



### Business Challenges and Objectives

- Extract invoice adjustment data from Salesforce and integrate it into the Data Warehouse per the client's request.
- Monitor customer attributes during adjustments linked to specific invoices, consider adjusted quantities, and decide on potential invoice splits.
- Ensure that the implementation of the solution does not adversely affect overall revenue numbers and calculations in the Business Intelligence system.

### Client

- Our client is a medical technology company focused on developing and commercializing innovative medical devices to treat complex and challenging cardiovascular conditions. They are more than a decade old in the industry, with a constant focus on improving the medical infrastructure through technology.

### Industry

- Manufacturing

### Function

- Sales Chain & Logistics

### Technology

- Microsoft Azure



### The Solution

- Flags have been implemented in the solution, allowing business users to review adjustments made in Salesforce once an invoice is updated.
- Integration of adjustment data into Azure, using information from Salesforce, involves marking adjusted invoices with specific adjustment flags.
- The solution's design emphasizes scalability, ensuring smooth handling of potential future scenarios where additional splits may arise from previously divided invoices.
- Segregating adjusted/split invoices is achieved through a carefully structured data model, distinguishing original invoices from adjusted/split ones to prevent any double counting in revenue calculations.
- Regular reconciliation of data across Salesforce, the Data Warehouse, and the BI system is conducted to identify and address any discrepancies, ensuring the accuracy of the data.



### Outcomes and Benefits

- The solution empowers business users to monitor adjustments made to invoices.
- It enhances visibility into sales amounts, aiding in more informed decision-making and resource allocation, especially in managing stocking orders.
- Tracking the salesperson associated with each invoice is facilitated by extracting information from Salesforce and storing it alongside invoice data in the Data Warehouse, enabling comprehensive performance analysis.
- An important feature is the assurance that including invoice adjustments or splits does not disrupt overall revenue numbers and calculations within the Business Intelligence (BI) system.