



CASE STUDY

VORTEX CANADA is the official Canadian distributor of Vortex Optics, a globally trusted brand of premium sport optics, accessories, and apparel. They distribute and service a range of products including binoculars, spotting scopes, and rifle scopes. Since bringing the brand into Canada in 2003, Vortex Canada has been dedicated to providing unrivaled customer service and exceptional quality, all backed with the Vortex unconditional, transferrable, lifetime VIP Warranty.

Vortex Canada was facing a significant challenge with their sales operations. They needed a solution for their sales rep to have easy access to information on their accounts without constantly reaching out to the head office for reports. Additionally, the process of submitting orders required the order entry team to manually transcribe orders into Sage 300, leading to inefficiencies and potential errors. To address these pain points, Vortex Canada chose Salesforce as their CRM solution and Greytrix for seamless integration of Salesforce with their existing Sage 300 system.

Challenges



Inefficient Access to Information

Their sales reps were relying on the head office for reports and account details, causing delays and inefficiencies in their workflows.



Manual Order Entry

Orders were manually recorded into Sage 300, affecting the operational efficiency.



Lack of Real-time Data

With no real-time data access, it was challenging for sales reps to manage the accounts effectively and make informed decisions.



Operational Bottlenecks

The need to have constant communication between the head office and sales reps created bottlenecks, which slowed down the entire sales process.

Our Greenfield Solution

Tailored Salesforce Integration
Using GUMU™ Integrator

Greytrix provided a comprehensive solution – GUMU™ for Salesforce - Sage 300 integration, facilitating easy synchronization between Sage 300 and Salesforce. The key modules of the integration included:

- Customers
- Accounts
- Orders
- Invoices
- Accounts Receivable
- Aged Trial Balance

How Our Solution Helped their Business

■ Seamless Order Submission

We made their order submission process seamless, as orders can now be submitted through Salesforce.

■ Easy Sales History Review

With our integration solution successfully implemented into their business, their sales team can access a custom search component that allows them to review sales history.

■ Account Balance Monitoring

The integration facilitates effective monitoring of account balance and account receivable management through comprehensive information on trial balance.

■ Sales Performance Tracking

We also made it easier for them to track their sales. Using custom charts, previous years' sales can be compared with the current YTD sales. As a result, the sales team can keep an eye on account status and growth.

■ Order Worksheet

Using the custom Order Worksheet, the sales reps can see past sales quantities, inventory on hand, and current back-ordered quantities, ensuring improved accuracy and order process efficiency.



What Significant Results They Experienced

From enhanced sales operations to real-time data access, Vortex Canada saw some immediate and important results post deployment of the integration. Let's have a detailed look at them



Enhanced Efficiency

The integration ensured streamlined sales operations by automating crucial processes. As a result, their sales team's efficiency improved significantly.



Increased Accuracy

With the streamlined order processing and account management, they witnessed increased accuracy in delivering services to their highest standards



Real-time Data Access

One major issue their sales team faced was the inability to get real-time information. Our integration solution addressed this issue and ensured that the sales reps got the necessary information in real-time without delays.



Better Productivity

Order transcription was removed entirely through our Salesforce - Sage 300 integration solution. This reduced the workload on their office staff so that they could focus more on serving customers, increasing overall employee productivity.



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The team has been pleasant and accommodating to work with and are always quick to make changes happen when we request them. They listened to our requests and use cases, and ensured to deliver exactly what was needed, in some cases making additional suggestions that we had not thought of.

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We Guide Your Way Through Salesforce Through 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



***Data as shared by Vortex on 10th July 2024*



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Greytrix



GUMU™ Cloud

