

Clients Talk



CSI, a leading CRM Optimization Consultancy, turned to Inaport to meet a tight deadline for migrating from ACT! to Sage SalesLogix and got the results they needed: a successful migration completed on time and to budget!

Customer Systems International (CSI) clients are used to receiving opportunity-creating solutions in a reasonable timeframe and for a competitive price. To achieve this, CSI is continually building its pool of expertise and making sure it can employ the best software solutions available to serve its clients.

Recently, CSI needed to migrate data from a customised ACT! by Sage database into a customised Sage SalesLogix database. The client had an aggressive deadline so CSI looked at migration tools that may assist, including Inaport. After a short, complimentary evaluation ([available online](#)) CSI decided to use Inaport as a major element in its migration approach.

A large part of Inaport's appeal to CSI was that it came with ready-to-use profiles to migrate from ACT! These profiles map a standard ACT! database to a standard SalesLogix one and include email history, activities, linked documents, opportunities, notes and emails, as well as the usual contact details.

In this case, the customer's ACT! database was heavily customised, so the standard profiles had to be modified to accommodate the changes. This was reasonably straightforward, however, and much faster than setting up migration links from scratch. With Inaport, the hard part had already been done by InaPlex.

As Sookjin Hyun, CSI's Solution Manager, noted.

"The process of creating the data maps was extremely simple, and the fact that Inaport migrates everything from ACT! to SalesLogix in one run means that the amount of time spent on this project was greatly reduced."

As CSI was new to Inaport, InaPlex provided a lot of assistance and "hand-holding" to help its technical personnel quickly come up to speed. Even getting the software was easy, as Daniel Sosnowski, Technical Engineer, noted.

“ The part that impressed me most was how easy the process of obtaining and installing the software was. The latest software is quickly available from the main website and once it was downloaded, installation and configuration went through without a hitch.”

It wasn't just the technical aspects of Inaport that impressed, however. Michael Hopwood, Sales Manager, also appreciated the flexible licensing model that InaPlex offers.

“The 30 day license keeps costs to a minimum when there is a one off migration, while an unrestricted license is available for clients with ongoing data integration needs. This lets CSI offer our clients the best value solution for their requirements.”

The migration was completed smoothly and quickly, and the initial Inaport cost was easily offset against the gains it provided. CSI expects to use Inaport again for future migrations, as well as data integration and general data management, across the range of CRM solutions it supports - Accelero powered by Microsoft Dynamics CRM, Microsoft Dynamics CRM and Sage SalesLogix.

The client was very happy with CSI for completing the project on time and within the agreed budget. In turn, CSI 's team was very happy with Inaport and the support provided by InaPlex, as indicated by Michael Hopwood's praise.

“I would like to congratulate the InaPlex Team on an excellent product!”

Statistics

INSTALLED: 2010

KEY USE: Heavily customised ACT! by Sage to Sage SalesLogix migration

STATUS: Complete

PARTNER: www.customersystems.com.au