THE PINQCLOUDS
BUILDING TOMORROW'S SUCCESS

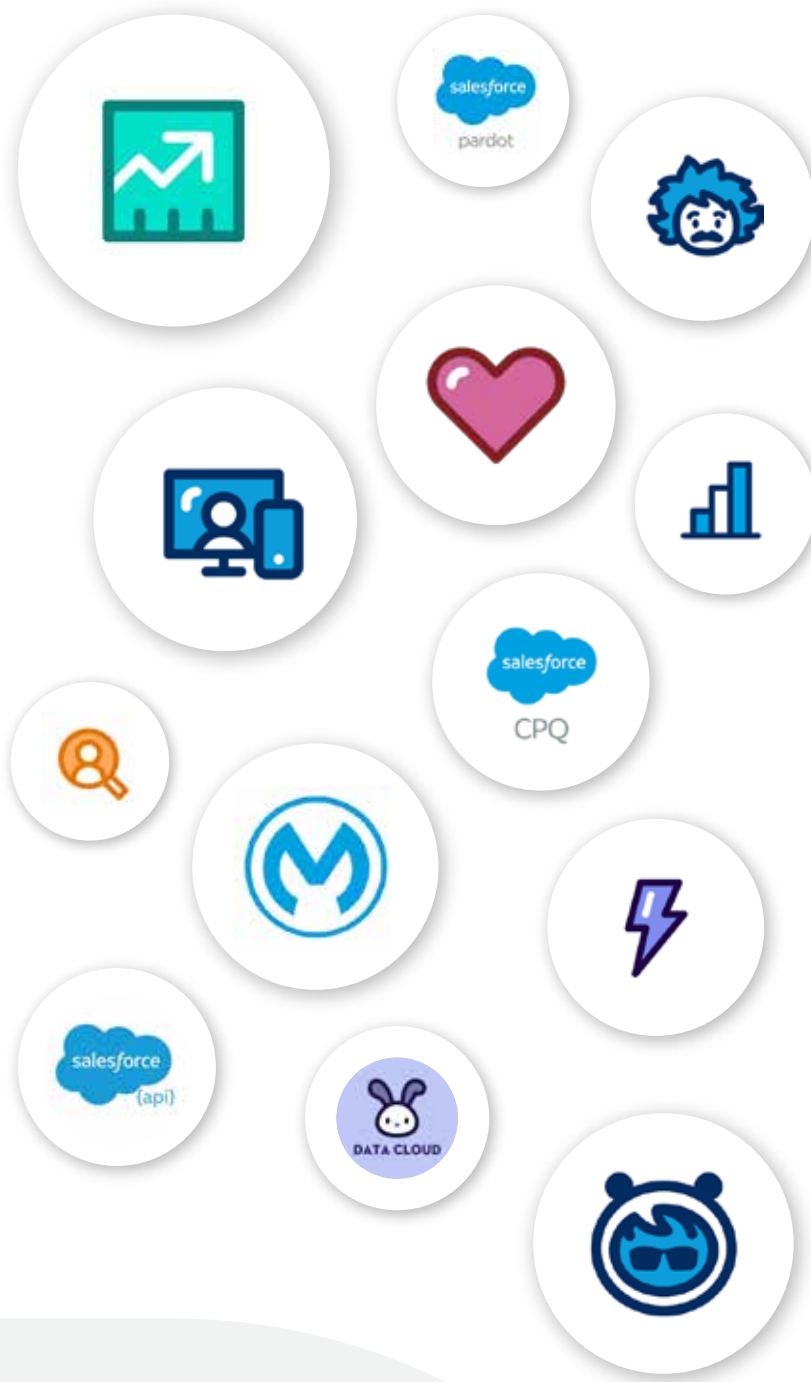# Dream Big.
Build Smart. Scale Faster.

