



AD VICTORIAM SOLUTIONS

Multi-Cloud Solution

Accelerates Sales & Advances Service Delivery



Highlights

- > Salesforce Sales Cloud
- > Salesforce Service Cloud
- > B2B Commerce
- > Pardot
- > SharePoint (ERP), 8x8 System (CTI), PayTrace, and Avaral Integration



Challenge

Everidge’s strategic plan to fill marketplace gaps, gain 360-degree data visibility, automate tasks, and increase their competitive edge included a unified sales and service management platform that integrated with their ERP and a robust eCommerce system. They sought a knowledgeable consulting partner that could implement and maximize the value of a multi-cloud system. Their strategy led them to the Salesforce® platform and Ad Victoriam Solutions.



Resolution

Sales Cloud

- > Eliminated email tracking of asset warranties and quotations with an integrated system where all reps can now view and manage customer purchases, warranties, and quotations.
- > Developed efficient lead capture and tracking methodology, illuminating the potential business opportunities previously lost due to process gaps. Opportunity time tracking implemented, expediting the quotation to close the process.
- > Integration of ERP connected data and files to Salesforce, eliminating multiple steps needed to attach files and access records.

Service Cloud

- > Unified service team and processes on Service Console, enhancing consistent and higher quality customer service based on real-time, comprehensive data.
- > Tracking of inbound case submissions through Email-to-Case and Work Order functionality.
- > CTI integration propelled repair call processing by triggering account information and Milestones for SLA’s, upon call connection.
- > Built custom components to expose contractor location through a visual map, speeding dispatching based on proximity.

B2B Commerce

- > Replaced manual order entry process with the implementation of a fully branded, device responsive eCommerce store to drive sales.
- > Integrated platform with PayTrace (payment gateway system), Dynamics AX (ERP), Avaral (tax calculator), and Google Analytics.

Customer Story Featuring

Everidge

Manufacturing

Everidge is the nation’s premier commercial refrigeration equipment manufacturer. They design, manufacture, market, and distribute a wide range of innovative commercial refrigeration equipment and refrigeration parts, along with service, repair, and support.

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Salesforce. Simplified.

