

Success Stories

Inventory Management Software Migration to Rootnet CRM

Rootstack migrated PEMCO information from an inventory management system through middleware development to activate and synchronize the Accounts, Contacts, Products, and Quotes modules later.

About Pemco

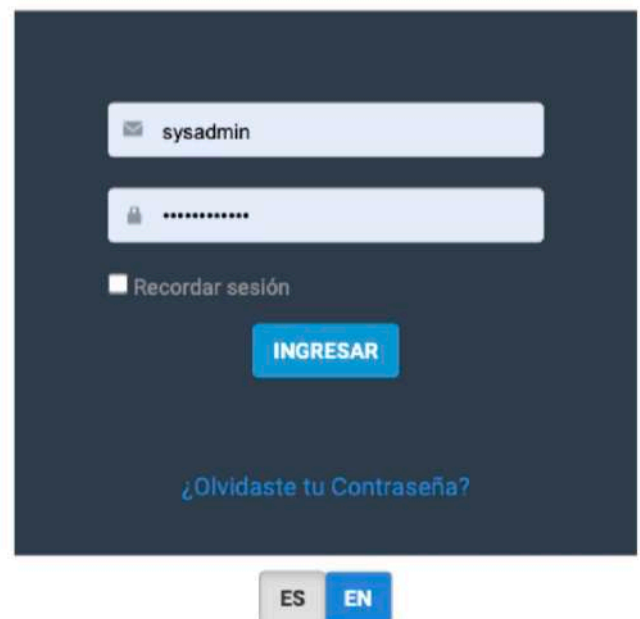
Pemco is a recognized company in Panama that sells tools, equipment for industries, appliances, and construction. Its main clients are other companies in the industry, workshops/automotive, and construction.



Challenge

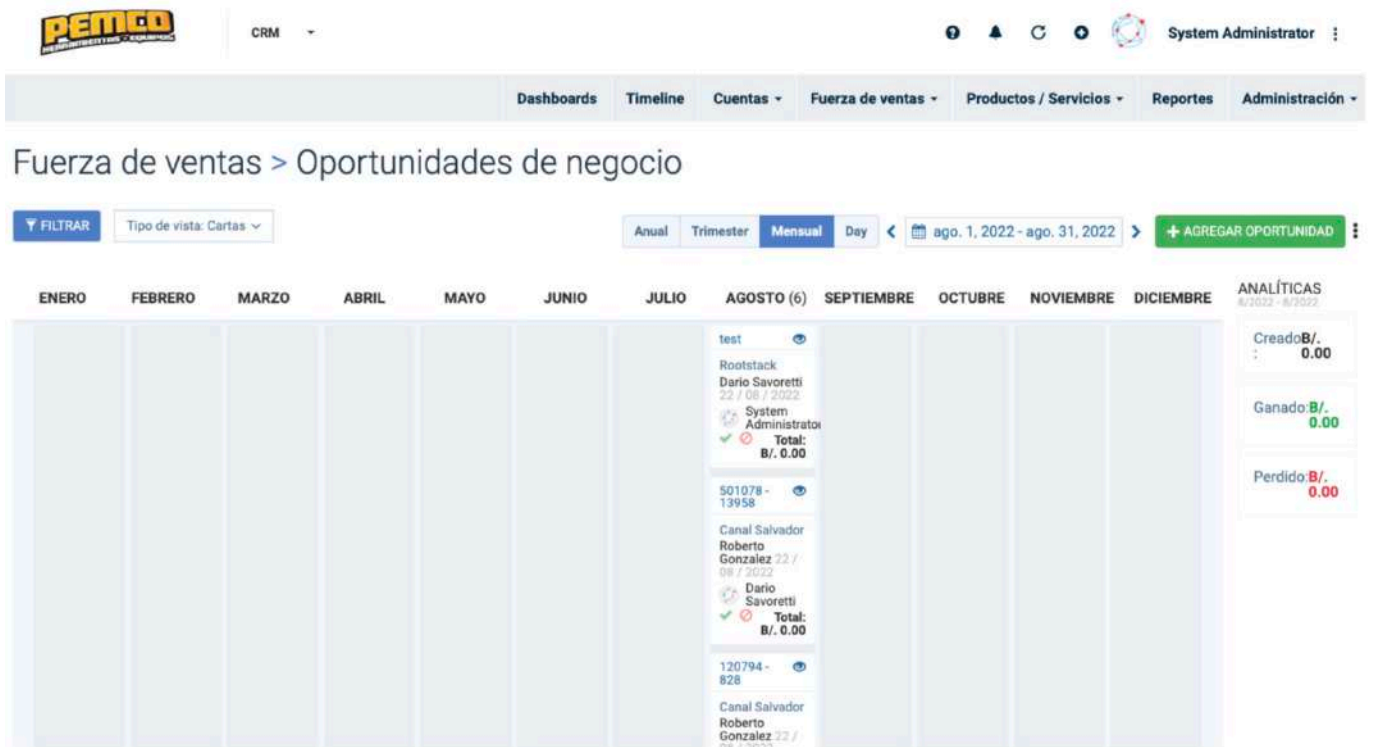
Due to the growth of Pemco, they needed to look for software that offered them more tools to achieve a better relationship with their customers and have greater control of their products.