Transform Challenges into Opportunities
with Our **Salesforce Expertise!**

salesforce
PARTNER

available on
AppExchange
salesforce

salesforce.org
CONSULTING
PARTNER

PLEDGE
1%
pledge1percent.org
PROUD MEMBER

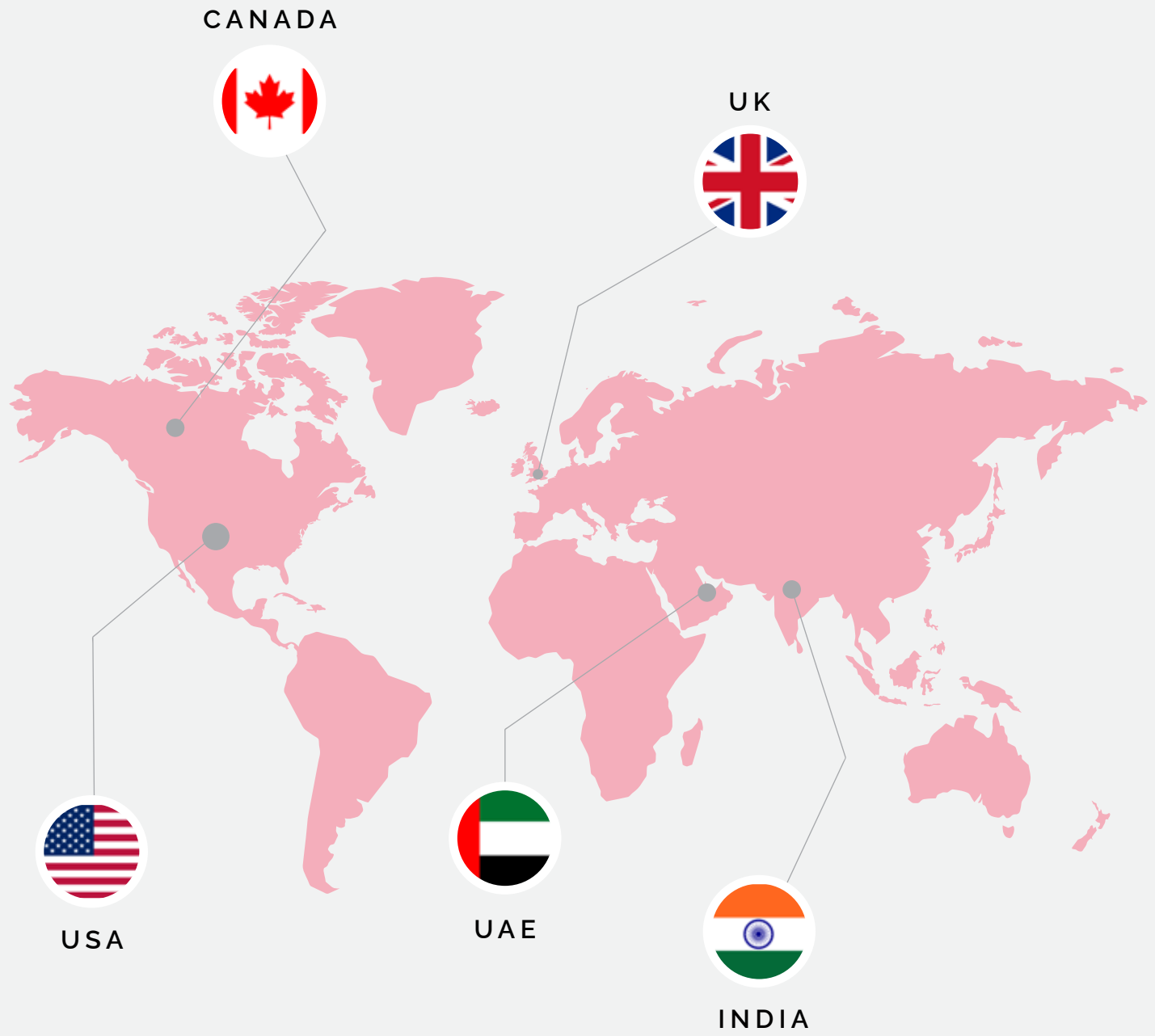SALESFORCE
TALENT
ALLIANCE
EMPLOYER

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We Are Familiar With

What We Have Achieved So Far

- Successfully implemented **100+** Salesforce solutions across industries.
- Migrated over **500K+** records with zero data loss.
- Reduced operational inefficiencies by **70%** through automation.
- Enhanced customer experience with personalized CRM solutions.

