appex Consulting

Your growth, powered by Salesforce

salesforce
CONSULTING
PARTNER

About Appex

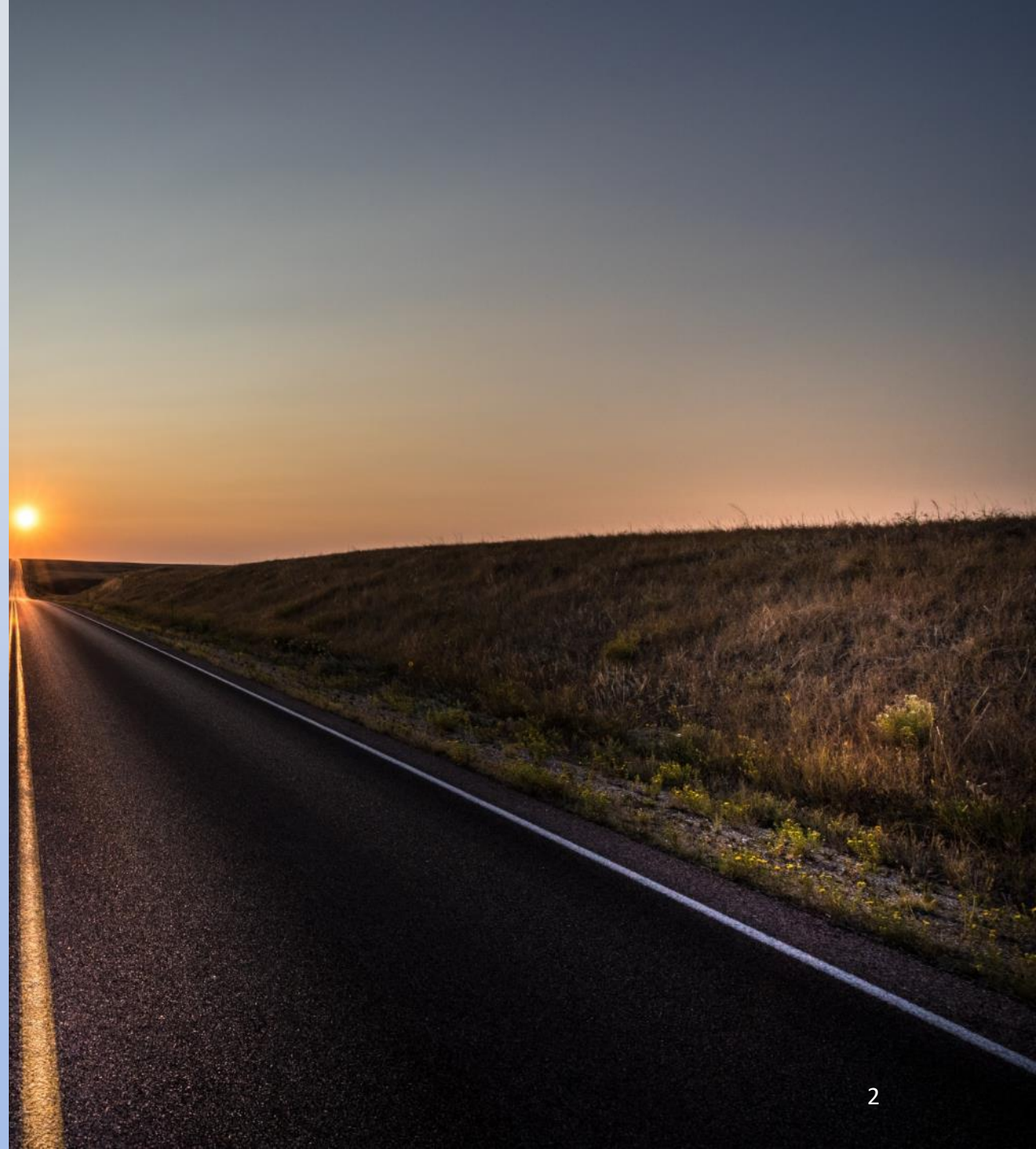
Appex is a certified Salesforce Consulting Partner[1] headquartered in Greece that serves clients globally.

