Twopir (2πr)
Consulting

Case Study: Streamlining Business Processes with Salesforce and MYOB Advance Integration

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

About the client

Our client is an Australian multinational corporation that offers accounting, tax, and other business services software for small and medium businesses. Our Client is a web-based accounting software that allows businesses to manage all aspects of their business in one place, both online and offline.

To enhance accounting, tax, and other services for a client, Twopir delivered specialized integration expertise with the MYOB Advance system. Following a thorough evaluation of various integration technologies, Twopir selected Salesforce for its seamless compatibility with MYOB Advance. This decision ensured the comprehensive and efficient management of the attendee process from start to finish.

Automating Data Management in Salesforce For MYOB Advance

🎯 **Challenge : Enhancing Efficiency Through Bulk Data Management in Salesforce**

Clients are encountering challenges while managing field values individually, rather than in bulk, leading to inefficiencies and time constraints. This becomes particularly cumbersome when handling large datasets. Similarly, creating accounts, opportunities, and quotes one-by-one is proving inefficient and error-prone, especially when dealing with substantial amounts of data. Streamlining these processes through bulk operations can significantly save time, enhance efficiency, and improve data accuracy, offering valuable benefits to organizations grappling with complex data management needs.

🛠️ **Solution : Revolutionizing Sales Efficiency–A Comprehensive Automation Solution for Salesforce**

- To enhance sales process efficiency in Salesforce, automate the creation of Accounts, Opportunities, and Quotes based on predefined criteria, such as lead conversion. This automation should also include actions like sending notifications and updating fields. For Quote objects, automate the calculation and updating of Tax and Freight fields based on the Quote Amount.

- Extend this automation to streamline the creation of Customer, Product, and Order records, reducing the need for manual data entry. Ensure to conduct rigorous testing and monitoring to guarantee the automation functions correctly and efficiently.

- These efforts will significantly improve sales process efficiency by reducing manual effort and ensuring accurate and consistent data management

Authenticating MYOB Advance with Salesforce

🎯 Challenge : Enhancing On-Demand Authentication Challenges with MYOB Advance

The client's need for on-demand authentication with MYOB Advance poses challenges in maintaining seamless and secure authentication processes. Issues include managing sessions effectively, handling token expiration, addressing network interruptions, and ensuring security against unauthorized access. Integrating these mechanisms with existing systems adds complexity. To overcome these challenges, a robust authentication system must be implemented, focusing on session management, monitoring, and updating security protocols.

🛠️ Solution : Streamlining Authentication Between MYOB Advance and Salesforce

- To improve authentication between MYOB Advanced and Salesforce, we've implemented a comprehensive solution. Initially, we meticulously tested MYOB Advanced authentication via Postman to verify its effectiveness.

- Subsequently, we scrutinized Salesforce's access token and refresh token mechanisms to ensure their integrity. To store these tokens securely, we developed a custom object and corresponding fields within Salesforce.

- This architecture allows for the secure management of tokens. Additionally, we created a Visualforce Page to simplify the token update process for clients. This page features a button that, when clicked, triggers the update of access and refresh tokens in Salesforce. Overall, this solution streamlines authentication processes and enhances security for MYOB Advanced and Salesforce integration.

Salesforce REST API Integration With MYOB Advance

🎯Challenge : Challenges in Salesforce API Integration for MYOB Advance

The client faces difficulties in establishing a secure and reliable connection between Salesforce and MYOB Advance using APIs. This challenge involves understanding MYOB Advance API documentation to ensure that the APIs support the required functionalities and implementing the integration within Salesforce. The client may encounter issues with API authentication, data synchronization, and error management, requiring careful planning and execution to overcome these challenges.

🛠️Solution : Building a Secure Salesforce API Integration for MYOB Advance

- To connect Salesforce with MYOB Advanced for order processing, we took a methodical approach. We carefully studied the MYOB Advanced documentation and tested API calls using Postman.

- After ensuring accuracy, we set up authentication in Salesforce using access and refresh tokens. To process orders efficiently, we used Batch Apex to handle batches and transmit them to MYOB Advanced.

