



CASE STUDY  
INTEGRATING BUSINESS SYSTEMS FOR A  
BIOLOGISTICS COMPANY

### CLIENT OVERVIEW:

The company provides medical research, medical services and medical staff to develop solutions for clinical, surgical and therapeutic patient treatment.

### CLIENT PROFILE:



**LOCATION:**  
Atlanta, GA



**EMPLOYEES:**  
100+



**INDUSTRY:**  
Medical and Material  
Science

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### CHALLENGE:

The client had a CRM and Order Management System that was very industry-specific, and no longer supported by the vendor. This created a lot of constraints for them when growing and expanding their business, so they switched to Salesforce.

They had the following Salesforce needs that CleanSlate was tasked to help with:

- ◇ Their pricing is often very customer-specific, so they wanted to leverage Salesforce's ability to have a different Price Book per customer.
- ◇ They wanted to use Service Cloud in conjunction with the Price Book feature to streamline the customer order process for Customer Care, and ensure accurate pricing per customer and order.
- ◇ They wanted to maintain parts of their current system, requiring an integration.
- ◇ They wanted to generate strong reports on their orders, the specific products that are selling, and at what price and quantity they are being sold.



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### TECHNOLOGIES:

- ◇ Sales Cloud
- ◇ Service Cloud

### FEATURES:

- ◇ Flow
- ◇ Process Builder
- ◇ Custom Development where configuration wasn't possible (Custom Apex Development where necessary)



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### SOLUTION:

CleanSlate integrated Salesforce and the client's current CRM. They did this in order to maintain current operations, while also leveraging additional features provided by Salesforce. This will streamline the entire workflow, and prevent duplication of data. Salesforce and QuickBooks, the company's current accounting system, have also been integrated so that Salesforce users have visibility into key financial data at various points in their workflow, such as ensuring customers are paying prior invoices before allowing new orders to be processed.

The integrations have been implemented using Scribe, a third-party cloud integration service. All of the integrations together position Salesforce to be a true Customer 360 view of what products are being sold and at what price points, so that the sales team can view and respond to trends in different segments of the market and across product lines.



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### RESULTS:

With Salesforce standard Price Books and Products check, the client can increase or can seamlessly honor customer-centric pricing that is typical of the industry and ensure accurate revenue, since products aren't going out the door with the wrong prices.

By using Service Cloud instead of an Outlook Inbox, the client has a more manageable shared queue, a standardized order fulfilment process that includes required quality checks, and a more efficient workflow that serves customers faster.

### CUSTOMER SATISFACTION