For this reason, they decided to contact Rootstack, to adopt their Rootnet CRM product and accomplish the complete migration of the data they had in the previous Counter Points system. This information contained Vendors, Accounts, Quotes, Invoices, Items, and Products. Custom fields were also considered to implement them in the Rootnet CRM.



Solution

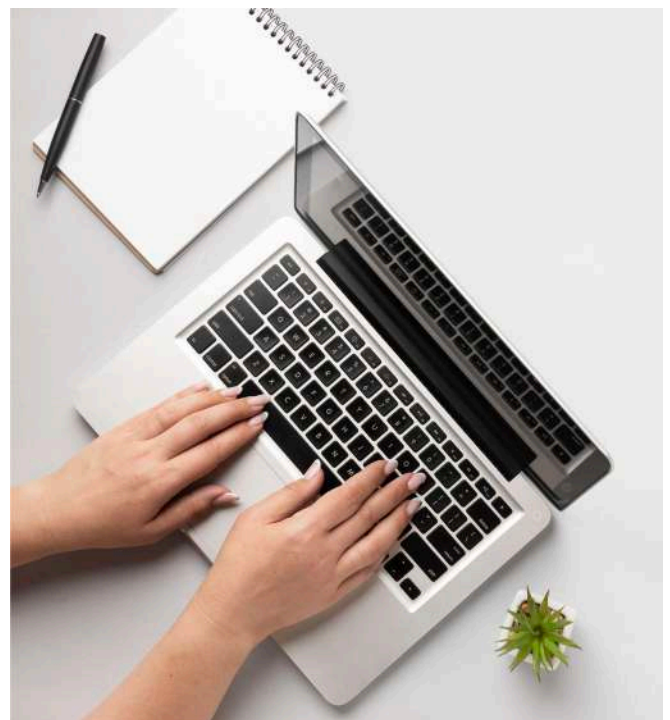
Rootstack worked along with Pemco to list all the fields that needed to be moved and map the heterogeneous data. Rootstack developed APIs Middleware with PHP 5.6 in Symphony, to execute the migration correctly and not lose important information.

