PERVASIVE

CASE STUDY

QuickArrow®
A NETSUITE COMPANY

"Clients now receive a notice of success or failure which is delivered and visible in the Salesforce user interface. Not only this, but QuickArrow now only needs two processes that work for all our customers. This frees up our integration engineers, giving us more time to make our customers happy."

– David Byrd
Senior Integration Consultant, QuickArrow

QuickArrow uses Pervasive Salesforce Outbound Messaging Service Support to Streamline Bidirectional Integration

QuickArrow Increases Customer Satisfaction while Reducing Maintenance Time by 80%

Challenge

- Needed a more efficient use of bandwidth in order to improve SaaS response times

Implementation Highlights

- *80% reduction in maintenance time*
- *20% reduction in customer on-ramp time*
- *20% reduction in issue management time*
- *Maintenance now handled by support personnel instead of engineers*
- *Scalable to handle increasing needs without increasing bandwidth*

Pervasive Products and Services

- Pervasive Data Integrator™
- Pervasive Message Listening Service
- Pervasive Integration Manager
- Pervasive Professional Services Group

Company Profile

Austin, TX-based QuickArrow offers a Professional Services Automation (PSA) solution specifically designed to help billable services organizations achieve the visibility needed to optimize their services operations. QuickArrow's Software as a Service (SaaS) solution fully integrates with leading SFA, CRM, and financial applications, replacing homegrown solutions and labor-intensive spreadsheets to automate workflows and streamline operations. The company's unqualified SAS 70 Type II certification and innovative Web Services API ensure reliability, flexibility, and data security for clients such as salesforce.com, HP, Borland Software, Symantec, Genesys, Informatica, and Proxicom.

Salesforce		QuickArrow
Accounts	⟷	Clients
Opportunities	⟷	Projects

Business Incentives and ROI

MORE EFFICIENT REAL-TIME SALESFORCE–QUICKARROW INTEGRATION NEEDED

QuickArrow has many successful SaaS integration implementations in place using Pervasive technology. Salesforce-QuickArrow integration is a service that showcases QuickArrow's commitment to meeting its customers' evolving needs. As more and more customers took advantage of this convenient service, bandwidth and other resources became strained, and the QuickArrow team sought to streamline their system. When QuickArrow Sr. Integration Consultant David Byrd heard about the **Pervasive Message Listening Service** and its support of Salesforce Outbound Messaging Service, he saw a solution.

QuickArrow has approximately 45 companies using their Salesforce integration. Some individual QuickArrow customers have as many as 24,000 accounts. In the past, these accounts were queried as often as 24 times per day to ensure a complete list of updates. This resulted in nearly six million records being queried each day from Salesforce on the Account object alone. It became clear as customer companies grew that QuickArrow needed a more efficient use of bandwidth in order to improve its SaaS response times.

SOLUTION

The key to the new integration was determining how the data was to come across. Instead of querying everything and determining what changed, a new system was set up to take advantage of Salesforce Outbound Messaging Service. The Salesforce back end sends out the data when a qualifying event occurs. For example, when a qualified Salesforce account is edited and saved, an Account Outbound Message is automatically sent to QuickArrow. When a qualified Salesforce opportunity is edited and saved, an Opportunity Outbound Message is automatically sent to QuickArrow and captured by the Pervasive Message Listening Service. Then, the message is processed into either a QuickArrow Client or Project.

David Byrd describes the solution, *"Instead of millions of records being queried a day, we typically receive less than 200 messages in a 24-hour period. The efficiency is not in how fast the process works, but in that you are only processing the relevant data that needs to be processed. That being said, we were able to complete the process from Salesforce to QuickArrow and back within 10-15 seconds."* This new streamlined process provides real-time bidirectional integration, and long-term scalability of QuickArrow customers with no response time delays or strain on limited resources.

In addition, the integration re-design project has yielded several additional benefits. David Byrd says, *"Clients now receive a notice of success or failure which is delivered and visible in the Salesforce user interface. Not only this, but QuickArrow now only needs two processes that work for all our customers."* This allows integration engineers to focus on other pressing projects.

QuickArrow Sr. Director of Professional Services Doug Richards, says, *"Because we are using a single code line for all customers, issue management takes 20% less time."* Integration engineers have also achieved 20% development time reductions, and 80% maintenance time reductions!

David Byrd adds, *"This frees up our integration engineers, giving us more time to make our customers happy."*

QUICKARROW CUSTOMERS BENEFIT FROM THE QUICKARROW–SALESFORCE INTEGRATION

QuickArrow customers appreciate the real-time integration and more robust and user-friendly error reporting. RAND Business System Manager, Matt Buttrill, says, *"We have a fairly complex integration with Salesforce such that projects and clients are created automatically in QuickArrow based on rules. Projects are first created in a pre-sales area so we can track the work done by technical staff to help close a sale, and then when the deal closes in Salesforce, the project is moved to a different department pulling all the data with it."*

