



A JAPANESE MANUFACTURER OF OPTICS AND REPROGRAPHY PRODUCTS. THEY CREATE CUSTOMER-DRIVEN SOLUTIONS FOR THE MEDICAL, LIFE SCIENCES, AND INDUSTRIAL EQUIPMENT INDUSTRIES.



CASE STUDY

Challenges

- To create a system that helps the sales team to create correct quotes for the end customer by integration of multiple systems.
- To create a system that can manage its custom process, thereby managing the sales process with the help of roles such as the Territory Manager and the Sales Manager.

Our Solution

Solution

- System to generate quotes
 - Using salesforce CPQ and custom development quotes, the generation process was set up. The data required through some external system was configured using external object and for the information which was required based on some criteria, was integrated using REST API.
 - Management of the custom sales process using custom development using lightning web components was done. Through Apex, custom data tables were created; these tables had picklist fields which were not supported in the standard framework data table.

• SALESFORCE • STAFFING • CALL CENTER

-for users with role as Sales Manager

i) Data which was imported from another system was presented to the Sales Manager user. It enabled the user to filter the data based on country, territory manager, business units, business area and set targets for the same.

-for user with role as Territory Manager

i) Manage the stages of the open leads for the business unit. Business was assigned to him which helped him track and assign quality leads to the team.

Benefits

- Quote generation process became accurate and the problem of re-working on the same quote due to error in the discount, was reduced significantly.
- Custom sales process management helped the user to review the data at one go and set targets. All these things were very complex and also time-consuming processes in the earlier system.