




Business Situation

Servest (PTY) Ltd. is the leading facilities management services company in South Africa. The company provides a full range of soft services, ensuring the safety and comfort of custom-designed solutions across multiple sectors. The company's **25+ years** of experience, combined with its extensive research approach, ensures that it delivers informed solutions to its customers. The company currently has more than **10,000 employees** and **6500 value clients** across private and public sectors, including healthcare, transport, hospitality, retail, agriculture, automotive, mining, and distribution.


For years, **Servest** relied on **Sage 300** to manage quotes and orders. However, their sales team relied on Salesforce to track pipelines and performance. This ultimately resulted in a silo effect where multiple operational inefficiencies were being divided, and the sales process as a whole was hampered. Thus, with the aim of having smoother operations and better business productivity, all they needed was the right **Salesforce integration partner**, as suggested by their efficient partners.

CHALLENGES




**FRAGMENTED SYSTEMS:**

They faced a significant challenge with the disjointed systems for different sales functions. While they were using Sage 300 for their existing customers, the rest of their sales team was using Salesforce, leading to limited visibility of Outright Sales team customer engagement, their contact info, and quotes.




**MANUAL TRACKING:**

The process of tracking the sales team's performance against targets was manual and cumbersome.



**UNMANAGED PRICING CHANGES:**

Their sales team was making manual changes to pricing without an established approval process, risking errors and inconsistencies.



**INTEGRATION NEEDS:**

A critical need was to integrate Salesforce with Sage 300 for a streamlined quoting solution, allowing their team to see pricelists, stock levels, account health, and purchasing patterns—everything in Salesforce.



Greytrix embarked on a comprehensive project to address Servest's challenges. The project was completed in different phases.

► **Sage 300 Upgrade**

We first upgraded their Sage 300 system, which was a pivotal point in the entire project. Thereafter, project requirements were finalized.

.....

► **Post-Go-Live**

Once the project went live, Servest thoroughly reviewed the solution. There were a few minor data quality issues, which we addressed and resolved. There were also some challenges in updating their master data and Sage 300 sandbox access.

.....

► **Custom Integrations**

Their Outright Team project requirement was to have a quote solution integration from Sage 300 that could help them refer to a price list and stock volumes in one place. We customized the **Salesforce – Sage 300 integration** using the **GUMU™ integrator**, enabling seamless quoting and order processing. **The key features included:**



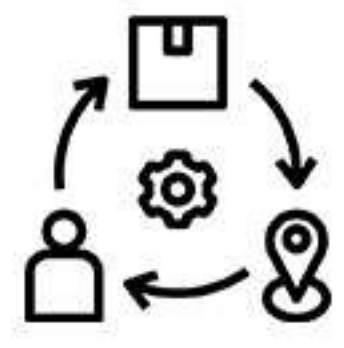
**Quote Solution:**  
Integrated Salesforce with Sage 300 using GUMU™ to display price lists and stock volumes in one place.

.....



**GL Accounts Mapping:**  
All customer accounts were made available with their details like ship to address and the financial data such as available credit, outstanding balance, and more.

.....



**Promoting Quotes to Orders:**  
Enabled orders to be processed in Sage 300 for picking and delivery.

.....



**Pricing/Products Synchronization to Opportunities:**  
With the help of GUMU™ integration, the pricing and products were synced to opportunities. The pipeline data shows how many quotes were made and how many orders were promoted.

.....



**Automated Discount Calculations:**  
Customized the solution for automatically calculating discounts while pushing through the finalized quote price. This prevented the rounding errors that could happen when relying completely on applying discounts.

.....



**Miscellaneous Charges:**  
Added functionality to include non-stock items like delivery or installation charges in quotes and orders.





How **Salesforce** Helped Their Business:

- ▶ **Seamless Integration**  
The GUMU™ integration app facilitated seamless integration, allowing the sales team to perform complex tasks more efficiently through accurate and effective quoting and order management.
- ▶ **Automated Operations**  
The GUMU™ integration with Sage 300 ensured that all quotes and orders were processed accurately and automatically. This eradicated the errors associated with manual entry and adjustments, ensuring more reliable and consistent sales operations.
- ▶ **Enhanced Data Visibility**  
Salesforce provided comprehensive visibility into customer interactions, sales pipeline, and performance metrics. This transparency facilitates better decision-making and strategy formulation.
- ▶ **Enhanced Reporting and Analytics**  
Salesforce's robust reporting and analytics capabilities allowed Servest to generate detailed reports on sales performance, customer engagement, and financial metrics. These insights helped identify trends, measure success, and make informed business decisions.
- ▶ **Better Sales Efficiency**  
Salesforce allowed Servest's sales team to operate more efficiently by centralizing all sales activities on a single platform. This unification allowed the team to focus on customer engagement and sales generation rather than juggling between different systems.

