



SYNC Provides a High-Level Overview of Bookings, Customers, & More Within Salesforce

Commercient SYNC Integrates Infor VISUAL &
Salesforce Enterprise

“Commercient SYNC gives us a single source of truth with Salesforce, and I can go through quotes faster and create reports much easier.”

“SYNC shows how we're progressing with sales, where we're at to date, and how far we have to go.”

CHALLENGES	SOLUTIONS	RESULTS
<p>Replace a previous and limited CRM with a new, state-of-the-art solution</p>	<p>Salesforce Enterprise, the top cloud-based CRM in the world</p>	<p>The Engineering Company improved managing of sales, customers, leads, opportunities, etc.</p>
<p>Data between Infor VISUAL and Salesforce remained siloed</p>	<p>Commercient SYNC, the #1 data integration platform for sales</p>	<p>Important Infor VISUAL data is easier to track in Salesforce, plus creating reports is much improved</p>
<p>Continue to streamline and enhance processes</p>	<p>Commercient and Salesforce</p>	<p>The Engineering Company will have a full view of sales, marketing, and customers</p>

Detailed Info and Quantitative Results



“**Commerciant SYNC gives us a single source of truth with Salesforce**, and I can go through quotes faster and create reports much easier,” said the Marketing & Sales Operations Manager at the Engineering Company.



The Engineering Company uses **Infor VISUAL for accounting and operations** and replaced previous, but limited CRM with **Salesforce Enterprise to improve their sales processes and better manage customers, sales, leads, opportunities, and more.**



“**Salesforce gives us visibility into what's actually going on in the business**,” explained Marketing & Sales Operations Manager at the Engineering Company. “We can check **messaging, response rates, and analytics.**”



They chose **Commerciant SYNC, the #1 data integration platform for sales, to connect their Infor VISUAL and Salesforce Enterprise.**

Detailed Info and Quantitative Results



The Engineering Company can access Infor VISUAL data in Salesforce Enterprise, including **customer information, accounting records, orders, invoicing, serial numbers invoiced, quotes header & detail, contacts, and much more.**



“We have a **high level overview of where we're at with bookings, customers, and more,**” explained Marketing & Sales Operations Manager. **“Pulling data in Salesforce through Commercient is honestly the fastest and best way to go.”**



Commercient also helps with forecasting. **“I created a management dashboard in Salesforce that shows how we did in 2020 versus 2021, 2022,”** she said. **“It shows how we're progressing to date, and how far we have to go.”**



Salesforce and Commercient will continue working with the company to streamline and enhance their processes, helping to give a **full view of sales, marketing, and customers.**

Engineering Company

Company Profile

The Engineering Company provides contract manufacturing services to original equipment manufacturers in the semiconductor equipment, medical, aerospace, consumer electronic and industrial automation industries. Quality driven manufacturing processes employed by highly skilled personnel have given the Engineering Company an outstanding reputation. Services include full turn key equipment solutions to fabrication of electro-mechanical assemblies, precision optics, motion assemblies, precision coils, and a variety of box build capabilities.

LOCATION

California

EMPLOYEES

50+

INDUSTRY

Manufacturing

Customer Business Model (B2B, B2C, or Both)

B2B

SOLUTION(S)

Commercient SYNC

ERP & CRM

Infor VISUAL & Salesforce Enterprise

GO LIVE DATE

2022

ABOUT COMMERCIENT



Commercient SYNC makes ERP and CRM data integration simple, quick, and efficient. Over the years we've helped companies of all sizes integrate their ERP data with their CRM system, helping businesses become more efficient.

Our SYNC integration has grown to over 150 systems, including Sage, QuickBooks, Acumatica, Epicor, SAP, SYSPRO and many others. With our ERP and CRM integrations, your data is synced to both systems in real time without the need for manual data entry, or the risk of human errors.

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