SOFTWARE COMPANY

Mistware SOLUTIONS

salesforce registered consulting partner

CREATIVE
STARTUP
COMPANY

CONSTANT GROWTH

DIGITAL TRANSFORMING

ABOUT US

Mistware Solutions was formed by a group of seasoned enterprise Salesforce consultants that were looking for a new way to deliver their services. With over a decade of consulting experience we knew that organizations of all sizes were desperately seeking reliable consulting partners, so why should large enterprises hold a monopoly on that pool of talent
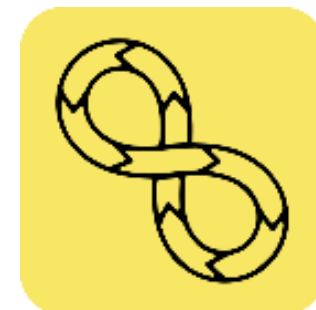
OUR SERVICES

IT CONSULTING
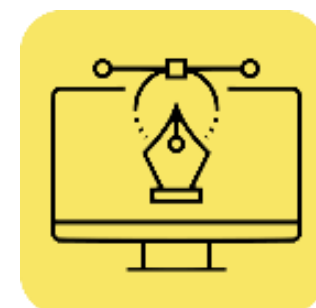Learn how to leverage IT consulting to effectively meet your business objectives.

DEVOPS & SUPPORT
Fast delivery and continual improvement through repeatable and automated code.

CLOUD
The question is not whether you should adopt the Cloud, but how best to do it.

DESIGN
Client interaction with your products and services should be seamless & enjoyable.

FIND US

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E: info@mistwaresolutions.com

W: mistwaresolutions.com

SOLUTIONS

Mistware

Leading Salesforce consulting start up

We are Leading Salesforce consulting partner start up with 4.7 App exchange rating, helping customer across the globe drive digital transformations for the last 1 years. We take pride in helping our customers solve complex business problems by implementing state of the salesforce technology solutions.

Given our unique approach to problem-solving, we tailor each solutions to the unique needs of every customer, providing superior results.

3 Countries
Global presence with operation in the India, UAE & Canada

10+ Clients
Long lasting customer-relationship with more than 80% repeat business

15+ Employees
A highly skilled diverse talent pool equipped to drive transformation & change

A Solid Foundation Built On Core Values

Teamwork
Leadership should derive from skill, not title; our CLEAR Values align teammates from/across all layers and levels

Ontime Executive
With little time to get it right, an employee's first instinct should be informed by our CLEAR Values

Entrepreneurship
With encouragement for risk-taking and innovation comes the need to act responsibly and with integrity

Nurturing Talent
We recognize people are our most valuable assets, and invest in attracting and developing talent

Standardization
Our CLEAR Values represent common standards that unite a global, increasingly virtual Mistware community

Inspire. Innovate. Transform.

Mistware Solutions is a leading independent, end-to- end
IT services company. We lead clients on their digital transformation
journeys and help multiply their capabilities.

Demonstrated Expertise
We have a strong legacy of working with diverse clients to achieve measurable business results

Technology Independence
Working with our global partner network, we deliver the best most proven solutions to de-risk technology investments.

Passion For Innovation
We challenge ourselves to continually enhance our knowledge and capabilities, providing practical solutions to complex problems

Collaboration
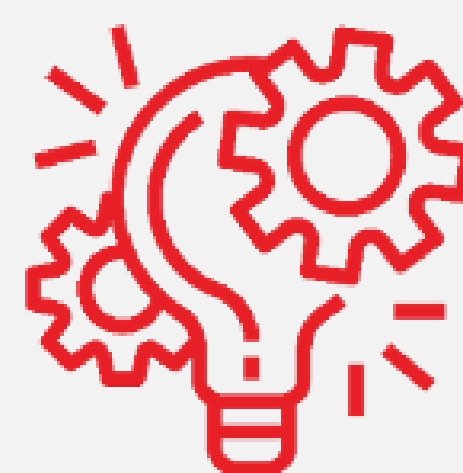We strive to create a collaborative environment that fosters innovation and drives efficiency

Staffing Services

- Contract, Contract to Hire
- Managed Services
- T&M, Rate Card Model, Mark-up model, Case basis

Extended Team Services

- Blended Extended Team (onsite + offshore)
- ODL (offshore development lab)
- IDL (Integrated Development Lab)

Project Services

- T&M Engagement
- Turn-key or Fixed-price projects
- Outcome-oriented projects
- Collaborative projects

- Improved operating performance and productivity by having right skill for right job

- Reduced staffing costs by just-in-time recruitment.

- Elimination of expensive bench.

-
- Prevention of loss of projects due to lack of right skill.

- Accelerated growth by fast ramping.

- Converting fixed costs into variable costs by hiring skills for required duration only.

