


 Enhanced productivity No custom code maintenance Improved customer insight

Pervasive® DataSynch™ optimizes business performance with true 360° visibility

Affordable, subscription-based QuickBooks® ↔ Salesforce® integration delivers fast, no-headaches solution

“We were using an inefficient custom-coded application to synchronize our Salesforce accounts to our QuickBooks customers and realized we needed to adopt a more flexible system that could not only synchronize our data but quickly and easily scale to adapt to future needs. Pervasive Software’s experience and proven leadership in the integration marketplace made our decision to go with Pervasive DataSynch easy for us.”

–Stephen Shang, CEO
Falcon Storage

Executive Summary

Falcon Storage was upgrading its QuickBooks application and, as part of this initiative, decided to migrate from custom coding to a packaged integration solution. They had used custom code to integrate QuickBooks to Salesforce and while this had initially worked well for them, they now realized that their custom-coded integration would be difficult to reuse and costly to repurpose and could not scale to handle the business as it evolved. Realizing these weaknesses, they sought an alternative approach and chose Pervasive DataSynch for use with QuickBooks and Salesforce to rapidly and affordably deliver integration they’d traditionally tackled with custom code.

Challenge

A specific challenge for Falcon Storage was automating invoices with Salesforce and synchronizing all their data between Salesforce and QuickBooks. “Our business model is based on renting portable storage services – we track our rentals every 28 days, through the use

of Salesforce. We process over 1000 invoices a month. To do this manually takes a full-time staff member about one month to process. We were using an inefficient custom-coded application to synchronize our Salesforce accounts to our QuickBooks customers which was labor-intensive and time consuming. But as QuickBooks products and the Salesforce API continually upgrade, we discovered our custom software could not easily be tweaked to help us stay on top of the changes,” said Stephen Shang, CEO of Falcon Storage.

Changes required a knowledgeable programmer to put in updates or new custom-coding for the system. Long implementation periods and the upgrading of an antiquated code-based system created a ripple effect throughout the organization in terms of costly modifications, risks to core business processes and diminished efficiency. “We realized we needed to adopt a more flexible system that could not only synchronize our data but quickly and easily scale to adapt to future needs

PERVASIVE
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About Falcon Storage

Falcon Storage is a portable storage and office space provider that offers a two-hour delivery guarantee on all products. In 2002, owners Brian Dieringer and Stephen Shang saw an opportunity to build a business in the storage container and portable office industry. Falcon Storage launched in January 2003 in Austin and quickly became a thriving business. Recently Falcon Storage was recognized by the Greater Austin Chamber of Commerce in the Architect of Ideas Award competition for excellence in innovation, customer service, community service, education and environment.

as our business continues to expand,” explained Shang.

“We looked on the salesforce.com® AppExchange™ and after researching about five companies we selected Pervasive Software. Pervasive Software’s experience and proven leadership in the integration marketplace made our decision to go with Pervasive DataSynch easy for us,” stated Shang.

Solution

Although Pervasive DataSynch’s standard installation provides a valuable solution out of the box, Falcon Storage wanted to extend the capabilities to enhance their service processes. Pervasive assigned a dedicated project manager to fully understand Falcon Storage’s business processes and assure the success of the migration. Within weeks, Falcon Storage had left behind the limitations of its custom-coded application to leverage Pervasive DataSynch’s more robust application. “We were particularly impressed with the responsiveness of Pervasive’s expert customer support



Falcon Storage gains optimized business performance

staff. They are one of the best teams I have worked with. With their help we were able to streamline our processes and enhance our operations,” declared Shang.

Falcon Storage uses Pervasive DataSynch to enable bi-directional synchronization of:

- Salesforce Account Name ↔ QuickBooks Customers
- Salesforce Opportunities ↔ QuickBooks Invoices.

Use of Pervasive DataSynch will also enable unidirectional synchronization of:

- Salesforce Products → QuickBooks Items.

The synchronization is seamless and requires no learning curve.

To actively compete in today’s ever-changing business environment, Falcon Storage required a system with robust, adaptable functionality that could stand the test of time. “Pervasive DataSynch allowed us to quickly update, providing a holistic view of our data,” confirmed Shang.

Benefits

Falcon Storage’s rigid custom-coding didn’t utilize the complete product architecture available from Salesforce which resulted in limited linking of opportunities. They were locked-in to invoicing the product offerings that were set up with the initial custom coding, unless their custom-code was re-written for new inventory. Pervasive DataSynch allows them to fully leverage the Salesforce platform to build workflows between their CRM and accounting applications. Pervasive DataSynch enables businesses to constantly adapt and respond efficiently to changing conditions — now Falcon Storage can easily update their product line and upsell to customers to improve their profit margin.

Pervasive DataSynch provides operational efficiencies to accelerate the cash cycle by extending the capabilities of CRM and accounting systems. “Traditional integrations between Salesforce and Quickbooks are based on product-based integrations but because our offerings are based on rental, time-based products, complex billing logic is involved in managing our rental orders. Pervasive DataSynch customized our system to work with our rental-based architecture based upon the requirements of the order. The streamlining of critical business

processes and automation of tasks such as data entry greatly speeds cash flow from days to hours. Faster payment processing allows us to accelerate our collection of property income. That’s business critical — no matter what business you’re in,” explained Shang.

Conclusion

“Pervasive DataSynch for use with QuickBooks and Salesforce has provided our organization end-to-end visibility into our customers, prospects and suppliers,” explained Shang. The gains from implementing Pervasive DataSynch have been significant — elimination of duplication across business functions and shared accountability for data quality. The transfer of information also contributed to time and cost savings resulting from shortened cash cycles and improved cash flow. “We can update and share information across the group. For example, new products can quickly be added to our inventory to be viewed and used by staff throughout our organization. This gets rid of a lot of manual entry, reduces errors, and processes become more streamlined. We are also able to break information down to more detailed types and can easily import the actual information from a particular customer. So, at any stage we have a much more accurate picture of the available data,” says Shang.

About Pervasive DataSolutions

Pervasive DataSolutions deliver simple, powerful integration with just a few clicks. Leveraging 20+ years’ integration experience, Pervasive DataSynch provides automated synchronization between on-line or on-premises software including Salesforce, QuickBooks, QuickBooks Online, and Microsoft Dynamics CRM. With affordable subscription pricing, Pervasive DataSolutions enhance value, business efficiency, and the competitive edge.

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