



# **Case Study**

# California, USA Based Client Gets Digital Solution Regarding Automated Quotation Generation

### **Client Overview**

The advancement of digital technology has created the opportunity to automate diverse work processes and practices. Contemporary firms are looking for innovative and smart solutions that can help them to overcome bottlenecks that arise due to reliance on manual activities. The client had been looking for an automated quotation process along with accounts and contacts-based organizational hierarchy. The professional IT team took the decision to integrate key digital features into Salesforce customization so that a one-stop solution could be delivered to the client that was aligned with its digital needs and requirements.

## **Problem Statement**

The client was looking for an ideal solution that would help it to smoothen its journey in the rapidly evolving business landscape. The chief problem areas that the client wanted to be taken care of include the following:

- How to enable an automatic generation of quotations for customers on the basis of selected products?
- How to create an organizationalhierarchy that is based on the 'Accounts and Contacts' setup?

In order to address the key concerns of the client, one of the fundamental steps involved getting an indepth insight into the existing problems. It was a vital step that helpedin identifying the main features that could be integrated together to offer an effective and unified digital solution.

# Resolution

To optimally address the concerns of the client, the team of experts startedanalyzing its unique requirements so that an appropriate and feasible solution could be developed. A systematic and methodical approach was adopted by the IT professionals so that all the intricate details could be given due importance to developing a robust and well-functional solution. The set of steps that were taken to meet the client's requirements have been presented below:

### Customized PDF quotation

The first step that was taken involved the creation of a customized PDF quotation. The objective of developing it was to reduce the manual processes that were adopted by the client. The introduction of the new quotation had the potential to curtail human involvement while generating quotations, and hence the possibility of errors would get diminished. Furthermore, the customization of the solution ensured the specific needs of the client were fused to produce a tailored solution.

# Contact hierarchy feature

The second step that was taken involved enabling the 'Contact hierarchy' feature that was available in Salesforce. By enabling this feature, it was possible to ensure that the client could easily get an accurate and precise view of the organizational chart at any given point in time. This feature had been set up so that the client would be able to understand who reports to whom within the organization and optimally handle its chain of command.

### **Client Benefits**

The innovative solutions that were deployed by the team of experts gave rise to a broad range of benefits for the client:

Improved automation for quotation generation

One of the chief benefitsthat the client was able to derive was the automation of quotation generation. The client's reliance on human factors for creating quotations based on the selected productswas reduced. It had the option to utilize the newly designed customized PDF quotation. The innovative solution created an opportunity for the client to not only save time but also have better control over errors and mistakes relating to quotations.

Clarity regarding the assignment of roles and responsibilities

The introduction of the contact hierarchy component helped the client to get real-time insight into the organizational chart. It aided in better allocation of duties among managers and organizational personnel. In addition to this, the client also was able to have a better degree of control over its core activities, processes and functions.