TRESBU
technologies

Salesforce

Select Partner Projects

Salesforce.com **Capabilities**

❖ Sales Cloud Implementation
- Campaign, Lead, Accounts, Contacts, Opportunities and Forecasting
- Products, Orders, Price books, Payments and Product catalogs
- Integration with Accounting systems like QuickBooks, Tally etc.

❖ Marketing Cloud Implementation/ Pardot
- Email, SMS and Social Marketing process
- Email/Social integration
- ExactTarget implementation
- Pardot B2B marketing solutions
- Survey Integration

❖ Service Cloud Implementation / Call Center / CTI
- Case Management
- Call Center solutions with custom agent console
- CTI integration
- Agent Console integration with Trespond
- Knowledge Base
- Communities and Sites for Salesforce
- Mobile/Lightening Optimization and conversion

TRESBU
technologies

Salesforce.com Capabilities II

- ❖ Lightning Apps/ Lightning API/ Lightning Platform
  - ▪ Salesforce1 multi device compatible custom apps
  - ▪ Custom lightning components on lightning framework

- ❖ Third Party integration or Salesforce-to-Salesforce integration
  - ▪ SOAP/ReST integrations with external applications
  - ▪ Streaming API
  - ▪ Lightning API
  - ▪ SocialCloud/Chatter Integration with Facebook and LinkedIn etc.
  - ▪ Third party connectors

- ❖ Data Management
  - ▪ Data Migration to SFDC or Export from SFDC
  - ▪ JItterbit Scheduler for automatic data load process
  - ▪ Informatica ETL implementation with transformations for master data load

Business Transformation **Accelerated**

TRESBU
technologies

Loan Provisioning **Cloud App**

LENDINGKA₹T

Loan Provisioning Cloud App

Problem

Massive growth in E-commerce provide enormous opportunities for individuals, small, and medium sized vendors to sell products online globally.

Challenge

But with the growth, the vendors faced inventory financing issues to meet the high pace of demand, putting their reputation and business at risk.

At the same time, the process for seeking growth capital through traditional banking institutions, was too slow to meet the challenging pace, and thus microfinancing was born and privatized. Our client had a unique, entrepreneurial concept in mind but didn't have the know-how or team to build it.

Solution

Tresbu built a a web/mobile compatible application on the salesforce platform, which can integrated to E-commerce and other third party applications from where e-commerce sellers can obtain instant loans. The solution offered complete loan requesting processing through an API and also through a customer community portal and integrated with credit bureau's and leading e-commerce providers.

Results

Our Cloud adaptation gave the client complete control on the operational costs and zero application downtime. The robust integration of API's enabled loan requesting and validation with no human intervention. Target customer satisfactions goals, target lead generation goals, and minimum tech support goals were all achieved.

salesforce

TRESBU
technologies

Business Transformation **Accelerated**

salesforce

skyhigh

Customer Experience Platform - JIRA

Problem

JIRA as an end-to-end project and service management tool. Difficult to manage customer issues and understand the productivity of technical support engineers through JIRA system as it had very minimal CRM capabilities. No flexibility in issue creation process, minimal customer engagement through the case resolution process, poor survey mechanism and poor analytics.

Solution

Effective customer success platform is required to engage customers in the process of issue resolution as it improves customer confidence and satisfaction which hugely contribute to customer retention and continued business.

We have suggested and implemented a very effective case management process on SFDC platform where technical support engineers can manage cases created by the customers.

Many custom events were defined to notify case stakeholders on the progress done by technical personnel. This ensured better SLA management and high customer bingo scores from feedback
- Integration with JIRA gave technical support engineers the power to collaborate with engineering teams and auto update cases as per bug statuses updated by engineering and business teams.
- Knowledge base to help as customer self-service portal.
- SFDC reports and dashboards gave complete picture of overall view on the case inflow/outflow, Support team's productivity, pain points and customer satisfaction.

Results

❖ Increased ease in case management on SFDC platform compared to JIRA.

❖ Multiple case creation processes helped better customer engagement with product services.

❖ Effective SLA management ensured huge improvement in issue resolution time and increased customer satisfaction.

❖ Knowledge management on customer self-service portal helped reduce support costs.

Business Transformation **Accelerated**

TRESBU
technologies

Salesforce One **App w Inventory & Service**

Salesforce One App
w Inventory & Service

Problem

- Batteries & inverters was using an SAP ERP solution to track all the company data associated with manufacturing, employees, sales , inventory.
- Customer had difficulties in engaging dealers and customers in the process and required a CRM solution to engage their dealers effectively to manage product inventory, purchase orders and invoices, customer registrations, customer issues and sales progress.
- As SFDC is a leading cloud CRM platform, customer was interested to adapt Salesforce.com for their business.

Solution

Customer was comfortable with out-of-the-box sales cloud features offered by salesforce & used campaign, Lead, opportunity effectively for their business. Tresbu built a custom dealer inventory management process all the inventory changes are tracked as per sales, purchase and re-placement orders reported by the dealers. Compatible on both web and also on Salesforce1 mobile app which would be used by the dealers.

customer registration process for dealers and customers themselves. As per the registration, service warranty was updated based on which service agents would validate customer's entitlement and resolve issues.

Main feature - Service Module, Inventory Management, Order Management, Invoice and Invoice Items ,Salesforce1 Mobile app with custom Uis, Customer registration and Entitlement, SMS integration

Results

❖ Multi device support as the solution was implemented on Salesforce1 platform.

