

Title

Development of a Salesforce package for a provider of embedded financial solutions

Meet the hero

Synebo's client is a provider of embedded banking and financial technology that empowers financial institutions and payment companies to deliver digital finance solutions seamlessly. With its modular finance platform, Synebo's client provides non-fintech businesses with extensive financial capabilities. Its primary customers include banks and similar financial institutions and PSPs & Merchant Acquirers.

About the client	
Industry	Embedded finance, Fintech
Headquarters	London, UK
Founded in	2011
Employees	50-100
Start of the project	May 2016
End of the project	April 2023

The challenge

Synebo's client identified the need to integrate financial data into their Salesforce platform. This would not only cater to their customers' evolving demands but would also allow them to manage and visualize their financial processes better.

The core challenges were identified as:

1. Providing centralized information access: Provide customers with a unified environment where they can view both their financial data and other interactions they've had with the company.
2. Ensuring enhanced customer experience: Improve the overall digital journey for customers by reducing the need to juggle between multiple platforms or applications.

3. Enabling data-driven decision-making: By having financial data within the Salesforce environment, the client intended to provide their end users with deeper insights.

Our solution

To fulfill the client's request, it was decided to develop a Salesforce package that will enable the display of integrated data. It should also support the view of all required connections between different types of related data.

This solution allows for adding analysis of the data inside the Salesforce environment. Naturally, it enhances customers' user satisfaction with Synebo's client's services.

The results

The Synebo team created a new Salesforce package. The package integrates the data from the web instance of the client's product to the Salesforce environment where the package is installed.

The integrated data is saved with the same configurations and connections as on the product instance. It helps the customers of the clients that use Salesforce to manage their financial requests, so it increases the workability of their product and makes it more flexible.

New full-fledged
Salesforce package

The integration of
data that supports
same configurations
and connections

Increased workability
and flexibility of the
customer's product