

CASE STUDY

CLIENT OVERVIEW

Backed with an industrial expertise of over 5 decades, inoday client has been serving to a huge clientele in global marketplace with its exceptional IT services. Having served to clients for nearly 53 years, it has set a benchmark for quality and high client satisfaction by delivering end-to-end software development services following a set of core values. Recognizing the needs of domestic and international customers, our client has consistently delivered valuable services when it comes to Software development. Using SAP Business One ERP and Salesforce CRM Sales Cloud, client swiftly meets the demands of its business associates within promised time frame.

CLIENT'S BUSINESS ISSUES

- Client faced several data management issues due to missing integration between SAP Business One and Sales Data.
- Entire Master data including Accounts, Contacts, Lead, etc. that was entered in CRM system by the corresponding sales representative needed to be manually updated to SAP Business One by company's accountants. This manual process of sales order entry led to too many errors.
- Based on opportunity won/closed on Salesforce, a sales order was manually created into SAP Business One, where there was a huge possibility of error.

SOLUTION OFFERED BY INODAY SALESFORCE TEAM

- Our Salesforce experts performed complete SAP Business One (ERP) Salesforce integration. Contacts, accounts, leads entered in the CRM system were all synced with SAP Business One B. P. Master Data as Leads. As soon as Leads were qualified in CRM and got converted into Accounts and Contacts, the corresponding Lead in SAP Business One B. P. Master Data got updated as Customer; and the CRM Contact was added as Contact Person in B. P. Master Data. Similarly SAP Business One B. P Customer and Contacts can be uploaded to CRM system and it creates new Contacts and Account.
- Similarly CRM Opportunity was synced with SAP Business One ERP system as Sales Order. Everything like Items Selected, Discounts (if any), billing and shipping address entered at the time of opportunity created were also synced back to SAP Business One ERP system. Further, based on the business requirements, the integration was also performed to sync opportunity created in Salesforce CRM with SAP Business One ERP system as a Sales Order for further order processing needs.

IMPACTS OF SAP BUSINESS ONE & SALESFORCE INTEGRATION

- Client got smooth in-house business processes with SAP Business One and Salesforce integration.
- Due to successful SAP Business One ERP and Salesforce integration, qualified Leads were converted into Contacts and Accounts that immensely helped their sales team members.

