# A Leading Manufacturer Transformed Its Order and Inventory Management Through ERP Integration with Salesforce

**More Efficient Order Processing. Precise Inventory Management. Improved Customer-centric Productivity.**

DAMCO
Ensuring Success. Always

## Client Profile

The client is a leading fertilizer and agricultural chemicals manufacturer with six production facilities spread across India and UAE. With the aim of bringing affordable and highly effective solutions to farmers, the client offers diverse types of water-soluble fertilizers, specialty fertilizers, and micronutrients. To strengthen their market and serve farmers across the vast geographies, the client has a well-established network of distributors and retailers.

## The Problem

The client was leveraging a legacy ERP system for logging in orders. But a lack of a dedicated interface for order management created inefficiencies including human errors, inconsistencies, and delays in the order management and product stock tracking process. The pre-existing ERP system was available for each user, making it vulnerable to errors. Overall, there was a strong need for a better technology solution for handling business-critical approvals, product stock tracking, and order management and processing. The client had decided to implement a Salesforce platform, integrating it with their existing ERP system using API integration solution. Overall, the integration project had the below-mentioned challenges that needed to be solved by a Salesforce partner.

### Absence of A Dedicated Order Management Interface

There was an apparent lack of a dedicated order management interface that can automate order approvals and management, product stock tracking, and other processes for streamlined order management.

### Legacy ERP Integration with Salesforce

The proposed solution involved the integration between the pre-existing ERP system and Salesforce CRM which brings in challenges due to different data structures and communication protocols, risking delays and other compatibility issues.

**Risk of Data Discrepancy**

There was a need to ensure high levels of data accuracy while migrating product data from the ERP system to Salesforce as inaccuracies in product details could result in order errors and inventory mismanagement, thus impacting overall data integrity.

**Customization & Salesforce Integration Issues**

There was a risk of compatibility challenges due to different customizations during the integration process such as addition of new fields and data transformation.

**User Adoption, Training & Support**

The proposed solution involved transitioning to a new interface with order-based approvals and auto-approvals based on conditions such as credit age and limit. This posed a new challenge in terms of user understanding, acceptance, and effective utilization of the new solution.

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| Lack of a dedicated order management platform | Risks associated with integration of Salesforce and ERP system | User resistance toward new system adoption | Risk of data discrepancies post Salesforce and ERP integration |

# The Solution

Damco's team of Salesforce experts carefully analyzed the business challenges and associated requirements, thereby reaching the conclusion that there's a need to implement the Salesforce platform while integrating it with the client's existing ERP system using API integration solution for streamlining the order management and stock tracking.

**Robust Integration of ERP accounts with Salesforce**

- Damco's team of Salesforce experts integrated the pre-existing ERP with Salesforce that automatically created new accounts in the Salesforce after formal processing, thus eliminating double efforts.

- This credit-based data facilitated order validation for accounts with huge overdue balances.

**Implementation of order management solution**

- The team implemented Salesforce powered order management solution that facilitated ease of sales orders creation, addition of multiple products based on location, warehouse, and stock availability.

- The solution allows order-based approvals once an order is created, thus facilitating automatic submission to ERP after approval.

- We also made tailored provision for auto-approvals when all conditions such as credit age and limit are met for faster approvals and reduced waiting time.

**Synchronization of product data**

Our team ensured that any product data update in the pre-existing ERP system was automatically synchronized with Salesforce, thus making both systems consistent regarding the available, reserved, and booked stocks.

**Comprehensive testing during and post integration**

- Damco's team performed rigorous testing to locate and address any integration challenges during the initial implementation phase to ensure a seamless integration between ERP system and Salesforce.

- We also reviewed customizations and integrations while testing them in the Salesforce sandbox environment before the actual deployment to ensure smooth functioning.

**Data validation and testing**

Our team of professionals performed a thorough data validation and data cleansing process to ensure higher level of data accuracy during the synchronization of product data to reduce the risk of any discrepancy and maintain system integrity.

**Deployment of staged migration and rollback plan**

The team planned for a staged migration with regular checkpoints to assess the progress and address any issue immediately.

**User training and change management**

Damco provided comprehensive training and support to users, ensuring they were familiar with the new Lightning interface.

# The Benefits

The implementation of Salesforce transformed the operational efficiency and decision-making process by streamlining the order management processes, reducing the stockout risk, optimizing resource allocation, and allowing the business-critical administrative forces to focus on more strategic tasks.

**Efficient Order Management:** Significant improvement in order management through order-based approvals and ease of sales orders creation, which streamlined approval process and ensured an efficient order processing.

**Enhanced Visibility into Inventory:** Accurate tracking of available, reserved, and booked product stock through real-time updates, thus providing teams with improved visibility into inventory for better decision-making.

**Reduced Process Administration Cost:** Integration of Salesforce with the formal account processing system automated creation of new accounts, which eliminated the redundant work and reduced workloads on administrative teams.

**Reduced Risk of Credit-related Issues:** Efficient order validation, powered by credit-based information in Salesforce, prevented creation of orders with huge overdue balances, resulting in better financial controls and reduced risk of credit-related issues.

**Accelerated Invoicing & Fulfilling Process:** Seamless data flow between Salesforce and ERP through order integration ensured automatic movement of approved movement to ERP system for expedited invoice and fulfilling process.

**Ease of Accessibility:** The responsive design of the solution allowed client's teams to access critical business data and perform tasks on their mobile while on the field, thus improving their productivity.

**Improved User Productivity:** Enhanced productivity of end users as the Lightning Experience's intuitive interface and enhanced features helped them navigate the platform faster.

**Scalability & Future-readiness:** Being a Salesforce-driven solution, it brought with it the scope of scalability, future Salesforce updates, innovations, and seamless automation.

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## Salesforce ERP Integration Driven Platform For Streamlined Order Management and & Enhanced Inventory Visibility-led Decision Making

### Get In Touch With Our Team of Salesforce Experts

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## About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. We help businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact us to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization

Contact us for more information on Damco's Offerings.

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