We are experts in Salesforce,
the best CRM platform globally.

Our extremely agile structure empowers us to tailor our services to companies of any size.

We enable our clients to adopt any Salesforce offering in order to elevate various aspects of their business, such as Sales, Customer Service, Marketing, Analytics & IT and truly digitize their processes.

[1]: For more information about the Salesforce Partner program, you can visit here



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Our Vision

We aim to become Europe's No.1 Salesforce consultancy for emerging markets by:

Focusing on Businesses of All Sizes

We bridge gaps of knowledge and other resources that usually forbid non-enterprise companies to realize the value of Salesforce.

Specializing in Salesforce

By being a Salesforce-exclusive consultancy, we create more value through our deep technical and commercial knowledge.

Operating Globally & Staying Agile

Our team is global, flexible, fully remote and proud of it! That is how we quickly solve problems for clients of any industry or size.

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The Salesforce Advantage

salesforce

Customer Relationship Management (CRM)

Manage customer relationships & improve internal collaboration

Automation

Native & custom flows to free up employee time and streamline operations

Scalability

Salesforce is 100% cloud-based, a perfect fit for growing businesses

Data-Driven Decision-Making

Robust analytics, reports & dashboards **powered by AI**

Integrations

Connect with 3rd party systems (ERP, marketing automation, e-commerce etc.) to centralize all data of your business

The world's #1 **AI, Data & CRM** platform[1]

[1]: International Data Corporation (IDC) ranked Salesforce #1 for the 9th consecutive year

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Our Services

4 different service packages to cover all your needs around Salesforce

Implementation

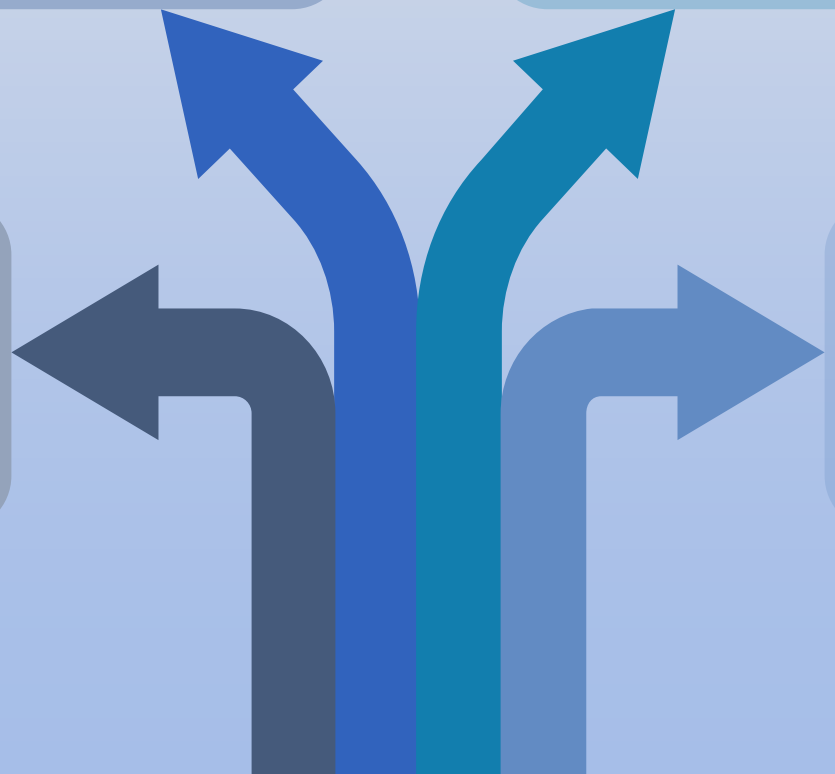
We build the Salesforce platform for you

We adapt the platform to your exact needs, customize any item you need and integrate it to other third-party systems you may use (e.g. ERP, marketing tools etc.)

