

Title

How Salesforce integration simplified the sales process for Cooby

Meet the hero

Cooby is the ultimate platform designed to revolutionize how sales professionals interact with prospects on WhatsApp.

With Cooby's innovative signature product, the **Cooby Chrome Extension**, people can finally gain much-needed visibility over their interactions with prospects. This groundbreaking data-driven platform is the first of its kind, integrating WhatsApp seamlessly with Salesforce and other productivity tools for quick and comfortable lead management.

About the client	
Industry	Computer Industry, IoT & Digital Intelligence
Headquarters	Xinyi Road, Taipei
Founded in	2020
Employees	<50
Website	www.cooby.co
Start of the project	July 2022
End of the project	October 2022

The challenge

The Cooby team set out to create a cutting-edge Salesforce integration that would help sales reps manage their leads on WhatsApp. Their ultimate goal was to simplify the sales process by eliminating the need to switch back and forth between WhatsApp and Salesforce for CRM tasks.

They aimed to synchronize Contacts, Leads, Accounts, and Opportunities between Salesforce and their extension, allowing users to attach WhatsApp chats to Salesforce records easily.

Our solution

To streamline CRM tasks and eliminate the need for toggling between WhatsApp and Salesforce, we developed an advanced Salesforce integration using the LWC framework and Apex. This enabled us to deliver a smooth and user-friendly experience.

Here are just a few of the amazing things that the Synebo team accomplished while handling every aspect of the Cooby integration:

- Designed a sleek UI component that allowed users to effortlessly view chats and dialogues from WhatsApp directly in their CRM.
- Developed an API that enables users to search for leads in their CRM using phone numbers from WhatsApp.
- Built an API that makes it easy to update contact information in Salesforce within WhatsApp, including the ability to attach WhatsApp chats to Salesforce records with just a few clicks.

The result

Our development team delivered a seamless integration solution for Cooby, which has attracted more customers seeking to simplify their lead management. This revolutionary integration has eliminated the need to switch between WhatsApp and CRM, saving valuable time and enabling sales professionals to focus on customer success.

Enhanced prospect
interaction visibility

Efficient CRM
integration

Time-saving sales
process