Our Global Presence

CANADA

UK

USA

UAE

INDIA

Our Way of Working

Discovery & Assessment

We dive deep into your business processes, identifying gaps and opportunities to align Salesforce solutions with your long-term goals. Our in-depth analysis ensures a roadmap that maximizes efficiency and ROI.

Strategic Planning

With a clear roadmap in place, we design and customize Salesforce solutions that cater to your unique business needs. Our approach integrates industry best practices, ensuring a scalable and agile implementation.

Seamless Execution

From data migration to system integration, we ensure a hassle-free deployment with minimal disruption to your business operations. Every step is executed with precision, maintaining data integrity and security.

Timely Delivery

We understand the importance of speed in today's fast-paced business environment. Our proven methodologies guarantee that your Salesforce implementation is delivered on time, within budget, and beyond expectations.

Discovery & Assessment

Strategic Planning

Timely Delivery

Seamless Execution

BUILDING TOMORROW'S SUCCESS

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Integration Platforms We Work With

stripe

HubSpot

APTTUS®

zapier

docusign

Microsoft Dynamics 365

conga

qb

We Work Fluently In

salesforce APEX

Java

JavaScript JS

HEROKU

node JS

Our Certifications

CERTIFIED Sales Cloud Consultant

CERTIFIED Platform App Builder

CERTIFIED AI Associate

CERTIFIED Advanced Administrator

CERTIFIED Administrator

CERTIFIED Nonprofit Cloud Consultant

CERTIFIED Sharing and Visibility Architect

CERTIFIED Identity and Access Management Architect

CERTIFIED Platform Developer I

CERTIFIED CPQ Specialist

CERTIFIED Data Cloud Consultant

CERTIFIED Experience Cloud Consultant

CERTIFIED Marketing Cloud Consultant

CERTIFIED Marketing Cloud Developer

CERTIFIED Service Cloud Consultant

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Services We Offer

Salesforce Data Migration

Data inconsistencies, security risks, and potential loss during migration can disrupt operations. Our expert team ensures **a seamless, secure, and error-free data migration** from legacy systems to Salesforce. We follow best practices, including data validation, deduplication, and real-time monitoring, to maintain data integrity and compliance throughout the process.
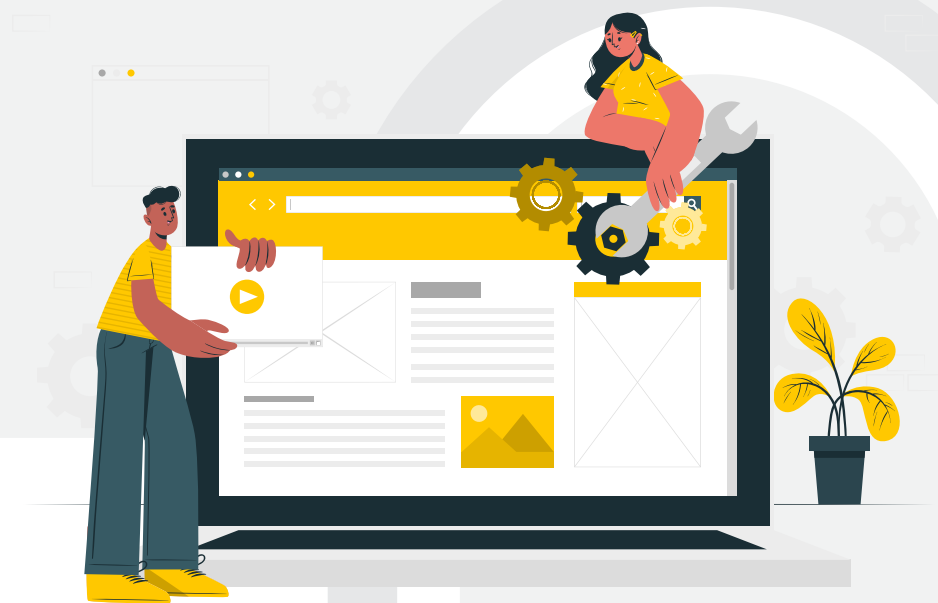
Salesforce Implementation

