Salesforce used by a real time advertising technology company to optimize processes

A leading real time advertising technology company that combines ad server and a real time bidding exchange with yield optimization for advertising and digital media companies.

Business Situations
- Needed to optimize marketing emails
- Needed campaigns to associate with opportunities not getting converted from leads, so as to include these campaigns in ROI
- Automate existing onboarding sales process
- Implement multiple approval processes
- Automate Task and Case creations for onboarding process

Solutions offered
- Multiple approval processes with validation rules
- Batch scripts to automate processes
- Apex schedulers to process Batch class and Apex classes
- Configuration of workflow rules
- Developing Apex triggers and classes to automate creation of Cases and Tasks
- Setting up Email-to-Case
- Developing Visualforce pages to upload files and export Excel/csv files
- Developing test classes with code coverage of more than 75%
- Deployment into partial sandboxes and production, performing smoke tests, and end-to-end testing

Achieved Results
- Campaigns were associated with each opportunity
- Automated Task and Case creation
- Implemented workflow rules and batch schedulers

About Company
Intelliswift Software Inc. is a premier software solutions and services company headquartered in the Silicon Valley with a proven track record of delivering results for over 300 brands among the Fortune 500 companies.

PROJECT SCORECARD

- Customer Rating – Outstanding
- Technology – Salesforce
- Team Location – India

Highlights
- Apex Schedulers and Batch Apex working flawlessly with exception handling
- Automated globally the two existing manual processes for handling clients

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