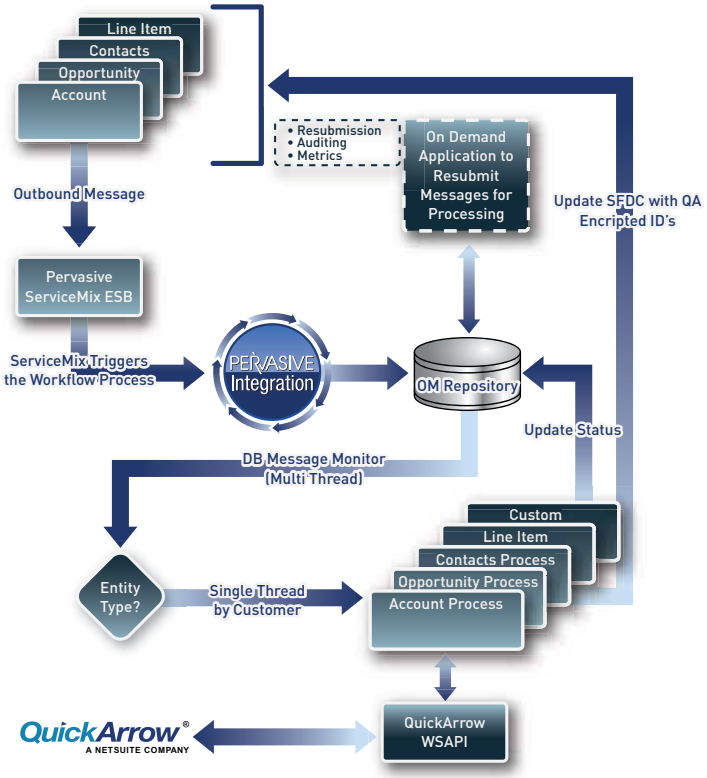
Buttrill adds, *"Multiple templates are used based upon the client type, products involved and the level of work being completed. All work done in QuickArrow is pushed back to Salesforce, giving our sales staff a live view of work completed, scheduled billings, completed invoicing, and expenses, whether billed or non-billed."*

Another customer, Kimberly Capelle of Zywave, says, *"Automated, real-time Salesforce to QuickArrow integration has really helped our business because it allows us to get things moving between Sales and Services right away and accelerates the overall process."*

QUICKARROW CUSTOMER ADVANTAGES

- QuickArrow user has object loaded in as little as 15 seconds
- Customers, sales, and services, as well as other groups receive qualified data immediately as it is updated in Salesforce
- If an outage occurs, the Salesforce user can resubmit via a supplied report
- Customer receives a notice of success in as little as 10 seconds

SALESFORCE–QUICKARROW PROCESS OVERVIEW



How It Was Done

PERVASIVE STREAMLINES VITAL QUICKARROW–SALESFORCE REAL-TIME INTEGRATION

QuickArrow Sr. Director of Professional Services Doug Richards, points to the Pervasive Message Listening Service, Salesforce connector, and the QuickArrow MCF Component as keys to QuickArrow's successful real-time Salesforce to QuickArrow integration. QuickArrow also uses Pervasive Integration Manager, which became a needed solution in 2008 when Microsoft Scheduled Task Manager kept failing.

The vision for the real-time process came out of the quarterly integration newsletter announcing the release of the Pervasive Message Listening Service and how it would work with Salesforce Outbound Messages. Realizing that taking advantage of this new technology would involve building a new integration, QuickArrow wanted the new integration to have the following features:

1. Single process per entity for all customers (i.e. scalable)
2. Allow for easy customer-specific customizations (i.e. flexible)
3. Step-by-step logging
4. From the Salesforce side, it needed to act like a Salesforce add-on
5. Ease of maintenance
6. Ease of support

PREVIOUS INTEGRATION PROCESS

One process per customer and batch integration were the norm prior to real-time processing between Salesforce and QuickArrow. Typically, each customer had a process containing five maps, five custom SQL steps running stored procedures to load the data through the database service layer, and one-batch-per-hour processing. Creating a new customer process involved replicating via a template an old process and making modifications to the maps and SQL steps.

REAL-TIME INTEGRATION

The new integration can be easily installed—thanks to a single integration code base—and then can be customized for individual customers. As David Byrd explains, *"There may be custom code per customer, but the functions all have the same names and individualized customer functions that can be called by a generic process. Ramping up and maintenance time and effort are now significantly reduced."*

Plus, ongoing maintenance has proven to be *"significantly easier and better."* Instead of QuickArrow's integration engineers handling maintenance, support personnel can do so, greatly aiding work processes.

The new process automatically retrieves a ClientID and other keys and keeps them in sync. The need for SQL API staging tables has been eliminated, and a PostgreSQL database is only used to store messages and calls.

Moving ahead, this message receipt model would work with many on-premises applications like Microsoft Great Plains, Quickbooks, SAP, and Microsoft CRM real-time integration. With Pervasive, QuickArrow can bridge firewalls to reach a variety of on-premises applications, as well as other SaaS applications.

TECHNICAL SERVICES AND SUPPORT ADVANTAGES

- QuickArrow users receive a success response when they refresh within 15 to 30 seconds.
- A failure message and the reason why will be noted on the appropriate Salesforce record and can be sent to a Salesforce and/or QuickArrow admin via an email alert. This significantly improves customer support.
- Maintenance is simplified. The integration code base is a single set of processes used by multiple customers.
- Customer-specific customizations are stored in functions specific to that customer and loaded when a message is received.

OVERALL TECHNICAL BENEFITS TO QUICKARROW

Flexibility. Wide connectivity and no custom coding let QuickArrow bring reliable, real-time integration to customers. One set of processes using only eight maps works for all customers.

Ease of Use/Time Savings. For QuickArrow staff, ramping up and maintenance time and effort are now greatly reduced. Man hours formerly tasked to maintenance can now be redirected to other customer projects.

Scalability. As customers' needs grow, the new process automatically grows with them, with plenty of bandwidth to spare.

PERVASIVE

Universal CONNECT!

Pervasive connects you to virtually everything

The most comprehensive initiative for universal connectivity to all data sources and applications – from legacy to on-premises to SaaS applications, files to databases, Web to mainframe.

Whatever it is, Pervasive connects to it and integrates it.

Over 500 reusable connectivity components

Connectivity out-of-the-box to thousands of applications and data sources

Rapid extensible connectivity to everything else

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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