



## Customer Success: Levitt-Safety

**Founded: 1935**

**Industry: Distribution**

**HQ: Oakville, Ontario**

**Solutions: Salesforce & OneOffice Duet360™ Enterprise for Infor SX.e & IFS**

**Partners Since: 2017**

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*Fraser Gibson,  
VP of Quality & Strategic  
Initiatives*

### Providing Safety at Scale

Levitt-Safety is an industrial distributor and provider of life, fire, and environmental safety products and services. Focused on building a safer tomorrow, Levitt-Safety prides itself on addressing the safety needs of organizations of all sizes primarily in the Canadian marketplace.

A Platinum Standard winner and recipient of Canada’s Best Managed Companies award since 2012, Levitt-Safety has recently utilized its industry expertise to expand its sourcing of occupational safety equipment, providing personal protective equipment (PPE) and respiratory fit testing in the wake of the Covid-19 pandemic.

### The Limitations of Customized CRM-ERP Connector

Fraser Gibson, Levitt-Safety’s VP of Quality & Strategic Initiatives, is responsible for strategic initiatives ranging from software implementation to re-engineering processes. In early 2012, Levitt-Safety was searching for a system to connect the company’s Salesforce CRM solution to its Infor SX.e ERP system. However, despite selecting a Salesforce-specific plugin, the connection experience remained suboptimal.

“It was simply not structured to map properly with Salesforce,” Gibson explained. “Critical fields were missing in the data package, including contacts associated with a quote or sales order. All the wonderful things you get in the Salesforce ecosystem didn’t play nicely together due to the custom Ship To object that was in the Infor SX.e integration. While some of the issues were fixed in subsequent updates to the application, it was a painful experience of finding the gaps and waiting for a solution.”

### Scalability and Reliability: Bringing Together Disparate Data Systems with OneOffice Duet360™

With extensive Salesforce expertise, Endowance was brought in as a service provider to fix the connectivity issues with the previous ERP integration.

Due to the increasing volume of service-related tasks being conducted at Levitt-Safety, Gibson and team were looking for a uniform, modern platform that offered cohesion between all pieces of the service business Gibson explains, “We needed to integrate another ERP for our service business that had to play well with our existing distribution software package and the existing integration with Salesforce.”

With contact records housed in Salesforce, product and accounting information in SX.e, and service information in IFS, the challenge of this integration would be connecting three different systems-- an on-premise solution, hybrid private cloud, and a public cloud into a cohesive flow of information.

Endowance Solutions' OneOffice Duet360™, was implemented to map these three separate data systems to operate from a single service center, but with information flowing from all systems simultaneously. "That was the real beauty of Endowance's managed package," explains Gibson. "All the data flow is shown in real-time, from scheduling to contact sharing, to flowing tasks to mobile. You don't have to worry."

For Levitt-Safety, the most dramatic improvement was the scheduling of recurring customer maintenance activities. "Normally this data would live in the SX.e system, but then an Excel spreadsheet would need to be pulled and manipulated, then uploaded. Work orders would be generated, then shared with technicians in either a physical piece of paper or other document sharing platform to get to the technicians.

Now, with Duet360 connecting the three systems all of this information is in IFS and pulls what you need for each particular job. Our service team sees the same customer records and parts setups as our product distribution team, while our salespeople see all activity going on in the various parts of the business. It's a game changer."

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### **A 360-Degree Customer Profile for the Future of Business**

Gibson notes that one of the biggest advantages unlocked through Endowance's business solution is the 360-degree customer view provided to all functional areas of the business. "Our salespeople were frustrated by account issues and having data that's difficult to work with. Duet360, has restored confidence and delivered a holistic customer view without having to dig into complicated data sets."

As more and more companies like Levitt-Safety expand their business to both product and service offerings, it becomes imperative not only to have a functional system, but one focused on ease of use.

"If the system information is letting you operate efficiently, then it's more likely people are going to use the solution and not go back to their own manual systems or workarounds. We're looking to Endowance's OneOffice Duet360 to continue to help us meet these growing marketplace demands and the smooth flow of process between sales, order fulfillment and service."