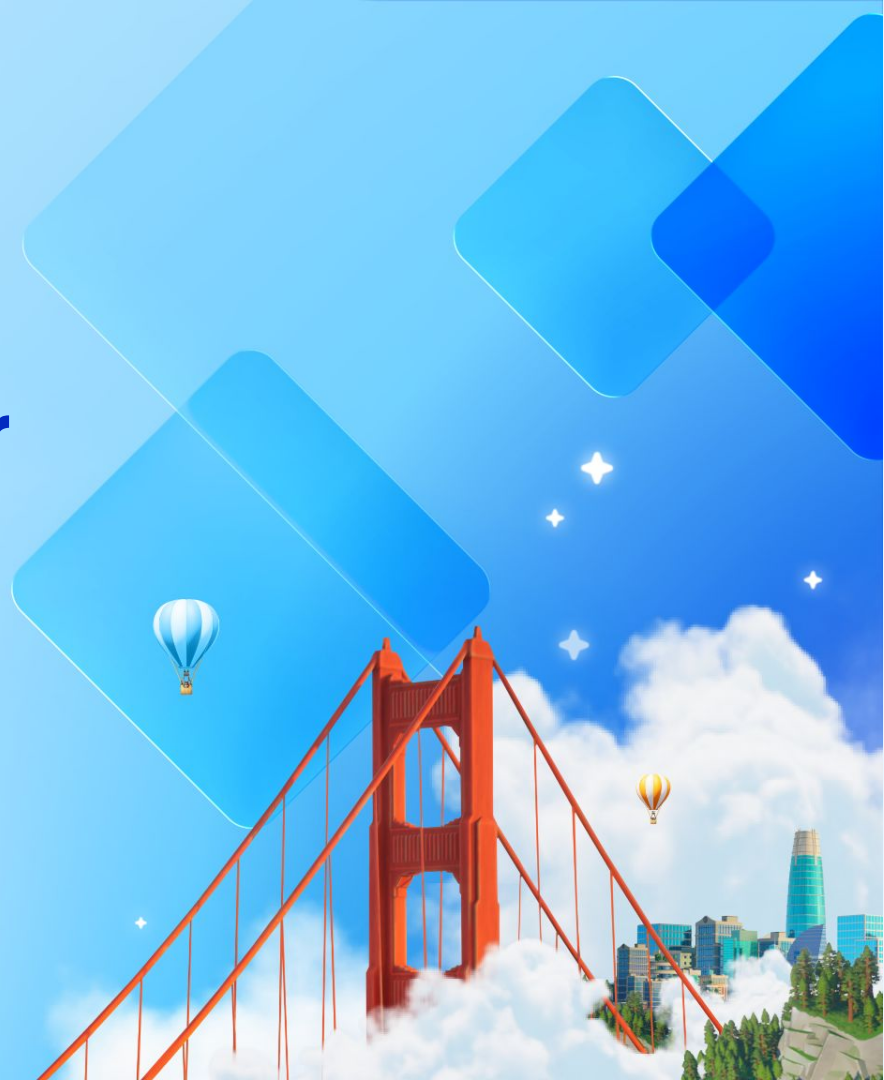




Boost Revenue and Cut Costs with Order Servicing Skills

Dreamforce 2025

October 2025



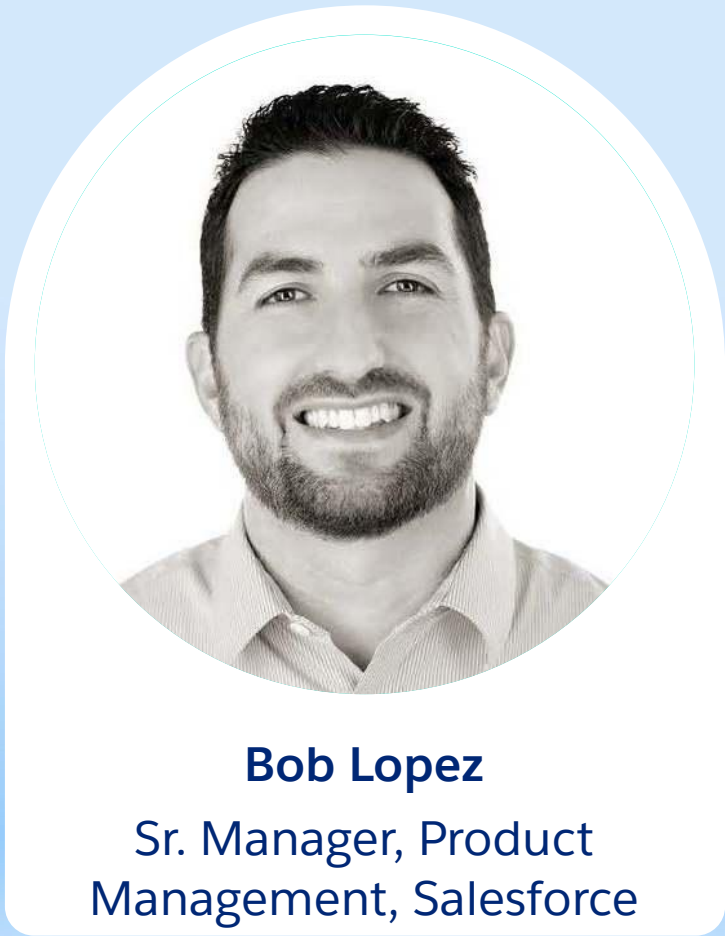
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This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to our ability to consummate the proposed Informatica acquisition on a timely basis or at all; our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.



