PERVASIVE DATA INNOVATION

AMERICAN INNOVATIONS

Improve Sales Efficiency in the Oil & Gas Industry

American Innovations Gets Mobile Connectivity between Salesforce and Microsoft Dynamics Great Plains with Pervasive

Increases Sales Orders by 15 Percent

Challenges

- Migrate Microsoft Dynamics GP data into Salesforce
- Create an ongoing synch between Salesforce and Microsoft Dynamics GP

Implementation Highlights

- ***15% increase in sales orders***
- ***Improved customer service***
- ***Streamlined sales order process***
- ***Minimized effect of organizational changes***
- ***Solid reliable performance, no downtime***
- ***Exceptional training and expertise***
- ***Fast, responsive support***

Products

- Pervasive Data Integrator™
- Pervasive Training Services

"You guys have some experts there who are pretty knowledgeable about Salesforce to Great Plains integration. I sat down with some folks, and they got me squared away. I was really impressed. I didn't expect that… I was comfortable enough to create maps as soon as I left."

– David Zamora, Business Process Manager, American Innovations.

EXECUTIVE SUMMARY

American Innovations® (AI), a privately held company based in Austin, TX with offices in Texas, Colorado, Arizona and Canada, provides remote monitoring and compliance technologies to various markets and industries with a focus on the oil and gas, and other pipeline industries. With a mobile sales team, AI needed a cloud-based solution to supplement their Microsoft Dynamics Great Plains ERP in order to create sales orders. They chose Salesforce CRM.

AI purchased Pervasive Data Integrator to migrate data from Microsoft Dynamics GP into Salesforce CRM, and then, on a regular basis, to move cloud data from Salesforce CRM to Microsoft Dynamics GP, which AI still wanted to maintain for its ERP workflow component for tracking work orders and manufacturing. AI participated in on-site five-day training at Pervasive, and was then able to create the maps needed.

Now, the AI sales team is able to generate quotes while out on the road. AI has streamlined its order process, by enabling the sales team to place customer orders no matter where they are, and has allowed the company to better service its customers.

CHALLENGE: INTEGRATE SALESFORCE TO MICROSOFT DYNAMICS GREAT PLAINS ERP FOR MOBILE SALES FORCE

AI had a small, very mobile sales team. Their previous method of calling in orders, and having someone at the home office key in the information was cumbersome, error prone, and slow. Microsoft Dynamics GP worked well for them, but the on-premise software just wasn't available to the sales team on the road.

Once AI decided to implement Salesforce CRM, it realized the need for an integration platform, both to get their Microsoft Dynamics GP data up into Salesforce CRM, and then to move data from Salesforce CRM in the cloud back to Microsoft Dynamics GP on an ongoing basis in order to maintain synchronization between the CRM and ERP.

Business Process Manager for American Innovations, David Zamora, evaluated software solutions on price, service availability, and license agreement match to their business model. *"Pervasive was recommended by a Salesforce solution provider, but we didn't just take their word for it. We took in several factors during the evaluation process, and thought Pervasive Data Integrator was a good fit for what we were doing,"* said Zamora.

SOLUTION: PERVASIVE INTEGRATION

The integration implementation would be fairly complex, involving creating a lot of custom objects and interfaces in Salesforce CRM that were not standard. AI decided to train their own personnel so they could build, modify, and enhance their integrations on their own. Zamora found the training right on target, and discovered that the last section was individualized particularly to his needs. *"You guys have some experts there who are pretty knowledgeable about Salesforce to Great Plains integration. I sat down with some folks, and they got me squared away. I was really impressed. I didn't expect that,"* said Zamora. *"Five days in boot camp training and I was able to learn it really quick. The training was well conducted and very thorough. I was comfortable enough to create maps as soon as I left,"* said Zamora.

