Case Study

Clinet - Healthcare Staffing & Travel Enabler

Industry - Healthcare Staffing

About Client -
 They are an award winning Medical Solutions company and is a travel healthcare agency on a mission to help others live better. They were also voted on Glassdoor as Top 50 Best Places to Work (2021)

01 Business Requirements

- Salesforce ATS Implementation
- Lightning Components for Sales, Service, and Production teams
- Targetrecruit Product Configuration
- Multi-Currency Enablement
- Timesheet Automation
- User Training
- Enhancements
- Microsoft Dynamics GP Integration
- Integration of AR / AP Data within Salesforce

02 Business Impact

- A more connected process and systems across the board
- Streamlining Accounting & Sales
- 80% efficiency increase in process of services rendering to Invoicing & Getting paid
- Increased visibility of useable data
- Reducing their Service to Cash cycle to days from weeks

Project Scope

Customer is a user of Salesforce and also an ATS (Application Tracking System). They are an award winning staffing company who ran into issues when the integration between their Salesforce ATS and Accounting did not exist. Also they had a challenge of automating the process of invoicing for all the service rendered after a placement or a job was closed by their team and enabling them to automate the process of invoicing their billable timesheets for the services rendered (Service to Cash) and reduce their overall billing cycle.
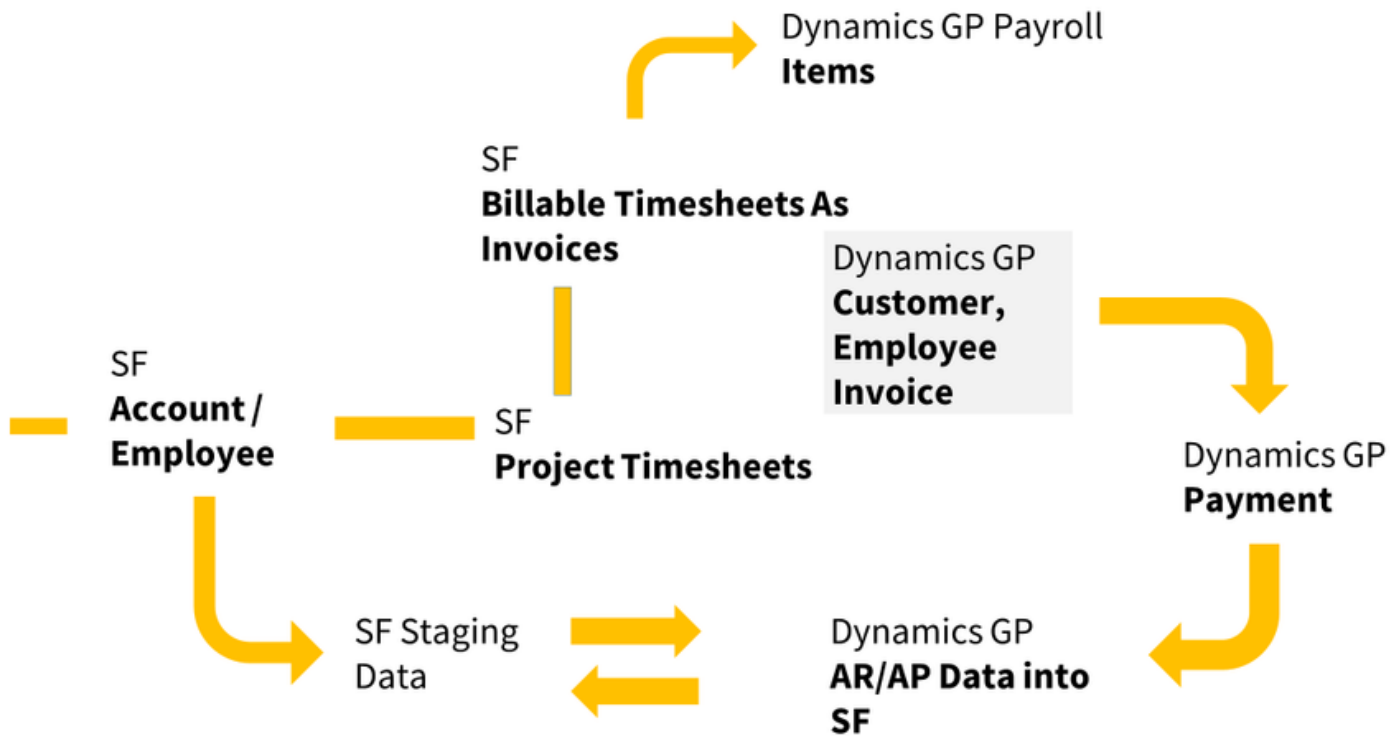
Solution Offered

The client did not have a standard Sales or Service Cloud licenses. Zucitech ensured the sales and services process was seamless by building equivalent components of Opportunity and Project Management objects. Zucitech also deployed several search and other iframe screens specific to Client's business use-case. Automated the process of queuing of timesheets on a bi-weekly basis and aggregating Invoices within Salesforce.

Key Deliverables -
- Auto queuing of billable timesheets
- Segregate all billable timesheets based on their week management
- Scheduling of billable timesheets into Invoices
- Integration of Invoices from Salesforce to Dynamics GP

Integration Solution at a Glance

Dynamics GP Payroll
Items

SF
Billable Timesheets As Invoices

Dynamics GP
Customer, Employee Invoice

SF
Account / Employee

SF
Project Timesheets

Dynamics GP
Payment

SF Staging Data

Dynamics GP
AR/AP Data into SF

Tech Stack & Resource Requirements

- Java, JavaScript
- LWC & Aura Deployment
- Salesforce REST, Bulk and SOAP APIs
- Solution Architects
- Microsoft Dynamics GP SMEs
- **Team Size** - 10
- **Timeline** - 9 Months

Environment

- Force.com Application (Targerrecruit)
- 850 OEM Users of Salesforce
- ERP: Microsoft Dynamics GP
- DB & API: eConnect 2019 & SQL Server Back-end