



Case Study

Jade Global breaks new ground by extending Salesforce

Billing to transform customer experiences for a leading provider of wedding and events planning marketplace globally

About the client

The Knot Worldwide (TKWW) is USA's leading digital wedding resource offering a seamless, all-in-one planning experience - from finding inspiration and local vendors to creating and managing all guest experiences, wedding registries and more. The trusted brand reaches a majority of engaged couples in the US through the #1 wedding planning website -TheKnot.com and #1 iOS and Android mobile app - The Knot Wedding Planner, The Knot national wedding magazine, and The Knot book series. Since its inception, The Knot has inspired approximately 25 million couples to plan a wedding that's uniquely them.

Products & Services

- Salesforce Billing
- Experience Cloud

Bringing Salesforce Billing Up to Speed to the Business Needs

TKWW recently launched a new product to engage its proactive global clientele. To streamline and offer a seamless billing experience to their customers, they brought Salesforce CPQ and Billing onboard. However, their Salesforce billing implementation was marred with complexities, not using native Salesforce billing package and payment gateways. When Jade Global took on the onus to set their Salesforce Billing right, TKWW was already working on a rigid timeline. TKWW had only a month to go live, and their billing cycle was not configured, and they needed Salesforce billing implementation with payment connectors.

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Industry: Event Management

Challenges the company met

- TKWW needed to integrate with Adyen payment gateway, which was a completely new payment gateway for Salesforce Billing
- Native Salesforce billing pages were not operational on communities. Collecting payments upfront was a major challenge for TKWW. Salesforce Billing does not track payment failures scenarios of unsettled transactions from banks. This means that if the transaction failed to settle, it just showed as successful in Salesforce Billing, but later when the bank settled it shows as failed.
- Additionally, they wanted customers to be able to login into their portal and make payments for the quotes that were created.

Jade Global's Approach: A New Spin on Salesforce Billing

- Jade Global's Solution Trajectory
- Understanding all the payment modes that needs to be supported
- Ensuring the right extension packages are installed in Salesforce to overcome any payment related challenges
- Writing the right billing and invoice rules and creating invoices
- Automating invoice generation and payment collection once accounts are added
- Enabling seamless self-serve experiences to customers, so customers easily log in to community and make payments

Jade Global offered a complete and integrated solution for Salesforce Billing Challenges. TKWW was able to use billing end-to-end, since Jade Global implemented the payment gateway, payments invoices, reporting and payment schedules.



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Benefits:

Leaving ERP workflows in favor of Salesforce's expanded capabilities

Salesforce billing is done in two ways, one with invoicing in Salesforce and payments collected in ERP, in TKWW's case this was NetSuite. And second, a more novel, transformational, and lesser known one- creating invoicing and the entire collection payment in Salesforce: generally, not part of the mainstream Salesforce offering, but brought to TKWW exclusively by Jade Global.

"ERP has been working very well for payments and logging transactions in finance books. Jade Global extended Salesforce capabilities to do what ERP has been traditionally and successfully doing for decades- disrupting this area- an ERP territory. This would be one of the first implementations of this kind in the world"

- **Swati Grover**, Principal Solution Architect, Enterprise Cloud Apps – Salesforce, Jade Global.

Jade Global implemented billing to a degree that left the finance team with the single task of only syncing their finance books to NetSuite, with the entire record of transactions logged in the finance books by Salesforce.

Transition from subscription-based selling to usage-based selling

The greatest advantage of helping proactive and dynamic businesses like TKWW, move from subscription-based selling to usage-based selling, now introduced through the new-fangled Salesforce CPQ and Billing, is giving them ease of flexibility in selling their products.

"With the new Crest Partnership status, Jade Global's first major project was our take and spin on billing. We worked with the uncharted potential of Salesforce billing. And how this translated into an end-to-end one stop solution for finance, was a new milestone for us."

- **Abhijeet Baneka**, Director-Client Services, Enterprise Cloud Apps – Salesforce, Jade Global

Integrating with third-party payment gateway

Jade Global used a middleman package- Chargent. Through Chargent, Jade Global was able to make Salesforce billing work to collect payments via the Adyen payment gateway.

Customised Salesforce billing for communities

TKWW wanted their customers to login into their portal and make payments for the quotes that were created. Jade Global created Salesforce Communities. Since native Salesforce billing pages didn't work for TKWW on Communities, Jade Global customised the whole billing experience for external users.

Implemented a call back proxy server setup

With the sheer growing volumes of TKWW's customers, troubleshooting failed transactions was not a very easy task since the reasons were many, like the customer gateway or the customer's bank being down. Moreover, we had to keep in mind that there are two types of failures:

- Failure due to insufficient funds in the customer's bank account
- Failure due to invalid account details provided by the customer when executing the payment order

The above failures are handled differently from each other and to handle them accurately, Jade Global needed to understand what exactly happened during each transaction failure. TKWW also needed a way of tracking these failures.

Jade Global implemented a proxy server for Salesforce billing which helped TKWW with the issues mentioned above. By implementing this proxy server, TKWW will be able to improve its service delivery towards customers as well as reduce its support cost.

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