

CASE STUDY

SALESFORCE & EPICOR INTEGRATION



Increased effciencies including data visibility, communication, and time.



Quote-to-order processing time dropped 25% during first year.

CLIENT: CUSTOM VALVE ACTUATOR MANUFACTURER

CHALLENGE:

- Give leadership real-time sales and manufacturing reports and dashboards that is difficult to access using the legacy ERP (Epicor).
- Create real-time operational reports and dashboards for the factory floor.
- Streamline sales and manufacturing workflows with new digital workflows.
- Reduce reliance on manual spreadsheets.
- Reduce risk of data error with less manual data entry.

SOLUTION:

- Integrated the Epicor ERP sales and manufacturing data with Salesforce using Mulesoft.
- Implemented a cloud-based workflow solution focused on more efficient processes that replaced the many time-consuming spreadsheets.
- Provided Salesforce reports and dashboards for all areas of business and made sure they were mobile friendly

RESULTS:

- Increased efficiencies across several key areas including data visibility, communication, and time.
- Quote-to-order processing time dropped by 25% during the first year. They also went from using 12 spreadsheets during order fulfillment to using none.
- Rate of data entry errors during the order processing became negligible.
- C-Suite was finally able to access real-time manufacturing and sales data with a highly-intuitive, user-friendly and mobile-friendly dashboard.

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Salesforce Integration with Manufacturing ERP

A manufacturing client had some pain points that are pretty familiar to similar companies within the same space. Namely, the firm wanted to both boost top-line sales and their bottom line profits. A key sticking point in reaching these objectives was the client's inability to tap into realtime sales and manufacturing data because of an outdated cloud/serverbased ERP known as Epicor. Currently, C-Suite needed to wait for reports generated at month's end for this kind of information.

The client also wanted to reduce processes for both manufacturing and quoting, increase the manufacturing and sales data visible across all levels, and reduce their reliance on spreadsheets. A decrease in errors during the data entry phase, as well as the manual resources needed for data entry, was also desired. As soon as CLOUDSTREET was contacted, it was evident that Salesforce was the perfect fit for this client. We set about integrating sales and manufacturing data from Epicor ERP with Salesforce using Mulesoft. While the client will continue to use Epicor as its primary ERP, they will implement the Salesforce platform to add to or replace certain processes that might not be usable in their current form or lack the functionality they need.

We also implemented a cloud-based software solution focused on new processes that can replace those that are outdated such as the many timeconsuming spreadsheets. By doing so, the client can reduce the manual entries needed as well as human error.

This solution also increases efficiencies across several key areas including data visibility, communication, and time. By integrating the Salesforce CRM solution, sales processes such as lead tracking, accounts, transactions, contacts, opportunities, as well as their related reporting, can be accessed.

The results for our client were pretty impressive. Their quote to order processing time dropped by 25

percent during the first year. They also went from using 12 spreadsheets during order fulfillment to using none. Instead, they rely 100 percent on Salesforce. By doing so, they enjoy streamlined planning, work management, scheduling, quality control, and inspections.

The rate of data entry errors during the order processing became negligible. To top it all off, C-Suite was finally able to access real-time manufacturing and sales data with a highly-intuitive and user-friendly dashboard.

Making the switch from a system that is a patchwork of different solutions that aren't working well can be overwhelming. Not knowing where to start and which solution will best meet their objective is why this client turned to CLOUDSTREET. Implementing Salesforce made the sometimes challenging process of changing gears worthwhile with the benefits it provides.

CONTACT US NOW TO EXPLORE SERVICE OPTIONS

We are in business to help you build a solid foundation for business success through informed and efficient use of available and transformative technology. CLOUDSTREET has the resources, the tools, the people and the commitment to help you achieve the goals you set for your business.