



**ARNE
AKSEL**

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INTEGRATION SUCCESS STORY

Arne Aksel

The challenge

Arne Aksel needed help with saving time and resources that were being used in manually carrying out processes like creating invoices, sending them to clients, creating orders, accepting payments, and shipping them. They were also looking forward to develop their webpage as per the specific designs and requirements of their business.

Thus, Arne Aksel needed help with:

- **Fetch, update, create deal:** Pipedrive deal creation from all information from the configurator.
- **Invoice creation in e-economic:** Automatic invoice creation in e-economic whenever there is a deal created in the Pipedrive CRM.
- **Quote creation in e-economic:** When a customer is added in Pipedrive, create a quote in e-economic and update the quote number in Pipedrive. This quote can be converted to invoice from Pipedrive.
- **Sync customers in Pipedrive:** When a deal is won in Pipedrive, the customer details are updated in the app.
- **Order creation in Katana:** When a deal is won in the Pipedrive, an order is created for the customer in Katana and also shipped through webshop.

The solutions

Our SaaS experts deeply analysed their business requirements before making the integration. The goal was to make something scalable and easy to use. There were multiple meetings before getting started with the project where we talked about all the issues that they have been looking at on all levels.

We began with integrating Configurator, Pipedrive, Katana and e-economic followed by building custom work processes according to their business needs.

We set a configurator in Lighthouse for Arne Aksel. From there, the client can create a new deal which leads to the creation of a new deal in Pipedrive.

A deal in Pipedrive leads to the creation of an invoice in Economic and updates Pipedrive deal with the draft invoice number.

The trigger from Pipedrive when a deal is won leads to the creation of sales orders in the Katana app and updating of the Pipedrive deal with the Katana order link.



Pipedrive + Visma e-economic integration

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About Arne Aksel

Arne Aksel is a solution in creating rooms with instant appeal and spatial well-being. They make your daily spaces richer through 'atmosphere in fabrics'.

Headquarters:

Copenhagen, Denmark

Industry:

Design

Complexity:

High

Products and services:

Production of high quality fabrics for curtains, delivery and fitting service

Website: <https://www.arneaksel.com/>



Very happy with Cloudfify to date. Seen a significant improvement in business revenue, as well as productivity of employees. Business revenue, as well as productivity of employees.

Regina Lau

Senior Manager, Arne Aksel

The results

- Time saved and money saved which was spent on manual processes.
- The automation made the whole process efficient and diligent.
- The process became scalable, no matter what the number of leads won or deals created automatically.
- Streamlined processes with no scope for human errors.
- Automated complex workflows for the smooth functioning of business processes.



List of value add from Cloudify

SaaS apps used:

- **Configurator** - The Arne Configurator is rich in features and simple in nature. It does three major things- Fetch a Pipedrive deal, Update a Pipedrive deal, create a Pipedrive Deal.
- **Pipedrive** - We used Pipedrive for custom automation as per their business requirements.
- **Katana** - The inventory management app was used to create sales orders.
- **E-conomic** - The accounting app was integrated to generate invoices and automate the invoicing process.



Get a Free Consultation

Need help with business process automation? Let us take up the burden and do the flow for you.

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