Thank you





Bob Lopez

Sr. Manager, Product
Management, Salesforce

Connection Is the Heart of Great Service



And your customers expect connected omni-channel experiences

Consistent Experience

84% of customers say companies do **NOT** excel at providing consistent experiences across channels



Connected Technology

70% of cases are about **order tracking and status**, but that data is in disconnected back office systems



The Role of Customer Service Has Expanded

Service teams don't just solve problems – they drive loyalty



Past

1 Service Reps and Mobile Workers

2 Case Numbers

3 Reactive Resolution

4 Customer Support

91%

of customers will make another purchase after a great service experience



Now

1 Trusted Advisors

2 Personalized Interactions

3 Proactive and Predictive Solutions

4 Customer Success



The Gap Between Service & Order Management Prevent Teams From Delivering Great Customer Experiences



Past

1 Service Reps and Mobile Workers

2 Case Numbers

3 Reactive Resolution

4 Customer Support



Lack of Tools for Efficiency



Siloed Data



Manual Processes



Disconnected Departments



Future

1 Trusted Advisors

2 Personalized Interactions

3 Proactive and Predictive Solutions

4 Customer Success

Seamlessly Service Omnichannel Orders

salesforce

Create a single pane of glass experience

Empower reps with tools to service orders

Automate case resolutions with agentic skills

Generate Revenue from the Service Center

Agentic Order Support

Return Reason Enhancements

High Scale Order Ingestion

30% Decrease

in support time after self-service deflection and call resolution for orders

The screenshot displays the Salesforce Order Support interface, featuring a 'Service Console' header with tabs for 'Order Summaries' and '00000111'. The main content area is divided into several sections:

- Totals:** A summary of financial data including Subtotal (USD 55.50), Order Adjustments (USD 0.00), Shipping (USD 1.00), Tax (USD 0.34), and a Total of USD 56.84.
- Actions & Recommendations:** A section with an 'Add' button and a list of actions: 'Cancel Item', 'Discount Item', 'Return Item', and 'RMA Return Items', each with a right arrow icon.
- Order Summary:** A detailed view of order 00044205, showing account information (Jess Smith), ordered date (5/5/2021, 8:07 AM), status (Fulfilled), billing address (5555 Main St, Burlington, MA 01803, US), sales channel (alpine), and tax locale type (Net).
- Summary:** A table listing order items with columns for Product Name, Name, Description, Status, Quantity, Unit, Line, Adjusted Line, and Total. The table shows three items: 'Standard Ground Shipping' (Fulfilled, 1 unit, USD 1.00), 'Alpine Energy Drink' (Fulfilled, 1 unit, USD 55.50), and 'Alpine Energy Drink' (Fulfilled, 1 unit, USD 55.50).
- Shipping Addresses (1):** A table showing one shipping address for 'Jess Smith' at '5555 Main St, Burlington, MA 01803'.
- Order Payment Summaries (1):** A section for payment details.

The interface is designed for a 'single pane of glass' experience, allowing users to manage orders efficiently. The URL at the bottom indicates a demo environment: 'https://pandemo.lightning.force.com/lightning/r/OrderSummary/10a8000000004s9wKAA/view'.

