



Cirrus Insight Enhances Salesforce Data Integration with Skyvia

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Founded in 2011, Cirrus Insight's sales enablement platform for Gmail and Outlook offers an all-in-one sales productivity platform with world-class Salesforce integration. The Cirrus Insight app works right from the inbox, offering customers immediate access to Salesforce CRM data, such as Leads, Contacts, and Opportunities, from their email service.

Company name:
CIRRUS INSIGHT

Industry:
SALES ACCELERATION

Product:
DATA INTEGRATION



Challenge

Originally, the Cirrus Insight team was looking for an integration solution to have automation between various systems, such as Salesforce, QuickBooks, NetSuite, SQL Server, Stripe, and others. Overall, it was about making sure that the data was correct, where and when it needed to be. The Cirrus Insight team started looking for integration solutions available on the market, but in the end, it was a lot of extra weight and a lot of customization that would require implementation time and consulting.

The goal was to make day-to-day data-related tasks automated and stop spending so much money and time on complex integration cases. The major integration scenarios were:

- Merging two Salesforce accounts
- Synchronizing data from Stripe (QuickBooks, NetSuite, SQL Server, and others) with Salesforce customer records and subscriptions



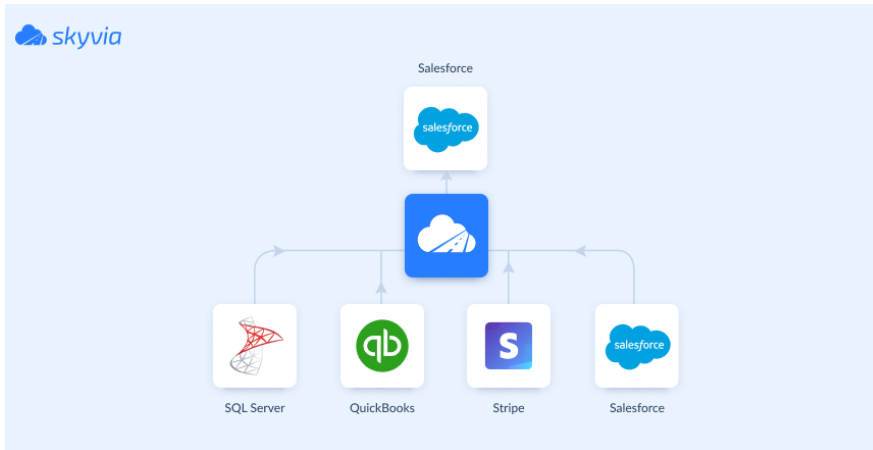
The main challenge was to be able to get the data integrated the way that we need, so we don't require help from a developer or a long implementation cycle to get things moving.

KRISTI CAMPBELL

Senior Salesforce Administrator Cirrus Insight

Solution

With Skyvia, the team could easily control different data objects that the team needed to send data to and was able to schedule the automated integration to make sure that data links in a way that is needed for business.



For the Salesforce to Salesforce integration, Skyvia was used to migrate data from one instance to another so that all operations are in one instance but still have all customer data in the other one. Thanks to such integration, the implementation costs are 20 times less than usual.

For the second integration scenario, Stripe data was transferred automatically into Salesforce. Skyvia handles bringing over automated data updates and integration, allowing for customer records synchronization between these systems.

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One of the great options of Skyvia, I feel comfortable managing it by myself. Like when you start, you have only one integration, you have fewer records to integrate, and you don't need everything at that time. But then, you can easily scale, escalating with meeting more jobs; you can add additional pieces as you need them but still keep it within the familiar framework, even if you setting up integrations between different systems (and Skyvia is very proactive, giving additional options for connectors).

KRISTI CAMPBELL

Senior Salesforce Administrator Cirrus Insight

Results

With all data changes happening every day, Cirrus Insight definitely sees operational efficiencies after applying Skyvia. Skyvia saves time and money resources since there's no need to take the information manually, and the team is able to integrate any tools or any data endpoint needed with ease.

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I really love how Skyvia can scale for what we need to do. And we keep finding more and more use cases where it makes sense so we can make more use of the investment we've already had. Without Skyvia, we have a lot of manual data entry going on, so we put it to replace manual imports. Now, Salesforce users spend less time entering data in multiple places, and they can do more revenue-generating activities.

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