PERVASIVE®

CASE STUDY

Speed to completion | Value | Efficiency

Customer Connect, Pervasive Services Group integrate Glovia accounting data to Microsoft CRM

WSDL solution, Pervasive® Data Integrator™ and Customer Connect's CRM expertise speed completion of complex project

"Pervasive has the people to stand behind their product. It's impressive. They helped us complete the Microsoft CRM integration rapidly and effectively. We can reach out to Pervasive to ensure our clients get the very best results – on budget and on schedule."

–Sue McAlexander
Senior Implementation Specialist for Customer Connect

PERVASIVE Data Integrator™

About Customer Connect

Cornelius, North Carolina-based Customer Connect empowers businesses to get customers faster and keep customers longer. As certified professionals in Microsoft Dynamics CRM, Salesforce and Pervasive, the company provides cutting-edge solutions that deliver sales and marketing results. Its unique blend of marketing experience and technical know-how results in fast, measurable results. Services include customer relationship management (CRM), Web marketing, data mining, and database marketing.

Executive Summary

North Carolina-based Customer Connect provides cutting-edge solutions that deliver sales and marketing results. Its services include customer relationship management (CRM), Web marketing, data mining and database marketing. As a Microsoft Gold Certified partner, Customer Connect provides Microsoft CRM solutions. The company has an excellent reputation for its expertise in CRM implementations, including data migration and integrations.

In 2007, Customer Connect was involved in integrating Barnhardt Manufacturing's Glovia accounting data into a MS CRM 3.0 system. Customer Connect rapidly completed the initial integration using Pervasive's powerful yet simple-to-use Pervasive Data Integrator tools. The sophisticated integration required system architects familiar with development of XML schemas and WSDL. By combining Pervasive's advanced integration technology, outstanding Pervasive Partner Support and Customer Connect's know-how, they were able to deliver on the initial phase of the integration. As a second phase of the integration, Barnhardt asked Customer Connect to very rapidly implement integration of additional Glovia and CRM tables. To meet the aggressive deadline, Customer Connect needed supplemental resources. The Pervasive professional services group came to the rescue and teamed with Customer Connect staff to finish the job on time.

Challenge

Customer Connect Senior Implementation Specialist Sue McAlexander was working on a complex ERP and data warehousing project for Barnhardt Manufacturing when the client requested next-phase integration of Glovia accounting data into its Microsoft CRM system. McAlexander said, "The complexity and tight deadline on this project required a team with deep experience in both CRM and integration. We needed a trusted partner that could be deployed within a fairly short period and could work with an evolving XML schema and WSDL to meet the requirements of our client."

Solution

The winning combination of Customer Connect's CRM expertise and integration know-how, combined with Pervasive's proven products and professional services team, delivered the complex integration project to meet the client's deadline. Sue McAlexander said, "I needed quick, experienced resources, and Pervasive's support staff and professional services personnel were phenomenal. I've worked with a lot of software companies, and I've never seen the kind of service I received from Pervasive. They helped us develop a Web services connector via a WSDL approach in phase 1, and quickly jumped in to deliver the entire phase 2 portion of the project."

Pervasive worked with Barnhardt and Customer Connect developers to get a development WSDL up and running. When the kinks were worked out, the WSDL was moved to Customer Connect production machine using a production WSDL. The mapping is one-way, with Glovia data containing a customer's

Customer Connect integrates with Microsoft CRM

address and records, such as buyer, shipping and billing data, loading to Microsoft CRM 3.0. The data is sent to the Microsoft CRM in the form of flat files.

"Our combined team had a lot of experience with CRM migrations and integrations, and particular expertise with Microsoft Dynamics CRM. We helped the client easily sync 3,500 accounts and over 8,000 addresses. The system is now up and running on a nightly 3:00 a.m. batch," McAlexander added.

Benefit

Productivity. Without a doubt, Customer Connect Senior Implementation Specialist Sue McAlexander believes Pervasive Data Integrator's ease of use is her favorite product hallmark. "Process Designer's GUI format makes my job so much easier," she noted.

Highly accessible support and services. A demanding deadline and complex data integration requirements were met by combining the talents of Customer Connect CRM specialists with professional consultants and support staff at Pervasive.

Conclusion

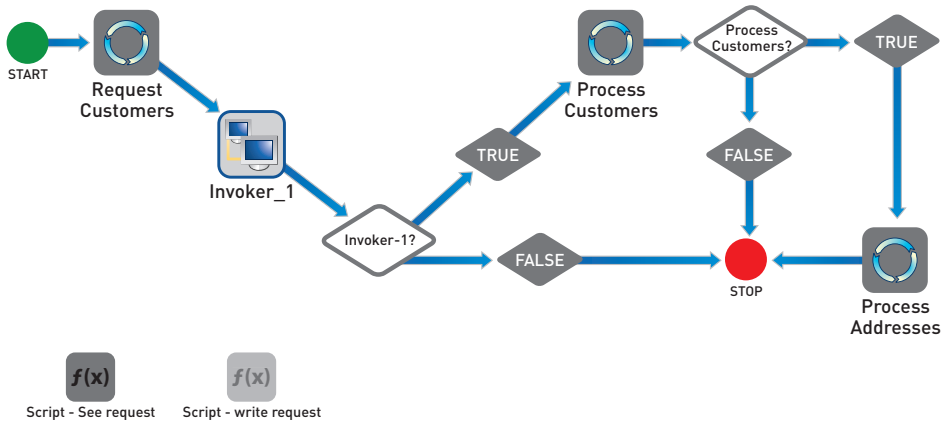
Customer Connect is pleased with the breadth of Pervasive Data Integrator's data migration and integration capabilities and Pervasive's support and services professionals. McAlexander said, "Pervasive has the people to stand behind their product. It's impressive. They helped us complete the Microsoft CRM integration rapidly and effectively. We can reach out to Pervasive to ensure our clients get the very best results – on budget and on schedule."

Customer Connect CRM Consultant Matt Wittemann adds, "Customer Connect has come to really appreciate Pervasive. We are so confident in their products and staff that we've become a partner. With Pervasive, Customer Connect can take on even the most challenging integration projects to drive more customer success and bottom line results."

Likewise, Pervasive has been highly impressed with Customer Connect's CRM and integration expertise. Customer Connect exemplifies professionalism and the can-do ethic embodied by Pervasive partners.

Next Steps

Sue McAlexander and Matt Wittemann attended the Pervasive User Conference, IntegratioNEXT, and came away highly impressed with Pervasive Data Profiler™. McAlexander said, "I see immediate benefits coming from Pervasive Data Profiler–for one, speed to completion on projects by doing data profiling ahead of migrating data. The cost also is attractive."



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.

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