Customer Success All Over The World

salesforce



claire's

BUCHERER

PERCASSI



MOVADO
THE ART OF DESIGN

THE
ABNORMAL
BEAUTY
COMPANY.
DECIDY

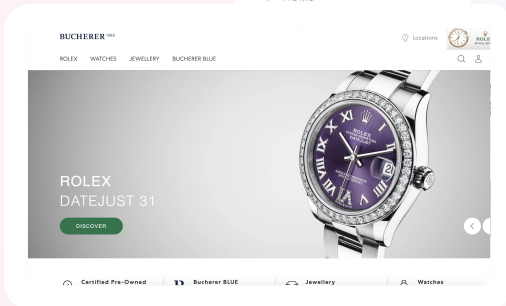
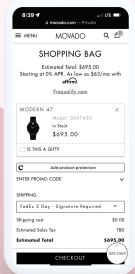
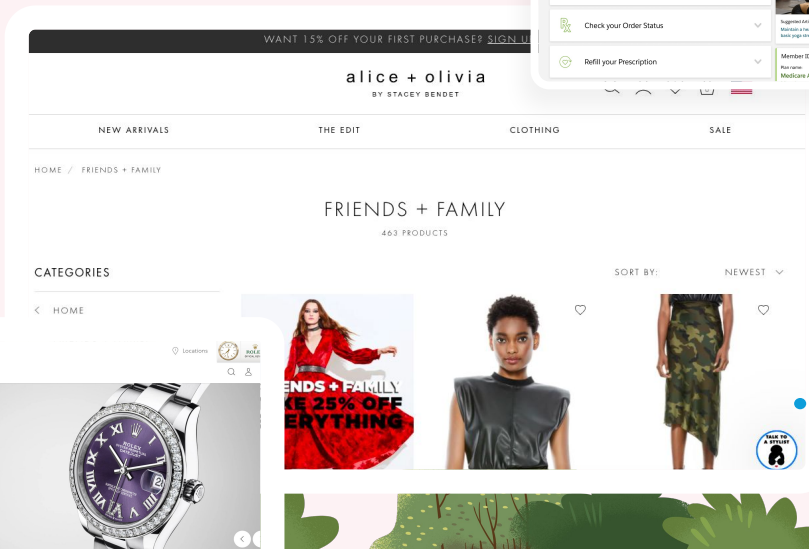
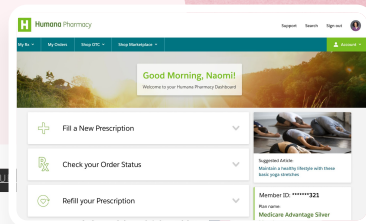
GANT

Funko



Fisher & Paykel

DAVID YURMAN



"Order Management enables us to drive high first-call resolution - more of our customers don't require escalation. This allows us to deliver five-star customer service."

- Christy Sports



Meet Today's Experts!



John Cardaris

Director, Product
Marketing

Salesforce



Mitch Springer

Director, Digital
Transformation

Formerra



Nick Schulte

GTM Lead, Salesforce
Technology Practice

Merkle

Transforming Order Processing to Enhance the Customer Experience

Problem

Manual order entry, outdated OCR tools, and inaccurate customer identification slowed down their order processing and increased errors. Back office connectivity to SAP / ERP data led to disjointed customer experiences and limited visibility into crucial data like product availability. Frequent manual validation added to staff workloads and reduced efficiency. Streamlining these processes with modern automation was essential to improving accuracy, speed, and overall order management performance.

Solution

Formerra is laser focused on their customer experience. They carefully picked the solutions and tools in order to enable their teams to offer exception omnichannel ordering experiences. With Salesforce OMS, Mulesoft and AI-powered automation solutions they now offer accurate PO and customer identification, seamless data extraction, and faster order validation. With fewer manual touches and real-time access to product availability, orders are confirmed quickly and reliably, ensuring a consistent, efficient, and expedited ordering experience.



60%

Fewer Manual
Touches on Orders

50% Faster Order
Confirmations



Michael Lane
Chief Strategy Officer

"Implementing Salesforce Commerce and OMS has enabled us to deliver an industry leading customer experience, including 24/7 order management and placement, streamlined order processing, and faster confirmations."



Salesforce Products Used



B2B
Commerce



Order
Management



Formerra.com

Find more stories at
salesforce.com/customers

FORRESTER TOTAL ECONOMIC IMPACT

Manage, fulfill, and service orders more efficiently.

Read how

A cartoon illustration of a person wearing a brown bear costume, holding a large white circular sign with the Forrester logo. The background features a stylized landscape with orange mountains, green trees, and a blue sky with clouds. A shopping cart icon is visible in a white circle above the person.

FORRESTER®



Thank you

Formerra Order Support Panel Discussion

1. Share an intro about Formerra and your role
2. What are your goals
3. Why did you choose OMS what challenges were you looking to solve
 - a. How do you see Salesforce and SAP working together
 - b. How are you looking at using AI with Order Management and Salesforce
4. Where are you today with phase 1, and what's your vision for phase 2
5. Forward looking how are you thinking about generating revenue from the freed up service team to better the customer experience
6. What are some pieces of advice for folks looking to get started

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