- Focus on your core businesses.
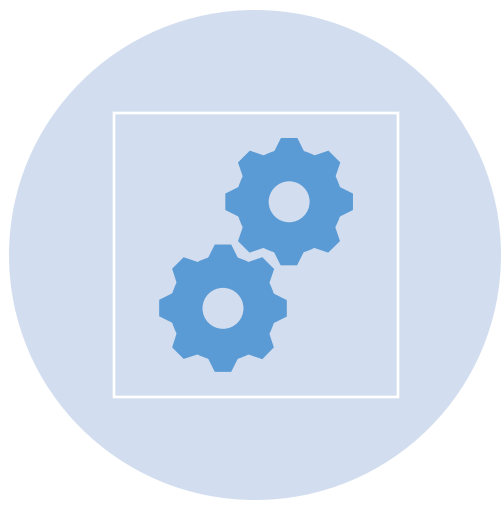
Salesforce Sales Cloud

Salesforce Service Cloud

Salesforce Marketing Cloud

Salesforce Education Cloud

SOLUTION OFFERINGS

DATA MIGRATION & COMPLEX INTEGRATIONS
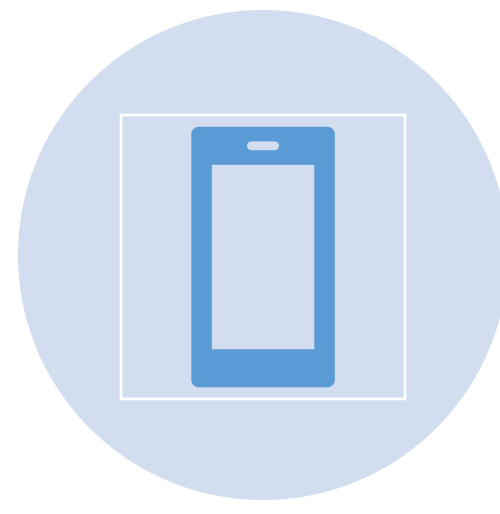
CHANGE MANAGEMENT AND END USER TRAINING

VALUE ASSURANCE

FULL SYSTEM IMPLEMENTATIONS

ONGOING MANAGED INNOVATION

TECHNOLOGY ROADMAPPING

RESOURCING

❖ **Development of an Application for Salesforce-Website Integration**

PWC

The Customer is a US-based startup, whose clients are mid-market and enterprise-level companies. The Customer helps its clients' sales teams to advance in the sales process, formalizing their marketing materials with the templates from the Customer's website. The Customer's clients can upload their marketing materials (case studies, success stories) into this website and adjust them to a predesigned format, which allows them to reduce design costs.

Challenge

The Customer commissioned Mistware Solution to develop a Salesforce custom app for Sales Cloud integration with the website for their clients to formalize marketing content and later have access to it in Salesforce. The app should make the Customer's clients' success stories available right in Salesforce. The Customer also wanted to place the app in AppExchange to make it available for the Customer's current clients and enlarge the client base with other mid-market and enterprise-level sales teams with accounts in Salesforce.

Solution

Mistware Solution's team created a single-page web application with the Lightning Component framework to address the Customer's need to ensure access to his website right from Salesforce solutions of his clients. The application was designed for both Salesforce Classic and Lightning Experience UIs. The integration of Salesforce Sales Cloud and the Customer's website was performed with REST API callouts using OAuth 2.0 for user authentication.

The application enabled access to the functionality of the Customer's website on automated designing of the case studies and success stories of his clients and made this formatted content appear in a separate section of the Account and Opportunity records in Salesforce solutions of their clients. The application enabled the search of marketing materials right in Salesforce Sales Cloud with the possibility to tune search fields based on the account name and size, deal size, industry, etc. Due to this functionality, the content describing a deal similar to the Account/ Opportunity a sales rep is working with appeared in these Account/Opportunity records.

Results

The Customer got a tailor-made single-page web application for Salesforce Sales Cloud integration with his website. The application can help the customer's clients to enhance the performance of sales teams engaged in complex sales providing them with relevant case studies and success stories of the unified format. The application appeared in AppExchange, which was the Customer's main benefit since they got revenue from the application's downloads.

Technologies and Tools

Salesforce Sales Cloud, Lightning Component, REST API, OAuth 2.0, Apex Code.

❖ Salesforce Community Cloud Customization for a Financial Organization

Cinch

The Customer is a European organization that provides financial consulting services to help their clients minimize investment risks.

Challenge

The Customer used a Salesforce Community Cloud-based solution to provide investors and manufacturers with a platform for collaboration and data sharing for streamlined deal-making. Unfortunately, the platform ceased to meet user needs in full as they wanted more personalized collaboration, which required new user roles. However, the Customer couldn't satisfy those needs within their Community Cloud edition and didn't have a budget for switching the edition. So, they looked for a reliable vendor to customize their existing Salesforce solution.

Solution

The Customer turned to Mistware Solution as a reliable provider of <u>Salesforce customization services</u>. Mistware Solution's team started with creating new custom user roles. To make them functional, custom sharing logic was created by modifying the default sharing model. This enabled data sharing between the newly created roles. Then, Mistware Solution's team enabled setting up data viewing permissions for different user roles individually.
To make new user roles appear as native within the collaboration platform, Mistware Solution's team introduced code changes.

