

ERP Integrations for AEC

Best Practice Solutions

Your business holds a hidden treasure within its ERP system, and it's high time to unlock the full potential. Let ERP integration with Salesforce uncover the gold.

Despite the uniqueness of data in each ERP, we've crafted a repeatable integration approach built specifically for AEC firms. Utilizing Salesforce Sales Cloud and Mulesoft, barriers are broken, providing you with a transparent view of your business.

Advantages of Integrating your ERP with Salesforce

- › **Starting with Customer Data:** Your sales team should NOT feel like they are putting a customer data puzzle together. Centralized customer data is the key to smoothing workflows, boosting decision-making, and enabling easier interactions.
- › **Estimates Integration (If You Estimate in the ERP):** Sync estimates into Salesforce for those quoting from their ERP or other platforms. Eliminate manual entry, reduce errors, and expedite the estimate-to-order cycle for a more unified experience.
- › **Field Actuals and Invoices:** Think of it as a GPS tailored for your projects. You have a clear destination—project actuals, total revenue, and margins. Plus, you receive real-time updates and track progress through detailed line-item views. This ensures you reach your financial goals as your final road trip destination.
- › **Insights and Collections Management:** Your sales team will feel empowered with synchronized data to help them proactively identify trends and prevent issues. Keep customers out of collections and foster stronger relationships through collaboration.

Some of the ERPs we've Integrated to...

Deltek

V | Spectrum

CMiC
CONSTRUCTION SOFTWARE. EVOLVED

V | Vista

PROCORE

V | Viewpoint

N | NETSUITE

Microsoft Dynamics

Unanet

SAP

A Strategic Integration Approach

Your process will always come first over the technology, and your ERP integration with Salesforce should be as direct as possible. This is our approach:

Craft & Blueprint: Our team will walk you through workshops, customizing and designing the ideal implementation plan.

Construct: Watch your vision come to life as we bring your blueprint to reality, showcasing weekly progress with updates.

Test It Out: We test it and train your team, so you can hit the ground running.

Launch: Navigate the initial weeks of your Salesforce roll-out with our expert guidance, ensuring a graceful launch for your team.

Revamping your Salesforce with an ERP integration isn't just restructuring — it's a fundamental change in data utilization. Partnering with The Hunley Group's integration experts ensures you exceed your goals with decisive, data-driven actions.

Now that you know what your ERP Integration Strategy looks like, here are the key Salesforce products that will assist you in this transformation:



Sales Cloud: Facilitates AEC ERP integration by centralizing customer information, streamlining sales processes, and providing a unified platform for managing client interactions.



Service Cloud: Enhances integration by offering a comprehensive customer service solution, enabling seamless communication and support throughout the AEC project lifecycle.



Field Service: Optimizes AEC ERP integration through efficient management of field operations, ensuring real-time collaboration, and timely project execution.



Data Cloud/AI: Contributes by providing intelligent insights, predictive analytics, and data-driven decision-making capabilities, enhancing overall efficiency and project outcomes.



Mulesoft: Acts as a robust integration tool, connecting diverse systems and applications, and promoting interoperability and data consistency.



Account Engagement: Streamlines integration with ERPs by centralizing data, fostering collaboration, and optimizing analytics for enhanced account management.



Tableau: Facilitates integration with AEC and enhances data visualization and analytics.

By integrating departments and fostering a no-silo approach, you create an environment of digital transformation. A smooth, data-driven sales process doesn't just enhance your sales team's performance — it's a game-changer for your entire business.

Transformation Starts Here

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