

APPCENTRICA CUSTOMER SUCCESS STORY

Sunview Patio Doors



Industry

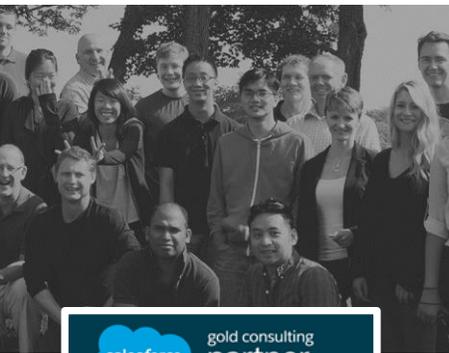
- Manufacturing
- Construction

Project Outcomes

- Unified sales data
- "One-click" reports
- Better visibility

Solution Features

- Sales Cloud
- Syspro ERP integration
- Custom reports and dashboards



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About Sunview Patio Doors

Sunview is one of the largest manufacturers of patio doors in Canada, employing a high-tech manufacturing process to produce vinyl and metal doors.

Challenge

Sunview had been using Salesforce for several years but the executive team was dissatisfied with the return on their investment. The vision of using Salesforce to manage the sales team performance – measuring actual sales from the company ERP against monthly targets set in Salesforce – remained intangible. Sunview struggled with a heavily manual process of aggregating data into Excel for each sales meeting and wasted time and resources trying to reconcile numbers. In addition, Sunview sells their products both through distributors and directly to some customers. While tracking the larger, direct opportunities in Salesforce made sense, there was a huge volume of orders that was being generated directly in Syspro for distributors which remained invisible within Salesforce. Such inconsistencies hindered the sales process at large and contributed to more time loss.

Solution

AppCentrica integrated Salesforce and Syspro and then built a custom solution to automatically create opportunities, ensuring all distributor account orders would be captured in Salesforce and attributed to the appropriate sales rep. Similarly, larger strategic opportunities managed by the sales team in Salesforce flow into Syspro as orders upon entering closed-won status. With data in Salesforce and Syspro now aligned, relevant up-to date reports and dashboards are easily configurable.

Utilizing the now consolidated data, AppCentrica helped optimize the page layouts for sales users and built reports and dashboards for executives to better monitor the team. The reports are updated automatically, fully customizable, and are configured to show sales figures and forecasts by individual; while being aggregated for sales managers.

Outcomes

Integrating Syspro ERP with Salesforce improved Sunview's overall sales efficiency. Data consolidation gave management enhanced reporting capabilities, more accurate forecasting, and better permitted them to track individual performance. It also enabled them to track actuals directly within Salesforce, eliminating manual effort previously spent in excel. The unified data set also directly benefited the sales team. Reps can now access all pertinent sales data within a singular system, therein minimizing data redundancy and inconsistencies. As well, automated opportunity creation has cut down on administrative tasks, empowering the team to focus more of their time on progressing new business.



"I brought in AppCentrica because our Salesforce was not properly integrated with Syspro, our ERP. We needed to ensure that the two systems reconciled Quotes and Orders for our Accounts. The team from AppCentrica built the integration so now our data is consistent and accurate, and my sales reps and I understand the full revenue picture of each Account right from Salesforce. This is a big win for us and we're glad we partnered with AppCentrica."



Tony Margiotta
President, Sunview
Patio Doors