

SUCCESS STORY

Global Technology Manufacturer

VALUE DELIVERED

- ✓ Combined **Salesforce, Agentforce, MuleSoft**, and integration expertise to address complex operational challenges.
- ✓ Worked closely with the customer to **align technology investments** with business goals and transformation priorities.
- ✓ Demonstrated **strategic advisory capabilities**.
- ✓ Delivered a **comprehensive transformation vision** under aggressive timelines in a competitive evaluation process.



OSF | DIGITAL

Elevating Revenue Operations Through Intelligent Quoting and Process Automation

Customer Profile

Our customer is a **global technology manufacturer** that develops integrated hardware and software solutions for managing complex commercial and enterprise environments.

Challenge

The company serves a large partner ecosystem and processes **high volumes of orders** across multiple markets and channels:

- ✓ Over 80% of their orders (more than 160,000 annually) were entered manually into their ERP.
- ✓ A large percentage of manual orders had discrepancies.
- ✓ With **thousands of dealers/distributors**, they didn't have a consistent format for purchase orders, resulting in discrepancies and errors that needed to be resolved manually.
- ✓ Did not have a **connection between Salesforce and SAP** for discount approvals, resulting in delays in order processing.
- ✓ Incomplete partner information on orders impacted incentives and warranty information.

Outcome-Driven Solution

- ✓ Analyzed the current state and designed the future state of the manufacturer's **quoting and ordering operations**.
- ✓ Mapped out a solution to close the gap on errors and discrepancies with:
 - **Agentforce Revenue Management** for quoting.
 - **MuleSoft Anypoint** for real-time integration between Salesforce and their ERP (SAP ECC).
 - **MuleSoft IDP** to scan orders that are in PDF form and MuleSoft CTO Advisory Services.



AI-ready

Scalable delivery model for faster regional rollouts and long-term growth

PRODUCTS

Agentforce Revenue Management

MuleSoft

Customer Adoption

- ✓ Offered strategic guidance to align **Agentforce Revenue Management** and MuleSoft with business goals during on-site meetings.
- ✓ Established a foundation for **standardized quoting**, automated order processing, and improved collaboration between **sales and operations functions**.
- ✓ Enabled **scalability across regions** and a large partner ecosystem.