

SALESFORCE – SAP Integration Case Study

Overview

The customer was using conventional ways to manage their sales and marking and were using SAP Business One server for managing orders and order processing information once sales are confirmed.

They purchase Salesforce cloud licenses to manage their Sales and Marketing activities. The goal was communicating with customer in Salesforce only until deal is finalized. Once a deal is finalized, move the deal information to SAP, which takes care of order management and deliveries.

The finalization of deal is when any opportunity is marked as Closed Won in Salesforce. When this happens, the information related to that opportunity and customer has to be sent to SAP.

But this led to their staff doing double entry of same information in Salesforce and SAP.

This led need of integrating Salesforce and SAP in real time so that data exchange happens in real time between two systems.

Solution

Salesforce customization was done to implement web service calls on SAP B1 server. These web service calls send following information to SAP B1:

- Customer
- Contacts
- Opportunity
- Opportunity Products

Using this Salesforce information, various records are created on SAP B1 using the database structure at SAP B1. This included customer, contacts, addresses, Orders and Order items.

This web service calls are placed when any opportunity is marked as Closed Won, which indicates that a deal is won.

The integration was done by calling SOAP/XML web services provided by SAP B1 server. No custom web service was required for this integration.

When opportunity goes into SAP as Order, it also generates Order Number which Salesforce gets in response and stores in Opportunity as SAP Order Number. This allows quickly locating salesforce records in SAP and vice versa.



Flow Diagram Opportunity Marked Closed Won Is Account Read Account and Contact Synchronized with SAP? information from Salesforce Database Build XML with Account and Contacts and Synchronize them with SAP Send SOAP request to SAP SAP Generales Codes for Account and Contacts Salesfoce Builds Order XML file with Opportunity and Opportunity Product detail, along with references to Salesforce updates Account and Contacts to store SAP codes in them, and also stores sync date time Account and Contact. Sales Rep code from SAP is also provided in XML Salesofrce sends SOAP request to SAP for creating Order SAP creates order and order line items. Send back order code to Salesforce Salesforce stores the SAP order code in Opportunity