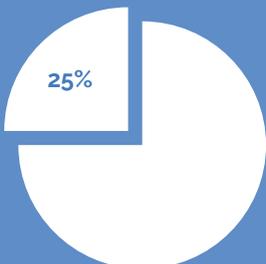


CASE STUDY

SALESFORCE & EPICOR INTEGRATION



Increased efficiencies including data visibility, communication, and time.



TIME SAVINGS

Quote-to-order processing time dropped 25% during first year.

CLIENT: CUSTOM VALVE ACTUATOR MANUFACTURER

CHALLENGE:

- Give leadership real-time sales and manufacturing reports and dashboards that is difficult to access using the legacy ERP (Epicor).
- Create real-time operational reports and dashboards for the factory floor.
- Streamline sales and manufacturing workflows with new digital workflows.
- Reduce reliance on manual spreadsheets.
- Reduce risk of data error with less manual data entry.

SOLUTION:

- Integrated the Epicor ERP sales and manufacturing data with Salesforce using Mulesoft.
- Implemented a cloud-based workflow solution focused on more efficient processes that replaced the many time-consuming spreadsheets.
- Provided Salesforce reports and dashboards for all areas of business and made sure they were mobile friendly

RESULTS:

- Increased efficiencies across several key areas including data visibility, communication, and time.
- Quote-to-order processing time dropped by 25% during the first year. They also went from using 12 spreadsheets during order fulfillment to using none.
- Rate of data entry errors during the order processing became negligible.
- C-Suite was finally able to access real-time manufacturing and sales data with a highly-intuitive, user-friendly and mobile-friendly dashboard.

SALES@CLOUDSTREETSERVICES.COM

+1-713-570-6585 | CLOUDSTREETSERVICES.COM