Complex CRM setup, integration hurdles, and misaligned workflows can slow business growth. We provide **end-to-end Salesforce implementation** services, customizing CRM solutions to align with your unique business needs. From configuration to deployment, we ensure a robust system that streamlines operations, improves productivity, and enhances customer interactions.

Services We Offer

Salesforce Lightning

Slow, outdated interfaces can reduce productivity and user adoption. We modernize your CRM with **Lightning Experience, custom components, and enhanced UI/UX,** ensuring a faster, more responsive platform that improves efficiency and usability.
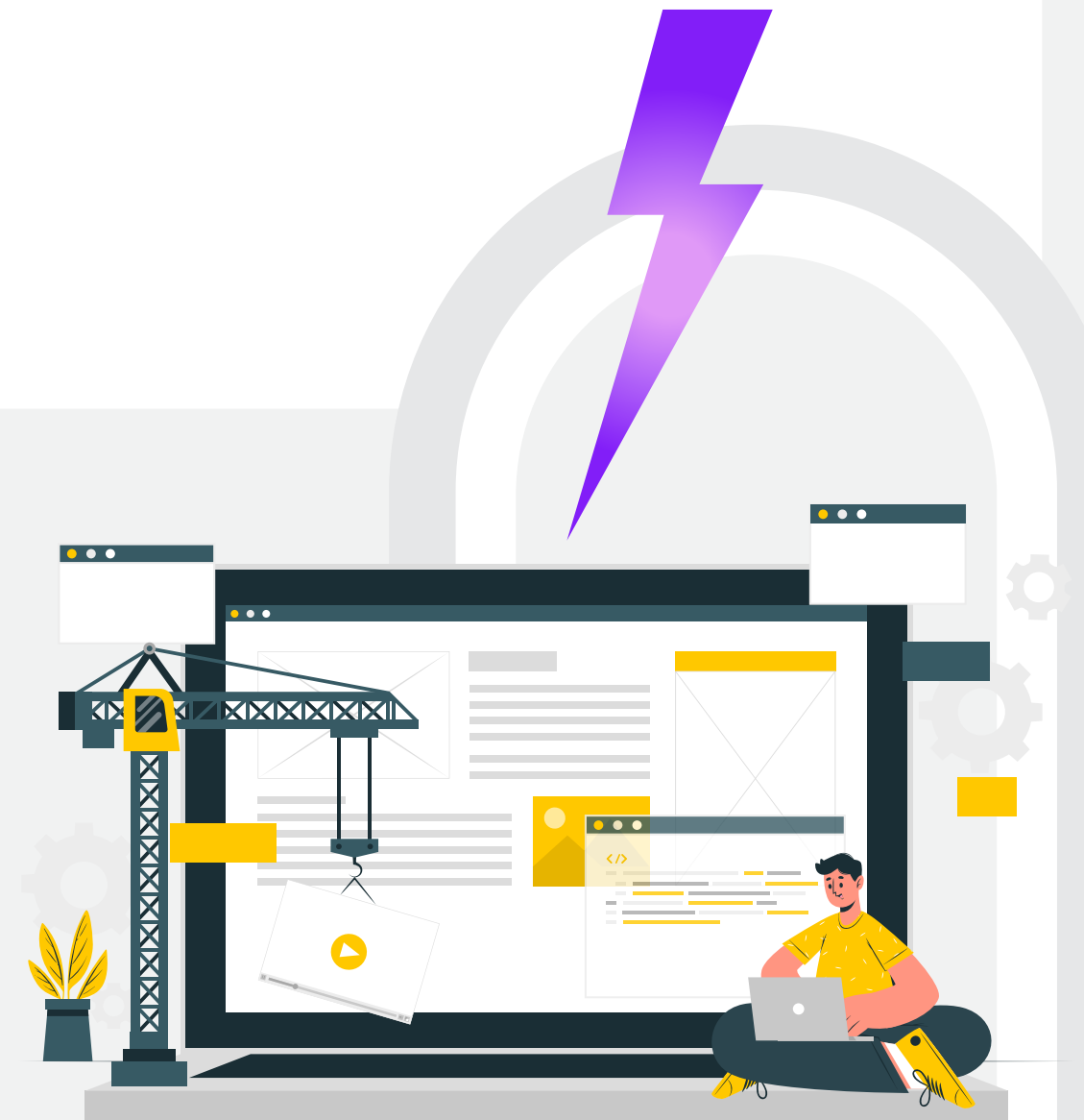
Salesforce Customization

