

Customer success story:

Principal Logistics Leverages Salesforce and Certinia for Operational Excellence

The Customer

Principal Logistics Technologies stands at the forefront of the logistics software industry, offering an array of sophisticated and adaptable solutions designed to meet the diverse needs of their clients. By leveraging their comprehensive ProWMS, ProSKU WMS Cloud, and ProERP software, Principal Logistics empowers warehouse businesses across multiple sectors with the tools necessary to enhance operational efficiency, reduce costs, and drive revenue growth. Their dedication to innovation and service excellence enables warehouse and supply chain operators, including those in the 3PL, eCommerce, healthcare, and retail industries, to seamlessly manage their operations and adapt to the dynamic market landscape effectively. With a commitment to developing cutting-edge technology and providing exceptional customer support, Principal Logistics Technologies continues to be a reliable partner for businesses seeking advanced and efficient warehousing solutions.

The Challenge

Principal Logistics Technologies faced a significant challenge in managing and integrating their existing systems, which included self-built applications, Harvest, Access Dimensions, and Excel spreadsheets. As the company experienced growth and acquisitions, their current systems became increasingly inadequate, leading to inefficiencies and scalability issues. They required a more robust, unified solution capable of standardising tools across the business, automating functions, and providing real-time visibility into operations. And, as the business grew, they needed a system that could support their continued growth. The limitations of their legacy systems hindered their ability to streamline operations, resulting in time-consuming manual processes and data silos. This fragmentation also impacted their ability to make quick, strategic decisions, posing a threat to their competitive edge in a dynamic market. The need for a more integrated, scalable, and automated solution became critical to ensure sustainable growth and efficiency.



Client name

Principal Logistics Technologies

Industry

Supply Chain & Logistics

Company Size

150

Headquarters

Manchester, UK



Salesforce
Sales Cloud



Certinia ERP



Certinia PSA

The Results

“Implementing Salesforce and Certinia has transformed our operations. By consolidating our systems into a unified platform, we can now integrate new acquisitions and business streams seamlessly. We have eliminated inefficiencies and gained real-time visibility and control over every aspect of our business. This has empowered us to scale effortlessly while maintaining the operational excellence that our clients depend on.”

- Sharon Jennings, CFO, Principal Logistics Technologies

Key takeaways from the project



Enhanced Operational Efficiency: Consolidating fragmented systems into a single platform reduced manual data entry and operational bottlenecks, leading to streamlined workflows and increased productivity.



Improved Financial Visibility and Control: Certinia ERP modules provided comprehensive financial oversight, facilitating accurate billing, efficient revenue management, and effective spend management, empowering real-time financial insights and control.



Scalability and Future-Proofing: The scalable Salesforce and Certinia solutions offered flexibility to grow and adapt, ensuring continual innovation and market responsiveness, safeguarding long-term success.

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Final Summary

Principal Logistics chose to implement an integrated suite of solutions provided by Agilyx Group: Salesforce Sales Cloud, Certinia PSA & Services CPQ, and Certinia ERP modules for Accounting, Subscription & Usage billing, Spend Management, and Business Analytics. This comprehensive solution addressed their challenges by seamlessly integrating their CRM, PSA, and ERP needs into a single platform. The Salesforce Sales Cloud enhanced their sales processes with robust automation and streamlined communication. Meanwhile, the Certinia PSA & Services CPQ simplified project management and service delivery, ensuring accuracy and efficiency. The Certinia ERP modules provided the much-needed financial visibility and control, reducing the complexity of billing. By standardising tools across the business, Principal Logistics was able to automate previously manual tasks, eliminating data silos and improving overall operational performance. These solutions were finally able to allow the organisation to deliver on their purpose — ensuring that their customers receive unparalleled efficiency and innovation with the best tools in the logistics industry.