Integrating SAP with SFDC: Simplifying the Process

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Executive Summary

For a business to grow rather than just sustain in the ever changing market condition, it is undoubtedly very crucial to convert every potential customer into business and every running minute to profit. Businesses run on a dual track of Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM); but to yield maximum productivity it is very essential that both ERP and CRM work in parallel and are synchronized with each other. This whitepaper highlights the benefits, scenarios, architecture and other aspects of SAP ERP and Salesforce.com (SFDC) CRM integration.

Introduction

"The secret of business is to know something that nobody else knows" (Aristotle Onassis)

There is no questioning the fact that innovative ideas and organizational learning take a business to the next level. It is very important for an organization to effectively utilize the enterprise resources and build a strong relationship with the customers to ensure better prospects for the business. To make it easy for the business runners to effectively plan and manage both of these crucial parameters, ERP and CRM were introduced.

ERP or Enterprise Resource Planning is the application that deals with managing the tasks related to finance management, human resources, payroll, inventory and receivables management and, other internal business processes. On the other hand, CRM or Customer Relationship Management focuses on enhancing the relationship with customers. CRM includes the tasks related to customer support and services, customer relationship, upsells, managing sales pipeline, creating dashboards for this information and similar tasks.

For a business to achieve the desired milestone, it is really important to introduce an effective ERP and CRM process. Traditionally, organizations have two different teams to work on both the processes independently. In case one team requires support from the other, it must go through a manual channel that results in a waste of time. For example, many a time when a customer representative needs information about a customer account in real-time, he must first raise a ticket for the same and then only after following the process he gets the required information.

As is evident from the above stated example, independently running ERP and CRM results in inefficiencies. Moreover, independently managing these two business processes also leads to:

- Duplication of data entry task
- Unorganized task management within the teams
- Manual intervention for any information sharing
- Inability to share real-time data

These and other limitations emphasized the need for ERP and CRM to work in tandem. This would ensure that all the information in ERP could be accessed, created or modified effortlessly in CRM and vice versa. Additionally, all this would work in real-time, i.e. without any time lag. To achieve this, there needs to be seamless integration between the two systems.

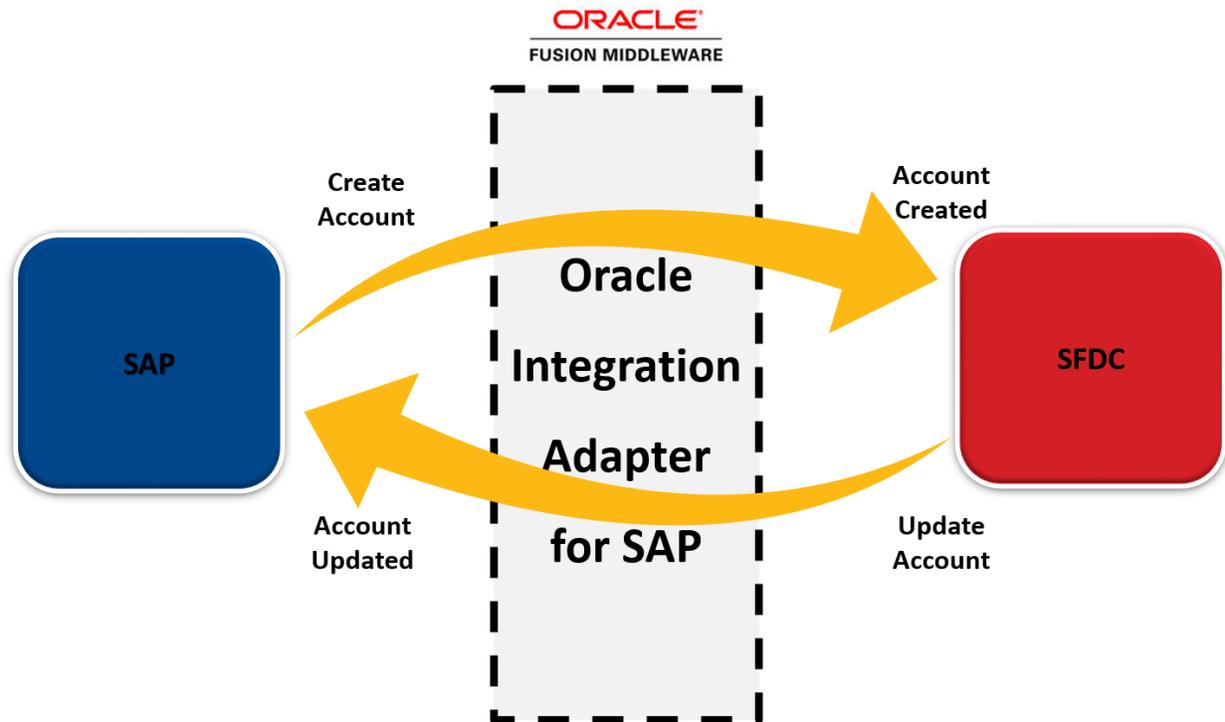## Architecture and Benefits for SAP (ERP) and SFDC (CRM) Integration

