PERVASIVE®

*Better Usability with Bi-directional Mashups*

# Internet News Organization Builds Salesforce CRM and Oracle Financials Bi-directional Mashup with Pervasive

## Seamless 360-Degree View of Customer Boosts Sales

### Challenges

- Create Salesforce CRM and Oracle Financials mashup
- Give sales staff ability to view and edit both applications' data in one interface
- Keep both systems consistently in sync

### Implementation Highlights

- Increased sales
- Full 360-degree view of customer
- Seamless bi-directional mashup

### Products

- Pervasive Data Integrator™
- Pervasive Professional Services Group

*" We are extremely pleased with Pervasive Software. The integration team jumped in the middle of our process, provided expertise when we needed it, and handled our problems. Pervasive was also very flexible with our Oracle Financials requirements changing. The consultants we used worked very hard, and we are looking at Pervasive as middleware for some of our other applications."*

**– Project Manager**

## EXECUTIVE SUMMARY

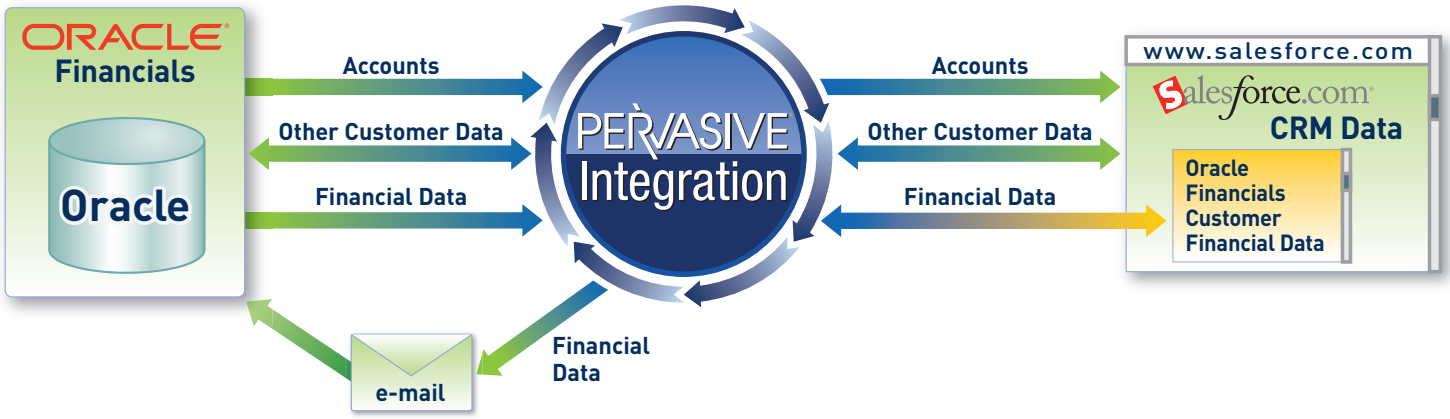
An internet news organization needed a cost-effective integration solution to connect Oracle Financials customer and sales information with Salesforce CRM in a mashup that would display the Oracle data in the Salesforce user interface. But, the need wasn't just for query and display, they also needed to give their personnel the capability to update the Oracle Financials data directly from Salesforce.

After an unsuccessful attempt with another solution, they discovered Pervasive integration software and its professional services team could do the job right.

## CHALLENGE

This organization had a Siebel system that worked similarly to Oracle Financials but frequently got out of sync. It didn't get all the data and was very frustrating for the sales team. The Project Manager said, "*We needed a better tool.*" The parent company of this organization used Salesforce CRM and were quite happy with it.

The organization switched their Siebel CRM application to Salesforce CRM. This introduced the need to integrate Salesforce CRM to their existing Oracle Financials systems. But that wasn't enough. The sales team didn't want to have to switch from one application interface to the other in order to see the full view of their customers, and update that essential information. While they wanted to see all the customer data in the Salesforce CRM window, it was essential to keep sensitive financial data stored on-premises in Oracle. And those two interlinked data stores had to be kept in perfect sync.



In addition to having very specific and 'within budget' needs, this organization was on a strict deadline and needed to purchase and implement the solution within four months. That seemed like plenty of time, but they ran into a snag.

## CHOOSING THE SOFTWARE

The organization explored a low cost solution from an implementation partner, but they oversold the solution's capabilities. During the proof of concept phase, they realized that the partner they selected didn't have the capability to build what they required, so they had to look for a new solution.

With only eight weeks left before a major sales conference, and jobs on the line, the organization gave Pervasive a chance to prove that they could handle the requirements.

The Project Manager elaborates, "*Pervasive had about the same cost, and said they could do what we wanted. So we jumped on that approach. We quickly did a proof-of-concept to make sure the solution could do the basic things we needed, and then we went with it.*"

## SOLUTION

In the Salesforce CRM interface, Pervasive displays customer financial account data from Oracle Financials alongside the CRM customer contact data in a small frame inside the same browser window. The organization's sales staff gets a full view of the customer from both applications in a single interface. In addition, Pervasive automatically pushes any contact updates from Oracle into Salesforce CRM itself.

The Project Manager elaborates, "*The mashups are working the way they are supposed to, and it's a big plus for the folks that are working with Salesforce CRM. We have had great feedback so far on the way the process has improved.*"

The integration is bi-directional. The organization's sales team can update customer financial data directly from the Salesforce interface. Pervasive automatically puts that data into an email and sends it.

"*Pervasive's solution produces the email and sends it to those on the sales team who enter it in a form manually. Integration in the other direction is occurring automatically, and that is where most of the activity is happening,*" adds the Project Manager. "*Accounts need to be created in Oracle anyway, and that automatic feed is a big advantage.*"

The capability exists to push that data directly back into Oracle via the native Pervasive interface, but that would have bypassed existing code that replicated Oracle data to other external systems. As a stopgap measure, the last step to get Salesforce CRM data into Oracle is done manually, but the plan is to eventually automate that with Pervasive technology as well.

The Project Manager adds, "*Pervasive was very flexible with Oracle Financials requirements changing. We appreciated the flexibility.*"

## BENEFITS

### Increased Sales

The Project Manager says, "*We have noticed sales have improved – we are actually doing better than expected this year, and part of that is from using Salesforce CRM, and having better information available to our sales team.*"

### Quick Implementation

With only eight weeks left in their implementation timeline, and starting over with a new solution, the organization needed Pervasive to perform as promised. "*There was a lot of pressure to have it done. People's jobs were on the line. And we made it,*" says the Project Manager. "*The consultants at Pervasive worked very hard.*"

## CONCLUSION

The Project Manager said, "*After a successful implementation, we are looking at Pervasive as potential middleware for some of our other applications.*"

He sums up the process, "*We are extremely pleased with Pervasive Software. The integration team jumped in the middle of our process, provided expertise when we needed it, and handled our problems. Pervasive was also very flexible with our Oracle Financials requirements changing.*"

### About The Company

This internet news organization is a global leader in communications and marketing services that enable organizations to connect and engage with their target audiences worldwide, through multiple channels, including press release wire distribution services.

### About Pervasive Software

Pervasive Software provides agile data integration software that speeds the flow of data between applications and between organizations. Our robust technology addresses SaaS, SOA and traditional integration modes and allows customers to re-use the same software for integration scenarios that span data warehouses, real-time application integration and data exchange with trading partners.

### For More Information

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