

Solution summary

Esker's Built-In Integration With Salesforce

Ensure excellent customer experience every time

Esker's B2B Customer Service solution suite features a built-in integration with Salesforce CRM and provides Sales Representatives with full visibility over their customers' account activities, including enquiries, orders and claims.

Benefits at a glance



Enhance visibility

and keep track of enquiries, orders and claims on customer accounts, both in Esker and Salesforce.



Increase process efficiency

with all customer information centralised in Salesforce.



Improve internal collaboration

as information is automatically shared within the company.

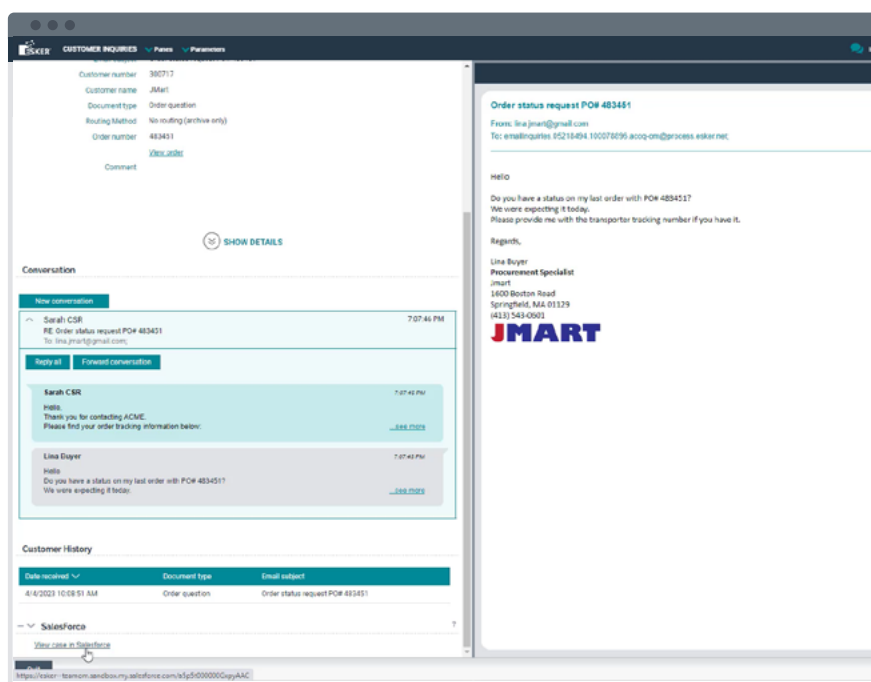


Enhance customer satisfaction

with improved account management.

Overview

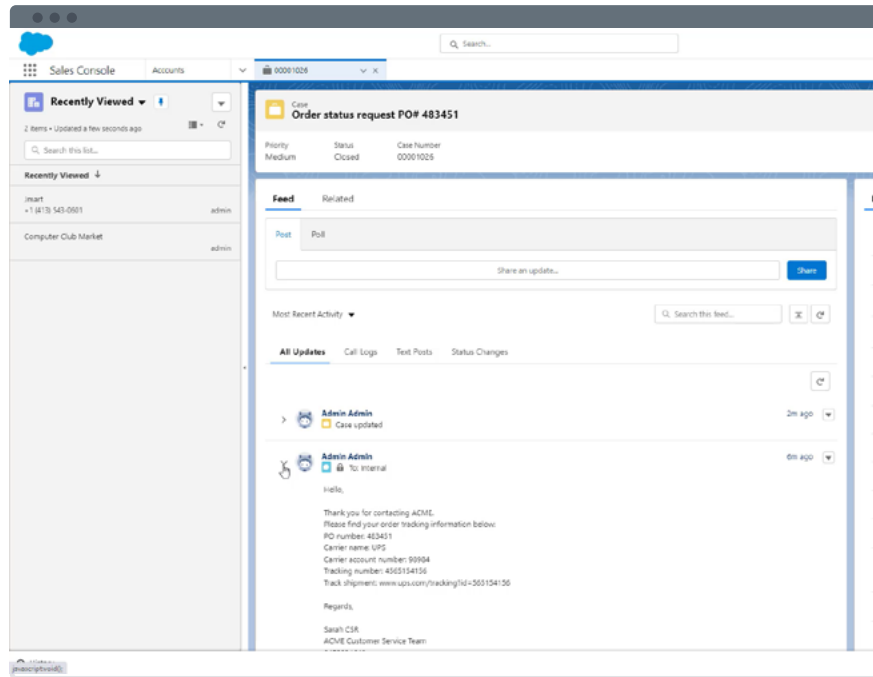
Esker's Customer Service solution suite features a new Salesforce integration. Esker's Order Management and Customer Enquiry Management solutions seamlessly integrate with Salesforce using APIs to securely authenticate and create or update cases and other objects in Salesforce. This integration gives sales reps full visibility over enquiries, orders or claims directly in Salesforce, allowing them to better follow up with their customers.



Integrated platform

When a customer enquiry, order or claim is processed, a Salesforce case is automatically created or synchronised through the built-in integration capabilities of Esker's platform. Esker solutions integrate with the customer's IT infrastructure to streamline the B2B customer service processes. Key features include:

- A direct link to the Salesforce case on the enquiry, order or claim
- Centralised customer information on Salesforce's interface (conversations, updates, details on customer account, etc.)
- Configurable objects and field mapping



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