SOLUTION GUIDE:

Stop Chasing Customer Data: Three Methods for Integrating Your CRM with Your ERP

Learn three methods for integrating your CRM and ERP so you can synchronize customer and order information, streamline sales and get the insights you need for customer success.

Shouldn't it be easier to find your own customer data?

In an era of digital transformation, your data holds the key to customer success—but only if teams can find it.

When your data is in disparate systems, it's difficult to piece together what customers really need, when they need it.

Your CRM is a key piece of the data puzzle, containing customer data, your sales and marketing pipeline and other information that helps drive the health of your customer relationships.

For manufacturing companies, an ERP is another key piece, filling in the gaps about customer orders, production timelines, delivery, invoicing and other critical pieces of a seamless experience.

The trouble arises when these two systems don't talk to each other, so you end up with only parts of your customer story.

A disconnected CRM and ERP creates a less-than ideal scenario:

- **Inaccurate customer data for the sales team**
- **Multiple logins needed / inefficiency**
- **Lack of access to data in the field**
- **Difficulty finding the right product, price**
- **Trouble prioritizing customers/deals**

Read on to learn how three different types of integration solutions can turn the process of finding and sharing customer and order data into a seamless experience.

We'll Show You How to Get from A to B

SCENARIO A:

When your CRM and ERP aren't talking

- Salespeople and/or field technicians call or message the office to get answers to questions like 'What has this customer purchased in the past?' or 'What other "A" customers are located nearby?'
- Salespeople respond hesitantly to customers: 'I think we have some in stock, but let me check and I will get back to you'
- CRM users *also* log into the ERP, consuming ERP licenses and using Alt-tab back and forth all day.
- Customers make their first purchase—and trigger a cascade of inter-departmental processes to facilitate setting them up in the ERP, performing a credit check, transcribing their order from CRM to ERP, and so on.
- The 'Back Office' not wanting the 'Front Office' in their system, slowing things down.

SCENARIO B:

When you succesfully integrate your CRM and ERP

CRM users have all the ERP data they need at their fingertips from within the CRM

- No Alt-tab
- No asking the Back Office
- No more 'Let me check'

Key steps are automated between CRM and ERP

- New Customer creation
- Sales Order creation
- RMA creation

Appropriate security and validation is included

- New Customers must have all the necessary data before they can be approved
- New records are put 'on hold' and other departments are automatically notified so they can validate and release them.

Defining the Path to a Successful CRM/ERP Integration

Before we talk about methods, let's establish our framework for success. Here are key criteria for an ideal CRM/ERP integration:

1. **Near real-time integration**
   Data needs to be transferred in real-time so that it's up to date and accurate whenever you need to use it.

2. **Integration in both directions**
   Key ERP data needs to be replicated into CRM (and vice versa), transfering key data without re-keying, such as New Customers, New Orders, Address Updates, etc.

3. **Configurability**
   The logic, approval steps, default values, process logic (and so forth) must all fit with the correct business process(es)—you shouldn't have to force your processes to fit the system.

4. **Cost Effective**
   The solution needs to fit into your budget in a way that the ROI makes sense.

5. **Fast to Implement**
   The integration needs to be executable in a reasonable amount of time to prevent disruption to your business.

6. **Scalable**
   The integration needs to support your data, even as your volume of data grows over time.

7. **'Future Proof'**
   You need to ensure you can maintain the integration, even as your CRM or ERP make updates to their products.

8. **'Ready to Go'**
   Operational 'out of the box'. Special setup only needed where something extra or different is required.

9. **Robust**
   Designed to handle errors and interruptions smoothly with automatic queueing and/or retries as well as error logs and notifications on serious problems.

10. **Easy to Use**
    Users need to love it or they won't use it and making the integration easy to use helps reduce barriers to adoption.

SOLUTION #1:

Get a Totally New Platform

This is the 'major surgery' option where you rip and replace your CRM and/or ERP completely in order to set up an integrated system that handles both financial and relationship data in one place. While starting fresh can solve your integration issues, you may have to compromise on customizations and rework some of your processes to fit the new system. This new adjustment may be easier for some groups to accept than others.

PROS

- System is tightly integrated
- Real-time data sharing
- Less customization time needed
- Often technically a more simple solution – no bolting things on the side of other things

CONS

- This can be a very expensive and disruptive option
- You may end up with a good ERP and a poor CRM or vice versa (nobody seems to do both well)
- If one of the systems is not 'best of breed' or 'best fit' – the team that gets the short end of the stick will be hard to motivate in adopting the new CRM or ERP

SOLUTION #2:

Get a Totally New Platform

If no one has already built an appropriate integration (or at least one that you can find) between your particular combination of ERP and CRM, then a Custom Integration might be required. Custom integrations are more feasible today than 10 years ago (and a LOT more feasible than 20 years ago); but they still have their challenges, mainly when it comes to time and cost. Since the integration is built just for you, you'll have to manage the inevitable maintenance on your own, which can be difficult if this technical knowledge is held by only a handful of people on the original development team.

