

Client

One of the fastest-growing logistics service providers in the world. It operates in sea logistics, air logistics, road logistics, and contract logistics, with a clear focus on integrated logistics solutions.

Solution

Salesforce, Integration

Industry

Logistics

Challenge

The client uses Sales and Service Clouds for the sales and customer support departments. The client has on-premise SAP to clarify warehouse stocks and inventory position numbers. SAP is responsible for logistics. There is also a separate financial module for placing orders and controlling payments.

The client's goal was to build an efficient system of transit and data synchronization from SAP ↔ SF and vice versa. When working with opportunities, agents were struggling to have up-to-date information about the availability of goods, upon completion of the sale. The delivery and payment mechanism must be launched on time.

The main challenge was that the SAP part was exclusively intranet and did not have a public API. Access was possible only from the local network.

Solutions

According to the client's requirements and the plans for further complication and scaling of their processes, our specialists proposed MULESOFT as the main connector solution to transit data from SAP to the Salesforce system.

MULESOFT IMPLEMENTATION includes the next 2 steps:

The first one was the data sync between SAP and Salesforce.

The second point was to update SAP data and set up the PushTopic event that is sent every time when the stage of opportunity is changed to a closed one. RA development team create an intuitive interface of dashboards and order creation, especially for the sales team, which became quick and painless.

Mulesoft was converted to be run by docker (soft) from the company's intranet.

Results

- **Since the client was already using some SF products, it was necessary to transfer all data from an existing CPM system to SF in order to use the whole data to its fullest and get a profit**
- **The Pipeline & Forecast Management Altogether, helps sales teams predict both short-term and long-term performance to make informed business decisions and to plan ahead in line with comprehensive forecasting based on KPIs. The real-time view of forecasts allows for making adjustments at right time.**
- **Simplify Contract Creation and Renewal of Quotes**
- **CPQ Salesforce (configure, price, quote) tool automates the pricing configuration for faster and more accurate quotes. With fully integrated invoicing that's ready in minutes, and perfect every time you can: Configure Complex Deals in minutes.**
- **Unify Sales and Finance without the need for endless meetings**
- **Reduce the Human Errors and Operational Costs**
- **Fasten and Shorten Sales Cycle**

"We found a great flow of communication and work and we are happy with our business relationship. The engagement has successfully rolled out 90% of CRM operations. Routine Automation's development is streamlining communications, reducing response times, and increasing CSAT. The team understands company ideals and identifies client needs accurately to address issues that arise."