Driving Salesforce Adoption and Modernizing UX with Lightning

Challenge

- Need for increased and widespread Salesforce usage.
- Have been using excel sheets for customers' quotes and billing, making the entire process time-consuming and prone to error.

Idea

- Automate the Quotation and Bill generation system to make the process easy and efficient

Our Solution

- Using a combination of standard (Account, Contact, Opportunities.) and custom objects(customizations for categories, sub-categories, products, implementation and professional services)
- Migrated all the products and product categories in Salesforce.
- Created a Lighting Ready Visualforce page for the sales team to create quotes for customers/ partners.
- Salesforce Lightning optimized for Contextual Hovers and imparted a visually appealing UI layout.
- Set up Conga (AppExchange app) for template creation for quote generations
- Created multiple reports on opportunity object for sales team to analyze their sales pipeline

Business Benefits

- Enabled sales team to generate quotes for potential customers and partners quickly and easily.
- Effective use of Visualforce customizations improved the quality and speed of sales team's processes.

Client Description

- Provides platforms and services that increase customer experience and improve agent and management productivity.
- Company has been using Salesforce for some time now. Works with Vocalcom, an App
- Exchange partner, for implementing CTI integration for Salesforce's end customers.

About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce,covering cloud advisory, Salesforce integration services and Lightning platform development.
We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.

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