Managed Services

We handle all your Salesforce back-end activities

If you already use Salesforce, we provide all the required maintenance & support services to minimize your effort (administration, automation building or general support)



Consulting

We advise you on Salesforce

We help and train you on the platform or educate you on the best cloud for your business

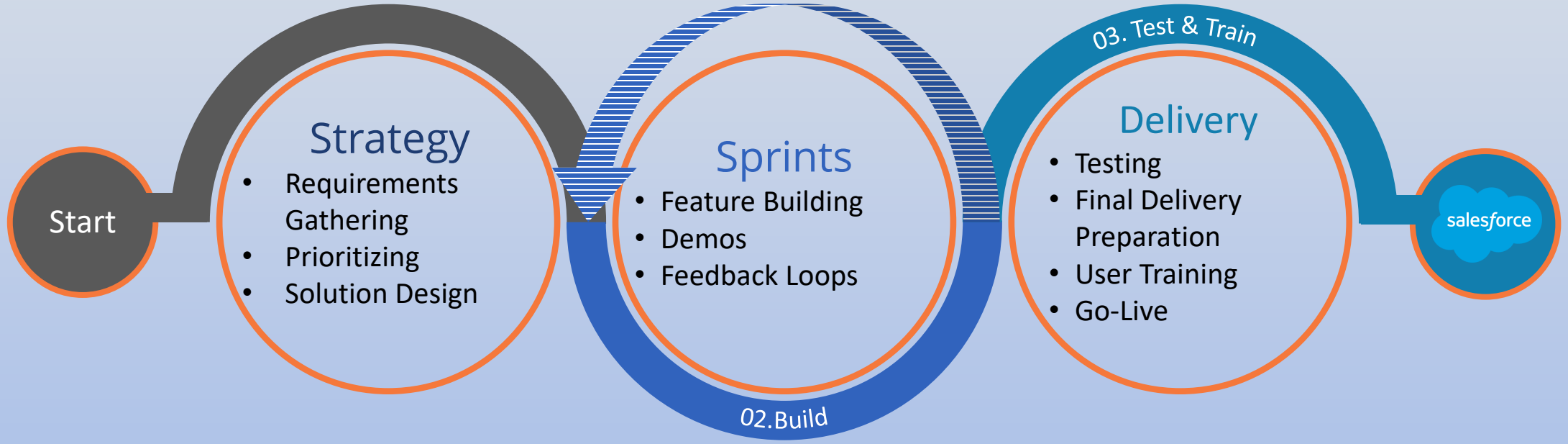
Org Optimization

We fix your Salesforce Org

If you notice problems in your existing Salesforce instance, we perform system health checks and help you optimize it

The Appex Project Methodology

We follow a flexible approach on each project to ensure quick delivery and optimal results



Pathways After Go-Live:

Project Warranty | Follow-Up Phase(s) | Appex Managed Services

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Appex Managed Services

Complete post-implementation Salesforce support

Delegate your Org's Management to Our Salesforce-Certified Experts

- Own your Salesforce Org without the need for technical knowledge or time devoted by your people
- Fixed amount of hours per month, exclusively dedicated to your business
- Use your hours for any Salesforce-related work
- Roll-over unused hours to the following months
- Option to purchase additional hours under the same (reduced) hourly fee

The Appex Team

We work with 50+ consultants & developers all over the world to cover any project needs

Faidon Giachanatzis

Founder & CEO

Faidon is a seasoned Salesforce professional with more than 3 years in the Salesforce ecosystem and 2 years in Consulting.

Previously employed by Salesforce itself at its European HQ in Ireland, he grew the technology's footprint in the Mediterranean and has witnessed firsthand the value it uncovers for businesses of any size.

