Cloudify
IMPLEMENT. INTEGRATE. AUTOMATE

Tromle.dk

TROMLE

INTEGRATION SUCCESS STORY

Explore how TED IVS created an automated pathway with Cloudify

Tromle

The challenge

Why TED IVS made the transition into the automation arena?

Tromle previously wasted hours generating client data and preparing individual agreements for the clients. Plus, manually doing this was not very scalable and had scope for errors.

Thus, Tromle needed help with syncing Pipedrive with Previsto so that every deal they get in Pipedrive would automatically generate an updated agreement in Previsto. At the same time, check the latest emails in Pipedrive deals by creating a zap for it.

What did TED IVS needed help with?

- Automatically adding deals in Pipedrive from Wordpress form and Facebook to Pipedrive.
- Automatic agreement creation in Previsto for every new deal created in Pipedrive.
- Check all the latest emails linked to Pipedrive deals.

Pipedrive + Previsto integration
We began with integrating e-conomic, and Syncro followed by building custom work processes according to their business needs.

The Solutions

How did we approach it?

- Once the automation was set up, new form submissions on Wordpress and Facebook created a new deal in Pipedrive automatically.
- For every new deal created in the Pipedrive, a customer was created in the Previsto followed by the automatic creation of an agreement.
- Whenever the client wants to create an agreement he can toggle the custom field in Pipedrive, and an agreement will be created and its id will be added to the Pipedrive deal.
- Whenever there was any new email linked to the deal, it was automatically updated in the Pipedrive deals.
- A zap set up was done in Zapier to check for the latest mail messages in Pipedrive deals. If there were any unread mails, the mail message info was posted to autocode.

Automations delivered - SaaS apps that helped TED IVS grow

- Automations delivered - SaaS apps that helped TED IVS grow
- Pipedrive – Pipedrive was the integration platform available along with all required triggers and actions. Plus, it's easy to use and monitor.
- Previsto –Cloudify has the expertise for creating custom workflows of agreement updates.

Tromle.dk

About Tromle

Tromle is a lawn maintenance solutions business based in Denmark. They offer services like the drumming of lawns and filling holes in the lawns.

Headquarters:
Denmark

Industry:
Heavy duty machinery service

Complexity:
Low

Products and services:
Products and services: lawn rollers, robotic lawn mowers, Tractose, landscape gardening

Website: https://tromle.dk/

Very happy with Cloudify to date. Seen a significant improvement in business revenue, as well as productivity of employees. Business revenue, as well as productivity of employees.

Regina Lau
Senior Manager, Nerd 911

Why Cloudify became the best fit for TED IVS?

- Partnerships: Elite Partner of Pipedrive. Acquires expertise in Previsto and are known Zapier experts.

- Automation experts: Unique team of automation experts who not only help implement apps but also integrate and make the related automation.

- Your ultimate process consultants - Cloudify helps businesses grow as a whole, manage their processes better, boost sales and increase revenue with smarter workflows and intelligent processes.

- Our offerings: Digital analysis, SaaS implementation, and Automation

- Marketplace by Cloudify: We have our own Marketplace with listed apps with predefined workflows.

- Customisations: We offer customised solutions for simple and complex business automation that best fit your business needs.

- Lighthouse by Cloudify: Your process monitoring tool and a unified platform that gives you a bird's eye view of the whole automation process.

Get a Free Consultation

Need help with business process automation? Let us take up the burden and do the flow for you.

Book a free consultation

www.cloudify.biz

Contact Us