FORTE DIGITAL

PTI Security Systems streamlines their business processes with B2B Commerce

Company overview

PTI Security Systems is a global provider of self-storage access control and security solutions with more than 40,000 installations of PTI products in self-storage facilities in more than 30 countries.

Industry	Headquarters	Founded
Manufacturing	**Scottsdale, Ariz.**	**1979**

Challenge

PTI was using Salesforce CRM with a lot of custom functionality to manage their specific business processes.

Additionally, Salesforce CRM was integrated with NetSuite ERP for customer, order, payment, and invoice management.

Finally, the sync between Salesforce CRM and NetSuite ERP was supported by two different software vendors.

PTI needed a partner that could implement a modern B2B online store and integrate it with the existing IT systems so that their core business processes remain synchronized.

Solution

PTI partnered with Forte to create a brand-new e-commerce solution (enabled by B2B Commerce) that streamlines the purchase process and enables useful self-service options for their customers.

We worked closely with software vendors responsible for the Salesforce CRM / NetSuite ERP sync. The new B2B Commerce solution fully integrates with PTI's existing data infrastructure to maintain efficient internal business flows.

Key deliverables

✓ **Customer and order data sync**
Ability to place an order in B2B Commerce store and pay by a credit card.

> **How it integrates with the existing Salesforce & NetSuite synchronization**
>
> After an order is placed in the store:
> - an opportunity and a quote are created on the Salesforce CRM side,
> - a credit card token (via integration with CyberSource) sent to the ERP.

✓ **Shipping**
Automatic shipping cost calculation (through integration with UPS).

✓ **Backorders**
Customers can order currently unavailable products.

✓ **Invoices**
Invoices are available on the web store, customers can view or download them.

What we did

Forte created a new B2B Commerce store that integrates seamlessly with existing business systems and improves ordering, buying, and self-service experience for PTI customers.

Powered by	Launched in	View demo
Salesforce	**2021**	**PTI store**

Integrations

Third-party products
- NetSuite | ERP
- CyberSource | payment processing
- UPS | shipping cost calc.

Salesforce products
- Commerce Cloud - B2B Commerce
- Sales Cloud
- Experience Cloud
- CPQ
- Salesforce CRM

Results

PTI now has a sleek, easy-to-use B2B storefront that provides a frictionless buying experience and smoothly integrates into the data sync between Salesforce CRM and NetSuite ERP.

- **Effective data sync architecture**
- **Enhanced self-service**
- **Improved customer experience**
- **Reduced sales reps' efforts**