- For user convenience, we added a custom button on the Opportunity object in Salesforce. This button allows users to submit a single order to MYOB Advanced easily.

- We also improved the success message on the Opportunity object for clearer confirmation of order submissions and immediate user feedback.

Data Mapping and Transformation

🎯 **Challenge : Mastering Data Mapping– Achieving Seamless Integration Between Salesforce and MYOB Advance**

Mapping data fields between Salesforce and MYOB Advance is essential for a successful integration. This involves mapping customer names, addresses, order details, and other relevant data. The key challenge is to ensure the accuracy, consistency, and currency of the mapping to avoid discrepancies and errors that can result in data synchronization issues and inaccuracies in both systems.

Data mapping

🛠️ **Solution : Mapping MYOB Advance Fields to Salesforce for Accurate Data Transfer**

- We conducted a detailed analysis of the fields in MYOB Advanced to understand their purpose and structure. Based on this analysis, we meticulously mapped these fields to their corresponding fields in Salesforce (SF) and created custom fields in SF to match those in MYOB Advanced. This meticulous approach ensures that data can be accurately transferred and understood by both systems.

- To guarantee accuracy, we performed thorough data validation to verify that the fields in SF are correctly populated and aligned with MYOB Advanced. Additionally, we documented the mapping process and field creation in SF to provide our client with a clear understanding of the integration.

- This documentation serves as a valuable reference for future use and maintenance of the integration, ensuring a seamless and well-documented data flow between MYOB Advanced and Salesforce.

Error Handling Mechanism

🎯Challenge : Efficient Error Handling Strategies for Seamless Salesforce–MYOB Advance Integration

The client's integration process encounters a major obstacle in managing errors that occur during data exchange between Salesforce and MYOB Advance. These errors stem from factors such as network problems, API rate limits, and data validation issues. Due to the absence of a robust error-handling mechanism, the current integration solution experiences failed transactions, data inconsistencies, and disruptions in the integration flow.

🛠️Solution : Enhancing Error Handling in Salesforce Integration with MYOB Advance

- To enhance error handling in our Salesforce integration with MYOB Advanced, we set up a custom platform event object to log errors. This allowed us to capture details like error messages, timestamps, and relevant context for future reference.

- We utilized try-catch blocks in our Apex code to manage exceptions from API calls or network problems. Inside the catch block, we created an instance of the custom platform event to record the error details.

- Additionally, we configured email alerts in Salesforce to notify administrators whenever errors were logged. This was achieved using Workflow Rules or Process Builder triggered by the insertion of the custom platform event. For known issues with predefined solutions, we implemented automated remediation steps, such as retrying failed API calls after a brief delay to address temporary network issues.

Enhanced Security and Efficiency

🎯Challenge : Navigating the Security and Compliance

Integrating with MYOB Advance requires a strong focus on security and compliance. This is crucial because the data involved, such as customer information, financial records, and other business data, is sensitive. To prevent unauthorized access, breaches, and other security risks, robust security measures must be in place. Implementing these measures demands careful planning and execution to ensure the protection of sensitive data and compliance with regulatory standards.

🛠️Solution : Enhancing Data Security in Salesforce–MYOB Advance Integration

- To ensure secure data management between Salesforce and MYOB Advanced, we encrypted all sensitive data using robust encryption algorithms for both data at rest and in transit.

- Salesforce provides built-in encryption features that we leveraged for this purpose. We implemented strict access controls using Salesforce's security features, including profiles, permission sets, and field-level security, to limit access to sensitive data to authorized personnel only.

- Additionally, we used secure APIs, such as those supported by Salesforce with authentication mechanisms like OAuth, for transmitting data between Salesforce and MYOB Advanced, ensuring that only authorized systems could access the APIs.