PROS

- You can get a bespoke solution integrating exactly what you want and when
- Definitely fitting the solution to your process(es), not the other way around

CONS

- It is a one-off, so you get to learn all the 'gotchas' for yourself
- Only one or two individuals will ever know how it works
- Might have a limited 'shelf-life' due to changes in either the CRM and/or the ERP
- Custom projects can be expensive
- It can take a long time to develop and to iron out the wrinkles

SOLUTION #3:

Use a Pre-built Integration - like CRM Connector for SYSPRO

CRM Connector for SYSPRO is a pre-built integration suite between CRM (Dynamics 365 or Salesforce) and the SYSPRO ERP, which is configurable and ready-to-go out of the box. After seeing our clients struggling to get Dynamics 365 and Salesforce to talk to SYSPRO, we set out to develop a flexible integration between these popular CRMs and SYSPRO to solve this unmet need. Based on our experience with custom integration projects for SYSPRO and CRM, we knew that no two use cases were alike and developed our pre-built solution to fit as many integration scenarios as possible.

PROS

- Cost effective
- Robust because lots of companies use it
- Comprehensive enough to handle many different common configurations of CRM/ERP and options for integrating the two (we have 'seen it all')
- For example, SYSPRO Sales Orders can be created from CRM Opportunities, Quotes, Orders, and/or Service Work Orders
- Includes 'extras' like ancillary table integration that might not get included in a one-off solution
- Regularly maintained to keep up with CRM and SYSPRO ERP updates
- You can have your cake (a widely used app) and eat it too (fine-tuned to particular requirements)
- Designed for environments with large data sets (hundreds of thousands of customers, products, configurations and millions of prices, invoice lines, etc.)

CONS

- May need tailoring to meet specific and/or unusual needs'

Solution Comparison

	New Platform	Custom Integration	CRM Connector for SYSPRO
Real-Time Data Sharing	✓	?	✓
Integrates Data in Both Directions	?	?	✓
Configurable	✗	✓	✓
Cost Effective	✗	✗	✓
Fast to Implement	✓	?	✓
Scalable	✓	✗	✓
'Future Proof'	✓	✗	✓
Ready-to-go	✓	✗	✓
Robust	✓	✗	✓
Easy to Use	?	?	✓

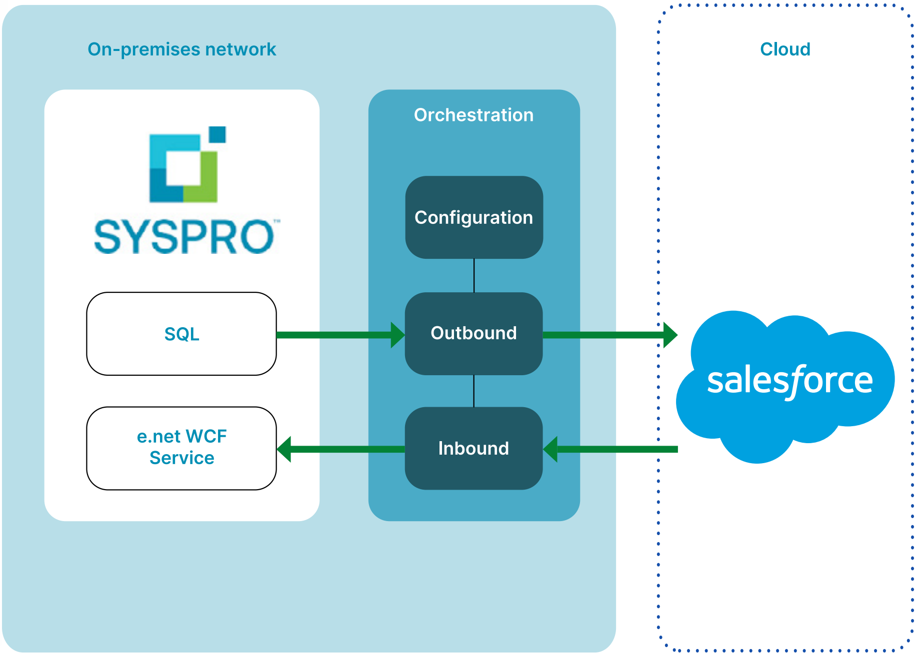
Synchronize Information and Streamline Your Business Processes

We designed CRM Connector for SYSPRO to connect your CRM to your ERP to develop our pre-built integration solution, we outlined a series of Design Parameters with flexibility in mind.

DESIGN PARAMETERS

- Must integrate with both the On-Premise and Online versions of CRM.
- Must pass data between between CRM and SYSPRO in both directions:
  - From CRM to SYSPRO
  - From SYSPRO to CRM
- Must utilize the full validated and robust interfaces provided by SYSPRO and CRM:
  - E.Net for SYSPRO
  - CRM SDK for CRM
- MOST IMPORTANTLY: Must allow for customization by the Customer.

Simplified View of the SYSPRO – CRM Integration Package Architecture



About Lola Systems

Lola Systems is a full-service Salesforce consulting company for medium-to-enterprise-sized customers, operating since 2018.

Our role is to act as trusted advisors for all things Salesforce, including how to use it, what apps you need to integrate, and how to connect it to your ERP and other systems. In fact, our development of a proprietary Salesforce Connector for SYSPRO™ ERP is where Lola all began.

Learn more about our pre-built integration: CRM Connector for SYSPRO

Download Product Sheet

Request a complimentary analysis of your CRM/ERP Integration requirements

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