Utility Rental Company based in North America

Introduction:

This is the largest Utility Rental Company based in North America. Renting porta potties, fences and sanitation utilities.
Salesforce CPQ was to be implemented. In addition a customer portal was to be built which could enable users to request for quotes, place orders and manage orders.
The Source of Truth was to be in Salesforce.

Team Size 15 | **Timeline in months** 18

ZingWorks was involved in-

CPQ customisation -
- Define rules for grouping products together and configure optional and required selections within bundles.
- Set up price books for various customer segments.
- Set up discounting rules based on quantity ordered, volume, partners, promotions.
- Created quote and order document.
- Created Quotes, Quote lines and opportunities
- Implemented Quote approval workflow.
- Implemented functionalities like Amendment - change frequency, Move units, Quantity change using Apex

Customer Portal -
- OAuth 2.0 integration
- Implementing APIs for web app so the customers can directly request for quote, manage orders from their mobile or desktop
- Developed SOQL's and SOSL's to retrieve data.
- Web interface built in Angular, Nest JS
- Mobile app built using Angular Ionic

WorkFlow automation -
- Implemented workflows -
  a. Send invites to onboard new customers
  b. Update case priority and case owner
  c. Update path to order workflow
- Implemented triggers using trigger framework keeping governor limits in mind
  a. Sending mobile notification
  b. Create audit tracking history
  c. Data mapping and price calculations

LWC customisation -
- Created LWC components for enhanced user experience for the inhouse Sales team.
- Created user permissions, object level, record level and field level security based on user profile.

Third party integrations -
- Stripe - for payment
- Dupeblocker - to identify duplicate accounts
- BriteVerify - to validate emails
- SideTrade - for centralised invoicing

How it benefited Utility Rental Company by working with Zingworks -
- Certified resources
- Expertise on different technologies under one roof.
- Dedicated team
- Strong project management processes followed
- Agile - 2 weeks sprint

salesforce **registered consulting partner**

CERTIFIED AI Associate | CERTIFIED Platform Developer I | CERTIFIED Platform Developer II | CERTIFIED CPQ Specialist

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