Empowering Sales: A Comprehensive Salesforce Solution for Medical Technology

TekLink An HGS Company

Business Challenges and Objectives

- The client aimed to retrieve account and agreement information from the Salesforce Platform.
- They sought to track invoices and associate them with the relevant salesperson and ongoing contracts.
- Utilizing agreement data, the client wanted to determine the admin charge eligible for each product category listed on the invoice for a specific salesperson.

Client

- Our client is a medical technology company focused on developing and commercializing innovative medical devices to treat complex and challenging cardiovascular conditions. They are more than a decade old in the industry, with a constant focus on improving the medical infrastructure through technology.

Industry

- Manufacturing

Function

- Sales Analytics

Technology

- Microsoft Azure

The Solution

- The team successfully validated by leveraging account data to confirm the current agreement status against the invoice.
- A user-friendly view, meticulously developed by the team, elegantly showcases invoices aligned with active agreements during the order invoicing process.
- Expertly utilizing agreement data, the team seamlessly calculates the total fees owed to the salesperson.
- Our scalable solution, crafted by the team's expertise, ensures adaptability to future scenarios where terminated or updated agreements only impact new invoices.
- The team's meticulous maintenance of a comprehensive history table, including start dates, end dates, and an active contract flag, facilitates accurate tracking and effective management.

Outcomes and Benefits

- The solution empowers business users by enabling the calculation of salesperson fees for each product category, fostering improved analysis for future agreements.
- Enhanced visibility into sales amounts and admin fees equips stakeholders for more informed decision-making and efficient resource allocation.
- Stakeholders benefit from powerful tools that allow in-depth analysis of sales, invoices, admin charges, and salesperson performance through BI reports and dashboards.
- The solution promotes data-driven decision-making, providing valuable insights into the impact of admin charges on revenue and salesperson compensation.
- A seamless integration between Salesforce and Oracle data ensures the automatic application of admin charges in the Azure backend process.