



Ship Canada

salesforce

Scope:

- Client Background: Operating a shipping business To From or In Canada.
- Objective: Seek an efficient solution for managing numerous customers and their freight requests.
- Overarching Goal: Establish a streamlined quoting system integrated with Salesforce.
- Key Focus: Provide prospects and customers with seamless access to Freight Quotations.

Solution:

- Developed a robust platform tightly integrated with Salesforce.
- Prospects can generate Freight Quotations saved in Salesforce, triggering automatic notifications.
- Customer interface with a dedicated login provides:
 - Comprehensive dashboard for the last 30 days of Freight requests.
 - Google map feature for shipping addresses.
 - Functionality to track shipments, download Bill of Lading PDFs, invoices, and log support requests directly from the portal.

Challenges:

- Absence of a quoting system for the client.
- Customers lacked independent access to information:
 - Freight status.
 - Past interactions with ShipCanada.
 - Details such as invoices, Bills of Lading (BOL), and freight addresses were not readily available.

Results:

- Effective solution implementation resulted in a substantial increase in Freight requests and business generation.
- Clients and customers now benefit from a more informed and engaged relationship.
- Enhanced capabilities allow clients and customers to download invoices, Bills of Lading, and track shipments.
- Overall outcome: Both the client and their customers are satisfied with the streamlined processes provided by the Ship Canada platform.

