




Case Study


100% Automation of Manual Quoting & Quote-to-Order Integration between Salesforce and Oracle Fusion Cloud ERP


Insight


A digital manufacturing company lacked the capability to deliver accurate and on-time sales quotes due to frequent errors & poor quoting efficiency. It hindered their close rate and adversely impacted their bottom line.

Forsys in collaboration with FloData stitched and streamlined the client's Quote-to-Order process. FloData's bi-directional data synchronization between Salesforce and Oracle Fusion Cloud ERP helped to integrate Quote-to-Order. As a result, they successfully removed friction in the customer's quote/order/purchase process, optimized the customer experience for self-service ordering, and eliminated manual quoting & data inconsistencies.

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Industry Revenue
Industrial Machinery Manufacturing
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Revenue
\$100+ M
- 

Employees
500+
- 

Headquarters
California, US

Business Challenge

The inflexible back-office tools created friction in the manual ordering processes, which hampered growth and customer satisfaction. The client needed an integrated solution that could offer a seamless data flow between Salesforce and Oracle Fusion Cloud ERP, and support collaboration between teams for sales efforts.

The critical challenges faced by the client were:

Manual entry of orders in Oracle Fusion Cloud ERP.

Disconnected quoting and order management systems.

Absence of automated validations/processes.

Transformation Journey

Forsys partnered with FloData to build the near real-time integration between Oracle Fusion Cloud ERP and Salesforce systems. The automatic updates in the Quote-to-Order process improved the productivity of the sales team and back-office staff. The orders created in Oracle are automatically captured and updated in Salesforce, which includes the below mentioned details:

Addition of new line items

Deletion of on line items

Update of line quantities

Splitting line item into multiple line item

Impact

With the Quote-to-Order integration between Oracle Fusion Cloud ERP and Salesforce, the client witnessed:

- ✔ **Reduced friction in the customer's quote/order/purchase process.**
- ✔ **Optimization of CX for self-service ordering.**
- ✔ **Removed manual quoting & data inconsistencies.**
- ✔ **Increased clean orders.**
- ✔ **Improved sales and operational forecasting.**
- ✔ **Lowered time-to-book orders.**

About the Client

The client is a venture-backed 3D printing technology company based in California. The company manufactures solutions that help its customers develop distinguished products and reach the market in less time. Global organizations use the client's digital manufacturing platform to create a wide range of functional end-use parts and print them reliably as required.

Solution Components

Oracle Fusion Cloud ERP, Salesforce, FloData, NetSuite, JIRA