A TWINENGINES CASE STUDY

From Shared Inbox to Instant Action: How Dornier Americas Put AI to Work Across Orders, Compliance and Marketing

A medical technology company already used AI at the desktop. TwinEngines put it to work inside the business.



5 years
of sterilization history, one search

7 systems
connected, ERP included

On arrival
every email recognized

ABSTRACT

Dornier Americas sells urology devices and consumables in a regulated market where documentation follows every shipment. Its president was already a confident AI user and wanted AI to do more inside the business. TwinEngines brought AI into three places around the ERP and CRM Dornier already runs: an inbox that recognizes and acts on orders and requests as they arrive, an archive that turns five years of sterilization certificates into a searchable record, and a data warehouse that gives AI clients one consolidated source of ERP, CRM and physician data through an MCP server. Sales operations, compliance and marketing now work from information that arrives organized.

At a Glance

The story in one look

PROJECT

AI that acts on inbound email, reads compliance documents and reaches company data for a U.S. medical device business, across sales operations, consumables and marketing.

INDUSTRY

Supply Chain, medical device and consumables distribution

ERP AND INTEGRATIONS

SyteLine ERP. Integrated with Salesforce, AcuityMD, Microsoft 365 email and SharePoint, an order processing system, a shipping system and a data warehouse.

RESULTS

- Leadership, sales and marketing see ERP, CRM and physician data together, open to reporting and AI clients
- Purchase orders and tracking requests recognized and acted on as they arrive
- Five years of sterilization certificates searchable by part and lot number

WORKBENCH CAPABILITIES

Workflow automation, integrations, document portal, data warehouse and reporting.

AI TOOLS

AI Email Router, Document Intelligence.

Overview

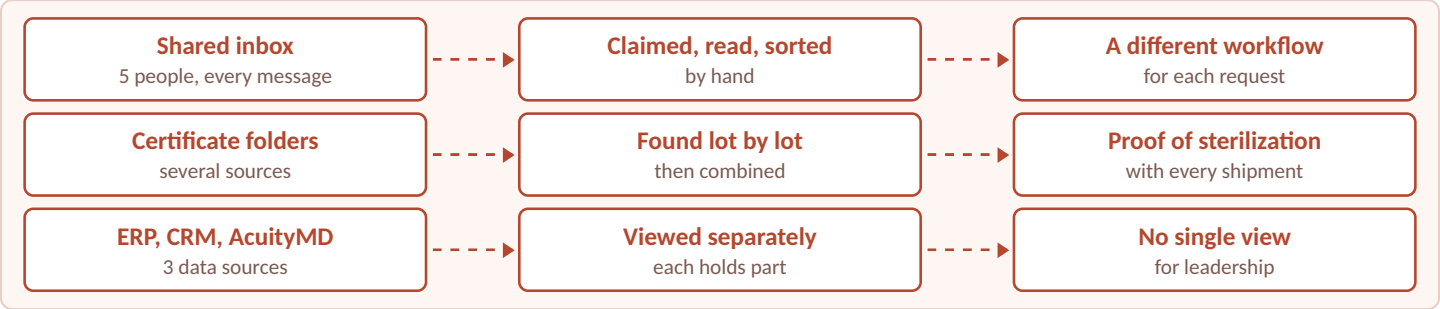
Who Dornier Americas is

Dornier Americas is the U.S. arm of a global medical technology company headquartered in Munich, focused on urology. It sells capital equipment, the larger devices used in urology procedures, along with consumables, the single use supplies that go with them. The relationship began with a peer introduction and a list of projects Dornier wanted a partner to help sequence.

1 The Challenge

Three places daily work gathered

Dornier sells in a regulated field where speed matters and documentation is not optional. Two business lines, equipment and consumables, each touch several systems, vendors and rules. Three areas stood out.



Every email claimed by hand.

A sales operations team of five watches a shared inbox. Each message is claimed, read and sorted: purchase order, expedited order, credit request, tracking question, RMA or another miscellaneous request. Every answer leads to a different operational workflow.

Certificates found lot by lot.

Every consumable that ships must travel with proof of sterilization. Certificates arrive from several sources, each in a different format. For each order, someone finds the certificate for every lot and combines them by hand.

Three data sources, no single view.

ERP sales data, Salesforce contacts and AcuityMD physician and procedure data each held part of the picture. Dornier may only market to physicians who have opted in, so leadership needed to see all three together with care.

