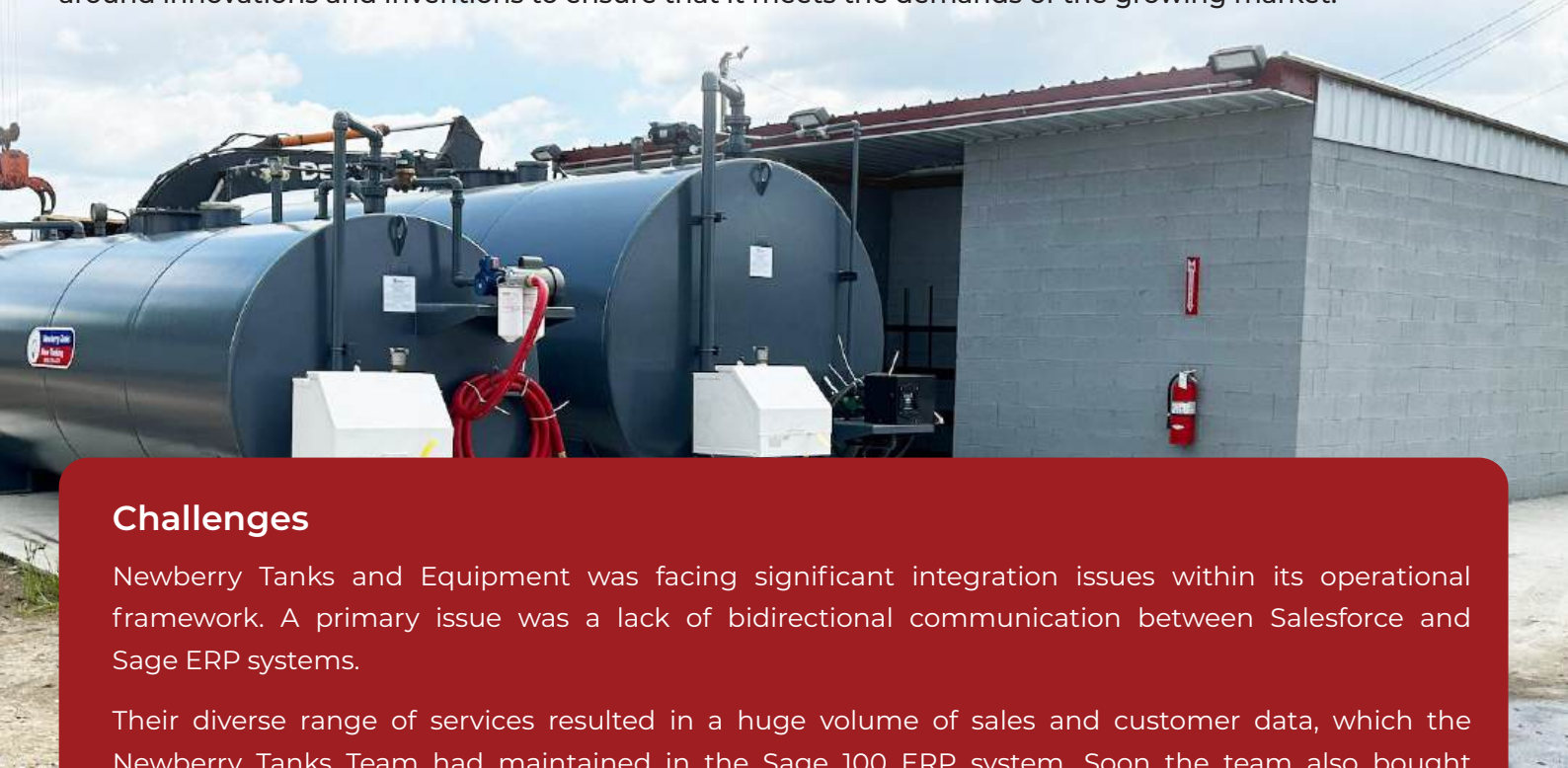


# Streamlining Operations at Newberry Tanks & Equipment with Salesforce and Sage 100 Integration

Newberry Tanks & Equipment, LLC is a leading manufacturer in the oil and petroleum industry based in West Memphis, AR, and Memphis, TN. It provides high-quality tanks and equipment. Its operations are centered around innovations and inventions to ensure that it meets the demands of the growing market.



## Challenges

Newberry Tanks and Equipment was facing significant integration issues within its operational framework. A primary issue was a lack of bidirectional communication between Salesforce and Sage ERP systems.

Their diverse range of services resulted in a huge volume of sales and customer data, which the Newberry Tanks Team had maintained in the Sage 100 ERP system. Soon the team also bought Salesforce CRM to manage leads and customers and effectively maintain orders and cases within CRM. This enabled users in the Newberry Team to incorporate an effective and more reliable way to manage field service work for an extensive customer base.

