



Case Study

Boston, USA Based HiTech Company - Get Solution on Salesforce Reporting Limitation

About Codinix

Codinix provides the salesforce solution to the client companies for the growth of their businesses. Codinix first understands the requirements of the clients and then works accordingly. Its team of experts is capable to create salesforce reports for the companies.

Moreover, its experts are well-versed in problem-solving. So, in case of any problem, the companies contact Codinix and get the best solution.

NAMICS Technologies, Inc. contacted Codinix for helping it in creating a <u>salesforce report to extract the data</u>. The experts of the client company themselves tried to create the report but that report had some limitations. Codinix helped the company and solved its problem with great expertise.

Prior Procedure in Client Company

- The client had a customer object called a Customer Call Report.
- Salespeople used to extract data manually.
- They would prepare the excel sheet on monthly basis, which was very time-consuming.

This was the problem due to which the company was gaining less profit as compared to its desired goal. A lot of the time of the salespersons, which was required to be spent on other useful activities, was wasted on just one task.

For resolving the above-mentioned problem, the client tried to make use of the salesforce report. But, some limitations were left for which the client company contacted Codinix.

Limitation

- The client was unable to pull the Meeting Notes in the Salesforce report.
- The reason was that it was a Rich Text field and it used to get truncated automatically.
- Salesforce Standard Report feature limitation was the reason behind this problem.

This was the exact limitation faced by the company. So, it contacted the team of Codinix to resolve this problem. The team first analyzed the problem carefully and then offered a solution.

Solution

Codinix provided the following solution to the client's company.

- The experts of Codinix created a custom button on the Customer Call Report List View page.
- It made it possible for them to extract the data in an excel file in their desired format.
- It was possible with just a button's click.
- There was no limitation left and they were able to acquire the entire meeting notes.

Outcome/ Client Benefits

- Now, the work for which the client company had to spend hours can be completed in one button's click.
- A lot of time of the sales team of the company is saved now, which they can spend on other useful salesrelated tasks.
- Due to the right usage of time, the production of the company is increasing now.
- The sales team can work on driving more customers now because they are not required to spend time in making the excel sheet manually.