Standard Salesforce features may not always meet specific business needs, leading to inefficiencies. We **customize Salesforce with tailored objects, automated workflows, and user-friendly interfaces,** ensuring an optimized experience that enhances efficiency and decision-making. Our custom-built solutions cater to your operational requirements while maintaining system scalability.

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Services We Offer

Salesforce AppExchange

Identifying and integrating the right apps for business enhancement can be overwhelming. We **develop and integrate Salesforce AppExchange applications** that extend your CRM capabilities, ensuring compliance, security, and optimal performance while aligning with your business objectives.

Salesforce API Integration

Disconnected systems and fragmented workflows lead to inefficiencies. We **integrate Salesforce with third-party applications** via robust APIs, enabling smooth data exchange, process automation, and real-time synchronization, ensuring operational continuity and efficiency.

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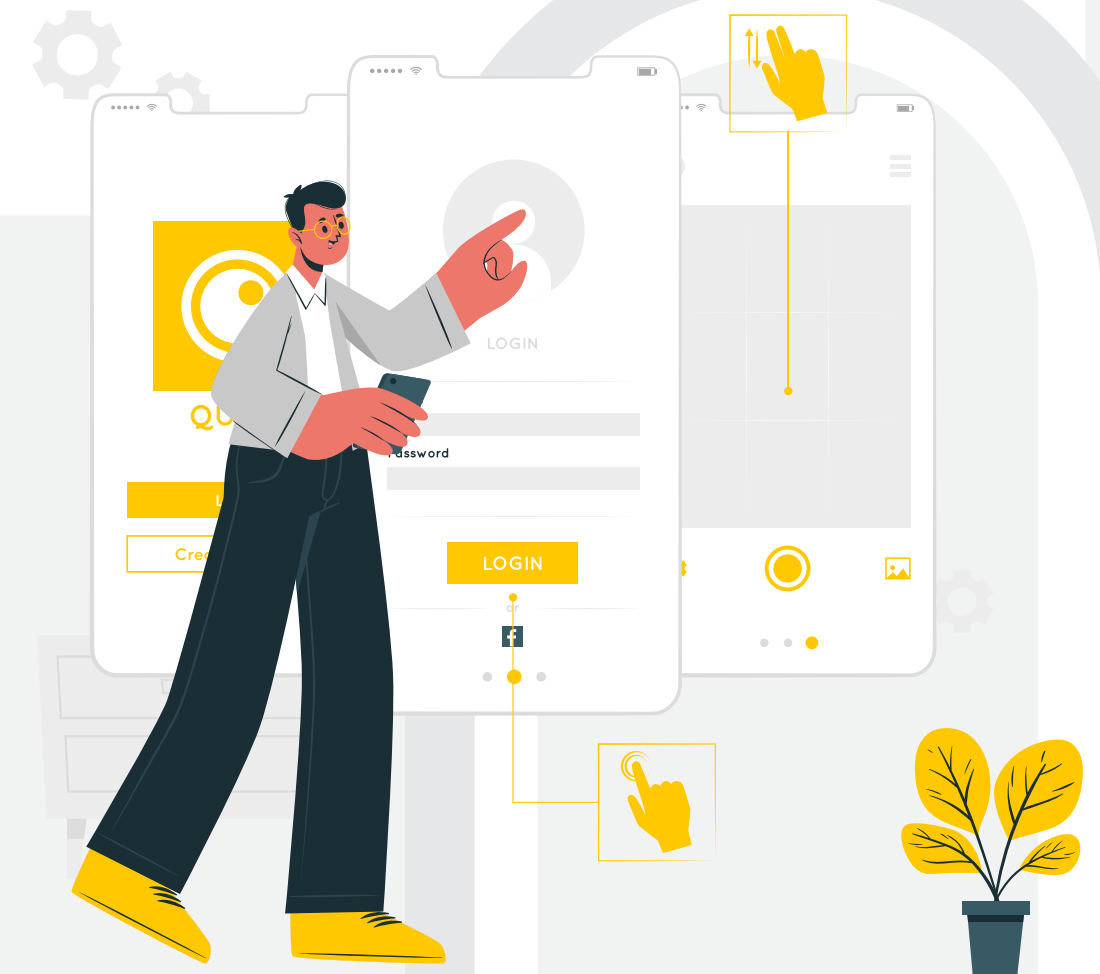
Services We Offer

Salesforce Development

Standard configurations may not be enough to meet advanced operational requirements. Our development team creates **custom workflows, Apex triggers, Visualforce pages, and Lightning components** to enhance Salesforce's capabilities, ensuring tailored solutions for your business growth.

Salesforce Support & Training

Poor user adoption and ongoing maintenance issues can hinder Salesforce's effectiveness. We provide **comprehensive Salesforce support and expert-led training** to empower your team. Our 24/7 support ensures your system remains up-to-date, secure, and fully optimized for your evolving business needs.

