Integration Success on Demand with Salesforce.com
“The fact that the Force.com Web Services API was so clean and intuitive made the Oracle-Salesforce integration painless.”

—Joe Graves, CIO/IT Director, Stratus Technologies

“As a longtime SAP professional, I have been pleasantly surprised at how easy it has been to link these two products together. Salesforce.com knows how important other systems are to our overall success, so the investments they’ve made in the Force.com Web Services API truly benefit customers like us.”

—Bill Schlemm, IT Systems Project Manager, Littelfuse

“Despite the company name, salesforce.com’s real core competency is its ability to cost-effectively manage huge volumes of information and transactions.”

—Robert Bois, AMR Research
Thousands of customers integrate Salesforce to hundreds of different enterprise applications. Force.com Web Services API transactions now represent over half of the more than 100 million service transactions salesforce.com handles everyday according to trust.salesforce.com.

Salesforce.com’s on-demand applications are faster, easier, and less risky to integrate than traditional on-premise software applications. Salesforce.com delivers impressive business results by helping companies focus on integrating their business processes, not their software.

As the on-demand leader, we applaud these customers, and the many more who have chosen to integrate with Salesforce and make the Force.com platform a strategic part of their enterprise environments.

For more information, please visit: http://www.salesforce.com/platform/integration/
## Integrated Billing Process Delivers Enterprise Visibility

### CHALLENGE

- AAPT sought to integrate customer information in Salesforce and corporate billing systems
- Provide a business intelligence reporting platform on a Sybase IQ warehouse
- The logical data integration had been attempted previously, using data matching based on the customer’s company names
- This approach was unreliable because of inconsistent data entry of company names in the two systems, and because of variations in the trading names and company names

### SOLUTION

- The company selected the Relational Junction solution
- Replicated Salesforce to both the SQL server and the Sybase IQ warehouse

### RESULTS

- AAPT now has a consistent view of Salesforce data in a reporting database
- The solution provides cross-reference billing data, using common business keys
- Users can use the current reporting tool set

---

AAPT Ltd

**Industry:**
Communications and Media

**Highlights:**
Billing Integration
Cost-Effective Integration
Enhanced Reporting
Rapid Implementation

Approved Through Sesame Software
### Integrated Support Process Improves Customer Satisfaction

**Adesa**

**Industry:** Financial Services

**Highlights:**
- Cost Effective Integration
- Data Warehouse Integration
- Rapid Implementation
- Reduced Service Cost

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Adesa needed to provide a unified customer view of data in the data</td>
<td>:: The company selected Scribe Insight and the Scribe Adapter for Salesforce</td>
<td>:: Improved customer satisfaction by giving customer service representatives access to</td>
</tr>
<tr>
<td>warehouse to customer service reps, using the Salesforce Service &amp; Support</td>
<td>:: Displayed and consolidated critical customer profile data in Salesforce for better customer</td>
<td>the customer data they need in a single system</td>
</tr>
<tr>
<td>application</td>
<td>service and executive reporting</td>
<td>:: Reduced support costs while providing customers with a more efficient call center</td>
</tr>
<tr>
<td>:: Required deployment with minimal IT support</td>
<td></td>
<td>infrastructure and process</td>
</tr>
<tr>
<td>:: Needed to manage ongoing maintenance without using developer resources</td>
<td></td>
<td>:: Improved data integrity across the customer master</td>
</tr>
<tr>
<td>:: Sought to eliminate costly, duplicate records while increasing customer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>visibility and accuracy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approved Through Scribe
**Customer Master Integration with Web Portal**

**CHALLENGE**
- The company sought to manage the independent agent and commission plan information between Salesforce and the organization’s agent portal
- Pick an electronic agreement signature from agents and update the contact record in Salesforce for follow-up
- Deploy with minimal IT resources

**SOLUTION**
- Selected the Cast Iron Integration Appliance; solution is 100 percent configuration-based and does not require coding
- Integrated Salesforce.com and the agent portal in real time:
  - Agent provides electronic signature on portal
  - Cast Iron acquires XML signature (FTP or HTTP) and updates Salesforce

**RESULTS**
- Integration project was delivered in 15 days
- Contact management process is now real time
- Solution enabled wide adoption of Salesforce as CRM platform
- Future projects include contract integration between Salesforce and the agent portal

---

**Allianz Income Management Services**

**Industry:** Financial Services

**Highlights:**
- Portal Integration
- Real-Time Integration

Approved Through Cast Iron
**Better Pipeline Visibility for Manufacturing Firm with SAP Integration**

**Analog Devices, Inc**

**Industry:** High Technology

**Highlights:**
- SAP Integration
- Pipeline Visibility
- Sales and Marketing Alignment

**Challenge:**
- Analog Devices wanted to reduce the need for manual entry and to increase application usability
- Improve enterprise data integrity and reporting
- Increase sales pipeline visibility
- Provide better resource allocation
- Align sales and marketing
- Multiple applications across systems produced disparate views of the customers

**Solution:**
- Analog Devices selected WebMethods middleware
- Deployed solution to 800 users, in more than 20 countries
- Integration covered 40,000 accounts and 30,000 products
- Customer and product data pulled from SAP; SAP remains account and product master
- Data includes hierarchies and attributes
- Salesforce accounts are augmented with SAP sales history

**Results:**
- Strong adoption drives worldwide alignment and collaboration
- Increased sales and marketing communication drives higher revenue
- Unprecedented visibility into the sales pipeline
- Standardized views of accounts and products across Analog Devices
- Reporting and analytics by enterprise data attributes
- Support for timely business decisions
## Integrated Customer and Material Master with SAP

### Challenge

- Ashland had inconsistent processes and data across multiple business units
- Needed a common platform to unify 21 different databases
- Expensive maintenance costs associated with multiple disparate databases (legacy CRM systems)
- Valuable company data located in several static, disparate systems
- Limited visibility into the pipeline for each business unit

### Solution

- The company deployed a centralized ESB strategy, with SOA-based middleware
- Consolidated data of four disparate business units into Salesforce
- Implemented four projects in parallel: SAP, SAP Business Information Warehouse, price optimization software, and Salesforce
- Deployed integrated solution to 1,100 current users, including 900 new users

### Results

- Achieved high user adoption of Sales Force Automation solution
- Improved lead and opportunity management
- Configured data model to meet integration and visibility requirements

---

**Ashland**

**Industry:**
Energy

**Highlights:**
- SAP Integration
- Data Warehouse Integration
- Enterprise Service Bus
Sales Order Visibility with JD Edwards

**Awana**

*Industry:* High Technology

*Highlights:*
- JD Edwards Integration
- Order and Invoices
- Customer Master

---

**CHALLENGE**

- Awana sought deep integration with JD Edwards back-office system
- Needed customer master integration
- Sales reps needed visibility into critical order data from the JD Edwards system
- Needed to expose invoice data to sales teams for more effective account management

**SOLUTION**

- Awana selected the Cast Iron Integration Appliance for a simple, “no coding” approach
- Simplicity of integration was a major factor in Awana's choice of the appliance over Microsoft CRM
- Achieved bi-directional integration with JD Edwards, to update accounts and contacts to JD Edwards and to extract sales orders and invoice data from JD Edwards
- Eliminated custom code