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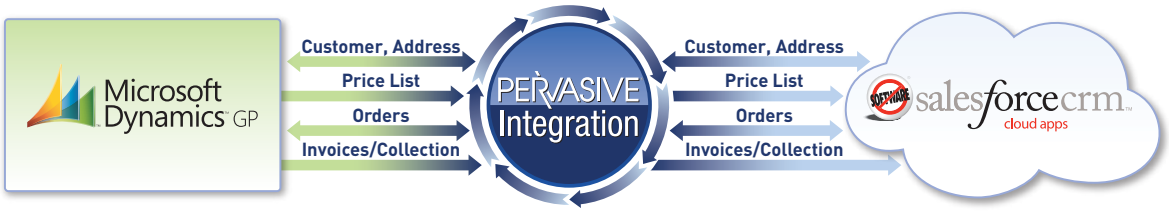

But when Zamora got started, he hit a snag. *"When we first installed Pervasive Data Integrator, the integration didn't work – but that turned out to be a really good thing actually,"* said Zamora. *"The reason was because our initial installation of the software on our Windows 2003 server was missing service packs. Y'all were very quick to jump on it, and find out the solution to the problem. We were able to troubleshoot it over the phone, and get the product up and running. It really highlighted the level of customer service Pervasive has, which I was really impressed by. From the technical aspect, they went above and beyond. We've had no problems after that."*

AI divided the integration implementation into phases, beginning with the migration of accounts, and then followed with the creation of a mechanism to create new accounts into Salesforce. They then created the custom sales object for sales orders, and synched invoices and collections objects as well. AI used the native MS Dynamics eConnect to pull sales orders down, in order to kick off the ERP workflow that creates work orders, schedules materials and sends that to manufacturing. It was logical to use MS Dynamics for that part of the job, and there was no problem meshing that with the Pervasive integration processes that did the rest of the work of synching GP and Salesforce CRM.

In addition, AI uses Pervasive to replicate their Salesforce CRM data locally in order to do data manipulation tasks before pushing the data back to the cloud. Zamora said, *"We use Pervasive processes to do comparisons between data fields, check for changes in various important fields. Then we sync the record if it's changed in one of those fields."*

"We also decided to move the collections information into the cloud and create an object in Salesforce so the collections department can easily track payables, and can enter notes into Salesforce," added Zamora. *"That was a bonus for us – we didn't anticipate doing that, but with Pervasive, it was easy enough to do all of that in the cloud. It only took us about a weekend to do. That was remarkable."*

Zamora said, *"Today, we have twenty different maps that run on a half hour to an hour basis, running constantly."* He added, *"It's very flexible."*

BENEFITS

Better customer service. With the ability to generate sales orders and quotes while on the road, AI is now able to better service its customers. *"This new system has allowed us to break down the barriers that existed between organizations because we can see the data as a central location. A good example being from the technical support team and customer service side – they can see the sales orders being placed and can service the customer better by seeing the information that's coming in,"* said Zamora.

15 percent increase in sales orders. With the new system implemented, Zamora has noticed a 15 percent increase in sales orders. *"Sales guys can enter info from anywhere, hotels, conferences, trade shows. At trade shows, our sales guys can generate a quote right there."* He adds, *"As we continue and the sales team gets more comfortable, I think the number [of sales dollars] will increase."*

Streamlined sales order process. He adds, *"This is where Pervasive comes in – it gave us the ability to move parts lists into the cloud, so basically the sales team can look up SKUs and create a quote for our customers. Then we turn the quotes into sales orders. In the past, our sales team didn't have the ability to do this. Before, they had to make a phone for someone else to enter it in and now they can do it themselves."*

Minimize effect of organizational changes. Zamora said, *"We have other offices, one office in Littleton, CO near Denver. When we went through a re-organization and had to split things and move sales team and accounts around. Using Pervasive and being able to push data up into the cloud made it pretty easy to accommodate that."*

No downtime. *"The product is reliable. It just works,"* said Zamora. *"Our maps are running at 99.9%. There's really no downtime. I'm responsible for keeping it running smoothly. I value the up-time. Any interruptions to Pervasive would shut down parts of our system and could end up costing us a lot of money."*

NEXT STEPS

AI plans to utilize this new cloud-based system for other locations. Zamora said, *"We also have an office in Longview. We are thinking about creating an instance of Salesforce for them to use the same methodology we are using today – same Pervasive maps and processes that we have currently."*

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.

About American Innovations

American Innovations (AI) provides oil and gas companies with critical knowledge and decision support for assets and infrastructure via corrosion protection and integrity management solutions. AI offers products and services to automate the collection, storage, and reporting of data for pipeline compliance and integrity, as well as for equipment used in the water/wastewater and agriculture industries. Bass Engineering, a subsidiary of American Innovations, offers cathodic protection engineering services. To learn more, visit www.aiworldwide.com

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