CASE STUDY

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: A leading freight transportation company in the US.

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

1 **Data Silos Eliminated:** Integrating Salesforce with TMS, WMS, and financial systems streamlined data sharing, improving decision-making.high-value tasks.

2 **Increased Efficiency:** Automating workflows reduced manual tasks, cutting errors and delays.

3 **Lower Costs and Growth:** Centralized lead and sales management in Salesforce reduced costs and opened up growth opportunities.

4 **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

CASE STUDY

Automating Salesforce & Stripe Integration Using n8n

Industry: IT Industry (SAAS Company)
Engagement Type: Salesforce & Stripe Integration with n8n
Product: Salesforce CRM, Stripe, n8n, Docusign, REST API, Apex clas

Client: SaaS Company

Client Overview

A fast-growing SaaS company needed a seamless integration between Salesforce and Stripe to streamline customer data management, automate payment workflows, and enhance contract execution efficiency.

Key Challenges

It was found that their existing process relied heavily on manual data entry, leading to inconsistencies, delays, and compliance risks. The key discoveries are:

- **Manual Data Entry & Syncing**
  Customer and payment information required repetitive updates across multiple platforms, increasing the risk of errors.

- **Delayed Invoice & Payment Updates**
  Lack of automation caused delays in financial reporting and customer billing.

- **Contract Management Bottlenecks**
  Contract generation and signature tracking were inefficient, requiring manual follow-ups.

- **Scalability & Security Concerns**
  The company needed a solution that could handle growing transaction volumes without compromising security.

