

CASE STUDY

Fast and easy financial application integration with Salesforce CRM for improved lead-to-cash process

A leading cloud computing management company needed to integrate their CRM and ERP platforms to increase employee productivity across the organization, enhance customer relationship management, and provide closed loop lead-to-cash management. OSF Global Services specialists implemented the IntacctMax solution for Salesforce CRM using streamline procedures, and successfully automated the internal lead-to-cash process.

The Client

Our client is a leading cloud computing management company offering a cost-effective, scalable platform that delivers on-demand power for name-brand companies.

The Challenge

The client had two requirements: maximize the functionality and performance of their cloud environment to support future business growth; and integrate their CRM and ERP platforms to ensure a seamless experience for their customers while providing closed loop lead-to-cash management.

Services

First, OSF Global Services provided high level technical consulting services for planning the IntacctMax implementation – an application that integrates Salesforce CRM with Intacct for complete lead-to-cash management. This phase required close collaboration with the client to ensure the technical implementation and features of the application matched the company's internal processes.

Then, to integrate the client's Intacct ERP 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.

We then tested IntacctMax using sandbox accounts, staged the solution, and provided technical support and consultative services for integration issues related to the Intacct platform API's.

Because we applied streamline procedures, the customer had IntacctMax up and running and all processes automated within one month from the project kickoff.

Technologies

- Force.com – an extremely powerful and secure platform for custom application development;
- IntacctMax for Salesforce CRM – a solution that closes the gap between sales and finance;
- Intacct Customization Services – set of tools for customizing Intacct ERP;

The Results

Automating the internal lead-to-cash process has boosted employee productivity across the marketing, sales and finance departments:

- Sales employees have quick access to real time customer account status (such as order history, delivery status, AR balances, payment history, etc.); and they are able to convert opportunities to orders at the click of a button
- Finance 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 and revenue management are automated

Also, the solution we customized and implemented:

- improved billing accuracy
- reduced revenue leakage

- supported better cross-functional collaboration
- improved contract management
- led to better reporting and real-time access to key business metrics, facilitating more strategic decision-making