---

**RESULTS**

- The complex integration was delivered in 25 days
- Customer data in multiple systems is now synchronized
- Awana account reps can close prospects more effectively

---

Approved Through Cast Iron
### CHALLENGE

- BOK Financial Corporation struggled with inconsistent sales forecasting and reporting, exacerbated by acquisition-based growth
- Lacked integration to legacy applications
- Needed a complete view of relationships across all lines of business
- Outdated contact management system
- Had concerns about security and compliance adherence

### SOLUTION

- The company deployed Salesforce Enterprise Edition to 600 users for commercial banking, wealth management, and operations
- Integrated Salesforce with the corporate data warehouse for critical customer profile data
- Integrated with a sales compensation application for incentive payouts
- Rolled out a Train-the-Trainer program, as well as eLearning courses

### RESULTS

- BOK Financial Corporation improved business visibility, decision support, and shared goals with executive dashboards and metrics
- Leveraged existing legacy apps and new processes added through acquisitions
- Boosted productivity by creating more efficient reports
- Reduced employee ramp-up time and increased user adoption with more effective training and improved sales data

---

**BOK Financial Corporation**

**Industry:** Financial Services

**Highlights:**
- Compensation Integration
- Data Warehouse Integration
- Enhanced Visibility
### CHALLENGE

- BP Solar wanted an integrated opportunity-to-order processing system in its in-store Home Depot kiosks
- Effectively manage a partner-based sales process
- Loop in the appropriate internal sales person at the right time
- Integrate opportunity data in Salesforce with order data in the Oracle 11i processing system

### SOLUTION

- The company selected the Bluewolf Integrator solution
- Integrated Salesforce and Oracle 11i to streamline its front- and back-office processes
- Built an enterprise-ready solution exclusively for Salesforce

### RESULTS

- BP Solar effectively implemented and managed an automated customer sales process with a strategic channel partner
- Streamlined overall communication between dealers and installers
- Reduced customer service personnel and infrastructure, saving approximately $40,000 annually

Approved Through Bluewolf
Bracco Diagnostics Inc

**Industry:**
Health and Life Sciences

**Highlights:**
Oracle Integration
Customer & Territory Visibility

---

**CHALLENGE**
- Bracco Diagnostics needed visibility into Salesforce accounts at different hierarchical account levels, to provide advanced reporting
- Automate account assignments within Salesforce after territory realignments
- Integrate account and opportunity data in Salesforce with an Oracle 8i sales and marketing database

**SOLUTION**
- The company selected the Bluewolf’s Integration Pack
- Bluewolf’s Replicator integrates key account data with Business Objects to deliver advanced reporting
- Bluewolf’s Integrator automatically updates sales team members on all necessary account information when territories are realigned
- Both products work together to update critical account and opportunity data between Salesforce and Oracle

**RESULTS**
- Bracco Diagnostics achieved improved visibility into accounts on a micro, parent, and global level
- Automated territory updates eliminate the need for direct resources to manage this process
- Unlocking data in the Oracle database made information more accessible within the organization
Jump in Productivity with Consolidated Environment and Quality Data

**CHALLENGE**

- Brocade sought to reduce IT spend (over 50 percent of budget was spent on custom integration)
- Address inconsistency in business data caused by data fragmentation across the enterprise
- Migrate over 300 sales personnel worldwide from a home-grown SFA system to Salesforce
- Synchronize internal operational, HR, and accounting data to Salesforce
- Leverage Salesforce data for operational and financial reporting and analysis

**SOLUTION**

- Brocade standardized on Informatica PowerCenter to integrate operational and analytical systems
- Sought drag-and-drop approach, versus coding from scratch
- Selected PowerCenter, the same integration platform embedded in the company’s two core applications, Oracle and i2

**RESULTS**

- Brocade realized a 10 percent improvement in productivity
  - Only eight weeks to complete development, QA, and production roll out, using two resources
  - Delivered 50 interfaces between Salesforce and the data warehouse in two months
- Improved confidence in data integrity through enterprise data management
  - Achieved consistent reference data between Oracle 11i and Salesforce
- Increased performance by over 300 percent
  - Over 200,000 records loaded nightly from Salesforce and the data warehouse
  - Load time, previously measured in hours, was reduced to less than ten minutes
**CHALLENGE**

- Campus Fundraiser needed to decrease lead response time
- Access current customer account information, as well as historical data in Salesforce
- Integrate with a proprietary application
- Required solutions that were cost and resource sensitive

**SOLUTION**

- Campus Fundraiser selected Scribe Insight, the Scribe Adapter for Salesforce
- Streamlined the lead-to-opportunity process; salespeople can now follow up on leads in real time

**RESULTS**

- Campus Fundraiser reps can now contact lead while still on the Web site, maximizing potential sales
- Provides better tracking of sale throughout the sales process
- Facilitates contact with motivated buyers and provides a more personalized customer experience
- Provides support for pursuing renewal business; historical data makes more personalized calls possible

---

**Campus Fundraiser**

**Industry:**
Financial Services

**Highlights:**
SQL Server Integration
Account & Historical Data

**Approved Through Scribe**
Carrier Access
Industry: High Technology
Highlights: MRP Integration, Enhanced Forecasting

Integration Centralizes Forecasting and Pipeline Visibility

**CHALLENGE**
- Carrier Access wanted to improve forecasting and pipeline management
- Gain insight into forecasts to manage the production and delivery of important production materials
- Roll out a CRM system that would be adopted by sales and integrate it with the organization’s MRP system

**SOLUTION**
- The company chose Bluewolf’s Integrator and Professional Implementation Service
- This single solution provided all necessary services, including implementation, integration, and change management to drive user adoption
- Opportunities are taken from Salesforce and put into the MRP system
- Product lists, customer accounts, account activity, and pipeline activity are taken from the MRP
- Trained approximately 60 inside and outside sales people on the new system

**RESULTS**
- Carrier Access rolled out the integration solution in four months
- Centralized forecasting and pipeline management greatly improves the ability to manage costly production materials
- Solution resulted in strong adoption by sales team
Over 7.5 Million Records Integrated from Multiple AIX Endpoints

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chevy Chase Bank sought to migrate 7.5 million ASCII customer records into Salesforce</td>
<td>The company selected the Pervasive Data Integrator for a fast migration and integration solution</td>
<td>The project was completed in five days, from project scope to completion</td>
</tr>
<tr>
<td>The solution needed to run on existing AIX Hardware</td>
<td>Solution delivered information needed to drive banking opportunities</td>
<td>Fast, highly accurate migration of ASCII fixed records and ongoing integration</td>
</tr>
<tr>
<td>Address unreliable network availability</td>
<td>Handled interruption of Internet connections</td>
<td>Achieved throughput of 90,000 records per hour</td>
</tr>
<tr>
<td>Ongoing integration of ASCII to Salesforce required updating and consolidation of “child” records in CRM system, while providing Salesforce IDs back to original system</td>
<td>Made it possible to integrate with Salesforce without system monitoring for restarts or administration</td>
<td>Salesforce is now an integral part of the bank’s CRM activities</td>
</tr>
<tr>
<td>Provide platform for future integration project, taking messages off WebSphere MQ and converting them to emails</td>
<td></td>
<td>Solution is easily managed by internal IT staff</td>
</tr>
</tbody>
</table>

