

CASE STUDY: Mainline Services Team designs and customizes HTP's SFDC.com application

Heat Transfer Products (HTP), founded in 1974 in East Freetown, Massachusetts, just north of the port town of New Bedford, is a designer and manufacturer of advanced high-efficiency heating and hot water systems. HTP draws on the area's historic manufacturing attributes that made it the site of the nation's first petroleum refinery, the location of dozens of textile mills, and the premier whaling port in the 1800s. HTP produces gas, electric, and solar-powered water heating and space heating products made available through distributors to homes and businesses throughout North America.

The Challenge

Jason Alpert, HTP's Manager of Customer & Technical Services, had recently met a challenge from management to provide an IT solution that captured technical support information. To optimize its capabilities, Alpert was asked to find a solution that would efficiently log calls and be flexible for future use. A requirement of the new solution was that it provide options for customers to access and submit data via the Web. He found that solution with Salesforce.com (SFDC), an enterprise cloud computing company that helps companies connect with customers and helps employees collaborate.

To set up the system and customize it for HTP's specific needs, Alpert called on an account executive from Mainline Information Systems. Alpert was aware of Mainline's expertise and knew that Mainline Professional Services could design and customize the Salesforce.com application for their environment. He asked the Mainline software services team to put together a proposal that would address their requirements.

The Solution

HTP wanted customers to have the ability to access the HTP website for a warranty and ticket checker and an online Return Merchandise Authorization (RMA) request submittal.

Salesforce.com's **"Service Cloud"** application provides a tool that enables companies to create and track customer incoming information from every channel and automatically route and escalate what's important. Its CRM-powered customer portal provides customers with the ability to track their own activity 24 hours a day and includes social networking tools as well as access to customers' entitlements and contracts.

The **Force.com platform**, based on the platform as a service (PaaS) model, allows external developers to create add-on applications that integrate into the main Salesforce.com application and are hosted on Salesforce.com's infrastructure. These applications are built using Apex (a proprietary Java-like programming language for the Force.com platform) and Visualforce (an XML-like syntax for building user interfaces in HTML like Ajax or Flex).

Mainline Professional Services: Mainline's software experts first developed a data model to transform the HTP data into a Salesforce.com format. They subsequently developed APEX Salesforce code for the controllers, and used the Salesforce Visual Force code to provide the user interface layer. Mainline also provided supporting documentation.

The Results

"The solution was easier and less expensive to implement than if we tried to do it in-house," Alpert remarked. "No equipment was needed, since we connected to the application directly through the Web. Plus, Salesforce.com is easily customizable, since we can access the tool, create fields, and gather information at a moment's notice. We can even change the interface.

"With Mainline's help, we got the results we were seeking," Alpert added. "The project went smoothly, and in the process, Mainline helped us discover new resources from the information we were getting. With Mainline we were able to maximize the tool beyond what can usually be accessed out of the box. I would definitely consider using Mainline for future projects."

THE CHALLENGE

- Customize Salesforce.com for product warranty information checking and submittal
- Customize and optimize Salesforce.com for HTP requirements

THE SOLUTION

- Mainline expertise in professional services to customize Salesforce.com
- Salesforce.com's "Service Cloud" application
- Salesforce.com's Force.com platform

THE RESULTS

- Facilitated HTP website customer access for product warranty information
- Customers can track their own activity 24/7
- RMA (Return Merchandise Authorization) request submittal capability
- Easy and cost-effective implementation