However, to achieve a better **ROI on the existing Salesforce CRM platform**, the **Newberry Tanks team** required the following –



### Reliable and Sustainable Integration:

A sustainable Integration tool will enable a smooth bidirectional synchronization of Sales, Customers, Products, Product Lines, and other Sales-related information between Sage 100 ERP and Salesforce CRM.



### A Quoting System within Salesforce CRM:

A robust and reliable Quoting system within Salesforce CRM would enable users to enter quotes and Orders for their customers within CRM and transfer them automatically to ERP for shipment and invoicing process.



### Sales Data Tracking System:

Enhanced and advanced reports/dashboards to help users track the sales performance of each user and view YTD (Year-To-Date) or monthly sales.



### Geographical Visualization:

Ways to visualize customers and sales through geographical maps that would enhance the field service experience.



## Solutions

### GUMU™ Integration

We integrated Salesforce with Sage ERP using GUMU™. This integration gives real-time updates on customers, orders, invoices, and inventory levels. We also configured real-time product pricing and AvaTax Calculation functionalities for the Quoting and Order processing in Salesforce. With customized Quick Line entry, we allowed users to enter and select multiple products within Salesforce standard Quote and Order. Users are now able to select diverse tanks and accessories within Salesforce CRM that are synced through systematic scheduled import routines from the Sage 100 ERP system.

The Sales Order promotion process enables users to instantly push Orders from Salesforce to the Sage 100 ERP system. Furthermore, all the invoicing data in Sage is synced back to Salesforce, giving users a complete view of Sales data within Salesforce CRM itself.

### Salesforce Maps

We integrated Salesforce Maps within the Salesforce CRM. This feature visualizes potential clients' locations on the map. This feature lets users get a geographic view of Accounts, Contacts, Opportunities, and other Sales data. We rolled out markers for the Billing and Shipping addresses, drawing out territories for every user. Heat maps helped to identify the volume of Opportunities won and lost in each state for respective users in Salesforce CRM. This enables field service agents at Newberry Tanks to easily track their customers over any street or state in the US region.

Additionally, generic Salesforce Maps features like Routes, and Optimization allows users to measure the distance to reach each lead and account within their respective territory and access real-time traffic information. Furthermore, users can schedule calendar appointments and cadences to visit any account record on a specific day, month, or year.

### Dashboards and Reports

Our team developed custom dashboards with an easy interface and navigation. This new dashboard also aligned with Newberry Tanks' KPIs. We integrated all-inclusive reporting tools, which provide real-time data for different operational functions within the organization.

The various reports and dashboards, such as top monthly, yearly, and quarterly sales data, help users plan their sales strategies more effectively. We also created visually appealing graphical reports and dashboards to help users visualize and understand the sales data synced within Salesforce.

### Continuous Support

Greytrix offered continuous support to Newberry tanks. Our team was responsible for troubleshooting issues. We trained the staff and identified areas that needed enhancement. We ensured that our support evolved along with the business' growth.





### Reduced Manual Process

The integration between Salesforce and Sage 100 led to a significant reduction in manual data entry tasks. This not only saved time but also allowed employees to focus on higher-value tasks, thereby enhancing efficiency and productivity. The presence of sales data in Salesforce CRM has also facilitated easy tracking and monitoring of operational activities.



### Real-Time Data Synchronization

The seamless synchronization between the two systems has significantly improved data precision and accuracy. This has led to the elimination of discrepancies in customer records and sales orders, instilling a sense of trust and reliability in the system.



### Increased sales opportunities

Post-implementation, Newberry Tanks observed a substantial increase in sales opportunities. The geographic targeting feature has empowered the sales team to reach out to a larger number of high-quality prospects, showcasing the growth and potential of the system.



### Higher customer engagement

Accurate data and insights led to a higher customer engagement rate. Based on the insights received after the integration, we planned a personalized approach that led to amazing customer engagement.



### Informed Decision making

The intuitive dashboards provided crucial metrics to the financial and marketing teams, which let them make more strategic decisions. As the data was being updated in real-time in the database, they could also make on-the-spot decisions. Account Dashboards are currently being worked on, and they will immediately impact our employees' ability to gain quick insights at the account level.



### Performance measurement

The reporting capabilities were revamped during the integration. This allowed management to assess individual and team performance regularly, fostering a culture of accountability and continuous improvement across departments.



### Continuous improvement

The feedback loop established through open communication channels allowed for iterative improvements, ensuring that the technology and process align with Newberry Tanks' evolving business needs.

#### We Guide Your Way Through Salesforce with Comprehensive Services:

- Consulting & Implementation
- Integration
- Migration
- 24/7 Support

## About us

Greytrix is a leading comprehensive business process management provider using cutting-edge technologies, including ERP and CRM systems. With years of experience serving clients in over 50+ countries, we intensely focus on the Sage ecosystem, Acumatica, Dynamics 365 CRM, Salesforce, and other systems.

\*\*Data as shared by Newberry Tanks & Equipment LLC on 19th August 2024

