

A major warehouse in Wisconsin integrates Peoplesoft (ERP) and Onyx (CRM)

The Client

A major warehouse in Wisconsin shipping more than a million products a month was ideally set for a major expansion when it realized it had to integrate its ERP and CRM.



The Challenge

The Client wanted to help its customer sales representatives who answer calls from customers and whose questions typically have to do with the product availability and its immediate shipment to the customer. The client also faced an issue with service requests and return / refund problems. The data leading to inventory was in placed in the backend Peoplesoft's Oracle database and the CSR's used Onyx (CRM) to better assist customers. Now the data in the Oracle database tied to Peoplesoft front end had to talk to SQL Server database which was tied to Onyx CRM. The different technologies and the sheer size and real time usage if such an information posed significant challenges to the client..

- Having inventory data information. Basically, when a customer calls, the agent should be able to know the exact information on inventory availability and status.
- Single view of products. This includes, presenting products, product literature, warranties, and refunds/replacements from a seamless integration between the two application working as one.
- Identify customer centric offers and present them when customer calls. Able to advise the customer to choose right product and service.

The Solution

Tasmea's EAI team after an assessment of the technical situation and the pressing business need of quick delivery of solutions, decided on a Staged approach to integrate data between the two different databases. However, explicit care was taken to ensure that the key dimensions were conformed to across the databases. This forethought helped in easily providing a single application view when the organization went through the integration process. The solution resulted in:

- Enhanced control leading to reduced turnaround time and improved customer service.
- Improved sales force management by more proactive progress tracking as compared to the inefficient reactive end of the period review.
- Improved forecast accuracy.

The Technology

- VB Scripts, Onyx CRM, Peoplesoft ERP, SQL Server programming and OLAP.