

# Automation of data movement between Salesforce CRM and Cloud ERP



## Introduction

Several manufacturing organizations have well implemented ERP and CRM platform systems in place. Most of the organizations find keeping business critical data in-sync across both systems to be an uphill task. Such systems could prove to be a disorganized jumble of on-premise and/or cloud applications that users must toggle between, using different login credentials and workflows. Trying to keep all such data organized and up to date is resource-intensive, eating up man-hours and despite best efforts could still prove to be error prone.



### Customer background

- ▶ The customer is a US based leader in discrete manufactured specialized products, having thousands of operational SKUs and a global client base.
- ▶ The customer organization is using cloud ERP for manufacturing developed by Global Shop Solutions and Salesforce as their core CRM system to maintain details including those for products, pricing and locations.



### Requirement

- ▶ Customer needed to improve productivity by implementing a cost-effective & reliable automation solution that would help integrate CRM data with ERP.
- ▶ Key requirement was to automate data movement between Salesforce CRM and the Global Shop solutions manufacturing ERP for customer orders, inventory quantity, inventory costs, pricing information, delivery dates, shipping & billing address locations.



### Scope

- ▶ Once an opportunity is won, order gets created in Salesforce. All data related to such customers & orders needed to be automatically moved to ERP system for further processing, order tracking/monitoring & delivery purposes.
- ▶ To integrate such data with invoices, delivery and performance management data in ERP.
- ▶ Extensive testing to ensure 100% data accuracy as the data gets integrated between source and destination systems.



## Solution

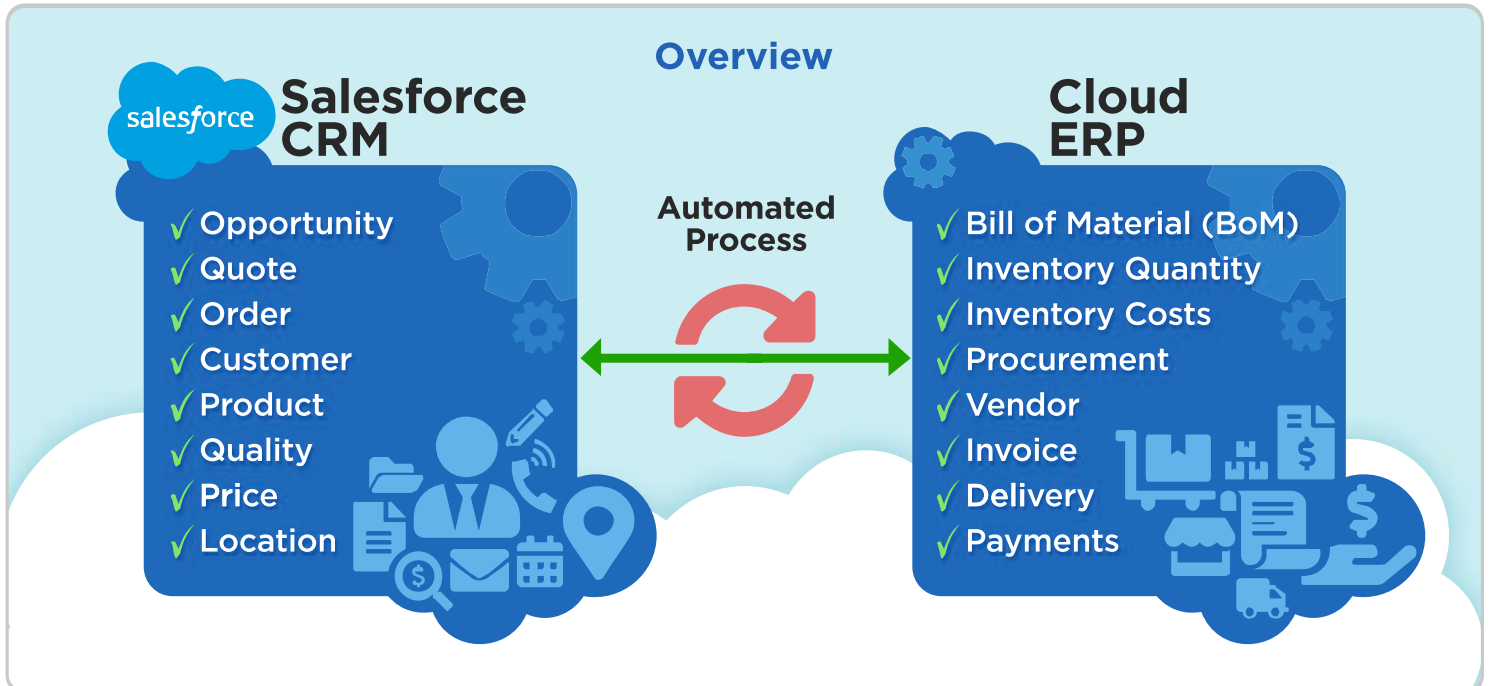
Aress software developed and implemented a customized solution that helped in:

- ▶ Automating data movement by scheduling an hourly run between Salesforce CRM and the cloud ERP, thereby ensuring that business critical data in both CRM and ERP systems is always in-sync.
- ▶ Captured processing errors / exceptions and sending email reports to concerned stakeholders for subsequent action.



## Business Benefits

- ▶ **Productivity Improvements** - A well-implemented integration of ERP with the Salesforce CRM project resulted in improved data quality owing to minimal manual intervention. This helped improve productivity & operational visibility for customer's manufacturing operation.
- ▶ **Reliable and Scalable Solution** - The solution has been tested for 100% data accuracy and plan is to scale it up to include advanced analytics and artificial intelligence for obtaining better insights into the manufacturing operation.
- ▶ **Cost Effective Solution** - This solution was a cost-effective & fully customized mechanism to kick start automation in the organization as compared to a costly product focused implementation.
- ▶ **Automation First Approach** - This is the first automation project for the customer, and it is helping them kick start 'Automation First' approach/ thinking and its implementation within the larger organization.



## Contact Us

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