

Connectrac Digitally Transforms the Customer Quoting Experience



ABOUT

Based in Dallas, Texas and founded in 2005, Connectrac is a brand/business entity of Legrand. It sells its products through electrical distributors, AV channels, contract furniture dealers, and others throughout the world. Connectrac is the go-to solution for top corporations, government agencies, schools, and universities.

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The need to digitally transform customer quoting

The growth of Connectrac came with a problem – more customer requests for price quotes on a growing range of products was straining on the quoting process. Connectrac averages 100 to 150 customer quotes per day, and each quote required 30 to 60 minutes of manual data input and verification. That’s because business team members had to manually enter each line on the quote, including the list of build materials for each product. “That’s over 100 hours per day, on average. It was simply an unacceptably large overhead cost,” commented Scott Livingston, the Director of IT at Connectrac.

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To minimize manual labor and speed the quoting process, Scott turned to Vision33, his SAP Business One implementation partner, to collaborate on a solution. He knew Vision33 offered a platform, called Saltbox, that was designed to integrate virtually any enterprise data and apps with SAP Business One. “When they said they could integrate our CAD with Business One, we had them visit right away,” said Scott.

Saltbox integrations streamline the business

Fast forward a month, and Saltbox was already streamlining the Connectrac business via two key integrations. Vision33 taught Scott how to use the Saltbox integration platform and how to feed CAD data directly into SAP Business One. "Our CAD tool integration uses XML import. It actually exports our CAD drawings, based on the drawn objects, and they appear in SAP Business One. It creates the quotes for us," Scott explained.

With all information (including customer information) automatically pre-populated at the CAD level, the only manual labor required by the business team is a simple, 2-minute order verification step. "We're pretty much 95% automated at this point, and that has dramatically added speed and cut costs from manual work," said Scott.

Currently, Scott's team is using B1 UP on the back end of quoting to auto-attach each quote to an email which is routed to the specific business teams. Soon, Connectrac will customize the integration even further to bypass business team review and

auto-send the quotes directly to customers. "Suddenly, we'll have zero-time quoting," Scott expressed happily.

The process will also optimize the customer experience. That's because Saltbox is enabling a direct integration to the company website where a customer-facing configurator tool enables customers to develop self-quotes using yet another Saltbox integration. "That's right. Customers will enter a product code, and the Saltbox integration makes it possible to translate that code into part numbers. An instant BOM gets created...and voila! Out comes a quote based on the codes." In the end, it all leads to Connectrac's goal of 100% self-service, real-time customer quoting.

"I have all these wonderful things I'm going to do with it now." Using Saltbox, Scott plans to connect to Tableau and WooCommerce (Connectrac's eCommerce site platform). "It's great that there's a WooCommerce plugin. I barely need to do anything to get that running."



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Saltbox is the path to self-service integrations

Because the Saltbox platform is easy to learn, Scott can customize it to suit his specific needs. He recently made several changes himself, including:

- Changing the mapping of fields
- Formatting calculations to pull in data the way his team likes it
- Connecting to additional applications using Saltbox's out-of-the-box integrations

Scott sees all of this as a way to streamline upgrades to SAP Business One. "I see Saltbox as a platform for all the external data attachment that we need to SAP Business One. It's a great way to eliminate the need for custom integrations and just have one tool that does it all for us."



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The Connectrac future with Saltbox and SAP Business One

Scott says that Connectrac always valued Business One for its ability to integrate broadly. Yet, the company was not taking advantage of that extensibility. Saltbox has changed all that. He says he will soon leverage its SQL connector to communicate with external databases as he upgrades the database to SAP HANA. He also highlighted more integrations opportunities which his team is now mapping via Saltbox.

Scott summarizes Connectrac's use of Saltbox this way: "You can completely reimagine the business, because suddenly every application and piece of data can be connected with minimal effort."



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Vision33 (www.vision33.com) helps growing companies deliver on the promise of technology through enterprise resource planning (ERP) solutions, including SAP Business One and Sage Intacct, automation, and integration solutions. Vision33 has the people, processes, and technology to help businesses solve everyday challenges and seize new opportunities for growth and transformation. With proprietary solutions such as iDocuments and Saltbox, Vision33 helps businesses leverage the right transformative technology for their digital transformation journeys.

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