



Customer Success Story

A pioneer of cloud-based dental software products **drives sales** by creating an engaging portal on Experience Cloud to **foster stronger collaboration** among its agents, resellers and customer

About the Client

Client is a pioneer of cloud-based dental software products trusted by thousands of dental professionals across the US.

Solution

- Built a community portal using Experience Cloud to order products through Salesforce CPQ
- Used Alteryx ETL to migrate data from multiple databases into a centralized Salesforce org
- Used Lightning Components and Apex Classes to integrate the 2CP API callouts with Salesforce
- DocuSign integration for e-signature and acquiring credit card details, payment information, and transfer data securely with encryption

Benefits

- ✓ Greater Visibility – Global drill-down into pipeline & activities
- ✓ Automated payments, streamlined processes, organized workflow pattern
Single source of truth
- ✓ A clear 31% rise in Sales from enhanced stakeholder collaboration

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