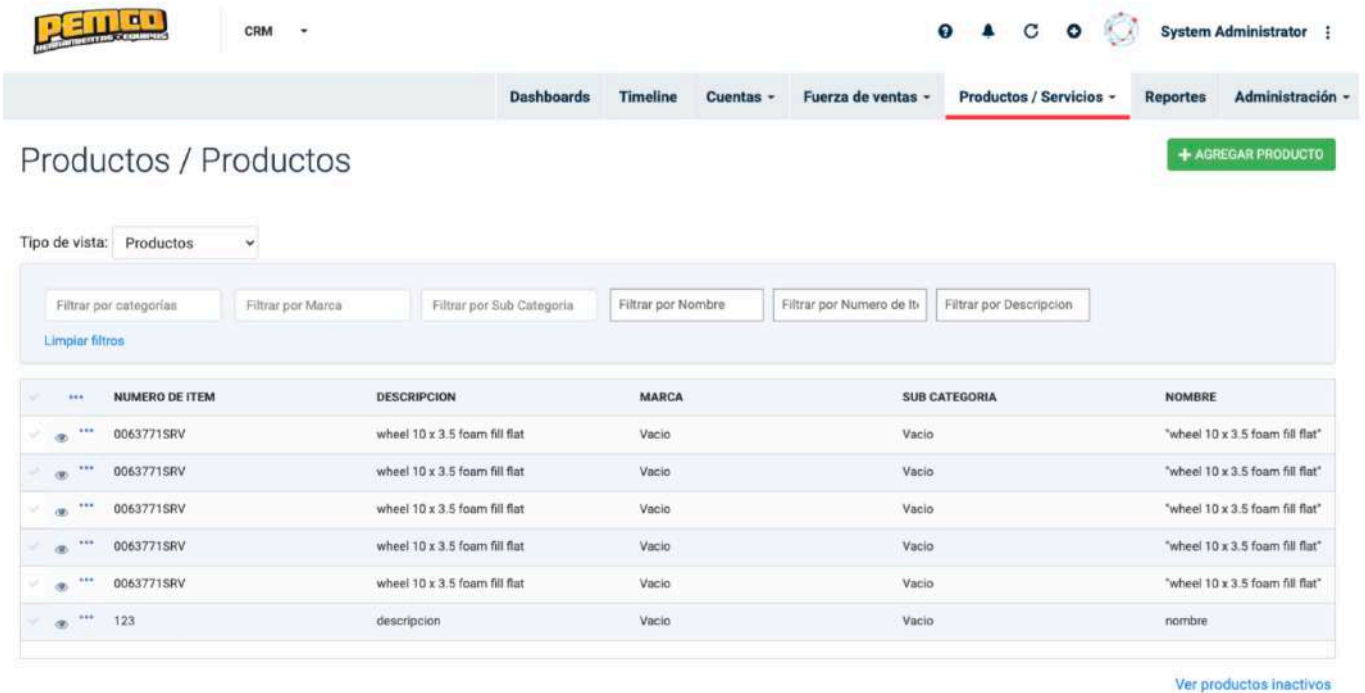


For the special fields, new columns had to be created to store the information corresponding to each record in the CRM Rootnet.

The relevant tests were carried out before the final migration, and it was verified that everything worked correctly. Once the data migrated in the Rootnet CRM, the activations and integrations of the modules that Pemco requested Accounts, Contacts, Products, and Quotes were made. The client needed these new features to have more scope and detail when analyzing the information of the customers and products in the system.

It should be noted that the entire project was managed in Rootnet, to track tasks by sprint, responsible parties, execution times, and delivery dates.





CRM - System Administrator

Dashboards | Timeline | Cuentas - | Fuerza de ventas - | **Productos / Servicios -** | Reportes | Administración -

Productos / Productos + AGREGAR PRODUCTO

Tipo de vista: Productos

Filtros: Filtrar por categorías, Filtrar por Marca, Filtrar por Sub Categoría, Filtrar por Nombre, Filtrar por Numero de It, Filtrar por Descripción. [Limpiar filtros](#)

✓	***	NUMERO DE ITEM	DESCRIPCION	MARCA	SUB CATEGORIA	NOMBRE
✓	***	0063771SRV	wheel 10 x 3.5 foam fill flat	Vacio	Vacio	"wheel 10 x 3.5 foam fill flat"
✓	***	0063771SRV	wheel 10 x 3.5 foam fill flat	Vacio	Vacio	"wheel 10 x 3.5 foam fill flat"
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✓	***	0063771SRV	wheel 10 x 3.5 foam fill flat	Vacio	Vacio	"wheel 10 x 3.5 foam fill flat"
✓	***	123	descripcion	Vacio	Vacio	nombre

[Ver productos inactivos](#)

Technologies

Customer and product information was on the Counter Points platform. This was moved to Rootnet CRM with more modules and detail to facilitate information management.

The technologies, tools, and languages used throughout this project were Rootnet CRM, PHP 5.6, Symphony, and SQL, among others.

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NUMERO DE ITEM

0063771SRV

DESCRIPCION

wheel 10 x 3.5 foam fill flat

MARCA

Ninguno

SUB CATEGORIA

Ninguno

NOMBRE

"wheel 10 x 3.5 foam fill flat"