Chevy Chase Bank

Industry: Financial Services

Highlights: Customer Master Integration, High Data Volumes, Multiple Endpoints
Advanced Reporting and Visibility to Client and Payment Data

CHALLENGE

- Cottingham & Butler needed advanced reporting that would track and summarize client and benefit payment data over time
- Management needed more insight to manage ongoing costs
- Benefit managers spent hours pulling information out of Salesforce and summarizing it for monthly review meetings with management

SOLUTION

- Cottingham & Butler selected Bluewolf’s Replicator to replicate Salesforce data to a back-office database
- Designed a program that links the back-office database with Excel

RESULTS

- The time needed to compile reports was reduced from six hours to less than ten minutes

Industry:
Financial Services

Highlights:
Legacy Integration
Enhanced Reporting
Web Site Integration Delivers Consistent User Experience

**CHALLENGE**

- CrushPad needed Web site integration with Salesforce to improve the customer Web experience and to support customer-facing personnel.
- Wanted operational capabilities for internal support and sales staff, based on a 360-degree view of the customer.
- Development costs and operational considerations made it impossible to integrate the Web site directly with Salesforce.

**SOLUTION**

- The company selected Relational Junction to enable bi-directional replication of Salesforce data between the Web site's MySQL database and Salesforce.
- CrushPad used Salesforce both as a data modeling tool and as an operational interface.
- Used PHP programming for the customer-facing Web site—making for a completely vendor-neutral solution.

**RESULTS**

- CrushPad achieved a consistent view of Salesforce data and the CrushPad Web site.
- Drastically reduced development time and complexity.
- Achieved 100 percent reliability and very high performance.
- Got full integration with Salesforce, without operational dependencies.

---

**CrushPad**

**Industry:** Distribution and Retail

**Highlights:**

- Web Site Integration
- Customer Master

Approved Through Sesame Software
Deutsche Bank

**Industry:**
Financial Services

**Highlights:**
- Mainframe Integration
- B2B Integration
- Large Data Volumes

---

**CHALLENGE**

- Deutsche Bank’s outdated sales applications and platforms required custom coding and were expensive to maintain
- Large volume of data was difficult to manage
- Wanted timely and complex territory classification realignment

**SOLUTION**

- The company chose Informatica PowerCenter
- Decided to extend on proven integration success
- Past projects included:
  - Data migration and decommissioning of two Siebel instances
  - B2B integration, with 15 accounts and trade vendors

**RESULTS**

- The mainframe migration to UNIX resulted in an IT spend reduction of 3 million runs a year
- Delivered seamless integration with a seven-terabyte global data hub
- Reduced trade ticket synchronization time with Salesforce to:
  - 5 minutes/day (~3000 tickets)
  - 13 minutes/month (~40,000 tickets)

---

Approved Through Informatica
# Complete View of Advertising Pipeline Increases Competitiveness

Dow Jones & Company

**Industry:**
Communications & Media

**Highlights:**
Data Warehouse Integration
Enhanced Forecasting
Enterprise Visibility

---

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: The company wanted to integrate Salesforce with its advertising data warehouse, to streamline and improve the sales process</td>
<td>:: Dow Jones &amp; Company selected Bluewolf’s Integrator and Professional Implementation Services</td>
<td>:: The integration was completed in five months</td>
</tr>
<tr>
<td>:: Needed complete synchronization of customer data</td>
<td>:: Trained about 400 sales people on system</td>
<td>:: Bluewolf’s Integrator is delivering deeper and more meaningful integrations than initially expected</td>
</tr>
<tr>
<td>:: Other key requirements included pipeline and forecast management</td>
<td>:: Deeper-level integrations are evolving from the company’s use of the system and from innovations within the Bluewolf Integrator product</td>
<td>:: Makes it possible deliver a complete view of advertising relationships (from actual ad spend to planned future spend), without running custom reports</td>
</tr>
<tr>
<td>:: Required deeper insight into actual and planned advertising spend by account</td>
<td>:: Sought to keep abreast of competitive activity</td>
<td>:: Improved employee productivity and insight into the company’s accounts and relationships (brand, agency, advertiser)</td>
</tr>
</tbody>
</table>

---

Approved Through Bluewolf
**Improved Customer Service with Integrated Energy Management System**

**Challenges**
- EnerNOC wanted to integrate customer information between Salesforce and various internal systems to support real-time customer service and alerts.
- Sought to provide a business intelligence reporting platform based on a relational database.
- Wanted to calculate financials from data within Salesforce.
- Sought to integrate customers, payables, and receivables with an Epicor financial system.

**Solution**
- The company selected the Relational Junction solution.
- Used Salesforce data replication for reporting data warehouses.
- Integrated with internal applications using SQL database technology.
- Integrated with the Epicor ERP system for financials.

**Results**
- Up-to-date CRM data now provides timely information for effective business response.
- Achieved a consistent view of Salesforce data in a reporting database.
- Realized development and maintenance savings, using off-the-shelf software.

---

**EnerNOC**
*Industry:* Energy

**Highlights:**
- Legacy Integration
- Epicor ERP Integration
- Enhanced Reporting

---

Approved Through Sesame Software
Enterprise-Wide Sales Process Integrated with Oracle 11i

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Fox Interactive Media was looking to standardize its sales process worldwide</td>
<td>:: The company deployed Bluewolf’s Integrator to integrate Salesforce with the Oracle 11i back office</td>
<td>:: Fox Interactive Media standardized on a single, company-wide sales process</td>
</tr>
<tr>
<td>:: Wanted to combine six different properties under a single umbrella</td>
<td>:: Created an automated process for opportunity-to-order management across disparate business systems</td>
<td>:: Improved and centralized forecasting across all properties</td>
</tr>
<tr>
<td>:: Needed to integrate Salesforce with the Oracle 11i database used by the finance department</td>
<td></td>
<td>:: Implemented a complete solution for opportunity-to-order management</td>
</tr>
<tr>
<td>:: Wanted to centralize forecasting across all properties</td>
<td></td>
<td>:: Synchronized Salesforce opportunities with Oracle opportunities; Oracle orders now automatically update Salesforce opportunities</td>
</tr>
</tbody>
</table>

Approved Through Bluewolf

Fox Interactive Media
Industry: Communications and Media
Highlights: Oracle Integration Centralized Forecasting
Improved Reporting and Auditing with QuickBooks and Portals

CHALLENGE

- goAUPAIR had unique business needs—the company provides au pairs from foreign countries to American host families
- Needed to replace a home-grown system with Salesforce, QuickBooks, and new, custom-coded portals
- Wanted to implement new functionality over a six-month period in stages, using both systems during the rollout
- Required a consistent view of customer data for complex reporting for government audits
- Wanted to replace existing QuickBooks integration because integration company had gone out of business

SOLUTION

- goAUPAIR selected the Relational Junction solution
- Converted legacy data to Salesforce through the Relational Junction warehouse, using Relational Junction ETL
- Platform allowed host families, local area representatives, and international representatives to access and update data on custom-developed portals
- Integrated with the legacy system during the rollout, using both Relational Junction ETL and replication technologies
- Provided two-way integration for the QuickBooks accounting system, where all credit card charges are performed

