

SALESFORCE – SAP Integration Case Study

Overview

The customer was using conventional ways to manage their sales and marketing 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.



Aspire Software Consultancy

Flow Diagram