❖ Easy to manage dealer engagement and observed increased control over inventory and warranty process

❖ Inventory management, dealers were able to stay informed about the demand & procure products from manufacturers on time.

❖ Automatic invoice generation processes

Business Transformation **Accelerated**

TRESBU
technologies

Enhanced Search For **Salesforce**

skyhigh

Enhanced Search For Salesforce

Problem

This customer has a cloud data security based product that provides an additional layer of security to their customer's data that is being saved in salesforce.com applications.

All customer critical data is encrypted and saved as cypher text to the database. As the data format is changed, normal search would not return any results as it cannot understand encrypted content. In addition to this, character length of the string is increased to multiple times when encrypted and global search has a string length limit of 100 characters only and any extra characters would be truncated before search is performed.

Data loss can also occur due to actions performed by humans deliberately or by mistake. Customer needed to intelligently identify such events occurred and track them as anomalies in their products.

Customer required a solution on SFDC platform which should be a managed package and would be given to their customers to install in respective Salesforce.com Orgs. .
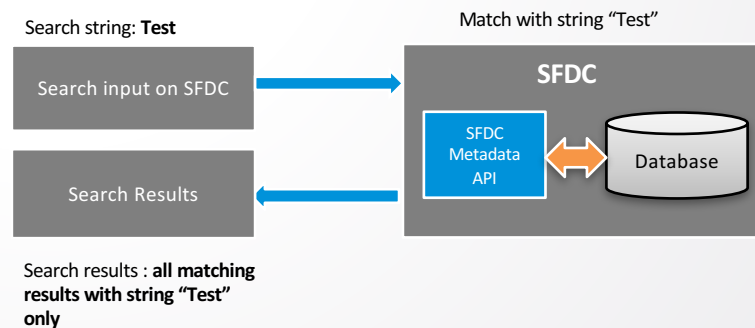
Solution

Tresbu implemented a salesforce application as a managed package with two main capabilities as below:
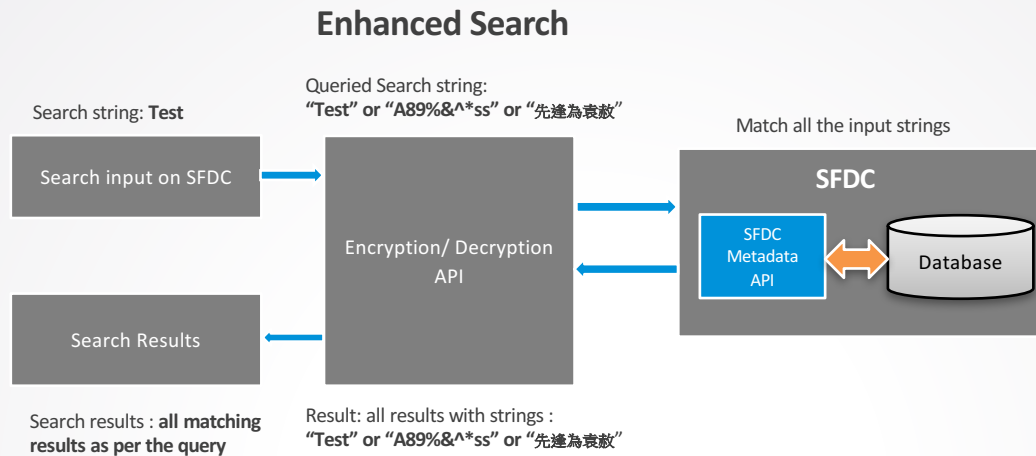
1: Enhanced search component
When a search is performed through enhanced search page, the search string is given to the encryption API and encryption API pushes the cypher format of the searched string to SFDC DB. The results are then decrypted by the API and the displayed in the results UI page.

Normal Search

Search string: **Test**

Match with string "Test"

Search input on SFDC → **SFDC**

SFDC Metadata API ⟷ Database

Search Results ←

Search results : **all matching results with string "Test" only**

TRESBU technologies

Enhanced Search For Salesforce II

Enhanced Search

Search string: **Test**

Queried Search string:
"Test" or "A89%&^*ss" or "先逢為袁赦"

Match all the input strings

| Search input on SFDC | → | Encryption/ Decryption API | → | **SFDC** |

SFDC Metadata API ⟷ Database

Search Results ←

Search results : **all matching results as per the query**

Result: all results with strings :
"Test" or "A89%&^*ss" or "先逢為袁赦"

This component consists of an UI page with a search bar that accepts search string with length up to 2000 characters and perform below actions.

Search Criteria allows Wildcard Characters similar to Salesforce.com global Search.
    Search string can be minimum of 2 Characters
    When the user enters the search criteria and clicks on search, it searches through all the objects and provide results to the matching results on all searchable fields.

Result set should be displayed in the result set page similar to the one displayed in Salesforce's standard results page.
        Phrase break and search special characters
        Iterated search for a single string

    An admin page with list of options to configure search behavior like searchable objects and results page components.

salesforce

TRESBU technologies

Business Transformation **Accelerated**

Partners & Credentials

Partners

Platforms

App / OS

Business Transformation **Accelerated**

TRESBU
technologies

Marquee **Customers**

Business Transformation **Accelerated**

TRESBU technologies

Free **Consultation**
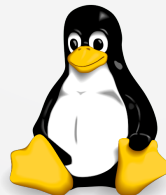
THANK YOU

contact@tresbu.com

408-508-5533

TRESBU
technologies