RESULTS

- The company completed the data migration in two months
- Achieved on-site backup and accessibility of all data
- Provided a one-year migration of legacy functions to Salesforce, living out of both systems seamlessly
- Provides consistent view of Salesforce data in a local database made accessible to thousands of remote customers and business partners
- Updates from the portals automatically update Salesforce data
- Integration of QuickBooks is up and running successfully
Customer and Product Master Integration with Microsoft Great Plains

**CHALLENGE**

- Grizzard wanted customer/product master synchronization between Microsoft Great Plains and Salesforce
- Convert incoming order information from vendors to Salesforce opportunities
- Send orders to direct-mail vendors
- Convert opportunities in Salesforce into project accounting orders in Microsoft Great Plains
- Eliminate the manual re-keying of data
- Existing custom code was not scalable

**SOLUTION**

- Grizzard selected the Cast Iron Integration Appliance
- Integrated the following apps across multiple systems:
  - Salesforce and vendors, via Web services
  - Salesforce and an SQL server-based legacy application
- Phase II to include integration between Salesforce and Microsoft Great Plains

**RESULTS**

- The first phase of integration was completed in 20 days
- Achieved automated sales order processing across Salesforce and Great Plains
- Automation improved operating efficiencies with vendors

**Grizzard**

**Industry:** High Technology

**Highlights:**
- Microsoft Great Plains Integration
- Legacy Integration
- Sales Order Process

Approved Through Cast Iron
**Honeywell**

**Industry:** Manufacturing

**Highlights:**
- Multiple Endpoints
- Data Warehouse Integration
- SAP Integration

---

**CHALLENGE**

- Honeywell wanted to integrate previous solution with a new SAP Business Information Warehouse (BW) solution
- Replicate SAP BW data to Salesforce
- Update customer container data from an Access database into Salesforce
- Manage and maintain solution with existing Salesforce admin staff

**SOLUTION**

- Honeywell selected the Pervasive Business Integrators solution
- Provided on-site fast-track training
- Updated Salesforce with account information stored in SAP, the system of record
- Updated daily customer container information from Access database
- Plans to leverage platform to enable future integration projects with SAP, including invoicing, A/R, shipping, annual operational planning, and integration with the Vendavo pricing application

**RESULTS**

- The integration implementation is more efficient than the previous batch solution
- Easier to maintain existing integration points and add new points as necessary
- Sales gets more relevant information, for better customer service
- Existing admin staff can manage the solution
- Solution met new requirements by sales, without additional licensing costs

---

**Approved Through Pervasive**
Streamlined Mortgage Application Process

IFG Group
Industry: Financial Services
Highlights:
Legacy Integration
Lotus Notes Integration
Adset Document Management

IFG Group needed fast, scalable integration of Lotus Notes

Update Salesforce with relevant Lotus Notes case data

Extract attachments (scanned documents) and indexing data from Salesforce with the Adset document management system

Eliminate manual entry of mortgage application details

Achieve better reporting for company’s sales agents

The company selected the Pervasive Business Integrator

Managed complex business logic with many factors to consider

Resolved multiple record dependencies

Provided a solution for downloading, decoding, and archiving attachments from Salesforce into the Adset system

Project took 42 days, from project scope to completion

Saved time and money; agents now can see the info they need to drive mortgage business

Provides highly accurate integration of data with complex business logic

Met Lotus Notes data requirements

Salesforce is now an integral part of the qualification and management aspects of the mortgage pre-application process

Increased efficiencies by eliminating error margins resulting from the manual data entry of mortgage applications

Solution is easily managed by internal IT staff

Increased efficiencies by eliminating error margins resulting from the manual data entry of mortgage applications

Solution is easily managed by internal IT staff

Approved Through Pervasive
## Improved Customer Renewal Process

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Intrep needed to contact customers faster, to increase renewal rates</td>
<td>:: The company selected Scribe Insight, the Scribe Adapter for Salesforce</td>
<td>:: Intrep improved timeliness and number of renewal calls by 20 percent; increased actual renewal rates by 15 percent</td>
</tr>
<tr>
<td>:: Support for a virtual call center</td>
<td>:: Streamlined renewal processing</td>
<td>:: Saved more than $100,000 in manual labor costs</td>
</tr>
<tr>
<td>:: A flexible integration tool to handle its unique needs</td>
<td>:: Eliminated error-prone manual process</td>
<td>:: Reduced address and phone data errors from 25 percent to 8 percent</td>
</tr>
<tr>
<td>:: Required solutions that were cost and resource sensitive</td>
<td>:: Solution was made available to telemarketers across the country, using Salesforce to support a virtual call center</td>
<td>:: Simplified updates from “Do Not Call” list to ensure compliance</td>
</tr>
</tbody>
</table>

- Intrep
- Oracle Database
- Data Cleansing
- Services MapQuest

**Intrep**
Industry: Services

**Highlights:**
- Legacy Integration
- Virtual Call Center

Approved Through Scribe
Visibility across 13 Separate Data Silos Delivers Enterprise Efficiencies

CHALLENGE

- Funding for the integration project was contingent on the ability to prove its impact on the company
- Integrate multiple data sources and targets in SQL, Oracle, and other endpoints; involving 13 separate United Kingdom organizations
- Eliminate manual replication and synchronization of data
- Managers lacked confidence in data integrity, wanted “single view” of data
- Source of replication errors was not known
- Manual intervention in lead process was time consuming, costly, and inaccurate
- Integration was the final step in a data cleansing project

SOLUTION

- Investors in People selected the Pervasive Data Integrator solution based on:
  - Speed of implementation—needed to complete by the end of financial year (government funded body)
  - Ease of use—automated integration
  - Scalability and performance across multiple applications, to provide room for future growth

RESULTS

- The company achieved a consistent view of the data, resulting in improved customer service and decision making
- Improved reporting
- Lack of manual intervention has increased accuracy and productivity
- Integration supports business expansion with proven value to management and a rapid ROI

Investors in People

Industry:
Financial Services

Highlights:
Legacy Integration
Multiple Endpoints
Enhanced Reporting
### Integrated Order Management via Mobile Devices

**Karl Strauss Brewing Company**

**Industry:** Distribution and Retail

**Highlights:**
- Microsoft Great Plains Integration
- Mobile Order Entry

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karl Strauss Brewing Company needed to compete with the beer order and delivery capabilities of larger rivals</td>
<td>The company selected the Scribe Insight solution, including the Scribe Adapter for Salesforce and for Microsoft Dynamics Great Plains</td>
<td>Improved accuracy and timeliness with mobile order confirmation</td>
</tr>
<tr>
<td>Sought to improve customer interactions by providing sales reps with key information from the Great Plains system while in the field</td>
<td>Made it possible to enter orders via Salesforce Mobile</td>
<td>Created a competitive advantage by making superior customer service possible</td>
</tr>
<tr>
<td>Required solutions that were cost and resource sensitive</td>
<td>Streamlined sales order processing to handle high order frequency and higher sales volume</td>
<td>Sales management can now use Salesforce to track account activity, including sales</td>
</tr>
<tr>
<td></td>
<td>Eliminated a manual, dual-entry process and introduced a new audit procedure</td>
<td>Marketing can tie activities directly to sales volume filters</td>
</tr>
<tr>
<td></td>
<td>Karl Strauss expanded the sales volume and the reach of the sales team, without expanding in-house processing</td>
<td>Costly order entry mistakes were eliminated with new audit procedure</td>
</tr>
<tr>
<td></td>
<td>Immediately eliminated three to five man-hours of processing per day</td>
<td></td>
</tr>
</tbody>
</table>
### CHALLENGE

