

ABOUT THE CLIENT

The client is a leading provider of cloud-based point-of-sale (POS) and business management solutions, designed to streamline operations for retailers, restaurants, and other service-based businesses. With a focus on flexibility and scalability, the client empowers businesses to manage their sales, inventory, and customer relationships with ease.



CHALLENGES

Comprehensive Approval Process

- Implement a robust approval process for Quotes and their associated Quote Line Items, allowing for both parallel and sequential approvals.
- Incorporate smart approval mechanisms to improve efficiency and accuracy.

Multi-Store Quote Generation

- Enable the generation of a single quote for a client with multiple stores in various locations.
- Ensure corresponding orders, cases, installations, and tasks are correctly assigned to each location.

IMPLEMENTED SOLUTIONS

Salesforce Advanced Approvals

- Developed Salesforce Advanced Approvals from scratch.
- Created approval rules tailored to specific needs.
- Implemented custom Apex logic to manage all approvals in a unified flow.

Salesforce CPQ

- Customized Quote Line Groups to represent individual stores within a quote
- Developed custom logic using Flow, Apex, and Triggers to support this functionality

Salesforce Service Cloud

- Delivered expert analysis and customized recommendations to optimize workflows and enhance Service Cloud functionality.
- Leveraged deep Service Cloud expertise to align platform capabilities with business requirements, ensuring efficient service operations.

Product Rules Implementation

- Built customized solutions to support Product Actions, CPQ Validation Rules, Alert Rules, and Selection Rules at the quote line group level.

Salesforce Experience Cloud

- Configured Salesforce's native approval processes to streamline account approvals seamlessly within Experience Cloud.
- Customized approval paths to manage complex hierarchies and conditional logic for enhanced decision-making.
- Integrated real-time notifications and approval status updates for improved visibility and user experience.

User Training

- Conducted training sessions to ensure seamless adoption.
- Training the end users on the custom CPQ Application.



IMPLEMENTATION OVERVIEW

Install Advanced Approvals

Installed Salesforce Advanced Approvals to automate and streamline the approval process for quotes and quote line items, enhancing overall efficiency.

Conduct User Trainings

Conducted comprehensive user training to ensure smooth adoption and effective utilization of the newly implemented features.

Develop Custom Automation

Developed custom Apex classes, triggers, and Flows to support complex business logic and automate various processes, ensuring seamless system functionality.

Configure Experience Cloud

Configured Salesforce Experience Cloud to handle account approval processes using native approval workflows, enabling efficient and transparent approvals.

Optimize Service Operations

Provided Service Cloud expert analysis and guidance, delivering tailored recommendations to improve service operations and enhance case management efficiency.



RESULTS

Efficiency

30% reduced approval times through smart mechanisms.

Accuracy

25% improvement in approval accuracy.

Customization

Tailored solutions met specific client needs, enhanced operational effectiveness by 20%.

ABOUT US

Cloudely started its journey in 2013 with a vision: to disrupt the way enterprises and business manage cloud applications. Since then, its clientele has expanded to global business across diverse horizontals.

Cloudely Inc. holds a decade of proven experience in delivering Contract Management, Quote to Cash, and Salesforce Implementations.

With its global presence, with headquarters in California and Center of Excellence in Hyderabad, India, Cloudely is committed to surpass customer expectations and making ideas happen by flawlessly leveraging human intellect and technology.

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