

Case Study

Manufacturing Company in UAE supplying parts for Automotive companies

With Salesforce the sales team is able to manage the complete quote to order process and ensure successful order fulfilment based on available inventories

Challenge

Manual Quote management process using MS Excel spreadsheets. Quotes provided to customers in Excel format

Over 100 SKUs were included in a quote making updates cumbersome and prone to errors

Quotes were revised multiple times to present rates and obtain customer updates in Excel

Quotes and Orders needed to be confirmed based on rates and stock in SAP. Information needed to be fetched and updates manually in quote sheets.

Orders manually keyed in SAP after quote approved by customer

Solution

Complete Lead to Order Cycle managed in CRM

Quotes created in Salesforce with option to export quotes and import quote updates from MS Excel minimized manual entries

Product SKUs, rates and updated inventory information obtained through seamless integration with SAP B1

Option to maintain multiple quote versions to track revisions

Automated workflows to generate orders for approved quotes and integrate orders with SAP

Application / Tools



Benefits

Visibility to Opportunity pipeline

Faster turn-around of quotes

Increased Accuracy in Quotes and Orders

Better Production and delivery planning

Timely order fulfilment