- KONE needed to fully integrate Salesforce with its SAP back-office systems
- Required rapid deployment to more than 1,800 users in 43 countries, within 12 months

### SOLUTION

- The company used the Force.com platform to integrate SAP customer master data and transactional data such as orders, contracts, prospect tenders, and billing with Salesforce
- Solution included both bulk data migration and a traditional integration component
- Synchronized account and equipment data between regional SAP instances and Salesforce
- Enabled bi-directional publishing of account data and uni-directional publishing of equipment updates

### RESULTS

- KONE’s pilot program went live within three months
- The company plans to integrate a Web-based, automated lead-management system in the future

---

**Industry:** Manufacturing

**Highlights:**
- SAP Integration
- Global Deployment
- Multiple Endpoints
Rapid Integration of Complex Environment and Multiple Endpoints

**CHALLENGE**
- Korean Air needed an ETL solution that could be implemented in a few days, to meet a CRM deadline
- Needed to integrate many disparate systems
- Required enterprise-level scalability and the flexibility to address a complex system environment

**SOLUTION**
- The company selected the Pervasive Data Integrator
- Project cost less than $5,000
- Eliminated labor-intensive integration activities

**RESULTS**
- The solution met the fast-track timeline; it was completed within days from project scope to completion
- No custom coding was needed
- The solution is easily managed by internal IT staff

---

**KOREAN AIR**

*Industry:* Manufacturing

*Highlights:* Legacy Integration, Multiple Endpoints, Rapid Implementation

Approved Through Pervasive
QuickBooks Integration Delivers Better Customer Service and Lowers Costs

**CHALLENGE**

- LightWedge required reliable integration between Salesforce and QuickBooks
- Meet growing demand for its products while reducing operational costs
- Improve customer service
- Needed an integration solution that was highly available

**SOLUTION**

- The company chose Pervasive Software DataSynch: QuickBooks edition
- Key integration between systems included synchronization of:
  - Accounts and customers
  - Opportunities and sales orders
  - Products and inventory items
- Mapped invoice details to opportunities
- Provided cost-effective implementation and subscription-based pricing

**RESULTS**

- LightWedge achieved a packaged solution, delivered via the Web
- Two-way synchronization of key objects is now possible
- Products created in Salesforce now populate inventory items in QuickBooks
- Project improved employee productivity by reducing double entries
- Adoption is high because there is no new software to learn, manage, or maintain

Approved Through Pervasive

**LightWedge**

**Industry:** Manufacturing

**Highlights:**
- QuickBooks Integration
- Rapid Implementation
## Integrated Sales and Product Management Processes with SAP

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Littelfuse lacked up-to-date information on the company’s 50,000 parts—critical to the sales process</td>
<td>:: Littelfuse used the Force.com platform to integrate the SAP parts master into the Salesforce product object</td>
<td>:: The integration solution went live in just two weeks</td>
</tr>
<tr>
<td>:: Establish specific workflows and collaboration between sales and product management, to identify the right parts for customers and prospects</td>
<td>:: Parts created or modified for one customer were productized and could be easily added to the parts list and made available for other customers</td>
<td>:: Solution shortened the sales cycle and increased customer satisfaction by streamlining the part selection and refinement processes</td>
</tr>
<tr>
<td>:: Support product management with tight integration between Salesforce and SAP</td>
<td>:: Added ad hoc capabilities to weekly data updates</td>
<td>:: Sales, engineering, and product management groups now collaborate throughout the sales cycle to ensure the correct parts are specified</td>
</tr>
<tr>
<td>:: Provide a multicurrency, multilingual system for a global audience</td>
<td></td>
<td>:: Product marketing can use Salesforce to understand what parts will be driving future revenue</td>
</tr>
<tr>
<td>:: Achieve anytime, anywhere offline access</td>
<td></td>
<td>:: Manufacturing can better anticipate production requirements</td>
</tr>
</tbody>
</table>

**Littelfuse Inc**  
**Industry:** Manufacturing  
**Highlights:** SAP Integration, Parts Master Integration
# Streamlined Lead Capture and Support Processes

<table>
<thead>
<tr>
<th><strong>CHALLENGE</strong></th>
<th><strong>SOLUTION</strong></th>
<th><strong>RESULTS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>:: LivePerson wanted to upload information from its instant chat solution to Salesforce</td>
<td>:: LivePerson selected Bluewolf’s Integrator solution</td>
<td>:: Completed chats are now pushed from the LivePerson database into Salesforce as a sales lead or support case</td>
</tr>
<tr>
<td>:: Wanted better follow-up on sales opportunities and customer support needs</td>
<td>:: Rapidly integrated the company’s lead-to-opportunity process</td>
<td>:: Agent productivity increased by 20 percent</td>
</tr>
<tr>
<td>:: With limited development resources, the company needed a solution that was fast and easy to deploy and configure</td>
<td></td>
<td>:: Customer service has improved</td>
</tr>
<tr>
<td></td>
<td></td>
<td>:: The sales cycle has been shortened</td>
</tr>
</tbody>
</table>

LivePerson, Inc

**Industry:**
High Technology

**Highlights:**
Custom Integration
Lead-to-Opportunity Process

Approved Through Bluewolf
# Magma Design Automation Inc

**Industry:** High Technology

**Highlights:**
- SAP Integration
- Multiple Endpoints
- Order Master
- Support Process

---

## Challenge

- Magma needed a simple platform to integrate purchase requisitions with Salesforce
- Integrate orders from SAP
- Create visibility into customer software downloads for manufacturing
- Automate support with streamlined processes for escalations on delays
- Custom coding was rejected as unscalable

## Solution

- Magma deployed the Cast Iron Integration Appliance, for SAP and Salesforce connectivity out of the box
- No middleware programming needed
- The appliance provided real-time integration between the following applications:
  - Purchase requisitions to SAP
  - Sales orders to SAP
  - Escalations to customers on release delays
  - Automatic download of new software builds

## Results

- The integration was delivered in 16 days
- No coding was needed to complete the project
- Costs were 10 times lower than those of the closest competitor
- Magma now has a standards-based, scalable platform

---

**Customer Master and Sales Order Visibility Through Integration with SAP**

 Approved Through Cast Iron
Streamlined Lead Management Process

**CHALLENGE**
- Media Trust needed to consolidate all sales activities and customer management into Salesforce
- Synchronize information in two legacy systems that perform ad delivery and tracking

**SOLUTION**
- Media Trust chose the out-of-the-box Relational Junction solution for Salesforce data warehouse
- Worked with Sesame Software’s professional services team to plan single integration point
- Loaded initial data into Salesforce, using the same scripts used to synch the databases
- Integration was accomplished without using the Force.com API

**RESULTS**
- Internal database administrator completed the integration for each legacy system in about two weeks each
- Overall integration costs were very low
- Media Trust has easy and prompt access to integration support
- Solution is flexible and effective
- Integrations are quickly and easily changed to accommodate dynamic business environment

