



Case Study

SAM Medical one of the leading US based manufacturer of world-class medical devices brought about functionality, productivity, accountability, and efficiency in their organization by implementing GUMU™ integration of Sage 100 with Salesforce.com and Greytrix as implementation Partner. The integration paved way to create and promote new Customers & Orders on the go, through any device capable to access Salesforce.com and save time on the request raised by the back-end teams, for creating Orders manually in Sage 100 ERP by the Sales Team. They are now able to move data automatically in real-time from Sage to Salesforce, thus improving efficiency and productivity of the Sales Team and Administrators.

Industry
Medical Device Manufacturer

Region
US

Integration Partner
Greytrix

Industry Type
Medical

ERP
Sage 100

Website
<https://www.sammedical.com/>

Overview

SAM Medical was established 35 years ago to fuel the founders' passion for innovation. Within these years it was able to place their name alongside the most respected and award-winning medical giants carving a niche for themselves in medical device manufacturing and in the field of pre-hospital emergency products. Headquartered in Tualatin, Oregon, SAM Medical now distributes life preserving devices to over 200 countries globally.

SAM Medical was calculating & searching for their options to efficiently communicate the dataflow between Sage 100 and Salesforce system used by them. As they had no way of determining Item stock availability (based on the Sales/Leads captured in Salesforce) and the probability of them being converted into an Actual Customer for proper sales in Sage 100. They wanted a solution that would boost Accountability, Productivity, and Efficiency of the Sales Team and help them improve and streamline reporting for upper management for which Salesforce – Sage 100 integration was the only key.

The primary objective of the organization was to improve synchronization of Customer information, Orders and Invoices to flow from Sage into Salesforce automatically in a single direction. They got in touch with a Partner who claimed to be able to provide the feature, but after months of hard-work, time and money the process led to a failure. After that SAM Medical requested recommendation from a Partner friend (who worked with Greytrix on a separate system) and was aware of a GUMU™ integration product between SF & Sage systems that Greytrix already had. After doing the research and meeting with customers, already using the integration & making sure that the Greytrix GUMU™ integration for Salesforce with Sage 100 can deliver their requirements, they partnered with Greytrix. Greytrix was chosen for customization of Salesforce and integrating it with Sage 100 and was given the task of effortlessly mapping the modules between the two systems. GUMU's easy to use and cost – effective feature provided them with the flexibility to address their futuristic requirement in order to stay ahead of the competition.



Business Situation

SAM Medical Products is a United States based leading medical device manufacturer in the field of pre-hospital emergency care products. SAM Medical had a business vision to measurably improve pre-hospital patient care through innovative solutions to the toughest challenges faced in the medical field. They have been able to carve a niche for themselves by extensive research, and manufacturing their own splint, tourniquet and wound seal products for a diverse Customer base of militaries, law enforcement agents and first responders. To achieve this vision, the founder Dr. Sam Scheinberg took strategic initiatives to improve the functionality between Sage 100 and Salesforce for increasing accountability, productivity, and efficiency of the sales team and to improve and streamline reporting for upper management.

Prior to using Salesforce in SAM Medical, Sage 100 was used for generating orders, invoices, and Customer information but they had no way of tracking the leads generated through sales. Sales reps or administrators struggled with lost leads, were not able to target prospects and had to login to a second system to find the data.

During the course of time and a failed attempt to integrate the system SAM Medical were calculating more options available to them for maintaining data consistency, reduce dependencies to track order status and thus achieving a higher lead time in order processing and provide enhanced Customer experience. For which integration between the two systems was the only solution that could help sales representatives to easily access Customer details and sales summary on user-friendly Salesforce dashboards in real-time basis and keep their primary focus only on sales instead of manually tracking data.

Expectations from an Integrated Front & Back Office Application

SAM Medical vied to engage in streamlining its front and back office operations in order to achieve continuous growth. As the ERP and CRM applications operating in silos resulted in increased communication time-lines between sales and operations for status updates and data maintenance.



The key challenges for SAM Medical with its disparate IT systems were

- Data redundancy as there was duplication of data across Sage 100 and Sales-
- Syncing business data across multiple systems and applications
- Handling multiple systems for accessing Salesforce and Sage 100 caused loss of productive time
- Identifying prospects from the lead list in the database
- Increased lead time for processing Customer requests
- Mapping the accounting information from Sage 100 to Salesforce

After evaluating multiple options SAM Medical was by now certain in mind with an idea of a perfect solution that would cater to all their needs. They then came across the GUMU™ integration solution for Salesforce with Sage 100 developed by Greytrix that had all the qualities they were looking for. The lean product functionality, ability to customize the solution according to the specific business processes and a responsive Greytrix team impressed SAM Medical.

Greytrix Integration Benefit

Greytrix pre sales and development team analyzed SAM Medical's processes and requirements to the core and devised a customized, highly adaptable solution with GUMU™ integration for Salesforce with Sage 100. The out-of-the-box solution offered by Greytrix contained an architecture which embodied all SAM Medical's concerns stated below



Mapping Customers

Existing Sage 100 Customers could now be linked with Salesforce accounts without data duplication.



Generating Strategic Reports

SAM Medical had faced issues earlier tracking the business statistics. The need for a solution that could provide them business insights was very evident. The integration provided SAM Medical with an ability to track sales in Salesforce which generates automated reports that wasn't possible with only Sage 100.



Eliminated Data Redundancy

Sales representatives no longer manage and maintain order status in separate systems as information is now readily available in Salesforce. Also, with real time updates, the data captured in Sage 100 was automatically reflected in Salesforce.



Ease of Usability

Easy to promote Customer and sales order from Sage 100 to Salesforce, facilitated faster order processing thereby enabling Sales representatives to focus on Customer requirements.



Real-time Information Flow

The sales representative could now see orders placed in real time and the efforts of their hard work turned into actual orders as well as gauge their progress toward goals set.

During the assessment of the integration Jamie Burdett, Inside Sales/ Sales Coordinator at SAM Medical, noted that, "I have been very impressed with how professional and quick Greytrix Team has responded and resolved my queries. We had a look at different providers and settled with GUMU™ integration for Salesforce – Sage 100 because the informational video was very appealing, providing the exact solution we were shopping for. With further investigation into the product, the positive reviews at the Salesforce Appexchange and the cost ultimately were the deciding factors."

— Jamie Burdett, (Inside Sales Coordinator at SAM Medical)

Flexibility to Configure Salesforce Fields

Additional custom fields in Salesforce could be configured which automatically reflected on inquiries associated with Sage 100 data. Thus, they could now optimize the usability of their existing system and further improve their business processes.

Overall training and learning to access additional accounting data for sales reps took just an hour. Since data display and sales order entry is within the Salesforce screens, the ability to search and learn where to find information made it relatively easy to get acquainted to the integrated data.

GUMU™ integration for Salesforce with Sage 100 provided SAM Medical a mature, stable and economic solution that enhanced the performance of both its systems, thereby keeping itself a step ahead of its competitors. Also, after deploying the integration; IT, sales and operations departments could identify further needs to optimize processes since the pain points were now visible due to the integration.



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About Greytrix

Greytrix – a globally recognized and one of the oldest Sage Development Partner is a one-stop solution provider for Sage ERP and Sage CRM organizational needs. Being acknowledged and rewarded for multi-man years of experience, we bring complete end-to-end assistance for your technical consultations, product customizations, data migration, system integrations, third-party add-on development and implementation competence.

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