Industrial Compound Hosting Warehouse Provider Trusts Salesforce and Sage X3 Integration for their Operations

The client is one of the leading Industrial warehouse providers, offering to lease or rent out services to companies for setting up their stalls for public display. The customer has a collection of 40 huge warehouses that are open for industrial setups, art and cultural exhibits, design studios, art galleries, and private museums.

The client's marketing team reaches out to companies worldwide to offer space to set up their unit in the warehouse space. The companies which show interest to set up their exhibits get into a leasing contract for a stipulated period. Upon agreeing to the contract terms and conditions, the lead becomes a customer.

As a prospect becomes a lead and then a customer, the accounting transactions such as invoicing, payments, receipts, and contract renewals are maintained by the client's internal operations team. With the massive scale of operations handled by the client, it is quite challenging to manage the marketing-sales operations along with the back-end operations on the accounting side. On average, the client receives 20-25 new leases/renewal requests every month. This number grows 4 times during the yearly festival and holiday season, which becomes the hotspot for companies setting up their exhibits.

The process of lead management, sales cycle, and customer onboarding is managed in Salesforce CRM. The marketing and sales team who are mostly on the field or are stationed at different country offices handle their operations on Salesforce.

The onboarded customer details are shared through a template excel file to the back-office operations team then runs a batch file to load the data into Sage X3.

While this looks like a straightforward process, there are chances of data errors that can creep into the excel sheet. The data in X3 is not harnessed in real time. It depends on the batch process to run to make it synchronize with the salesforce system. Once the lease record is created in the Sage X3 system, the operations such as the revenue recognition schedule are triggered.

GerminIT's consulting team approached the customer with their analysis and proposed integration of the salesforce system with X3. The team undertook a careful study on the mapping between Salesforce and X3 along with streamlining the entire customer cycle process from a prospect to lead to a customer. A detailed study was made on the customer cycle operations thereby eliminating the need for manual intervention in between.

With the Salesforce-Sage X3 integration, the client was able to improve its process efficiencies by 180%, achieved a smooth and streamlined process integration without any scope for error, and thus could focus better on new customer acquisition.

Reach out to our ERP experts to know more about how we were able to integrate Salesforce and Sage X3 seamlessly.

To know more e-mail, us at info@germinit.com