

SMART ACCESS TECHNOLOGY COMPANY · ENTERPRISE

Salesforce CRM, Shopify Plus and NetSuite connected: order management cost down 48%

48%

cut in order management and processing costs

2 → 1

commerce platforms

1 click

Push to Shopify action in Salesforce starts an order from the opportunity

THE PROBLEM

B2B orders ran on one commerce platform, retail orders on Shopify, and accounting on NetSuite. Partner pricing, product visibility rules and order data were maintained in more than one place, and reps could not start an order from the CRM.

WHAT WE DID

We consolidated all commerce onto Shopify Plus, migrating partner contacts, customer-specific pricing and product visibility rules. We connected Shopify Plus, Salesforce CRM and NetSuite through Workato, added a Push to Shopify action in Salesforce so reps create orders from the opportunity, built custom checkout fields, and automated billing through NetSuite.

RESULTS

- 1 Order management and processing costs cut by 48 percent.
- 2 One commerce platform in place of two, with consistent customer and order data across CRM and ERP.

CLIENT

Smart access technology company, enterprise scale

OUR ROLE

Commerce consolidation and integration

SYSTEMS

Salesforce CRM, Shopify Plus, NetSuite, Workato

TIMELINE

6 to 12 months

Partner contacts, customer-specific pricing and product visibility rules migrated; billing automated through NetSuite.