

# CASE STUDY

## Using Salesforce Process Builder to automate the process of approving deals/opportunity

### Background

**Industry:** Healthcare

**Tools:** Salesforce

The client is a US independent supplier of medical products and services, existing on the market for 20 years. Besides providing medical supplies, they focus on answering questions about products and insurance. Their focus is on providing their patients and customers with the best products and services.

### Challenge

Working in the medical supplies industry, and having a great number of clients, involves making more than 100 deals on a daily level. Up until the introduction of Salesforce, the client's sales team was checking each deal/opportunity manually to see whether it fits the requirements for signing a deal. Expanding globally meant that this number will at least double. So, the client needed a solution that would automate the process of checking the deals/opportunities regarding certain criteria, would greatly decrease the time needed to submit deals and would increase the efficiency.

### Solution

The solution consisted of creating an automatic approval process based on predefined criteria. Once the criteria/conditions were set, the process was automated by using Salesforce process builder. Therefore, when a deal/opportunity was submitted, it went through the validating process across the predefined criteria, and if the deal/opportunity fit the criteria, the responsible party receives an email notification to decide whether to approve or reject the request.

### Business Outcomes

By using Salesforce Process Builder, the client maximized the process of approving deals/opportunities, thus eliminating the manual work and improving enterprise efficiency.

Key results included:

- Automated processes of approving deals/opportunities
- Eliminated manual submission requests for approval
- Reduced time spent on manual deal validation by 70%
- Fast and easy approval of requests