Fotis Makridis

Salesforce Tech Lead

Fotis brings extensive expertise in Salesforce architecture, integrations, and technical leadership, enabling Appex to deliver innovative and scalable solutions for each client.

He has strong background in the Pharma, Gaming, and EdTech industries, contributing in how Appex can implement Salesforce successfully across diverse sectors.

Our Certifications:

CERTIFIED Administrator

CERTIFIED Platform Developer I

CERTIFIED Sales Cloud Consultant

CERTIFIED Service Cloud Consultant

CERTIFIED Experience Cloud Consultant

CERTIFIED Revenue Cloud Consultant

CERTIFIED Agentforce Specialist

Thank You!

Any Questions?

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Appendix

Project Success Stories

Project Success Story

Boussias – Publishing & Events Management

The Problem

Boussias, a leading media and events organization in Greece and Cyprus, had already been using Salesforce for three years before engaging Appex. However, their internal structure was highly complex with multiple sales teams operating in parallel, fragmented data sources, and disconnected systems across departments. Teams lacked a unified view of customers and processes required excessive manual effort. Despite having Salesforce in place, the organization wasn't fully capitalizing on the platform's capabilities.

Fit with Salesforce

- **Sales Cloud** provided the foundation for scalable sales processes across diverse business units.
- **Marketing Cloud** enabled targeted, automated communication for events, media products, and subscriptions at scale.

With the right architecture and implementation, Salesforce could become the single, connected operating system for the entire organization.

How Appex Helped

- Built a fully custom and automated Subscription management module to manage new sales and renewals.
- Integrated Salesforce with their e-commerce storefront and their ERP (Entersoft) for real-time alignment across sales, billing, and product data.
- Continuously added new automations to reduce repetitive tasks within Sales Cloud.
- Collaborated with the Boussias database team to unify scattered data into a consistent, reliable source.
- Designed and executed a multi-month training and adoption plan for all departments.

The Result

Boussias now operates on a unified Salesforce setup with cleaner data, connected systems, and significantly improved team productivity. Sales and marketing activities run more efficiently, reporting is clearer, and repetitive tasks are largely automated—giving teams more time to focus on revenue-driving work and supporting the company's continued growth.

Project Success Story

OTRO Pay - Fintech

The Problem

OTRO Pay, a newly established Electronic Money Institution, needed to fully separate its CRM operations its sister company, OKTO Pay, following organizational changes. The existing Salesforce environment hosted critical sales, approval, and compliance processes, along with historical data across EU & UK markets. OTRO required a seamless migration to a standalone Salesforce org without disrupting ongoing operations, losing data relationships, or breaking complex automations and DocuSign-based contract workflows.

Fit with Salesforce 📈

Salesforce Sales Cloud provided the foundation for rebuilding OTRO Pay's CRM operations in an independent environment while preserving existing business logic. Native Salesforce migration capabilities, combined with Apex, Flows, and approval processes ensured continuity of sales operations, governance, and compliance within a clean, scalable Salesforce org.

How Appex Helped

- Delivered a full Salesforce org setup for OTRO Pay, including company configuration and Sales Cloud setup.
- Migrated core CRM objects (Leads, Accounts, Contacts, Opportunities) with full data relationships preserved across EU & UK markets.
- Migrated critical business automation including Apex classes, Flows, approval processes, validation rules, profiles, sharing rules, and email templates.
- Migrated historical files (contracts, PDFs, Excel and CSV files) linked to Accounts and Opportunities.
- Implemented and configured the DocuSign Salesforce connector with OTRO-specific templates, signer roles, and approval flows.
- Supported user creation, role setup, and access control to ensure secure and compliant operations from day one.

The Result

OTRO Pay successfully transitioned to a fully independent Salesforce environment with zero data loss and uninterrupted business operations. All critical sales, compliance, and contract workflows continue to operate as expected, enabling OTRO to run Business-as-Usual immediately after go-live. The new Salesforce org provides a scalable, secure foundation to support OTRO Pay's growth and future enhancements.