ORACLE®
FUSION MIDDLEWARE

Create Account

Account Created

Oracle

Integration

Adapter

for SAP

SAP

SFDC

Account Updated

Update Account

Figure 1: Master Data Synchronization

Integration of SAP and SFDC can be carried out through a common platform and in this paper we evaluate Oracle Fusion Middleware as this platform. The information is securely fetched from the SAP system and then sent to SFDC; in a similar manner, information or data is securely taken from SFDC and then sent back to SAP. This automates the entire process and hence greatly reduces time and human efforts. Integration of SAP and SFDC also facilitates:

Centralized Data It facilitates organizations to store data at a common share point rather than saving at different ERP and CRM systems, eliminating the need to re-enter information in individual units.

Targeting Potential Customers: Along with targeting new customers, it makes business sense to target already existing customers. To efficiently target the proposed customers, it is mandatory for the sales representative to have complete details about the customers, including business transactions, preferred products, personal information, contact information, etc. Integration of ERP and CRM makes it possible to get all the details at a single place without the need to refer to the two applications separately.

Precise Prediction and Decision Making: For a business to constantly grow, it is unquestionably crucial to base future steps on upcoming market trends. Integration of SAP and SFDC facilitates the planners to have a better view of the data figures and business statistics and hence provides a better control over the internal business processes.

Ability to Track Customer Interaction: Many businesses face the problem of first adding contacts in ERP and then validating the same with CRM to make sure that the customer is not associated with any fraud or unsolved transaction in the past. This process takes a lot of time and human efforts. Integration of SAP and SFDC combines this task into one and hence saves a lot of time.

Integration Scenarios

Integration of SAP and SFDC involves different scenarios that are critical to the entire process. In the next section, all these possible integration scenarios are briefly discussed to highlight the SAP and SFDC integration process.

Account Synchronization

- Connect SAP and non-SAP applications
- Synchronize customer data between SAP and Salesforce.com in real time
- Integrate without writing a single line of code
- Share crucial data without compromising security

Opportunity to Quote-to-Order

- Synchronize product master and financial accounting data between SAP and Salesforce.com in real-time
- Send data for 'won' opportunities from Salesforce.com to SAP for the Quotation
- Send Quotation to Salesforce.com for acceptance
- Once it gets accepted by customer, Purchase Order can be created by SAP and the purchase order details can be sent to Salesforce.com for tracking

Order-to-Cash to Contracts

- Send data for 'won' opportunities from Salesforce.com to SAP for purchase order creation
- Once the Purchase Order (PO) is issued, according to the terms of the PO, the vendor will supply materials along with the Invoice Bill to Salesforce.com
- After finalization of invoice receipts, payments are made
- Closure of invoice is done basis the contract, and the update is made in Salesforce.com

To Summarize

Integration of SAP and SFDC smoothens and automates the complete business process. Moreover, it is secure, reliable and absolutely easy to use even by professionals who do not have a technical background. When going for the SAP and SFDC integration, it is important to see that the adapters used for integration are developed in-house for better control and customization. Also, the after-sales technical support must be considered when hiring integration teams.

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Corporate Headquarters
Silicon Valley
488 Ellis Street
Mountain View, CA 94043
T (650) 386 4000
F (650) 961 2369
www.bcone.com

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