At this task, the team collaborated with the Customer's in-house Salesforce developers working in different time zones. To ensure smooth cooperation and clear sharing of tasks, the work was structured in a way that each developer worked on the assigned code part, thus avoiding interference with the performance of other team members. When the developers finished their part of coding, code was automatically reviewed and merged, tested and deployed.

Results

The Customer was able to deliver enhanced collaboration capabilities for users of their collaboration platform while remaining within the same Salesforce Community Cloud edition. As a result, they managed to boost client satisfaction and increase the ROI of their Community Cloud solution at the same time.

Technologies and Tools

Salesforce Community Cloud, APEX Code, JavaScript, Chart.js, Visualforce.

❖ **Salesforce Sales Cloud Customization for an IT Product Company**

Genesis Global

The Customer is an IT product company that specializes in healthcare applications.

Challenge

The Customer's Salesforce Sales Cloud-based solution didn't correspond to their business needs. In particular, the sales process was hampered due to the automated Opportunity field updates that weren't working at particular Opportunity stages. The decision-making and sales activities planning were impeded by non-comprehensive reports. Particular data sets, which should have been viewed by sales managers and C-suite members only, were exposed to sales reps, due to the absence of object-level and field-level security, which violated the Customer's internal policies.

Solution

The Customer used the Professional edition of Salesforce Sales Cloud, which didn't allow code-based customization, so they needed to have the solution configured with point-and-click tools.
Mistware Solution's Salesforce team reviewed *the faulty automated Opportunity field updates,* which weren't working at particular Opportunity stages. Upon completion of the review, the team used the Process Builder to replace the faulty updates with new ones that reflected the Customer's sales specifics to the full. It helped to achieve the relevance of the info at the Opportunity stages in Salesforce CRM.
To enable comprehensive reporting, Mistware Solution's Salesforce team created two custom report types for Account and Opportunity objects using default Salesforce reporting functionality. Enabling custom report types allowed reflecting the state of Accounts and Opportunities clearly, thus adding to the reports' comprehensiveness.
To provide role-based user access to particular Salesforce objects and their fields to certain user groups, Mistware Solution's Salesforce team introduced user profiles and permission sets with default Salesforce functionality. It allowed restraining the sales reps' access to sensitive info about the Customer's clients, which should have been available to sales managers and C-suite members only.

Results

The Customer had their Salesforce Sales Cloud-based solution adjusted to their business needs. Tuned automated Opportunity field updates made the info on the state of Opportunities up-to-date. Custom report types allowed the Customer to further build comprehensive reports that displayed the state of Accounts and Opportunities in full, which improved decision-making and sales activities planning. User profiles and permission sets enabled role-based user access to the CRM info, which helped to comply with the internal policies.

Technologies and Tools

Salesforce Sales Cloud (Professional edition), Process Builder, Salesforce Reports, Profiles and Permission Sets.

❖ Salesforce Customization for an Analytics Company

Tech Active

The Customer is a US-based analytics company that helps clients facilitate the insurance process with AI-based property intelligence.

Challenge

The Customer used CRM based on Salesforce Sales Cloud for collecting client information, sales management and team collaboration. Yet these processes were set up inefficiently, thus, the Customer looked to customize their existing solution to increase sales performance.
The Customer also wanted to improve their customer service processes as they suffered from low customer satisfaction. Yet, they lacked in-house resources and expertise to carry out these tasks.

Solution

The Customer turned to Mistware Solution for <u>Salesforce customization services</u> for their Sales Cloud-based CRM. Mistware Solution's team started the project by analysing the Customer's needs to find the best way to customize their Salesforce solution within the existing license. To maximize the efficiency of the solution and help organize a steady sales process, Mistware Solution's team:

- Created and adjusted user roles and permissions to enable specific automation features for different user groups, such as sales reps and sales managers.
- Implemented the automated task assignment to ensure quick engagement of sales reps with clients.
- Set up triggers for automated email notifications for sales employees not to miss a single deadline throughout the sales process.

To resolve the existing customer service challenges, Mistware Solution's team integrated the Customer's Salesforce Sales Cloud with Service and Community Clouds. To improve the Customer's customer service KPIs, such as customer satisfaction and retention rates, and decrease customer service agents' workload, Mistware Solution's team:

- Set up <u>case management processes</u> with escalation workflows and automated email notifications.
- Created a <u>customer self-service portal</u> with a knowledge base, a FAQ section, and a case request page for a convenient submitting of case requests.

Results

The Customer was able to increase their sales volume and drive their sales team's productivity due to the increased amount of automation and the adjusted user roles and permissions. Having enriched their CRM with Salesforce Service and Community Clouds, the Customer was able to deliver a high-quality customer service experience, thus building customer retention and increasing overall customer satisfaction.

Technologies and Tools

<u>Salesforce Sales Cloud</u>, <u>Salesforce Service Cloud</u>, Salesforce Community Cloud, APEX, JavaScript, REST API.

Mistware
SOLUTIONS

pwc

WEBVILLEE

forceark
consulting

tech active

PSP
TECHNICAL SERVICES

HIC Global Solutions

kastech
KNOWLEDGE IS OUR STRENGTH

SOFTINFO

celonis

YASH
Technologies

InfoBeans
CREATING WOW!

Thank You

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