

# Streamlining Sales Order Processing: A Supply Chain Case Study



## Client Challenge

Our client, a leading technology enterprise, relies heavily on a customized Salesforce CRM integrated with an Oracle ERP system for their sales operations. This seamless transition from Salesforce to Oracle acts as the pivotal gateway for converting customer opportunities into confirmed sales orders. However, the client faced a critical obstacle when they performed a refresh of their Salesforce instance. Updates to the Salesforce User Interface (UI) and associated List of Values (LOV) led to a malfunction that prevented the creation of new opportunities.

Without an immediate solution, the client faced the grim prospect of severe operational disruption—left unnoticed, this would have resulted in severe negative impacts on customer satisfaction, revenue losses, and missed shipments.



## Solution

In response to the challenge, we utilized Attest, our comprehensive business process assurance solution, to validate the end-to-end process spanning from Salesforce CRM to Oracle ERP. Attest helped us diagnose the issues affecting the Salesforce instance and pinpoint the specific changes that had caused the LOV and UI errors.

After identifying the problem areas, our team provided the client with actionable insights that enabled them to make the necessary changes to their Salesforce portal. This ensured that the system could be validated seamlessly, and the gateway from Salesforce to Oracle ERP could operate without interruptions.



## Business Benefits

The implementation of Attest to diagnose and solve the issue brought immediate relief and long-term benefits to the client:

- ✔ **Prevention of Revenue Loss:** By quickly resolving the issue, the client was able to avoid what could have been a costly delay in sales order processing, thereby safeguarding revenue streams.
- ✔ **Customer Satisfaction:** The rapid troubleshooting and solution implementation meant that customers experienced minimal disruption, which helped maintain high customer satisfaction levels.
- ✔ **Operational Efficiency:** With the issue resolved, the client's sales process returned to its peak operational efficiency, enabling the timely processing of sales orders and ensuring that shipments were not missed.
- ✔ **Risk Mitigation:** The experience provided valuable insights into potential vulnerabilities in the system, allowing for enhanced future planning and risk mitigation strategies.

By leveraging Attest to ensure the smooth functioning of their Salesforce-Oracle ERP integration, the client not only solved an immediate problem but also bolstered their operational robustness for future challenges.