



About

Proud to be PBS's single largest producer for television, the Web, and mobile, with favorites like Nova, Masterpiece, Frontline, Antiques Roadshow and more. **WGBH** has been recognized with Emmys, Peabodys, and Academy Awards and is devoted to providing in-depth perspective, bringing new experiences, and giving the best in educational content.

We needed functionality that is not yet available in our ERP financial system and Sierra-Cedar designed and implemented a Salesforce solution that met our needs and exceeded our expectations. SCI's expertise in both the ERP system and Salesforce made it a very collaborative and successful project.

Maureen Henehan

Corporate Headquarters:

Boston, Massachusetts

www.wgbh.org

Industry:

Media – Educational Public Broadcasting

Technology:

Salesforce.com

ERP Integration

About Sierra-Cedar

Sierra-Cedar delivers industry-focused client success by providing consulting, technical, and managed services for the deployment, management, and optimization of next-generation applications and technology.

www.Sierra-Cedar.com

Background

A significant portion of WGBH's production operations and activities are funded by grants from individuals, private foundations, and government agencies. WGBH operates in a project-centric environment to record time and materials. Individual projects are set up to account for each episode of a program and have multiple funding sources (grants) that are set up and maintained. These funding sources can span across projects (episodes, seasons, productions). WGBH's legacy system allowed for the collection of pertinent data and after-the-fact allocation of project costs to grants so they may be billed to a sponsor. The solution was developed due to the functionality being on the roadmap of the ERP Financial system, and not being available at the time of WGBH's go-live.

Challenges

The biggest challenge of the project came during the testing of the solution. Due to the complexities of the logic (many parameters were considered when allocating transactions), and the need to synch legacy data with the ERP Financial data, it took significant time to validate that the application worked as expected. Sierra-Cedar did significant testing before asking WGBH to conduct User Acceptance Testing.

Converting the legacy data proved to be challenging as well. In the end, however, WGBH felt the data has never been "cleaner" and the allocations are processing with a 100% accuracy rate.

Solution

The solution is made up of several components: ERP Integration, Salesforce Configuration, and a Custom Engine:

- **ERP Integration**

The ERP Integration brings transactional data from ERP Financials into Salesforce. Once the Salesforce Custom Engine processes the transactions appropriately, the updated transactional data is transferred back to ERP and maintained in ERP, the system of record.

- **Salesforce Configuration**

Salesforce holds the lists of grants available to fund projects, expenditures that each grant will/will not pay for, and the priority in which funds will be charged. Updates can be made to this data by WGBH staff. In addition, Salesforce displays the results of the transactions and tracks remaining balances of each grant.

- **Custom Engine**

The Custom Engine makes the funding decisions based on the project and grant data held in Salesforce. The engine evaluates the projects, grants, exception rules, funding levels, etc., and creates the transactions that are brought back into ERP.