The 8 Dos and Don'ts of MS Dynamics AX Integration With eCommerce, EDI, and CRM.

Close your eyes and recall a few seconds of the song "Life is a Highway" by Tom Cochrane. Got it? The year that song broke the Billboard Music Top 20 list, the same folks who wrote this paper were beginning their first ERP integration job.

We've collaboratively drawn up our learnt dos and don'ts from the past 22 years. Prepare to move buyer order data directly into your MS Dynamics AX accounting system to support fast service and shipping and – most importantly – create happy customers.

Spend a few minutes with us.

1) Don't neglect the data created by a sales order

- o You have a marketing manager: they own web content.

- o You have an accountant: they run with orders and invoices.

- o You have an IT leader: they manage your systems.

- o Or, you may be all of these things: a proud entrepreneur

An important question: Who at your business owns the data after a buyer clicks 'Buy?'

Oddly enough – often the answer is, "no one". Or the answer is, "Kevin." And then Kevin shakes his head. It's time to step up, Kevin. Or, it's time to appoint a Kevin at your company.

Your buyer's purchase details are created within your online store. How will you get it from your webstore or eCommerce platform to your MS Dynamics AX system for processing?

2) Do appoint an 'order data owner' at your company

You need someone to be in charge of the data created by your customers as they buy the things you want to sell them. Buyer and sales data such as:

- o Order details

- o Customer information including billing and shipping addresses and customer number

- o Shipping / tracking numbers

- o Invoices

- o Inventory

- o Product information

Controlling order data flow is the *most important* step in making sales orders move fast. And fast sales orders mean fast shipping and invoicing. Those 2 things mean happy customers.

The math is simple:

Fast sales orders + shipping info to the buyer + invoicing = Happy customers

3) Don't try to build your own accounting connection

Many of the customers that we have worked with in the past tried to integrate order data into their MS Dynamics AX themselves, but quickly found out they had opened a can of worms.

Custom accounting integration = cost. While creating the first connection could make sense, you'll find out very soon that change is going to come.

- o What if you change accounting or ERPs in 3 years?

- o What happens when you upgrade your accounting package?

- o What if your eCommerce, EDI trading partner or CRM adds a new field or a new requirement?

- o What if your in-house integrator leaves town, or leaves your company?

- o What if you want to start selling to EDI trading partners, or across more eCommerce carts?

Even the slightest change to your connection requires work to keep the data flowing correctly.
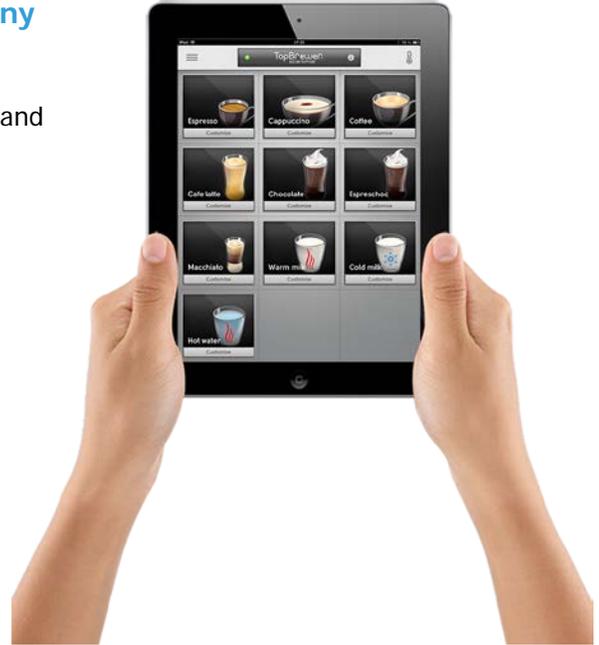
4) Do use a connector that is already built

The world is full of smart people. Why build a connection for an accounting system, eCommerce platform, EDI trading partner or CRM when someone else has it ready to go, and manages upgrades for you?

- o Large repository of pre-built integration touchpoints (so you can grow and change with a low cost of ownership)

- o Loads of experience and thousands of integrations delivered

- o Integration solutions that are built, maintained and supported in-house

5) Don't overlook the details

Let's pretend you sell guitars. Where does the information behind your guitars for purchase live? Often product details are loaded into your MS Dynamics AX accounting or ERP, and are also loaded SEPERATELY into your eCommerce platform, CRM or EDI trading partner.

These itemized product lists rarely ever match as they are often loaded by two different people or teams within a business. For example:

- o Your webstore may list 50 different guitar types, each with a SKU

- o Your accounting package may list only 45 different guitar types, each with an item #

- o When trying to flow order data for one SKU number to sync in your accounting system, a 'translation' needs to be created to change the SKU # into the correct item # that your system recognizes.

The mismatch is a huge time sucker.

6) Do mirror the inventory across your business systems

Book out a few hours this week and compare your inventory / item identifiers across your systems. Make sure they speak the same language, so to speak.

Each item in your catalog should have matching descriptors in your accounting system and on your eCommerce store or CRM application.

- Item #
- SKU
- UPC
- Buyer part number
- Seller part number
- Vendor number
- Discounts
- Tax rates

This will make data flow between your two systems a whole lot easier.

7) Don't try to build your own website

Entrepreneurs and merchants are roll-up-your-sleeve type people. While I'm sure you'd eventually get a website created and onto the web – the end result will very likely be a less than great optimized.

As much as brands analyze the perfect package for a Coca-Cola can, your business should embrace the effort and reward of a well-suited, high-performance website that looks, feels and smells like you.

8) Do engage a smart web agency

These days you don't have to be Coca-Cola to have a great website. There are lots of great solutions for small, medium and large businesses, with varying degrees of hand-holding and cost.

Assess your website needs and remember – it's not about what you want. It's about what your buyer wants in a website:

- Who is your current or desired buyer?
- What would a website look like for them?
- How will they find your website?
- What will convince them or nurture them along their digital journey?
- Where can they try it?
- Where can they buy it?

We are not the website pros. But we've seen over the years that customers with great websites have great success. Don't skip that necessary 'do.'

About eBridge Connections

Today those same smart folks that wrote this paper facilitates fast orders for buyers of over 600 manufacturers, merchants and entrepreneurs around the world including Everlast, Ital Pasta, and H&R Block. eBridge is no Tom Cochrane, but we proudly wear the title of integration rock stars.

Build your own integration plan now. Head to our website.