic organization, faced challenges in fostering seamless collaboration on content within Salesforce and integrating it with other key applications. The lack of integration capabilities hindered team communication and productivity, impacting workflow efficiency and hindering the organization's growth objectives.

🔧 Solution : Box Enabled Seamless Collaboration and Integration

To address these challenges, we proposed the integration of Box with Salesforce, providing our client with a robust solution for seamless collaboration and integration. By leveraging Box's powerful features and seamless integration capabilities, our client could facilitate collaboration on content within the Salesforce platform. Furthermore, Box's integration capabilities extended beyond Salesforce, allowing our client to connect with other essential applications like Slack, enhancing communication and collaboration across teams..

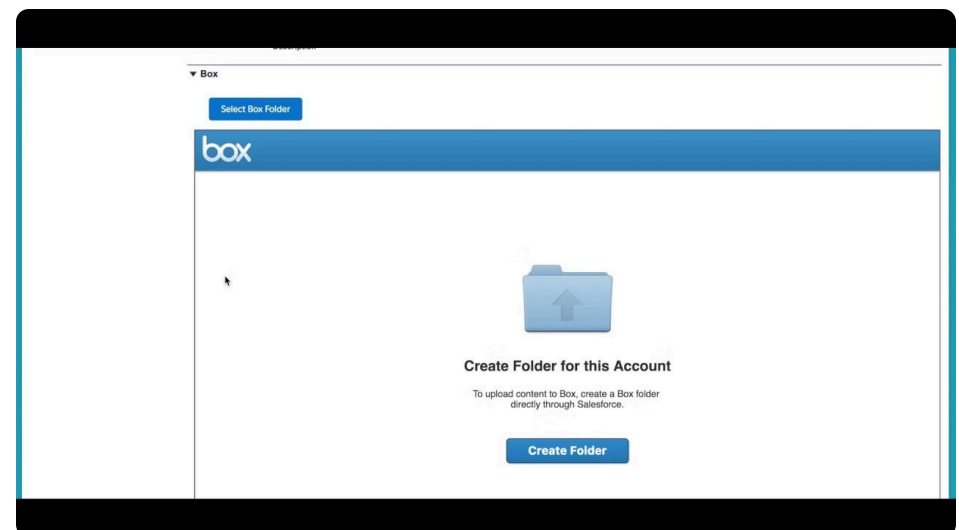
Automated Monthly Folder Creation in Box.com

🎯 Challenge : Manual Folder Creation Process

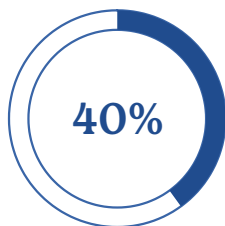
The existing method of manually creating folders at the onset of each month proved to be a bottleneck in the client's workflow. This labor-intensive process not only consumed valuable time but also introduced the potential for human error, hindering operational efficiency and diverting attention away from more strategic initiatives.

🔧 Solution : Automating Folder Creation, Access Sharing, and Notification with Box's API

- **Automated Folder Creation:** We automated the folder creation process, ensuring that new folders are generated at the onset of each month without manual intervention. This automation significantly reduces time and effort while minimizing the risk of human error.
- **Automated Access Sharing:** Once a folder is created, the system automatically assigns and shares access permissions with the relevant team members and stakeholders, ensuring immediate and appropriate access to necessary resources.
- **Email Notification and Upload:** To keep everyone informed and streamline communications, our solution includes automated email notifications. Team members receive an email alert once the folder is created and shared, detailing the folder's availability and access information. Additionally, the system supports automated uploading to Box, further enhancing the efficiency of file management.

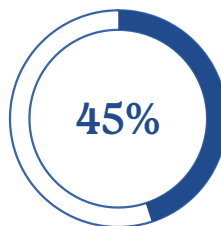


Results



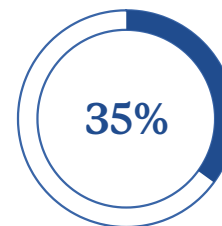
Efficiency Increase

Automating folder creation and task management boosted efficiency by 40% by eliminating repetitive tasks.



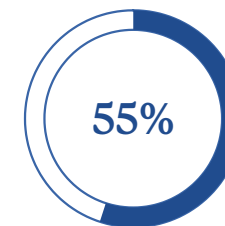
Productivity Boost

Centralizing content management and using TaskRay increased productivity by 45%, enabling focus on high-priority tasks.



Integration Efficiency

Integrating Box with Salesforce improved integration efficiency by 35%, minimizing time spent switching platforms.



Speed Enhancement

Automating VAT task handling and monthly folder creation improved speed by 55%, reducing delays in service delivery.

Our Partners

We are esteemed partners of best AppExchange products. This provides us an edge and access to partner ecosystem that are designed to support and help customers in their complex business needs.

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Testimonials



Vincent Croser

-Vice President, Sales & Marketing

Twopir Consulting is a hardworking company, exceptionally knowledgeable, and always willing to go the extra mile to support me. Their communication is top-notch, and they consistently deliver on time and within budget. I couldn't be more impressed. Their ability to solve complex challenges while maintaining a high level of professionalism truly sets them apart. Whether it's handling intricate technical issues or providing strategic guidance, Twopir Consulting exceeds expectations every time. I highly recommend them to anyone looking for a reliable and skilled partner.



Benedict Texeira

-Chief Operating Officer

Twopir Consulting played a crucial role in customizing our Salesforce CRM. They managed the project effectively, keeping us informed and ensuring that all milestones were achieved on time. Their expertise in Salesforce allowed them to tailor the CRM to our specific real estate needs, resulting in a highly functional and efficient system. Twopir Consulting ensured smooth data flow and promptly resolved any issues that arose.



Mary H. Lex

- Senior Marketing Executive

Upon meeting the team, I checked references and received high praise. With extensive Salesforce experience, I confidently affirm Twopir Consulting's excellence. They swiftly crafted a custom automation workflow, despite vague specifications. Working tirelessly, they ensured project success and provided invaluable assistance. Their expertise in configuring and optimizing Salesforce has significantly improved our automation and customer relationship management processes. Trust your project to the team for exceptional results.



For more information, contact support@twopirconsulting.com

Thank you for your interest in TwoPir Consulting Pvt Ltd. To learn more about our services and how we can elevate your Salesforce experience, please get in touch with our team. We are here to answer any questions you may have and provide tailored solutions to meet your unique business needs. Reach out to us today!

Visit our website: www.twopirconsulting.com

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