---

Media Trust
**Industry:** Communications and Media

**Highlights:**
- Legacy Integration
- Rapid Implementation

Approved Through Sesame Software
## Integrated Lead Tracking and Marketing Accountability

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Miyachi Unitech needed to consolidate seven disparate customer databases</td>
<td>:: The company chose the Force.com platform for integration</td>
<td>:: The AppExchange apps extended the value of the Salesforce app and improved the efficiency of the sales, marketing, and HR processes</td>
</tr>
<tr>
<td>:: Fragmented customer data hindered collaboration across sales teams</td>
<td>:: Integrated core back-office processes (customer master, quotes, orders, invoices, and RMAs) with its legacy ERP application</td>
<td>:: Increased visibility to reduce the number of internal calls to check order status by 70 percent</td>
</tr>
<tr>
<td>:: Wanted to integrate a Web mail solution with Salesforce</td>
<td>:: Included bi-directional sync of front office and back office processes; deployed solution to employees across 18 countries</td>
<td>:: Improved the accuracy of forecast and pipeline information</td>
</tr>
<tr>
<td>:: Sought to improve customer visibility across 18 different countries</td>
<td>:: Provided integrated product configuration and quoting process across Salesforce and ERP systems</td>
<td>:: Provides ability to monitor marketing ROI, including lead generation spend and matching campaign revenue</td>
</tr>
<tr>
<td>:: Required improved lead tracking processes and marketing accountability</td>
<td>:: Extended the standard data model to integrate custom objects from external systems as well</td>
<td></td>
</tr>
<tr>
<td>:: Wanted to deploy Salesforce globally across all sales teams</td>
<td>:: Installed nine applications from the AppExchange marketplace</td>
<td></td>
</tr>
</tbody>
</table>

---

### Miyachi Unitek Corporation

**Industry:** Manufacturing  
**Highlights:**  
- Legacy ERP Integration  
- Global Implementation  
- Quote-to-Order Process  
- RMA Process

---

Approved Through Salesforce
Northeastern University

Industry: Education

Highlights:
- PeopleSoft Integration
- Multiple Endpoints
- Donor Process
- Rapid Implementation

Customer Master Integration with PeopleSoft and Microsoft SQL Server

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>∷ Northeastern University needed to track fundraising information from donors</td>
<td>∷ The university deployed the Cast Iron Integration Appliance, which provides a no-coding approach to integration</td>
<td>∷ The integration was completed in 25 days by the university’s internal team</td>
</tr>
<tr>
<td>∷ Multiple systems included Salesforce, PeopleSoft on DB2, and a fundraising gifting application</td>
<td>∷ Implemented a multi-directional integration solution for the PeopleSoft donor process, Salesforce accounts, opportunities, and campaigns, and for the SQL Server 2000 donor information</td>
<td>∷ Improved the tracking of fund-raising efforts and campaigns</td>
</tr>
<tr>
<td>∷ The manual data entry process was extremely error prone</td>
<td>∷</td>
<td>∷ Improved visibility into associated data</td>
</tr>
<tr>
<td>∷ The existing custom code was unscalable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Approved Through Cast Iron
Billing Integration Improves Service with Oracle 11i

Nuance Communications Inc

**Industry:**
High Technology

**Highlights:**
Oracle Integration
Billing Process
Order Process

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
</table>

- The company’s sales reps had no insight into customer billing cycles, ordering information, or what products their customers had
- Lack of insight impaired the ability to effectively cross sell or renew business
- Billing questions took a lot of effort and time to resolve, involving numerous employees and phone calls
- Needed integration with its Oracle 11i finance system

- Nuance Communications deployed Bluewolf’s Integrator
- Integrated Salesforce with the back-office system, including account, customer, and invoice data

- Invoices and orders are now automatically pushed from the back-office system into Salesforce
- More effective account and customer management
- Improved selling process and enhanced sales rep productivity by eliminating the need to chase down customer information internally
# Customer Master & Sales Order Integration with Multiple Systems

---

## Challenge
- Open Text faced a common dilemma: to acquire and rapidly integrate, or to be acquired
- On a tactical level, the company wanted to simplify its credit-check process
- On the strategic level, it needed to simplify the lead-to-order process
- Its custom code was not scalable and maintaining it was labor intensive
- The cost of changing the SAP system was prohibitive

## Solution
- OpenText deployed the Cast Iron Integration Appliance
- Solution serves as a platform for integrating numerous systems, including SAP, Salesforce, Cognos, and Microsoft Great Plains
- Facilitated SOX/Compliance

## Results
- The first integration was delivered in ten days, with a five-month ROI payback
- Integrations no longer hinder acquisitions
- Eliminated reliance on costly SAP experts

---

**Open Text Corporation**

**Industry:** High Technology

**Highlights:**
- SAP Integration
- Microsoft Integration
- Multiple Endpoints
- Rapid ROI

Approved Through Cast Iron
### CHALLENGE

- Field sales needed real-time visibility into ERP data, including A/R, invoices, and order status/parts tracking in Salesforce.
- Utilize the powerful CRM functions in Salesforce, while leveraging sales order functions in Microsoft Dynamics (Navision).
- Custom code was not scalable for the six projects planned over three years.

### SOLUTION

- Open Text Corporation chose the Cast Iron Integration Appliance, requiring no coding.
- Integrated Salesforce with Microsoft Navision.
- Extracted A/R data from ERP to a Salesforce dashboard.
- Updated the sales order status into Salesforce opportunity records.

### RESULTS

- The entire project was delivered in 17 days.
- Field sales now has real-time visibility into sales order details.
- Eliminated reliance on custom code and expensive consultants.
- Plans for the next phase include real-time sales order integration between Navision and Salesforce.

---

**Optimus Solutions**

**Industry:** Services

**Highlights:**
- Microsoft Dynamics Integration
- Order Process
- Real-time Integration

---

**Approved Through Cast Iron**
# Integrated Lead Management and Support

![Diagram of data flow from Legacy Applications to Salesforce](image)

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
</table>
| :: Credit card processing company needed a fast, scalable integration of multiple applications and an internal data warehouse with Salesforce | :: The company selected the Pervasive Business Integrator solution  
:: Linked a multi-step integration process into a single, automated integration task | :: Achieved a fast, highly accurate integration in days, from project scope to completion  
:: Reps now have the information needed to drive new business, resulting in increased sales  
:: Faster customer response time  
:: Reusable maps reduced time for data movement from 24 hours to 30 minutes  
:: Single point for data entry means many fields are populated automatically, resulting in increased data accuracy  
:: Project was extended beyond original scope to provide improved lead management and client service/support  
:: Moved development in-house; solution is easily managed by internal IT staff |
| :: Reduce reliance on custom code and third-party developers               |                                                                                                                                            |                                                                                                |
| :: Automate notification for installation at client sites                  |                                                                                                                                            |                                                                                                |
| :: Transfer data with minimal user errors                                  |                                                                                                                                            |                                                                                                |

