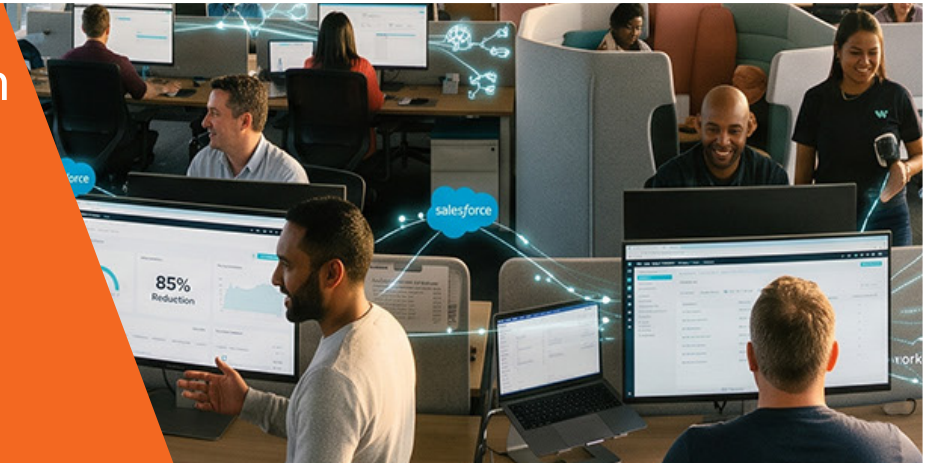


Workato Integration Cuts Manual Data Entry 85% for a Global Cloud Platform Provider



The Customer

A global cloud computing services provider operating a high-performance edge cloud platform, the company gives developers secure, scalable infrastructure. It relies on Salesforce CRM, NetSuite ERP, and a leading telecom billing platform to run its order-to-cash operations.

The Challenge

Disconnected systems were forcing manual work into every stage of the order-to-cash cycle.

- No native connectivity between Salesforce, NetSuite, and the billing platform, creating fragmented data silos
- Teams manually updating and verifying data across systems, raising the risk of errors
- Inconsistent synchronization slowing down onboarding, billing, and reporting

The Solution

The company partnered with CriticalRiver to build a real-time, bi-directional integration across Salesforce, NetSuite, and the billing platform using Workato.

- Automated product configuration in the ERP and billing systems for new customer setups
- Automated account creation in billing and financial systems for order accuracy
- Connected Salesforce to ERP and billing platforms for automated order processing on quote closure
- Synced subscription, usage, one-time, and cancellation billing data into NetSuite for accurate invoicing

The Results

Manual, error-prone processes gave way to a unified, automated operational framework.

- Faster, more accurate customer onboarding and billing
- Greater confidence in financial and operational reporting
- A scalable foundation to support continued growth

Impact Delivered

- 85% reduction in manual data entry across CRM, ERP, and billing systems
- 70% faster order provisioning from quote to fulfillment
- 90% accuracy in billing and revenue data synchronization

Solution Components

Workato Integration Platform, Automated Product Configuration Workflow, End-to-End Sales Order Automation, Real-Time Data Sync (Salesforce ERP & Billing Systems), Integrated Billing and Revenue Management