

Transform Freight Management Operations With Salesforce Implementation And Boost Efficiency

■ Industry

Transport & Logistics

■ Engagement Type

Salesforce Integration

■ Product

Salesforce CRM, Lightning Web Components (LWC), REST, and SOAP APIs, RESTful web services

Client Overview

The client is a leading logistics and freight management company. It was facing challenges in its operations due to fragmented systems and manual processes. These inefficiencies were hindering their growth and impacting overall performance.

Key Challenges

On analysis key discoveries are found and shared with the clients with the most suitable solutions:

- **Fragmented System Creates Data Silos:**

The system was disconnected and worked in isolation. This led to inefficiencies, data mismatches, and slower decision-making processes.

- **Manual Processes are Causing Delays:**

Manual data entry causes delays, mistakes, and inefficiencies in data management and communication.

- **High Operational Costs:**

The absence of an effective system for handling leads, tracking sales, and building customer relationships led to missed growth opportunities and higher operational costs.

- **Struggling with Limited Visibility:**

Challenges in tracking and analyzing key business metrics due to outdated or missing reports. Their existing reporting system was either too basic and unable to provide real-time insights

The Solution

The Pinq Clouds proposed a comprehensive integration solution leveraging Salesforce as the central hub for freight management and integrating it with the client's existing Revenova TMS systems using RESTful web services.

Integration Architecture Design

Our team built an integration setup using RESTful web services to connect Salesforce with the client's TMS, WMS, and financial systems.

SOAP API Integration

We used SOAP APIs to integrate Salesforce with QuickBooks, automating invoicing and payment processes.

Custom Development

We developed custom code and components in Salesforce to enhance features, tailored to the client's freight management.

Testing and Deployment

After thorough testing, we deployed the solution in phases, providing training and support to the team.

Impact

- **Data Silos Eliminated:** Integrating Salesforce with TMS, WMS, and financial systems streamlined data sharing, improving decision-making high-value tasks.
- **Increased Efficiency:** Automating workflows reduced manual tasks, cutting errors and delays.
- **Lower Costs and Growth:** Centralized lead and sales management in Salesforce reduced costs and opened up growth opportunities.
- **Custom Salesforce Dashboards:** Custom Salesforce dashboards and reports, give real-time insights in a single dynamic view.

Result

By connecting their systems into a unified platform, we enabled faster decision-making, reduced manual workloads, and opened up new avenues for growth.

89%

Increased Efficiency

98%

Customer Satisfaction

75%

Reduced Operation Cost

88%

Increased Customer Visibility

Client Testimonial



The Pinq Clouds transformed our freight operations by integrating Salesforce seamlessly with our existing systems. Their solution streamlined processes, improved visibility, and eliminated manual inefficiencies. With their expertise, we now work faster, smarter, and more efficiently. Highly recommend their services.

Freight Transportation
Company, US