



SYNC Gives Sales & Engineering Access to ERP Data in Salesforce

Commercient SYNC Integrates Epicor 10
& Salesforce Enterprise

“SYNC helps tell the story about Pleatco's performance and they can make faster and more accurate decisions.”

“Salesforce becomes the system of truth with Commercient SYNCing Epicor 10 data.”

CHALLENGES	SOLUTIONS	RESULTS
Implement a state-of-the-art, cloud-based CRM solution	Salesforce Enterprise, the leading CRM in the world	Pleatco has modernized their sales processes
Data between Epicor 10 and Salesforce remained siloed	Commercient SYNC, the #1 data integration platform for sales	Both the sales and engineering teams can access ERP data in Salesforce
Create a CRM to ERP data integration	Commercient's Phase 2 SYNC	New accounts, sales orders, and contacts created in Salesforce are SYNC'd to Epicor 10, saving time

Detailed Info and Quantitative Results



"With the Epicor 10 data SYNCing into Salesforce, it's telling a story about Pleatco's performance," explained Mike McGibbony, Founder and CEO of WhiteRock. "They can make faster and more accurate decisions based on what's happening."



Pleatco utilizes Epicor 10 for accounting and operations, and they implemented Salesforce Enterprise, the world's top CRM solution, to modernize their sales processes. They worked with WhiteRock to help improve their use of Salesforce.



"We worked with Pleatco to help them become very competitive and fast with Salesforce, which then becomes their single point of truth," said McGibbony. "And over time, other departments will use Salesforce, such as Operations, Production, and others."



Data between Epicor 10 and Salesforce remained siloed, so Pleatco and WhiteRock chose Commercient SYNC, the #1 data integration platform for sales, to connect their systems.

Detailed Info and Quantitative Results



Pleatco can access data Epicor 10 in Salesforce Enterprise, thanks to Commercient SYNC. This includes **customer information, accounting records, users, sales orders, orders released, invoicing, serial numbers, item master, price levels, manifest module, Erp.CustomerPriceLst, Erp.PLGrupBrk, Erp.PriceLst, Parts, etc.**



“Pleatco is now seeing not only Epicor 10 data coming into Salesforce that their inside and outside sales teams can use, but their engineers have access to some of that data, as well,” explained Mike McGibbony.



New accounts, sales orders, and contacts created in Salesforce Enterprise are SYNC'd to Epicor 10, helping to save the team at Pleatco time by eliminating double data entry and possible errors.



“Commercient has the ERP and Salesforce data flowing back and forth, so they can work in one system, Salesforce, instead of two, three, or four,” concluded McGibbony.

Company Profile



At Pleatco Filtration, their goal is to provide clients with a quality customer support experience whatever the need may be. Whether trying to identify their filter for replacement or if they need some help understanding how to remove, clean or replace their customers' cartridge the are here to find answers and solve problems. Pleatco is a leading designer and manufacturer of pleated filter cartridges and other filtration products for the pool / spa and industrial end markets across both USA and Europe. Products are marketed under the Pleatco Ultra and Pleatco Advanced brands, which are backed by an industry leading engineering, product development, sales and marketing and customer service teams.

LOCATION	<i>Louisville, Kentucky</i>
EMPLOYEES	<i>31-50</i>
INDUSTRY	<i>Manufacturing & Distribution</i>
Customer Business Model (B2B, B2C, or Both)	<i>B2B</i>
SOLUTION(S)	<i>Commercient SYNC</i>
ERP & CRM	<i>Epicor 10 & Salesforce Enterprise</i>
GO LIVE DATE	<i>2022</i>

ABOUT COMMERCIENT



Commercient SYNC makes ERP and CRM data integration simple, quick, and efficient. Over the years we've helped companies of all sizes integrate their ERP data with their CRM system, helping businesses become more efficient.

Our SYNC integration has grown to over 110 systems, including Sage, QuickBooks, Acumatica, Epicor, SAP, SYSPRO and many others. With our ERP and CRM integrations, your data is synced to both systems in real time without the need for manual data entry, or the risk of human errors.

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