2 The Goal

What had to change

Dornier wanted AI working inside daily operations, with a partner who could advise first and build second.

1
Start where AI matters most.
Sort the project ideas and choose the quick wins with the biggest impact.

2
No email waits to be claimed.
Recognize every inbound message the moment it arrives, then route it to the right workflow or respond right away when the request allows.

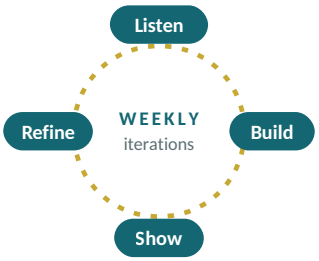
3
Certificates found quickly, not lot by lot.
Put the right sterilization documents in hand for every lot shipped.

4
One view across three data sources.
Bring ERP, CRM and physician data together within Dornier's marketing consent rules, and put it within reach of AI.

3 What We Built

One idea, three places

One idea runs through all of it: AI connected to the systems and documents Dornier already works in, not a tool sitting beside them. Every TwinEngines engagement starts with a Solution Architect and work moves in weekly, agile iterations. Dornier began with an advisory engagement. TwinEngines worked through the project list with Dornier's teams and chose where AI would make the fastest, most visible difference. Each workstream then ran with the group that owns the process, alongside global IT. Workbench capabilities for email handling, document processing, integration and AI access to data gave the work its foundation, and TwinEngines tailored the classification categories, certificate checks and data flows to Dornier's products, vendors and rules.



Dedicated Solution Architect | **Weekly, agile iterations** | **Advisor first, builder second**

1 **Advise** — Rank the project ideas

2 **Triage email** — AI sorts each message on arrival

3 **Index certificates** — Read, check and store

4 **Connect data** — ERP, CRM and AcuityMD in one warehouse

5 **Open to AI** — MCP server on the warehouse

6 **Enrich contacts** — Opted in physicians only

AI inbox triage.

AI reads each incoming email and classifies it on arrival. Purchase orders and expedited orders go to Dornier's order processing system, which processes the sales order without a person handling it. Credit requests, RMAs and other miscellaneous requests are classified and routed to their own workflows.

Automatic tracking answers.

When the AI recognizes a tracking request, it checks the shipping system and replies to the customer immediately if the order has shipped, with no routing needed. If the order has not reached the shipping system yet, the workflow keeps checking for 12 hours, then hands the request to the sales operations team.

Sterilization certificate intelligence.

Azure Document Intelligence reads certificates in each source's format, extracts the lot numbers and checks that every required document is present. Everything lands in a searchable portal holding five years of history, the period a sterilization certificate stays valid. Enter a part and lot number and the right certificate is on screen.

Connected data, open to AI.

Data from SyteLine, Salesforce and AcuityMD flows into one warehouse. AcuityMD delivers its data on a quarterly schedule to Azure storage, and TwinEngines loads it into SQL Server. SyteLine data arrives through the integration platform Dornier's IT team already uses. An MCP server on the warehouse lets AI clients work with the same consolidated data that reporting draws on.

Contact enrichment built on opt in rules.

Matching on each physician's NPI number, the integration brings contact details and procedure activity from AcuityMD into Salesforce records. It enriches only contacts already in Salesforce and never adds new ones, a design that came straight from Dornier's compliance standards.

HARDEST TECHNICAL PIECE

Classification. Beyond the requests that trigger automation, the AI sorts credit requests, RMAs and other miscellaneous requests. Tuning each category until every message reached the right workflow was the most iterative part of the build.

HARDEST PIECE ON DORNIER'S SIDE

Access to ERP data. Dornier's global IT team manages access deliberately, as a regulated business should. SyteLine data reaches the warehouse through the platform Dornier already trusts, not through direct database access. Regular working sessions with the team kept the pace steady.

