



MIGRATION CASE STUDY

CHALLENGE

The client is a leading provider of a wide range of business management applications and services to small and medium based businesses (SMB's). The client supports more than 2.8 million customers in the U.S & Canada with application covering a full range of business requirements including accounting, customer relationship management, contact management, warehouse management, specialized industry needs among many others.

Business growth brings new challenges to businesses. The client's customers using an entry level accounting package, due to changing business scenarios, upgrade to comprehensive and powerful financial and operations management systems that will cater to their increased business complexity. The client wanted CI to develop a transition tool to enable its customers to migrate to the new system smoothly. The main business challenge in developing a migration tool was to match the data and the transactions from the basic accounting package to the comprehensive financial and operations system without losing track of business critical information and being user friendly at the same time.

SOLUTION

CI's team did a detailed analysis of the requirement by comparing the features / user interfaces of the basic accounting package and the powerful financial and operations system. This analysis helped in the mapping of the fields between both systems. Some of the development challenges that we faced were handling of tallying of trial balance, posted transactions which have tax code and tax authorities that do not exist in the master, deletion of master records used in the transactions, handling of negative and positive details within a transaction and handling different set of tax authorities.

CI's team developed a wizard based transition tool that would migrate data from the basic accounting package to the other system with minimal user intervention. The key feature in the tool was the ability to restart the conversion from the point where it was left earlier. (refer screenshots)



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TECHNOLOGY

Client's product framework

ABOUT CI

CI is a global product development services organization and a partner to established technology leaders, helping them bring software products to market in less time and at reduced operating costs. CI partners with clients to create dedicated delivery centre's.

CI has been able to continuously maintain partnership with clients for almost 10 years through a compelling combination of proven methodologies, expert developers, high standards of quality and commitment.

CI provides complete product lifecycle services from new product development to product re-engineering, support and migration. CI has worked with over 200 clients over the past 11 years.

CI's product development teams are spread across our Global Delivery Centres in Chennai, India and offices in the United States. The software professionals serve as virtual extensions of our client's local development teams. By leveraging the capabilities, a partnership with CI has proven to increase product quality while reducing the time to market and operating costs by 50%.