**Payment Processing Inc.**

**Industry:** Financial Services

**Highlights:**
- Legacy Integration
- Data Warehouse Integration
- Lead Management Process
- Support Process

Approved Through Pervasive
Sales and Invoice Order Integration with NetSuite

**Salary.com**

**Industry:** Financial Services

**Highlights:**
- NetSuite Integration
- Order Process
- Invoice Master

---

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Salary.com was using Salesforce CRM and NetSuite (ERP)</td>
<td>:: The company chose Cast Iron Integration Appliance for its “no coding” approach</td>
<td>:: Complex integration was delivered within four weeks</td>
</tr>
<tr>
<td>:: Multiple integration needs, including matching Salesforce opportunities to sales orders in ERP, and invoice details from ERP to Salesforce</td>
<td>:: Used cross-reference data mapping rules</td>
<td>:: Eliminated the error-prone manual data entry process</td>
</tr>
<tr>
<td>:: Automation to eliminate manual, labor-intensive, duplicate data entry</td>
<td>:: Bi-directional integration with NetSuite converts Salesforce opportunities to sales orders in NetSuite (XML API)</td>
<td>:: Provides platform for additional projects, including database integration</td>
</tr>
<tr>
<td></td>
<td>:: Extracted invoices from NetSuite using XML APIs</td>
<td></td>
</tr>
</tbody>
</table>

Approved Through Cast Iron

---
## Improved Customer Experience with SAP Integration

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: The company struggled with inflexible and shallow functionality in its proprietary healthcare CRM system</td>
<td>:: The company deployed Salesforce SFA to 60 healthcare sales professionals in the United Kingdom</td>
<td>:: The solution was delivered in three months, without any up-front technology investment</td>
</tr>
<tr>
<td>:: Relied on email for sharing and reviewing customer information from fragmented databases</td>
<td>:: Customized system with Force.com Builder, to provide a single, comprehensive view of GPs, practice nurses, and other professionals</td>
<td>:: Increased sales effectiveness and uses productivity</td>
</tr>
<tr>
<td>:: The lack of a common, central system for viewing customer information meant minimal management insight into sales performance</td>
<td>:: The Force.com Web Services API provided seamless integration with SAP and the organization’s healthcare databases</td>
<td>:: Improved sales processes and insight into critical sales issues and pipeline</td>
</tr>
<tr>
<td>:: No integration between CRM and back-office systems and databases, including SAP</td>
<td>:: Provided complete implementation, customization, and integration</td>
<td>:: Enhanced efficiency of customer service</td>
</tr>
</tbody>
</table>

Sanofi Pasteur MSD Ltd  
**Industry:** Health and Life Sciences  
**Highlights:**  
SAP Integration  
Multiple Endpoints  
Rapid Implementation
**Standard Life Investments**  
**Industry:** Financial Services  
**Highlights:** Legacy Integration, Customer Master, Enhanced Reporting

## Improved Visibility and Reporting across Multiple Applications

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
</table>
| :: The company wanted to integrate customer information between Salesforce and a custom contact management application | :: Standard Life Investments selected the Relational Junction solution  
:: Salesforce data was replicated to a relational database  
:: Used existing tool sets for a custom integration between the Relational Junction schema and internal systems | :: The company now has a consistent view of customer data in its internal systems and in Salesforce  
:: Uses existing database-level integration tools, as well as the current reporting tool set |
Global Integrated Forecasting with Oracle 11i

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>:: Stratus Technology wanted to fix broken business processes, including inaccurate sales forecasting</td>
<td>:: Implemented bi-directional integration to Oracle, using the Force.com platform</td>
<td>:: Implementation was completed in seven weeks, including integration with Oracle financials, six languages, and 13 currencies</td>
</tr>
<tr>
<td>:: Measure marketing and other business expenses against actual sales</td>
<td>:: Replaced previous Siebel solution with Salesforce for 170 users</td>
<td>:: Lead conversion has accelerated from weeks and months to as little as a single day</td>
</tr>
<tr>
<td>:: Align global forecasting, lead management, and operational spend</td>
<td>:: Integrated sales information with marketing campaigns, supply chain, manufacturing, contracts, and accounting</td>
<td>:: Integrated dashboards synchronize sales information with campaigns, supply chain, manufacturing, contracts, and accounting</td>
</tr>
<tr>
<td>:: Integrate disparate sales and operations data silos globally</td>
<td></td>
<td>:: User adoption occurred almost instantly—as much as 90 percent of the sales teams accesses Salesforce at least once a week</td>
</tr>
<tr>
<td>:: Replace failed and expensive CRM investments (Siebel and then an on-premise, homegrown system)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Stratus Technologies

**Industry:** High Technology

**Highlights:**
- Oracle Integration
- Forecasting
- Rapid Global Implementation
SunTrust Banks

**Industry:** Financial Services

**Highlights:**
- Legacy Integration
- High Data Volumes
- Rapid Implementation

---

### CHALLENGE

- With over 3,000 users and growing rapidly, company needed Salesforce integration with over one million customer records
- Improve visibility into its business
- Reduce costs and improve efficiencies
- The significant number of distributed legacy applications were a challenge

### SOLUTION

- Sun Trust Banks chose the Pervasive Data Integrator solution
- Eliminated labor-intensive integration activities
- The platform can be used for additional integration projects

### RESULTS

- A highly efficient integration between Salesforce and the legacy systems was delivered in 40 days, from project scope to completion
- The solution solved the legacy applications challenge
- No custom coding was required; solution is easily managed by internal IT staff

---

Approved Through Pervasive
Customer Master Integration with DBSi on AS/400

**CHALLENGE**
- Company needed real-time integration between Salesforce and an internal DBSi application on DB2/AS400
- Custom code was not scalable and too difficult to maintain
- Integration partner’s proposal for changes was too expensive
- Needed a dealer-friendly solution

**SOLUTION**
- Thompson Caterpillar selected the Cast Iron Integration Appliance for reliability and easy maintenance
- Integrated customer master data between dealers and company’s DBSi
- Eliminated custom code

**RESULTS**
- The integration was delivered in just three weeks
- No coding was needed to complete the project
- The solution was leveraged for other Thompson Caterpillar dealers
- Additional projects will include the warranty process, service order process, and inventory management process

**Thompson Caterpillar**
**Industry:**
Manufacturing

**Highlights:**
Legacy Integration
Real-time Integration
Customer Master

Approved Through Cast Iron
CHALLENGE | SOLUTION | RESULTS
---|---|---
Multiple silos of customer information in sales, finance, and marketing resulted in a fragmented view of the customer | TIBCO leveraged the existing enterprise service bus (ESB), formed by TIBCO BusinessWorks and EMS | TIBCO Software now has real-time dashboards, with clean data
Existing systems included Salesforce, Cognos, and Oracle | Connected Oracle, Salesforce, and Cognos to ESB, using adapter technology | Increased real-time visibility into deals, to improve accurate decision-making and effective action
A distributed data stewardship model resulted in incomplete, overlapping, or incorrect data | Developed automated process on top of ESB, to aggregate and cleanse Salesforce data and synchronize it with other systems | The modular architecture makes possible quick implementation of changes in business requirement
Senior management demanded real-time visibility into core sales metrics in Salesforce | | |

