



#### Customer Location

Syracuse, NY

#### Industry

Technology

#### Platforms

Microsoft SharePoint 2010  
Salesforce CRM

#### Critical Need

- Replication of Salesforce CRM objects to SharePoint lists in order to enable all employees to access accurate, up-to-date information

#### AvePoint Solution

DocAve Data Replicator for  
Salesforce  
DocAve Content Replicator for  
Salesforce

**“DocAve ensures that all of the information our sales team gathers and enters into Salesforce CRM is consistent with the information the rest of our teams access through SharePoint.”**

*- Shi Ming Chung, Business Analyst,  
Systems Made Simple*

## Systems Made Simple Eliminates Silos for Staff and Saves up to 8 Months by Replicating CRM Data to Microsoft® SharePoint® with DocAve®

### Success Highlights

- Replicated Salesforce CRM objects to SharePoint lists in real time, enabling all employees to access up-to-date information and incorporate it into fundamental business workflows
- Saved six to eight months of development and testing by not having to build a custom solution in-house to connect systems
- Retained full fidelity of information, including all metadata, upon replication from Salesforce CRM to SharePoint

### Customer Profile

Founded more than 20 years ago, Systems Made Simple (SMS) is a Service-Disabled, Veteran-Owned Business that delivers leading healthcare IT systems, services, and strategies to federal agencies.

### The Challenge

SMS originally implemented SharePoint solely as a document repository, allowing its staff to store, access, and share files on the platform. As it grew to more than 300 employees, the company’s use of SharePoint matured as well. The platform is now utilized by staff for program management, and the company’s developers created widgets and workflows that allow for better collaboration and increased efficiency.

At the same time, the company’s sales staff utilizes the customer relationship management (CRM) software Salesforce CRM from salesforce.com in order to track and store information about sales opportunities. Similar to SharePoint, the company built workflows into Salesforce CRM to ensure opportunities move through the sales pipeline in the way they are supposed to.

While both systems were useful to employees, helped keep track of projects and opportunities, and increased productivity, the existence of two separate systems began to pose a challenge for SMS. “Because our sales team was using Salesforce CRM for opportunity tracking and the rest of our staff was using SharePoint for document management, we were finding that information was becoming siloed – existing in either one area or the other,” said Shi Ming Chung, Business Analyst at SMS. “In order to maximize efficiency for our staff and ensure that all teams had access to the most up-to-date, relevant information, we had an immediate need to make the two systems communicate.”

Since neither SharePoint nor Salesforce CRM offered native solutions to connect data between the two systems and the organization needed to solve this challenge faster than the six to eight months of development and testing required to build a solution internally, SMS began a search for a third-party solution.

## The AvePoint Solution

Chung and his team investigated several solutions and ultimately chose to implement DocAve Data Replicator for Salesforce and DocAve Content Replicator for Salesforce from AvePoint as a business-critical SharePoint solution that connects SharePoint with other line-of-business data systems such as Salesforce CRM. “We looked at a handful of companies, but from the demonstration of AvePoint’s products we could see that they were much simpler to implement and easier to manage than all of the others,” Chung said. “Implementing DocAve Data Replicator and DocAve Content Replicator helped us save at least six to eight months of development and testing, and we did not have to spend internal cycles creating a solution ourselves.”

After a simple installation, SMS began to utilize DocAve Data Replicator. DocAve provides real-time replication of Salesforce CRM objects to SharePoint, empowering organizations to further analyze CRM data and incorporate it into fundamental business workflows. When sales representatives from SMS enter or change information from opportunities in Salesforce CRM, that information is automatically replicated into SharePoint lists with full fidelity, including all metadata. “DocAve ensures that all of the information our sales team gathers and enters into Salesforce CRM is consistent with the information the rest of our teams access through SharePoint,” Chung said.

DocAve also helped SMS ensure that data in Salesforce CRM was up-to-date. Using DocAve’s data replication abilities, the company created a SharePoint workflow that notifies the sales team whenever information is missing that should have been replicated to SharePoint from Salesforce CRM. “If information is left out of the sales team’s account management process in Salesforce CRM, SharePoint can now let them know,” Chung said. “Thanks to DocAve, SharePoint alerts the representatives so they know what needs to be updated or added.”

Throughout its use of DocAve, SMS utilized AvePoint’s live, 24/7 technical support whenever needed. “Our SharePoint administrator has worked with AvePoint’s support team on several occasions and has always had a positive experience,” Chung said.

## The Bottom Line

Because of its success with DocAve Data Replicator, SMS will soon begin to utilize DocAve Content Replicator, which replicates documents located in SharePoint libraries into Salesforce CRM content workspaces, making business-critical content published in SharePoint available in Salesforce CRM via a simple point-and-click approach. “As our company continues to build out its infrastructure, we see ourselves using DocAve even more in the future,” Chung said.

## About AvePoint

AvePoint is a global technology company and proven software leader. Since its founding in 2001, AvePoint has become the world's largest provider of enterprise-class governance, compliance, and management solutions for social enterprise collaboration platforms. AvePoint helps more than 10,000 customers – including many Fortune 500 companies and government agencies – meet their specific business objectives by enabling collaboration with confidence. AvePoint, Inc. is headquartered and maintains its principal operational center in Jersey City, NJ, with wholly owned operational centers in the USA, Canada, Australia, South Africa, United Kingdom, France, Germany, Netherlands, Switzerland, Japan, Singapore, and China. AvePoint is a Depth Managed Microsoft Gold Certified Application Development Partner and Gold Certified Collaboration and Content Partner as well as a US Government GSA provider via strategic partnerships.

AvePoint U.S. Headquarters:  
3 Second Street  
Jersey City, NJ 07311  
800-661-6588  
[www.avepoint.com](http://www.avepoint.com)