ESTADO

Si

PRECIO

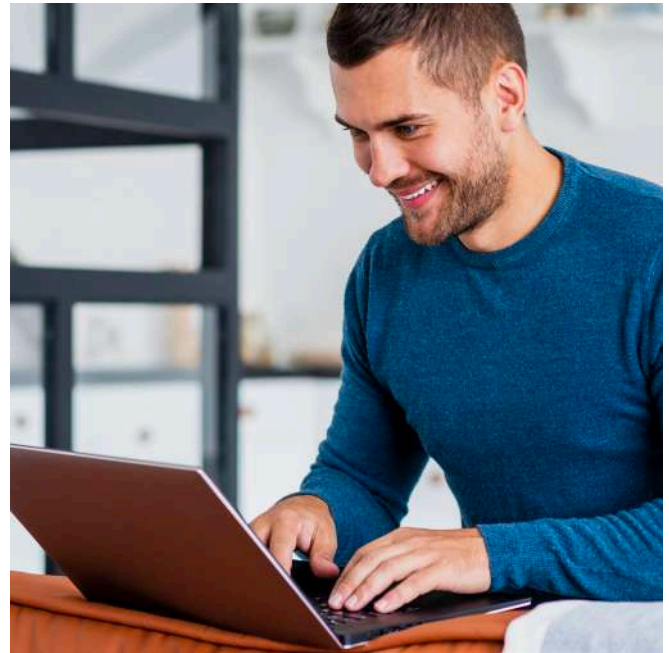
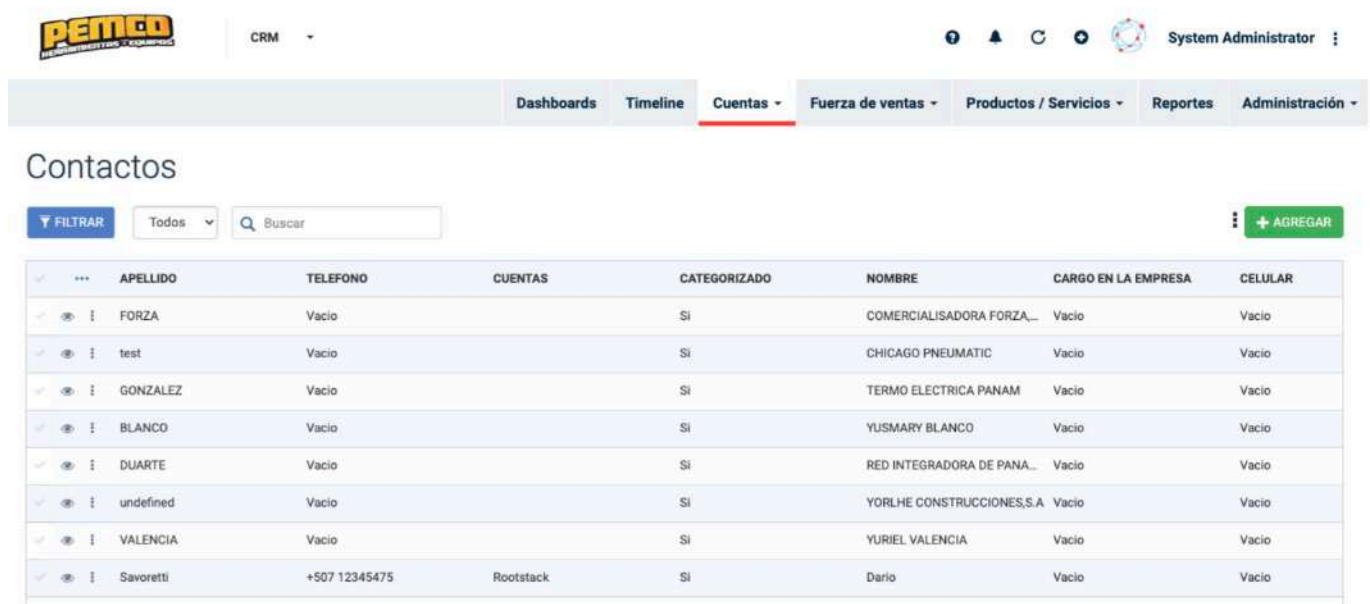
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CATEGORÍA

Productos

Two Rootstack Fullstack developers and one PM were involved in this project. With their capabilities, they were able to solve the challenges of migrating data from the old system to the current one and enabling the new modules for the integral operation of the CRM.

Through our +10 years of experience in technology, we have successfully completed different migrations of business systems, not only CRMs, but also ERPs, accounting systems, payroll, websites, tools for monitoring complete projects, and others. We have an expert team in different technologies and a strong track record in different industries.

The screenshot shows a CRM interface with a navigation menu including 'Dashboards', 'Timeline', 'Cuentas', 'Fuerza de ventas', 'Productos / Servicios', 'Reportes', and 'Administración'. The 'Cuentas' section is active, displaying a table of contacts.

✓	☰	APellido	TELEFONO	CUENTAS	CATEGORIZADO	NOMBRE	CARGO EN LA EMPRESA	CELULAR
✓	☰	FORZA	Vacio		Si	COMERCIALIZADORA FORZA...	Vacio	Vacio
✓	☰	test	Vacio		Si	CHICAGO PNEUMATIC	Vacio	Vacio
✓	☰	GONZALEZ	Vacio		Si	TERMO ELECTRICA PANAM	Vacio	Vacio
✓	☰	BLANCO	Vacio		Si	YUSMARY BLANCO	Vacio	Vacio
✓	☰	DUARTE	Vacio		Si	RED INTEGRADORA DE PANA...	Vacio	Vacio
✓	☰	undefined	Vacio		Si	YORLHE CONSTRUCCIONES,S.A	Vacio	Vacio
✓	☰	VALENCIA	Vacio		Si	YURIEL VALENCIA	Vacio	Vacio
✓	☰	Savoretti	+507 12345475	Rootstack	Si	Dario	Vacio	Vacio

Would you like to migrate any of your company's systems to achieve greater scope and better functionality?

Contact us, we are here to make your projects a reality.