Dashboards and visibility

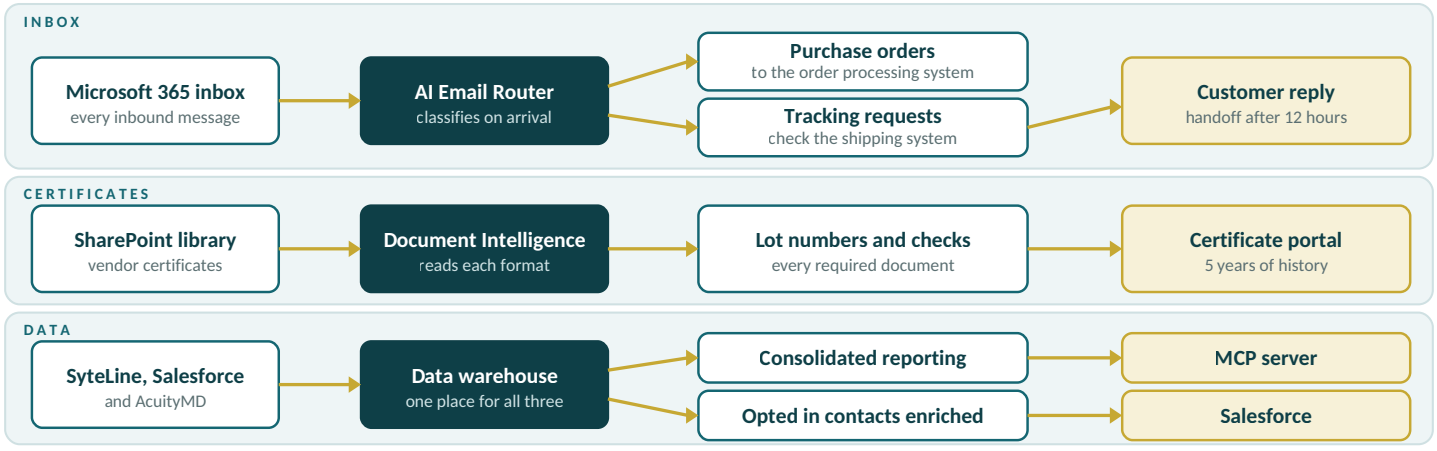
Leadership, sales and marketing can see ERP sales, Salesforce campaigns and contacts, and AcuityMD physician activity side by side in consolidated reporting. The consumables team can search five years of sterilization certificates on its own. Visibility is built into nearly every TwinEngines project, and Dornier's is no exception.

WHAT LEADERSHIP CAN SEE

- ERP sales
- Salesforce campaigns and contacts
- AcuityMD physician activity
- Certificate search, 5 years

How the Systems Connect

Three lanes, one foundation



4 What Changed

Results for the business

Leadership can see the business.

5 years	7 systems	On arrival
of sterilization history, one search	connected, ERP included	every email recognized

AI does the sorting so the team can do the judging.

BEFORE		WITH TWINENGINES
Every email claimed by hand	→	**AI recognizes and acts on each email on arrival**
Certificates found lot by lot	→	**Part and lot search across five years**
Three data sources, no single view	→	**One warehouse for ERP, CRM and physician data, open to AI**

- **Visibility across three data sources.** Marketing, sales and leadership work from one consolidated picture of ERP sales, CRM contacts and physician activity, and AI clients can work with the same data.
- **Orders that move sooner.** Work on a purchase order or expedited order begins as soon as the email arrives.
- **Tracking questions that answer themselves.** Routine tracking requests are answered immediately when the order has shipped, without anyone looking up the order.
- **Certificates on demand.** A part number and a lot number lead to the right certificate across five years of history.
- **Fewer things missed.** Sales operations reported better tracking of what is going on, items moving through the queue faster and fewer things missed.

BUILT	EXTENDS TO	ONGOING
Inbox triage, certificate archive, connected data	Order driven certificate assembly, an inbox work queue in a portal, marketing attribution	New projects as Dornier's priorities evolve.

Closing

Closing the gap

Dornier's ERP, CRM and shipping system each did their jobs. The gap sat in the spaces between them: an inbox, a folder of certificates and marketing databases that did not talk to each other. TwinEngines closed it by putting AI inside those spaces. AI that began on a leader's desktop now carries work for the whole team. The clearest proof is the question the team keeps asking, which is not whether the work is finished but what to build next. The inbox still receives the same mail. It just knows what to do with it.

Industry Supply Chain, Medical Devices · **ERP** SyteLine · **Integrations** CRM (Salesforce), Microsoft 365, Shipping, Other (AcuityMD, order processing) · **Workflow** Sales, Operations, Custom · **AI** Email Attendant, Document Intelligence · **Outcome** Visibility, Speed, Accuracy, Automation, Customer Experience