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10 TIPS FOR INTEGRATING YOUR CRM AND ERP SYSTEMS

GUIDELINES TO SIMPLIFY THE PROCESS



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INTRODUCTION

More and more companies do not want to be tied to a single business software provider. They want each of the applications they use to provide the ideal function and cost; the term used for this approach is ‘Best-of-Breed’. Many enterprises now use their core systems with other on-premise and on-demand applications: including Salesforce.com , Microsoft SharePoint, Lotus Notes, Oracle, specific IBM i-based software and many other applications.

The price for this software diversity is the time spent managing enterprise software and organizing the communication between different complex solutions. Tedious manual programming of point-to-point interfaces between solutions can cause the advantages of the best-of-breed approach to completely evaporate—but there is a solution. Rather than manually programming interfaces, companies can use systematic business process integration solutions that speed project completion, simplify integration, reduce risk and ensure that integration solutions are easily maintained while remaining flexible and adaptable.



Here are 10 tips to make the right technology selection for integration your ERP and CRM solutions:

1. USE LOOSELY-COUPLED ARCHITECTURE INSTEAD OF POINT-TO-POINT INTEGRATION

Manually programming an interface between solutions may seem easy at first glance. Once you have programmed a direct connection, however, problems begin. As a rule, point-to-point integration becomes confusing and creates an integration environment that is difficult to maintain. Enterprise applications become inextricable from one another leading to integration scenarios fraught with risk and instability. Therefore, you should focus on integrating technology which is loosely coupled giving you the option for a variety of architectural approaches and topologies ranging from the hub and spoke model to ESB to SOA.

All of your in-house software solutions should be loosely coupled to the integration architecture to prevent brittle direct data connections between applications. For example, in a hub-and-spoke architecture, neat star topologies are formed, if one application changes, none of the other application connections are affected. Otherwise, the enterprise engages in a topology that looks like spaghetti and suffers in terms of agility due to poor maintainability.

2. USE STANDARD CONNECTORS

When standard application and technology connectors are used instead of custom-coded interfaces, risky manual programming is avoided. An integration vendor that provides and maintains components for all the major solutions, such as JD Edwards, SAP, Salesforce to name but a few, does your business a great service by eliminating your need to create these connectors manually. Manual programming is lengthy and risky. Components designed for each specific solution will take advantage of BAPI, RFC and IDOC standards and a component for Web Services is often useful as well.

The preferred approach to integration is one that allows you to configure a component provided by an integration software suite. Best practices in software integration use standard application and technology components to allow you to leverage the work of others so that you can focus on your business rather than the low-level aspects of software integration. Of course, you should check to see if the components are certified by your core solution provider to be reliable and stable

3. USE VISUAL BUSINESS PROCESS AND INTEGRATION FLOW DESIGN

The ability to visually model business processes and the integration processes that support them will ensure that both stakeholders and IT managers are in alignment concerning any integration. Process and flow visualization allows for multidisciplinary communication and understanding of the required integration.

Therefore, an integration technology for the planning and implementation of integration solutions should use a graphical user interface that can visualize processes for both technical and non-technical users.

4. MAINTAIN CHANGES IN THE TARGET OR SOURCE FIELDS WITHOUT PROGRAMMING

The world does not stand still and the business community least of all. Therefore, business processes change constantly. IT support for these changing processes requires frequent adjustments to business rules and technical configurations. Changes must be implemented easily and without creating a ripple effect. If integration to a third party system, such as Salesforce.com, is hard-coded, then changes are difficult.

Ideally, modifications required by changes in the ERP or CRM solution should be configurable with a few mouse clicks to modify the exchange of data through the hub to include changes such as new data fields, names, types, and sizes.

5. PLATFORM- AND DATABASE-INDEPENDENT INTEGRATION TECHNOLOGY

The software landscape, in most businesses, is heterogeneous. When it comes to integration, solutions must be connected to IT environments that often seem worlds apart.

The integration system selected should be platform-independent. It should integrate easily with your chosen CRM and ERP as well as handle options for interoperability with Web, mobile or even IBM i-based applications. This relates to our earlier point regarding connectors: the integration system should offer connectors for all relevant IT worlds so that they can be integrated in a platform independent manner.

Look for an integration vendor who is current with the latest technology, as this is a good sign of their intention to provide connectors for future versions as well.

6. RELY ON EXPERIENCE WITH SIMILAR BUSINESS AND TECHNOLOGY SCENARIOS TO ENSURE FAST PRODUCTION STARTUP

Despite the individuality of business processes, there are similarities that can be leveraged in every integration project. For example, invoicing processes are broadly similar in many companies and the same solutions are usually involved.

Therefore, a mature integration technology has the advantage of having accomplished similar business processes before. There is no need to reinvent the wheel each time. The past experience of your integration vendor will often enable the kinds of ‘quick wins’ that both line-of-business and IT managers depend on for continued executive-level support.

7. MONITOR BUSINESS PROCESSES

A business process monitor as part of your integration solution will allow you to monitor and manage error handling—a role that can be mission-critical. If interoperability lags, it can affect the performance of the entire company. Therefore, the interfaces between the solutions should be monitored.

Once your integration project is designed, monitoring should be both built-in and configurable. It should be built-in in the sense that no additional effort is required to access the monitor. But it should also be configurable so that you can display the most important information in dashboard views and even determine which data gets placed in the log as an attachment.

8. USE AUTOMATIC DOCUMENTATION

To achieve a maintainable and stable integration project, self-documenting integration processes are extremely useful. If integration projects have deficient documentation capabilities, mission-critical project information can be lost when employees move on to other assignments or jobs.

At the same time, documentation can be annoying, tedious, and time-consuming work. Therefore, when the integration technology solution is self-documenting, professionals are far more likely to add any pertinent notes from either a business or technical perspective.

9. IMPLEMENT CERTIFIED INTEGRATION

Even though the subject of this white paper is integration between ERP and CRM systems, it is still important to seek certified integration solutions from established business partners. These official Certifications for the interfaces are important especially if any sort of emergency support is required.

10. LOOK FOR EXPERIENCED TECHNOLOGY PROVIDERS

Choose an integration technology vendor with deep experience in your CRM and ERP ecosystem. You should make sure that a provider is not new to technology integration in your chosen environment, is active and can prove this with awards and customer case studies.

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With a presence in more than 50 countries, including 24 regional offices, we collaborate closely with our customers and thousands of business partners to accelerate their business performance.



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