

## CASE STUDY

# Automating CRM Processes for Digital Content Provider

**To eliminate redundancies and increase efficiency, a digital content provider wanted to automate the process of connecting the opportunities data from its ordering platform with contact data stored in Salesforce and invoice data stored in Intacct. The Salesforce CRM application developed by OSF Global Services dramatically reduced the manual work by linking the opportunity-to-order and order-to-cash processes.**

## The Client

This company provides a cost-effective and efficient vehicle for businesses, institutions and individuals around the world to acquire and distribute digital content.

## The Idea

Our client uses Salesforce CRM to manage its customer data and Intacct for financial management and accounting. The company also uses a customized ordering platform. The opportunity-to-order data is coming on the ordering platform and in Salesforce (data introduced by our client). To eliminate redundancies and increase efficiency, they wanted to automate the process of connecting the opportunities data from the ordering platform with data stored in Salesforce and the invoice data in Intacct.

## The Solution

The client had distinctive business features, therefore a close collaboration between OSF and the client was necessary in order to understand work flows and business processes.

OSF specialists were able to develop an application that takes the data from the Oracle tables, transforms it, and sends it to Salesforce CRM via a Java-based integration. The import is made at specific intervals to meet the client's business needs, and all of the processes are now automated.

Furthermore, to integrate the client's Intacct platform with its Salesforce CRM solution, we configured each platform's layout, including changing UI's and establishing parameters; and we customized the Salesforce CRM application through Force.com to match IntacctMax based on the client's specific needs.

This way, the data is migrated from the existing system to interconnected Salesforce and Intacct systems, which offer more powerful features, generating accurate overview of customer data.

## Technologies

Intacct API 2.1, Salesforce Web Services API, JEE (JSP and Java Bean), Tomcat 5.5, AJAX, dom4j, Oracle 10g, IntacctMax for Salesforce CRM.

## The Results

OSF Global Services has successfully migrated data from the Oracle tables ordering system into Salesforce and Intacct systems— Sales, Marketing, and Accounting respectively. The two new systems were strategically interconnected in order to generate global reports and complete customer data. The application we developed reduced the manual work by linking the opportunity-to-order and order-to-cash processes.

Automating the internal order-to-cash process has increased employee productivity and optimized business processes across the marketing, sales and accounting departments:

- Sales employees have fast access to customer data and they are able to convert opportunities to orders at the click of a button
- Accounting employees see pricing and terms promised by sales, and neither finance staff nor sales operations has to re-key order data
- Post-sale accounting transactions are automated