

How Vertex streamlined credit and supplier risk scoring for a global food and beverage leader

Automating Financial Risk with a Centralized Salesforce Platform



Client Overview

- A global food and beverage enterprise with one of the largest supply chains in the industry. The organization manages a vast customer base with long payment terms and works with over 40,000 direct and indirect suppliers worldwide.

The Challenge

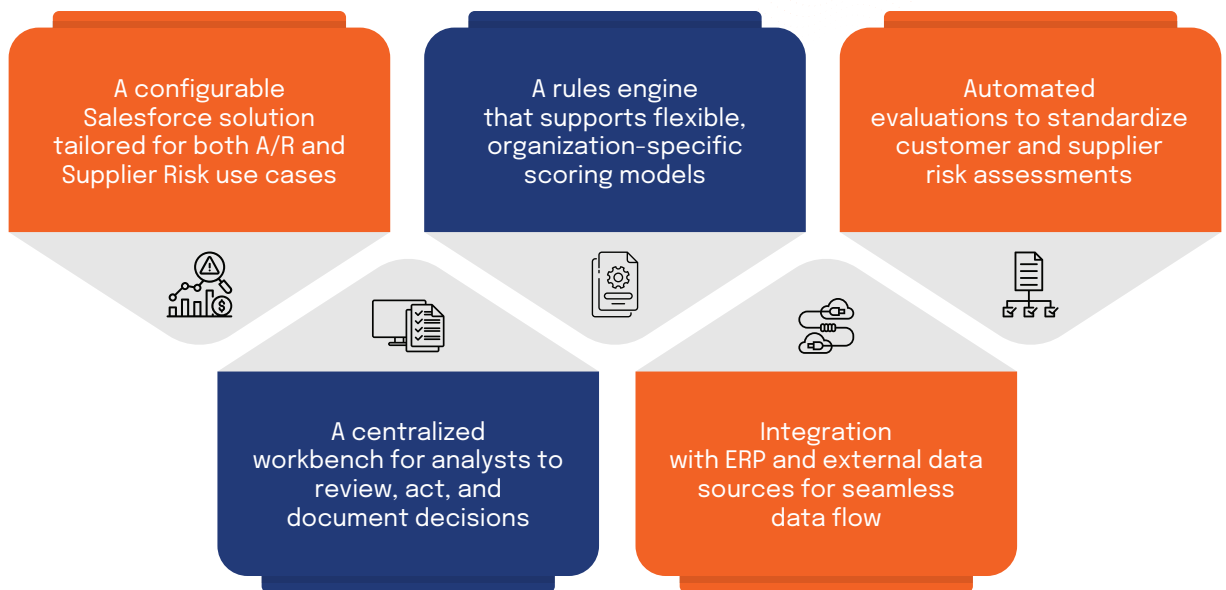
- The Accounts Receivable and Global Supply Chain teams needed a unified digital platform to manage financial risk at scale.
- Their key objectives included:



Business Impact

- › Vertex delivered a Salesforce-based solution that empowered both A/R and Supplier Risk teams to make faster, data-driven decisions.
- › All customers are now scored annually, with dynamic credit limit adjustments
- › Credit limits are automatically pushed to SAP to reduce collection risk
- › All major suppliers are evaluated annually for risk to strengthen supply chain confidence
- › Risk ratings are visible across procurement teams via a centralized dashboard
- › Manual assessments reduced; process now fully auditable and compliant

What We Delivered



Technical Highlights

- › Integrated with internal systems (SAP) and external sources (Experian, D&B)
- › Used Salesforce screen flows to simplify and standardize scoring workflows
- › Enabled data encryption at rest using Salesforce Shield for financial data security
- › Established a Center of Excellence (CoE) for governance, rollout, and adoption