The Solution

The Pinq Clouds implemented an automated integration using n8n to enable real-time data synchronization between Salesforce and Stripe.
The solution included bi-directional data sync, automated invoice processing, and DocuSign integration for contract management.

Data Synchronization

We synchronized existing Stripe customer accounts—including subscriptions, payments, and invoices—into Salesforce, and set up a bi-directional sync so that when an opportunity is marked as "Closed Won" in Salesforce, the corresponding customer record is automatically created or updated in Stripe.

Payment & Invoice Automation

Stripe webhooks were configured to trigger n8n workflows whenever new payments or invoices were generated, ensuring Salesforce is updated in real-time with these records and eliminating manual reconciliation.

DocuSign Integration for Contract Management

When an opportunity was updated to "Contract Executed," n8n triggered the DocuSign API to automatically generate and send contracts, and the signed documents were captured and stored in Salesforce.
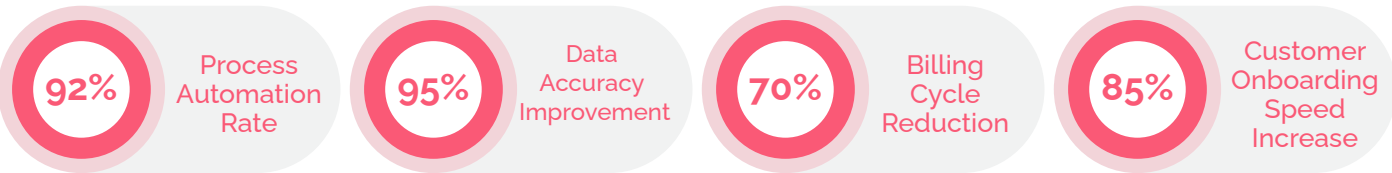
Impact

1	**Time Savings:** Reduced manual data entry by 80%, freeing up resources for high-value tasks.
2	**Improved Accuracy:** Eliminated data inconsistencies between Salesforce and Stripe.
3	**Faster Invoicing & Payments:** Reduced invoice processing time from days to minutes.high-value tasks.
4	**Seamless Contract Management:** Automated contract generation and tracking improved compliance.
5	**Scalability:** The solution handled increased transaction volumes efficiently without performance bottlenecks.

Result

By integrating Salesforce and Stripe using n8n, The Pinq Clouds provided a highly efficient, automated, and scalable solution that streamlined the client's financial and contract management. This project's success demonstrated the power of workflow automation in enhancing operational efficiency and business growth.

| 92%	Process Automation Rate	95%	Data Accuracy Improvement	70%	Billing Cycle Reduction	85%	Customer Onboarding Speed Increase

CASE STUDY

78% Amplification In Customer Engagement with Salesforce Marketing Cloud And Data Cloud For Non- Profit Dental Insurance Company

Industry: Financial Services, Healthcare and Life Sciences, Non-Profit
Engagement Type: Implementation and Integration
Product: Salesforce Marketing Cloud, Data Cloud