Project Success Story

Proximed & Africa Biosystems - MedTech

The Problem

Proximed and Africa Biosystems Limited, 2 prominent MedTech sister brands in Sub-Saharan Africa, were operating with fragmented sales processes, no unified pricing structure, and manual quote creation. With key financial data sat in separate systems, there was slower decision-making and errors across countries and teams. Field Sales had no route optimization or map-driven prospecting, and leaders had limited visibility into their activities.

Fit with Salesforce

Sales Cloud with **Salesforce Maps** provided a scalable backbone for lead-to-quote automation, territory management, and field productivity, while enforcing data quality and security. A custom integration with **Oracle NetSuite** delivered bi-directional sync for Accounts and Quotes, linking commercial and financial data for a single source of truth. The platform also allowed country-specific processes and currencies without compromising reporting.

How Appex Helped

- Implemented Sales Cloud and Salesforce Maps on a multi-country setup from scratch.
- Built a secure bi-directional integration with Oracle Netsuite via REST APIs.
- Enabled Maps layers and route optimization for field teams.
- Enforced quote, currency, and data-quality validations and automations.
- Led the Admin and Business Users training and adoption across the whole organization.

The Result

A unified, territory-aware CRM with automated lead routing, clean master data, and governed quoting, eliminating spreadsheets and regional inconsistencies. Field teams plan efficient visits with Salesforce Maps, while finance and sales stay aligned via NetSuite sync of customers and quotes for faster, more accurate decisions and executive visibility.

Project Success Story

Neurolife - Healthcare & Life Sciences

The Problem

Neurolife, a growing medical services provider in Greece, was struggling with manual processes for doctor compensation, shift scheduling and file management. Financial data lacked proper access controls and storage issues were starting to impact daily operations. The existing Salesforce setup wasn't aligned with their evolving needs.

Fit with Salesforce

Salesforce Sales Cloud provided the ideal platform to streamline operations, automate repetitive tasks and ensure secure access to sensitive data. With the flexibility of custom Flows, components, and integrations, it was the perfect foundation for Neurolife's digital transformation.

How Appex Helped

Appex led a full org optimization project, delivering:

- Automated salary and dynamic payment calculations for doctors based on real-time data.
- Shift scheduling and on-duty logging, fully automated and mobile-accessible.
- Integration with Google Drive to manage files efficiently without using Salesforce storage.
- Refined sharing settings and profiles to protect sensitive financial data.
- Custom Flows and objects to support admin efficiency and reporting accuracy.

The Result

A smarter, leaner Salesforce org supporting Neurolife's operations. Each doctor is now more empowered to use Salesforce, as their valuable time is dedicated more to focus on patient care. Manual spreadsheets are gone, file storage headaches are solved, and compensation is now handled with precision and zero manual updates.

Project Success Story

Medousa Developers – Real Estate

The Problem

Medousa Developers, a fast-growing real estate construction firm, struggled with fragmented sales processes across Mailchimp, Outlook, and HubSpot. They lacked a centralized and fully customized CRM, had limited visibility into project-linked opportunities and needed stricter data control and flexible contract management.

Fit with Salesforce 📈

Salesforce Sales Cloud – Enterprise Edition offered the perfect solution: an adaptable, secure platform that could be customized for real estate sales cycles, project-property relationships, approval workflows and automated contract generation—all within a single system.

How Appex Helped

Appex implemented Sales Cloud with:

- Custom modules for Projects & Properties
- A fully automated Quotation & Contract process
- Approval flows, data validation, and file access restrictions
- Migration of all legacy data from HubSpot
- Integrations with Outlook and **Mailchimp**

The Result

The client went live with a fully operational CRM tailored to their needs. UAT passed with flying colors, sales processes are now automated and compliant. The team now has full visibility into their pipeline and projects—ready to scale with confidence.