



A leading US restoration contractor leverages DemandBlue's Salesforce integration capabilities to automate their process

The client is a national leader in restoration, environmental remediation, and reconstruction process, providing comprehensive recovery services to address environmental hazards

Challenge

As the nation's leading restoration contractor, the client's employees were working at multiple locations where they procure a variety of materials for their daily operations. This data had to be handwritten in 'Material requisition form.' Someone had to later manually enter this data into their enterprise application, Sage 300 ERP. This manual input led to data inaccuracies, duplication of effort and loss of time. This eventually triggered frequent setbacks to their schedules, and resulted in inefficiencies and project delays. The client approached its technical team for a solution. Their lean in-house team was under duress to quickly come up with a plan to automate the entire process.

Technology/Environment: Salesforce, Jitterbit and Sage 300

Solution

DemandBlue's technical team performed a thorough assessment of the client's technical environment. Salesforce was used as a sales and marketing tool and housed their customer database. Client was using Jitterbit to integrate their invoicing application with Salesforce. Sage ERP was their enterprise tool. DemandBlue's advisory team identified that more than 50% of data written in the 'Material requisition form' pertained to customer information and was being pulled out from their Salesforce instance. Since Jitterbit is a renowned API integrator and as the client was already using it in-house, DemandBlue's advisory team proposed to develop the "Material Requisition Form" in Salesforce and integrate that with Sage 300 ERP using Jitterbit.

How the integration was accomplished:

- Created highly responsive Visualforce pages with dynamic fetching and binding of product list tables. This was done with Apex classes and Visualforce pages
- Since most of data was getting fetched from Salesforce, the team incorporated autocomplete feature to get the respective job details auto-populated
- Enhanced the form filling process to modify the data before pushing to the third party "Sage 300"
- Automated and increased data transition from Salesforce to Sage 300 using JitterBit
- Weekly scheduled data synchronization from Salesforce to Sage 300 via Jitterbit completed the entire automation process

Benefits

- Since a lot of data got auto-populated, form filling time, came down by 70%
- Employees experienced 40% faster task resolution
- Overall project efficiency increased by 35%
- Cost effective solution because the integration was planned using an existing tool like Jitterbit