Client: Nonprofit Dental Insurance Company

Client Overview

Our client is a top Nonprofit Dental Insurance company in the U.S. offering a range of insurance plans. They aim to offer personalized customer service and manage campaigns well. However, they juggle with incomplete data and low customer engagement.
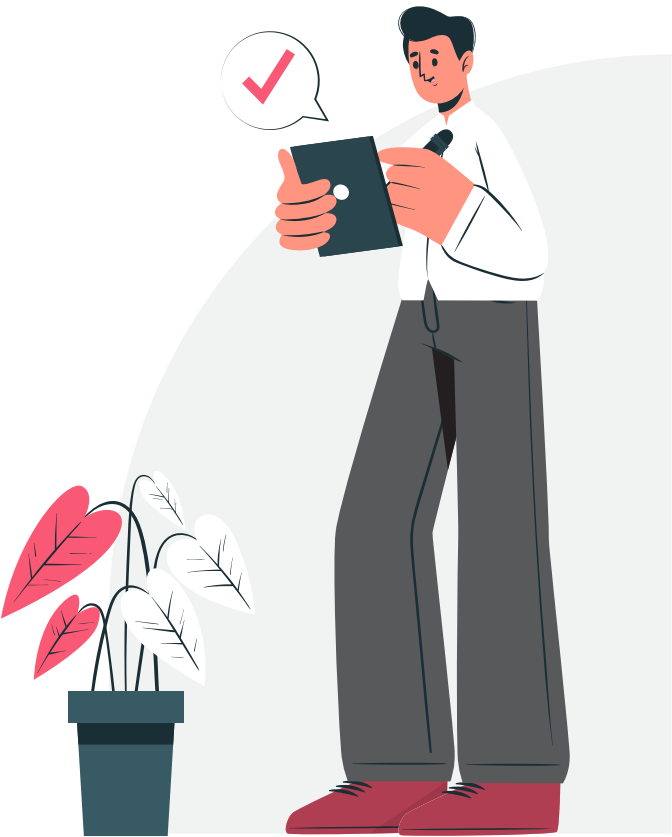
Key Challenges

The team of Pinq Clouds developers analyzed the overall process and highlighted the key challenges:

- **Data Quality Issue**
  Fragmented, incomplete data made it hard for the client to fully understand customer interactions and preferences.

- **Campaign Management**
  The client lacked a unified platform, causing inefficiencies in campaign execution and limiting actionable insights.

- **Inconsistent Customer Engagement**
  Engagement rates were low due to fragmented communication and lack of personalized interactions.

- **Lack of Multi-Channel Synchronization**
  Messaging across email, SMS, and social media was inconsistent, causing gaps in customer outreach.

The Solution

The Pinq Clouds implemented Salesforce Marketing Cloud and Data Cloud to address these critical issues. Our goal was to create a centralized system that could manage all customer interactions while ensuring data quality and providing insights to enhance engagement.

Salesforce Data Cloud Integration

We integrated Salesforce Data Cloud to unify all customer data into a single, centralized platform. This tool brought together data from various touchpoints, allowing the client to have a complete view of each customer's interactions, preferences, and history.

Salesforce Marketing Cloud Implementation

We used Salesforce tools to automate and manage personalized campaigns across email, SMS, and social media. Email Studio helped design and automate emails, Journey Builder created tailored customer journeys, and Audience Studio segmented audiences to deliver targeted messages to the right people at the right time.

Advanced Analytics and Reporting

With Datorama and Interaction Studio, the client gained the ability to monitor campaign performance and track customer interactions in real time.

Impact

1	**78% Increase in Customer Engagement:** Improved data quality and personalized tools led to higher customer interaction across email, SMS, and other channels.
2	**Streamlined Campaign Management** Salesforce Marketing Cloud automated campaigns, reducing manual tasks and increasing efficiency.
3	**Improved Data Quality and Insights:** Salesforce Data Cloud ensured accurate data for better targeting and more effective campaigns.
4	**Optimized Multi-Channel Campaigns:** Marketing Cloud synchronized messaging across email, SMS, and social media, ensuring consistent outreach.

Result

The Pinq Clouds enabled the nonprofit dental insurance company to overcome key challenges with centralized data and advanced marketing tools, the client significantly improved their customer engagement and streamlined their marketing operations.

78% Surge in Customer Engagement

85% Faster Campaign Execution

90% Increase in Data Accuracy

88% Boost in Multi-Channel Consistency

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Akash Bhati CEO & Director of Sales

Akash brings a decade of specialized expertise in Salesforce, helping businesses of all sizes optimize their CRM systems. Over these years, he has led numerous Salesforce implementations, enhancing business processes and customer engagement through tailored solutions. Akash is proficient in crafting agile solutions, developing technology roadmaps, and integrating Salesforce with complex business environments.

Book a Call Today!