Enhanced Security and Efficiency

Enhanced Security

1

Streamlined Workflow

2

3 Cost Savings

4 Improved Customer Experience

Results

Efficiency Increase

Tasks that used to take hours now only require minutes, thanks to streamlined workflows and automation

Productivity Boost

With the new system in place, teams are able to accomplish more in less time. This has led to a noticeable increase in overall productivity, allowing employees to focus on higher-value tasks.
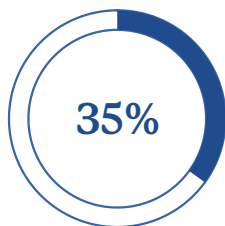
Integration Efficiency

Salesforce and MYOB Advance integration is seamless, reducing manual work and removing data barriers.
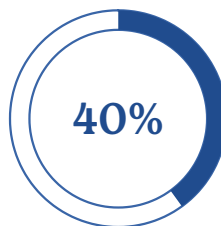
Speed Enhancement

Processes are quicker and more effective, resulting in faster response times and increased customer satisfaction.

Made with Gamma

Results

35%

Efficiency Increase

Automated provisioning slashed errors, improved system stability, and sped up onboarding processes by 35%

40%

Productivity Boost

Streamlined workflow led to 40% productivity boost; automated system rapidly scaled, creating thousands of subscribers effortlessly.

30%
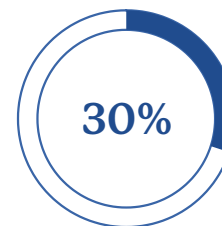
Integration Efficiency

Sophisticated integration boosted efficiency by 30% with seamless connectivity to billing, CRM, and network management systems.

50%
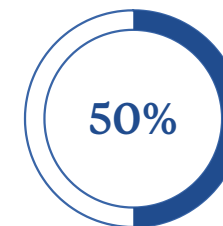
Speed Enhancement

Advanced methods led to 50% faster subscriber provisioning, enhancing service delivery for increased customer satisfaction and loyalty.

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.

conga® geopointe SMS Magic KULTURRA

gridbuddy Chargent PAYMENT PROCESSING FOR SALESFORCE webmerge Cirrus Insight®

123 FORM BUILDER S DRIVE Blackthorn ActiveCampaign >

formstack PandaDoc airSlate FormAssembly

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.

salesforce PARTNER

CERTIFIED — Administrator
CERTIFIED — Advanced Administrator
CERTIFIED — Platform Developer I
CERTIFIED — Platform Developer II
CERTIFIED — Education Cloud Consultant

CERTIFIED — Platform App Builder
CERTIFIED — Sales Cloud Consultant
CERTIFIED — Service Cloud Consultant
CERTIFIED — Marketing Cloud Email Specialist
CERTIFIED — Nonprofit Cloud Consultant

CERTIFIED — Marketing Cloud Consultant
CERTIFIED — Marketing Cloud Account Engagement Consultant
CERTIFIED — Marketing Cloud Account Engagement Specialist
CERTIFIED — Experience Cloud Consultant
ACCREDITED — Health Cloud

CONTEXTUAL MARKETING CERTIFICATION — HubSpot Academy
DELIVERING SALES SERVICES — HubSpot Academy
DEVELOPING A SALES PLAN — HubSpot Academy
INBOUND MARKETING CERTIFICATION — HubSpot Academy
DELIVERING CLIENT SUCCESS — HubSpot Academy

CONTENT MARKETING CERTIFICATION — HubSpot Academy
GROWTH-DRIVEN DESIGN AGENCY CERTIFICATION — HubSpot Academy
MARKETING SOFTWARE CERTIFICATION — HubSpot Academy
SALES SOFTWARE CERTIFICATION — HubSpot Academy
EMAIL MARKETING CERTIFICATION — HubSpot Academy

COS DESIGNER CERTIFICATION
INBOUND SALES CERTIFICATION — HubSpot Academy
CLIENT MANAGEMENT — HubSpot Academy
HubSpot PARTNER CERTIFICATION — HubSpot Academy
SELLING SALES SERVICES — HubSpot Academy

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**   Call us : **+917420894628**

Salesforce Services

Sales Cloud Implementation • Service Cloud Implementation • CPQ Implementation • Salesforce Field Service • Marketing Cloud Implementation • Account Engagement (Pardot) • Experience Cloud
• Commerce Cloud • MuleSoft • Jitterbit • Tableau • Customer 360 • Artificial Intelligence • Salesforce Related Products

Made with Gamma