Open Source CRM for Tourism

Wild-East Marketing GmbH - one of Germany’s leading service provider for online booking systems (OBS) decided to implement the Open Source CRM “SugarCRM”.

“SugarCRM is the world’s leading provider of commercial open source customer relationship management (CRM) software for companies of all sizes. Sugar easily adapts to any business environment by offering a more flexible, cost-effective alternative than proprietary applications. SugarCRM’s open source architecture allows companies to more easily customize and integrate customer-facing business processes in order to build and maintain more profitable relationships. SugarCRM offers several deployment options, including on-demand, on-site and appliance-based solutions to suit customers' security, integration and configuration needs.” [sugarcrm.com]

For Wild-East Marketing we set up a 3-step integration model, which would make sure that the company gets a CRM as quickly as possible and that it gets fully integrated with all company departments and software systems. Secondary target of the CRM implementation was to eliminate as many data isles as possible.

**Step 1** was setting up a basic SugarCRM and customizing it to the everyday needs of Wild-East Marketing. This included the import of all existing customer data from the “Combit Address Manager”, all Outlook instances and Access databases. Internal communication was greatly improved by using the shared calendar and an Outlook/Thunderbird plug-in, which enables all employees access the complete communications history with each customer. Furthermore we implemented and enhanced the “Projects” module, substituting “eProject”. Project management is now customer and account related, each CRM user can be assigned to project tasks, gets notified on every relevant change to his project and so on.

**Step 2** was developing a small business ERP package, called crmXP. It extended SugarCRM CE with the following modules:
- Products,
- Product Catalogue,
- Price books,
- Quotes,
- Orders,
- Invoices,
- Cockpit

crmXP allows Wild-East Marketing to trace the complete customer lifecycle throughout the company. Secondary target was emphasizing the distinction between B2C and B2B, which was realized by a flexible business model template engine for the “Orders” module.
Step 3 was synchronizing the live data from Wild-East Marketings OBS with the extended SugarCRM. Besides the address data from customers, which would be organized and used for E-Mail campaigns from SugarCRM, it was required to fetch all bookings, reservations (as “orders”) and invoices, so the CRM system can show “who booked what and paid when” anytime.

The synchronization had to be flexible and expandable by Wild-East Marketing employees, so we decided to go for an ETL solution. Compared to other tools Apatar was preferred by us because of its easy to grasp and intuitive handling and still offering a broad range of connectors and excellent support through the Apatar team.

Apatar enabled us to easily connect and synchronize SugarCRM with crmXP to Wild-East Marketings DATEV system ( invoicing), their OBS (online booking system) and some other MySQL and XML sources for statistics and Google AdSense.

Instead of creating one giant datamap for all the synchronized information we set up one datamap for each module and arranged them with Apatars scheduling tool.

That way it’s easily possible for Wild-East Marketing employees to modify and update single imports if necessary.

Using the “Cockpit” module Wild-East Marketing has a powerful BI tool at hands, which can generate real time reports with a mouse click, show conversion rate, hit rate, ROI of campaigns, order summaries per quarter/month/year and many other customer, order or product related information and turn it into any kind of charting, which can be used as flash object on a website, for presentations in PowerPoint or Impress or many other ways.

Future developments will open up the CRM to the customers, to enable them to track the status of their reservation.

Furthermore they will be able to file a case (i.e. complaint) into a ticketing system.