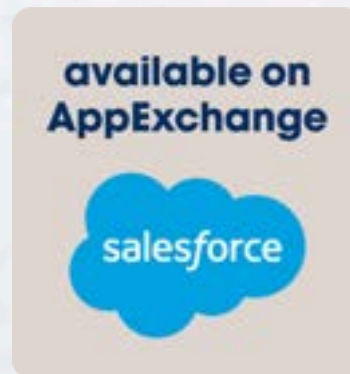




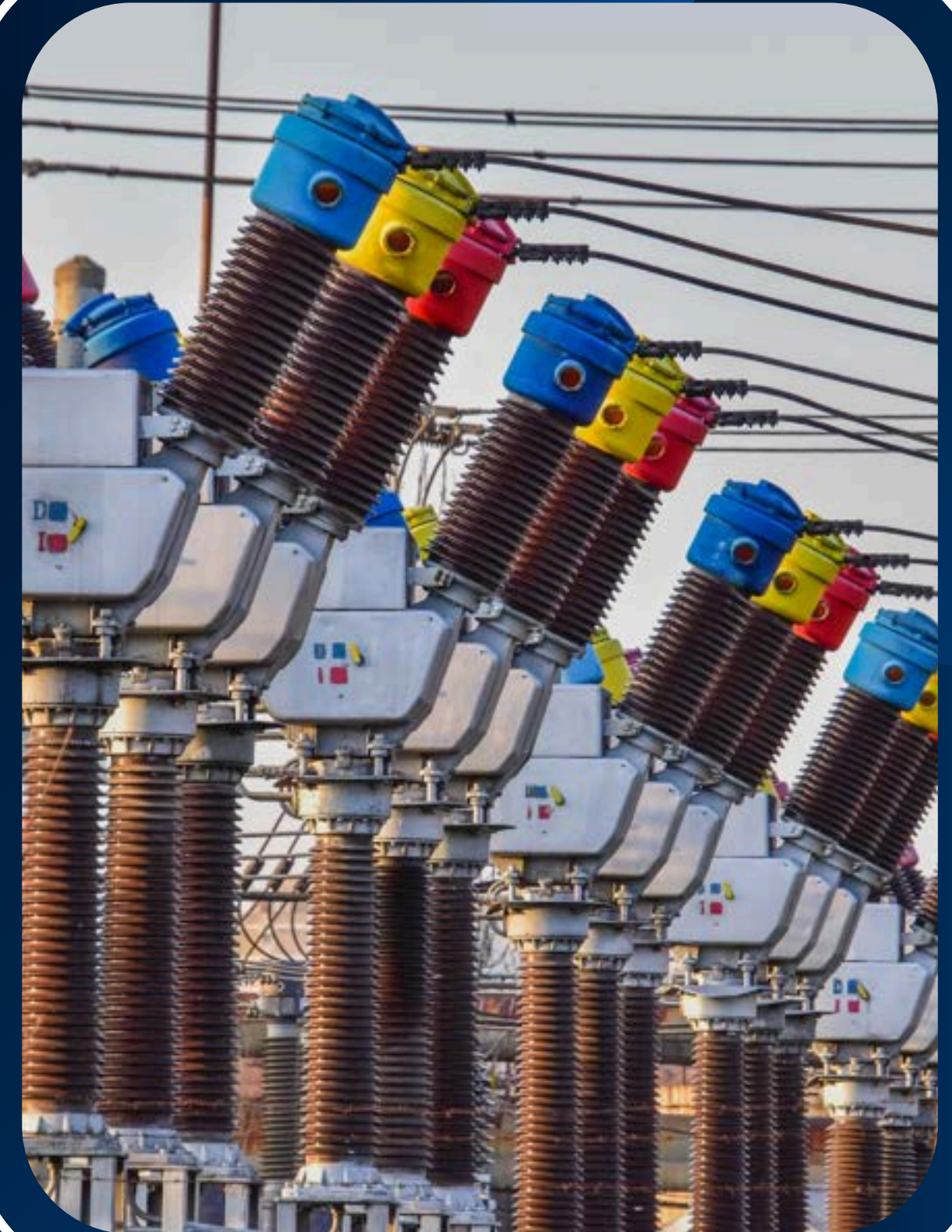
ASPIRE SOFTWARE CONSULTANCY



BACKGROUND

The customer is a manufacturer of heavy industrial equipment, including **Transformers, Switchboards, and Switch Gears.**

The customer selected Salesforce to manage their operations and sales activities and partnered with us to implement their processes within Salesforce. The customer was also using **QuickBooks** for accounting and wanted to **automatically push data from Salesforce to QuickBooks** — without using any third-party plugin to avoid recurring costs.



SOLUTION COMPONENTS



Sales Cloud

managing sales pipeline,
tracking leads, automating
tasks, and helping sales teams
close deals faster



Quickbooks

Connected Sales Cloud with
QuickBooks to track sales and
invoices in one system



Zapier

Zapier connects Salesforce with other
apps to automate tasks and workflows



Arka

Arka in Salesforce tracks
inventory and simplifies order
management



MuleSoft

Seamlessly connect applications,
data, and systems



Avalara

automates tax calculations, filings,
and compliance for businesses

SOLUTION

We conducted several discovery sessions, which resulted in defining the following key areas:

1. Roles & Permissions

The users were divided into the following groups:

- **Sales Users:** Worked with standard Salesforce objects like Leads, Accounts, Contacts, Opportunities, Products, and Pricebooks.
- **Operations Staff:** Required specific customizations and third-party integrations.
- **Service Staff:** Focused heavily on Assets and Cases, which were identified as core modules.