R  
E  
S  
U  
L  
T  
S

-  **Enhanced Sales Operations**
-  **Accurate Order Processing**
-  **Cost Saving**
-  **Improved Reporting**
-  **Data Quality Improvements**
-  **Enhanced Sales Functionality**

“  
*Client Testimonial*

*"The team worked closely with our IT team to best map our data. Where we faced challenges, they provided workable solutions that not only resolved the issues but also made our sales solution more efficient. Their support and turnaround time on emails gave us peace of mind that we had partnered with the right team."*



# We Guide Your Way Through Salesforce with Comprehensive Services



## Consulting & Implementation

Greytrix offers expert consulting services built to align Salesforce implementation with business objectives. Our consultants conduct thorough assessments and strategic planning sessions to ensure the Salesforce solution is implemented and tailored to the business's specific needs. We help set up the Salesforce system, configure it, and provide seamless deployment to minimize disruptions to daily operations.



## Development/Customization

Our customization services cover businesses for Apex development and Visualforce pages to Lightning components, with an aim to enhance the Salesforce system's capabilities. We provide tailored solutions to develop custom fields, objects, workflows, user interfaces, and the latest Salesforce releases and updates.



## Integration

GUMU™ is the plug-and-play integrator developed on Force.com that helps us seamlessly integrate Salesforce with various third-party applications and systems. We offer a range of GUMU™ for Salesforce integrations with different Sage ERP products and Acumatica.



## Migration

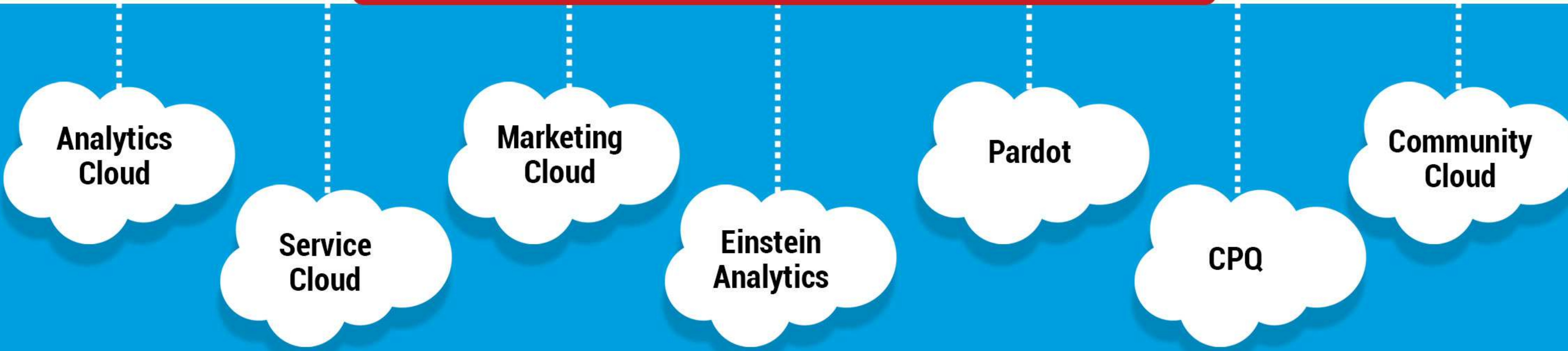
Our team delivers an effortless data migration experience secured by GUMU™. This modern, no-code integrator is not a middleware and doesn't save data during the migration process. We offer comprehensive migration services, including data mapping, cleansing, organizing, and de-duplicating.



## 24/7 Support

Our 24/7 Salesforce support services ensure that a Salesforce system remains robust and efficient to deliver more. Our dedicated Salesforce team is available around the clock to help businesses with timely assistance, troubleshoot issues, and perform maintenance tasks for their Salesforce system.

### OUR SALESFORCE PROWESS ALSO EXTENDS TO



For more information, contact us on