

ONTARGET PARTNERS

SALESFORCE.COM SYSTEM INTEGRATION AND DATABASE DEVELOPMENT USE CASE

Overview

OnTarget Partners manages account data in Salesforce.com for B2B, private equity firms, business owners and venture capitalist organizations. TAP Innovations integrated into their Salesforce.com and business systems to eliminate duplicate records, manual processes and spreadsheet usage. Bi-directional integrations, transformations and innovation in data capture are a few of the ways premier system integration solutions met their business objectives.

Business Challenge/Problem

OnTarget Partners manages business and customer data in a Salesforce.com CRM, which is not integrated with other business systems for customer account and lead management. Data management environment limitations:

1. Lacks automated processes to send data to external systems
2. Manual, time consuming and lengthy processes
3. Multiple digital and people sources for lead management
4. Duplicate record checks fall on the CRM user, and oftentimes don't occur due to time and system limitations
5. Excel processes like vlookups cause data confusion and duplicate work

Digital Tools

TAP Innovations is a premier system integrator and transforms data and lead management systems, processes and workflows. The OnTarget Partners database is now free of duplicates and incorrect information.

TAP Innovations eliminates manual work through:

- Enhanced Salesforce.com CRM functionality
- Automated information capturing from external systems to save time and reduce errors
- New data fields due to business system integration
- Customized technical settings to control the functionality of the integration
- Extended feature for file uploads
- Rigorous data testing and verification

TAP Innovations solutions improve workplace efficiency, customer interactions and lead management analytics.

“TAP Innovations’ affordable solutions allow us to capture and share information in innovative ways that we know our team members and clients can be excited about.”

Ed Trachier,
Owner and CEO of OnTarget Partners

TAP Innovations Solutions

TAP Innovations is a premier systems integrator and customer implementations expert for HR, CRM, Financial, LMS, POS, and Healthcare (EMR and PM) software companies. Solutions are easily scalable and repeatable across multiple industries including franchises:



Bi-directional integrations



Bulk data loads to transfer historical data



Data transformations



Actionable Information through reporting & analytics



Data capture



“TAP Innovations is the right partner to take our data infrastructure to the next level.”

Ed Trachier
Owner and CEO of OnTarget Partners

Partnership Expansion

TAP Innovations also provides OnTarget Partners with a Salesforce consultant for systems updates and improvements. Working with OnTarget Partners, TAP Innovations recently developed a small business database tool that contains 661,000 business records. More on that project can be found [here](#).



Contact TAP Innovations today to get started on eliminating your Manual Efforts and Spreadsheets (MESS)!

Visit tapinnov.com to get started!



www.tapinnov.com
tapinnov@tapinnov.com
972.842.4554

About TAP Innovations

theAppPlace (TAP) Innovations is a premier system integrator that delivers cloud-based solutions for business Digital Transformation. TAP...THE Integrated TI Core automates manual processes and greatly reduces spreadsheet sprawl, actions data into information and performs intelligent content organization across people and entity enterprises. A growing set of TI Core Modules for CRM, Business Intelligence, Integrations, and more are web and mobile enabled and quick to fill data interoperability gaps with core business systems. TAP Innovations solutions have been implemented to streamline business processes for leading healthcare and financial management organizations as well as internal departments for companies from 50-15,000 employees and users.

Visit tapinnov.com to learn more.