

From Disconnected Systems to One Connected Operation

Connect Systems. Automate Processes. Improve Operational Efficiency.

Client Profile

Industry: Wholesale Distribution

Company Size: ~110 employees

Environment: ERP + CRM + Microsoft 365 + E-commerce + Shipping & Finance Systems

Business Model: B2B distribution with growing digital sales

The company had invested in several business applications as it grew. Each system worked well independently—but they weren't working well **together**.

Customer information lived in the CRM.

Orders were processed through the ERP.

E-commerce operated separately.

Shipping had its own system.

Finance maintained additional information.

And employees were filling the gaps.

What They Wanted to Achieve

The company wanted to:

- Connect its core business systems
- Eliminate duplicate data entry
- Automate repetitive processes
- Improve order and customer visibility
- Reduce manual errors
- Accelerate order processing
- Improve customer response times
- Give employees a single view of critical information
- Create a scalable operating model for growth

Their objective

Make information flow automatically across the business—without people having to move it manually.

The Challenges

Disconnected Systems

CRM, ERP, e-commerce, shipping, and finance systems operated independently.

Duplicate Data Entry

Employees frequently entered the same customer and order information into multiple systems.

Manual Handoffs

A completed action in one system often triggered an email or spreadsheet task for someone in another department.

Limited Visibility

Employees couldn't always see the complete status of a customer, order, shipment, or financial transaction from one place.

Slow Processes

Orders and requests could sit waiting for someone to manually move them to the next step.

Human Error

Manual copying and reconciliation increased the possibility of incorrect customer information, order details, and status updates.

Growth Was Increasing the Problem

As order volume and customer activity increased, the company needed more people simply to manage the increasing administrative workload.

How OJASVI Advised the Client

We Didn't Start by Connecting Everything to Everything.

That usually creates a beautiful mess.

OJASVI first mapped the client's critical business processes from beginning to end:

Customer → Quote → Order → Fulfillment → Shipment → Invoice → Customer Follow-Up

We identified where:

- Information was being entered repeatedly
- Employees were waiting for other teams
- Emails were triggering manual tasks
- Data was being reconciled
- Decisions could be automated
- Systems needed to exchange information

We then prioritized integrations based on:

Business impact + transaction volume + manual effort + automation opportunity

The Recommended Solution

An Integration & Intelligent Automation Layer

OJASVI designed a connected architecture using APIs, workflow automation, business rules, and Microsoft technologies where appropriate.

CRM ↔ ERP

Customer and account information could flow between systems, reducing duplicate entry and improving consistency.

E-Commerce ↔ ERP

Online orders were automatically transferred into the appropriate business workflow.

ERP ↔ Shipping

Order status and fulfillment information could flow between systems automatically.

ERP ↔ Finance

Relevant transaction information was made available to financial workflows without repeated manual entry.

Microsoft 365 / Teams

Notifications and workflow actions were brought into the tools employees already used.

Intelligent Automation

Integration was only part of the solution.

OJASVI introduced automation around the information moving between systems.

Automated Routing

Transactions were automatically directed to the appropriate process or team.

Business Rules

Rules determined what should happen based on order value, customer type, product, status, or other business conditions.

Exception Handling

Instead of requiring people to review everything, the system identified transactions that actually needed human attention.

Automated Notifications

Teams were notified when action was required rather than manually checking systems.

Data Validation

Information could be validated before being passed to the next system.

Workflow Tracking

Management could see where transactions were in the process and identify bottlenecks.

What OJASVI Was Able to Solve

Disconnected Systems

→ Created automated information flows between critical business applications.

Duplicate Data Entry

→ Reduced repeated manual entry.

Manual Handoffs

→ Automated movement of work between departments.

Slow Approvals

→ Introduced automated routing and notifications.

Data Inconsistency

→ Improved synchronization between systems.

Limited Visibility

→ Created a more connected view of business activity.

Operational Bottlenecks

→ Identified and automated high-volume process steps.

Scaling Challenges

→ Allowed transaction volume to increase without requiring proportional administrative headcount.

A Typical Process Transformation

BEFORE

Customer places order

↓

Employee checks e-commerce system

↓

Copies order into ERP

↓

Emails fulfillment team

↓

Fulfillment updates spreadsheet

↓

Shipping receives information

↓

Employee updates CRM

↓

Finance receives notification

↓

Customer service checks status manually

AFTER

Order Received

↓

Automatically validated

↓

ERP order created

↓

Fulfillment notified

↓

Shipping workflow triggered

↓

CRM updated

↓

Customer status updated

↓

Finance workflow triggered

The process moves. People intervene only when their judgment is needed.

The Time Savings

For an SMB processing a significant volume of orders and customer transactions, the cumulative impact of small manual tasks can be substantial.

Illustrative Impact

Activity	Before	After	Potential Time Recovered
Duplicate data entry	35 hrs/month	10 hrs	25 hrs
Order/status coordination	28 hrs	8 hrs	20 hrs
Manual notifications	15 hrs	3 hrs	12 hrs
Data reconciliation	22 hrs	7 hrs	15 hrs
Exception/status reporting	18 hrs	6 hrs	12 hrs
Total	118 hrs/month	34 hrs	~84 hrs/month

Potential capacity recovered: ~1,000 hours per year

Illustrative scenario; actual savings depend on transaction volume, system complexity, process design, and automation scope.

But Time Wasn't the Biggest Win

The company didn't simply save administrative hours.

It changed **where people spent their time.**

Instead of:

Copying data

Checking systems

Sending reminders

Reconciling records

Updating spreadsheets

employees could focus on:

Customers

Sales

Supplier relationships

Problem solving

Process improvement

Business growth

People stopped being the connection between systems.

The systems became the connection.

How It Supported Growth

The company could increase:

Customers

Orders

Transactions

Products

Sales channels

without increasing administrative workload at the same rate.

The integration layer also created a foundation for future capabilities such as:

AI-powered document processing

Predictive analytics

Intelligent customer service

Automated forecasting

Advanced Power BI reporting

AI-assisted exception management

Integration became the foundation for intelligent operations.

Business Value

Simplify

Fewer disconnected processes and fewer manual handoffs.

Accelerate

Move information and transactions faster across the organization.

Improve Accuracy

Reduce errors caused by repetitive data entry.

Increase Visibility

Give teams better access to current business information.

Free Employees

Shift people away from repetitive administrative work.

Scale Efficiently

Increase business volume without proportionally increasing operational overhead.

Create a Foundation for AI

Clean, connected, accessible data provides a stronger foundation for future intelligent automation.

The OJASVI Difference

We Don't Just Integrate Systems. We Redesign How Work Moves.

Our approach is:

Discover → Map → Connect → Automate → Measure → Optimize

We identify where systems should communicate, where workflows should be automated, and where human judgment still adds value.

The goal isn't to remove people from the process.

It's to remove people from the parts of the process that don't need them.