

An Eminent Technology Consulting Firm Automated Its Billing Process, Improved Its Team's Productivity & CX Through Salesforce-Powered Custom Solutions



Automated and Accurate Billing Process. Better Productivity Leading To Improved Customer Relations.

Client Profile

Established in the year 2009, the client is an eminent technology consulting firm with expertise in telecom network design and implementation, utility bill audit & recovery, cloud services, among others. With the clientele spread over several countries, the client has strong expertise in providing their customers with the necessary technology support to select and implement cutting-edge technology solutions.

The Problem

The client wanted an improved billing process and ticketing support system as the existing systems were incapable of handling the client's preferences. The existing billing process was manual, which was not only time consuming, but error prone as well. Parallely, the existing ticket system was a legacy one that failed to handle the automated system generated HTML emails and information related to client communication was getting lost.

Manual and sluggish billing process: The existing process for customer billing was manual and sluggish. Every month, the team used to generate PDFs and excel sheets manually, following which bills were triggered to customers.

Inconsistency in billing: Several times agents modify commission data in contracts, even after confirmation, which impacted the final billing amount. The client was looking for a way to lock and unlock these commission records in the contract so that the data utilized for the billing remains consistent and accurate.

Legacy ticketing system: The existing ticketing system was a legacy one which was incapable of handling HTML emails generated through automated systems. Due to this issue, all the information was getting lost as the HTML emails were getting rejected by the ticketing system, leaving the customer unattended and their problem unresolved.

Requirement of a separate ticketing support system: The client required a completely separate ticketing support system for their premium accounts so that a dedicated agent could be assigned to these customers for responsive, quicker and better support.



Dependency on manual processes for billing



Inaccurate billing due to frequent changes in commission records by agents



Limitation of legacy ticketing system to serve clients faster



Incapability of ticketing system to handle HTML emails

The Solution

After detailed analysis of the client's unique business requirements and challenges, Damco's Salesforce professionals planned to develop a tailored solution on Salesforce to address the billing issues while upgrading the ticketing system for improved capabilities.

Development of a feature-rich Salesforce-based billing solution driven by automation

- Our team of Salesforce experts developed a Salesforce-based tailored billing solution that showed the total revenue against all customers for the billing month.
- The team provided the functionality to lock and unlock the commission records that restricted agents from making any changes in the contract data during the billing process.
- Additionally, the solution had the functionality to generate properly formatted invoices automatically in PDF and Excel, as per customer preferences, and were sent as attachments for billing.

Upgradation of the existing ticketing system to avoid information losses

- Damco's Salesforce team further upgraded the client's existing ticketing system so that it can support the system generated automated HTML emails and initiate tickets using the information in those emails.

Implementation of a different ticketing system for premium clients

- As per the client's requirements, our team implemented a separate ticketing system for their premium accounts. Each case generated through the new ticketing system was directly linked to the associated premium account.

The Benefits

The Salesforce-based billing solution and the upgraded ticketing system improved the overall customer experience and employee productivity.

- **Improved employee productivity:** Significant improvement in employee productivity as the new Salesforce-based billing solution reduced manual work, which saved time and effort of the staff.
- **Reduced billing time:** The billing time was reduced as the automated solution generated bill documents on the basis of the account preferences in preferred formats and same was emailed to the customer as attachments.
- **Better support to customers:** Improved and timely support to customers with the upgraded ticketing system that can now handle the automated HTML emails, ensuring the data isn't lost. This helped teams to provide right and timely support to each customer without leaving anyone unattended.
- **Improved customer relations:** Deployment of a separate ticketing system for premium accounts help the client maintain better relations with their elite customers.



**Salesforce-powered Custom Solutions for Reduced Manual Efforts,
Improved Employee Productivity and Better Customer Relations**

[Talk To Our Salesforce Team](#)

About Damco

Damco Solutions is a strategic Salesforce Gold Consulting Partner and holds expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customercentric digital-first organization.

Contact us for more information
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