**TIBCO Software Inc**

**Industry:** High Technology

**Highlights:**
Oracle Integration
SOA-Based Middleware
Data Warehouse Integration
Multiple Endpoints

Approved Through TIBCO
# A Single View of the Customer across the Enterprise

<table>
<thead>
<tr>
<th>CHALLENGE</th>
<th>SOLUTION</th>
<th>RESULTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK-based Honeywell subsidiary wanted migration and data transformation from multiple sources, including MFG pro, into Salesforce&lt;br&gt;Needed nightly updates between affected systems&lt;br&gt;With an incomplete view of customer data, the company did not realize the full value of CRM&lt;br&gt;With short timeframes, the estimate of 44 days for a manual integration was prohibitively costly&lt;br&gt;Concern about the maintenance costs of custom code</td>
<td>Trend selected the Pervasive Business Integrator solution&lt;br&gt;Managed the solution with internal IT resources&lt;br&gt;Met all update requirements with no scheduling problems&lt;br&gt;Leveraged Salesforce self-service attributes, while extending value to other data sources and a potential new SAP project</td>
<td>Implementation was completed in 10 business days&lt;br&gt;Sales, technical support, and customer service personnel have a single view of the customer&lt;br&gt;Gained ability to support business expansion and mergers&lt;br.Reporting can be changed and improved quickly&lt;br&gt;The project achieved fast ROI and provided proof of value to management</td>
</tr>
</tbody>
</table>

**Trend**

**Industry:** Manufacturing

**Highlights:**
- MFG Integration
- Multiple Enhancements
- Rapid Implementation
### CHALLENGE
- Tumbleweed needed an on-demand dashboard for sales information
- Wanted timely and reliable information
- Alternatives were difficult to run and configure, so custom coding was required

### SOLUTION
- Tumbleweed selected the Informatica On Demand Data Replicator, both for its AppExchange certification and because no hardware or software was required
- Data was replicated in both full and CDC (changed data capture) extract modes
- Used Hyperion BI Suite 9.3

### RESULTS
- Tumbleweed had a full copy of sales data within one hour of signing up with service
- Executive dashboards were in production within a month
- Replicated Salesforce data is accessible across the corporate firewall, using a Web browser

---

**Tumbleweed Communications Corp**

**Industry:**
High Technology

**Highlights:**
- Hyperion Integration
- On-Demand Integration
- Rapid Integration

---

Approved Through Informatica
Integrated Partner Network Integration with Oracle 11i

**CHALLENGE**

- Yamaha’s customer data was housed in multiple contact managers, division-specific databases, and an outdated customer service system
- Needed to consolidate and automate processes to meet their long-term financial goals
- Required robust integration with Oracle and homegrown systems
- Wanted rapid implementation with minimal risk

**SOLUTION**

- Used the Force.com platform to integrate to the Oracle 11i back office and multiple legacy applications
- Created a single view of customers across the company
- Downloaded pre-integrated AppExchange apps for email campaigns, surveys, contracting, and electronic signature
- Deployed Salesforce nationwide across the sales, marketing, credit, operations, and the artist relations divisions, and most recently to service and support

**RESULTS**

- Yamaha improved tracking and management of customer information, as well as the activities associated with sales calls
- Integrated campaign management manages interactions associated with hundreds of trade shows
- Better coordination of sales and marketing to large customers increased commercial and institutional sales

---

**Product Item Summary**

- Dealer Eligibility

---

**Oracle 11i**

**Integrated Partner Network Integration with Oracle 11i**

**Highlights:**
- Oracle Integration
- Multiple Endpoints
- Partner Network Integration

---

**Yamaha Corporation of America**

**Industry:** Distribution and Retail
### Challenge

- Zimmer Holdings unsuccessfully tried to implement SAP CRM for 1.5 years.
- Needed multiple levels of integration from SAP data to Salesforce to achieve complete, consistent updates.
- Wanted “one source of truth” in a solution that was easy to use and administer.
- Needed daily, weekly, and monthly updates.

### Solution

- Zimmer Holdings selected the Pervasive Business Integrator.
- Met all update requirements with no scheduling problems.
- Leveraged the self-service attributes of Salesforce, while extending the value of the existing SAP investment.

### Results

- The fast, highly accurate integration took approximately two weeks from start to completion.
- Salesforce is now an integral part of sales, marketing, and customer support activities.
- Gained “one source of truth” in a solution that’s easy to use and administer, resulting in increased sales effectiveness.
- Real-time view into business includes sales and invoicing activities by region.
- The solution is easily managed by internal IT staff.
- Zimmer Holdings plans to implement additional phases for even more value.

---

**Zimmer Holdings**

**Industry:** Financial Services

**Highlights:**
- SAP Integration
- Product & Invoice Master
- Rapid Integration

---

Approved Through Pervasive
Integrated with Index

Data Warehouse
AAPT Ltd
Adesa
Ashland
Brocade
Deutsche Bank
Dow Jones & Company
Standard Life Investments

Legacy and Custom Applications
AAPT Ltd
AIMS-Allianz Income Management Services
BOK Financial Corporation
Carrier Access
Chevy Chase Bank
Cottingham & Butler
Deutsche Bank
IFG Group
Investors in People
Korean Air
LivePerson Inc
Media Trust
Miyachi Unitek Corporation
Payment Processing Inc
SunTrust Banks-National Bank Of Commerce
Thompson Caterpillar
Trend

Microsoft
Campus Fundraiser
Crushpad
EnerNOC
Grizzard
Karl Strauss Brewing Company
Open Text Corporation
Optimus Solutions

NetSuite
Salary.com

Oracle
Adesa
Awana
BP Solar
Bracco Diagnostics, Inc
Brocade
Fox Interactive Media
Intrep
Northeastern University
Nuance Communications Inc
Stratus Technologies
TIBCO Software Inc
Tumbleweed Communications Corp
Yamaha Corporation of America

SAP
Analog Devices, Inc
Ashland
Honeywell
KONE
Littelfuse, Inc
Magma Design Automation, Inc
Open Text Corporation
Sanofi Pasteur MSD Ltd
Zimmer Holdings

QuickBooks
goAUPAIR
LightWedge

Communications and Media
AAPT Ltd
Dow Jones & Company
Fox Interactive Media
Media Trust

Distribution and Retail
Crushpad
Karl Strauss Brewing Company
Yamaha Corporation of America

Education
Northeastern University

Energy
Ashland
BP Solar
EnerNOC

Financial Services
Adesa-Allianz Income Management Services
AIMS-Allianz Income Management Services
BOK Financial Corporation
Campus Fundraiser
Chevy Chase Bank
Cottingham & Butler
Deutsche Bank
IFG Group
Investors in People
Payment Processing Inc
Salary.com
Standard Life Investments
SunTrust Banks-National Bank Of Commerce
Zimmer Holdings

Health and Life Sciences
Bracco Diagnostics, Inc
Sanofi Pasteur MSD Ltd

High Technology
Analog Devices, Inc
Korean Air
Ashland
Brocade
Carrier Access
Grizzard
LivePerson, Inc
Magma Design Automation, Inc
Nuance Communications Inc
Open Text Corporation
Stratus Technologies
TIBCO Software Inc
Tumbleweed Communications Corp

Manufacturing
Honeywell
KONE
Korean Air
LightWedge
Littelfuse, Inc
Miyachi Unitek Corporation
Thomson Caterpillar
Trend

Services
goAUPAIR
Intrep
Optimus Solutions