Deliverables Created:

- **Roles & Profiles**
- **Permission Sets**
- **User Management**
- **Experience Cloud Site** for contractor resources



2. Sales Process

This was a major area of brainstorming.

Due to the unique sales cycle involved in manufacturing transformers and switchboards, extensive customer input was required before quotes could be submitted.

We customized Salesforce to support this collaborative quoting process.





3. Data Sharing Across Systems

We implemented integrations with the following systems to eliminate redundant data entry and ensure seamless data flow:

- FieldNation Marketplace
- NetSuite ERP

Integration Methodologies Used:

- Direct API Integration
- MuleSoft Integration Tool

Benefits of Integration:

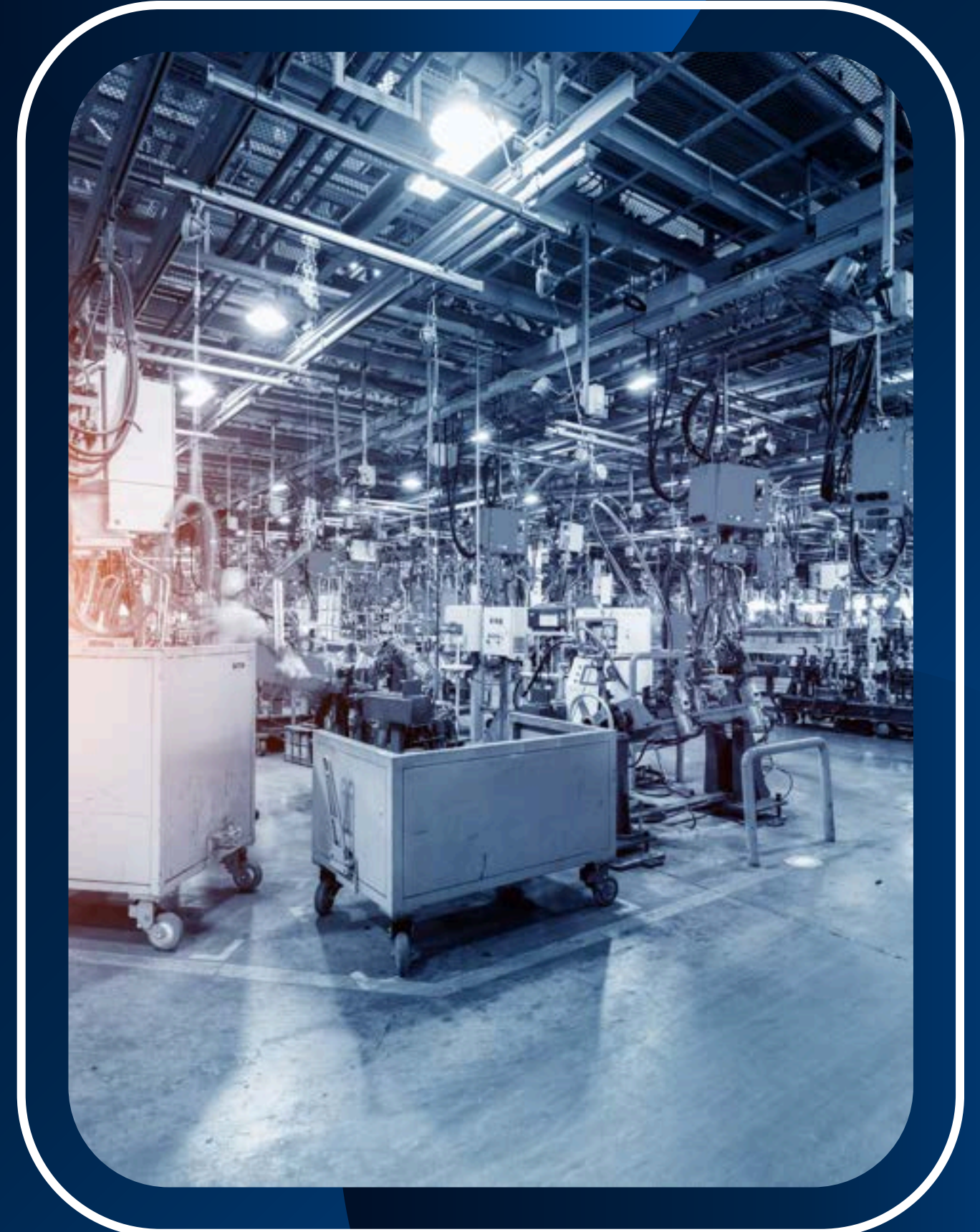
- Eliminated duplicate data entry
- Improved data accuracy by ensuring a single source of truth
- Enhanced speed of:
 - Technician allocation
 - Customer invoicing
 - Inventory adjustments

Overall, these solutions streamlined operations, improved data consistency, and enhanced service delivery — all of which were noticed by the customer's end clients.

BENEFITS

With our solution(s) in place, the customer saw huge time and quality benefits in following operations:

- Centralized system for processing tickets, emails were out of process now
- Greater customer satisfaction with timely updates and quick resolutions
- Totally removed data duplication efforts across system
- Greater data accuracy and quality due to automation in gathering and sharing data.
- Higher SLA achievements and thus saving on SLA penalties



WHAT CLIENT SAYS

Bakul at Aspire Software Consultancy has been amazing to work with. Aspire team has been our custom developers for 3-4 years. Assisting us in multiple projects revolving around custom salesforce solutions, Aspire team has made us a priority and completing all of our projects above our expectations. Projects have always been done on a timely manner, and implantation has always been seamless. I would highly recommend Aspire for any Salesforce coding or custom application development.

