Is your 2017 New Year's resolution to sync order data?

eCommerce | EDI | CRM

YOUR
INTEGRATION PROJECT PLANNING
WORKBOOK

Hit print & grab a pen

Your New Year's Resolution for 2017: Find a better way of processing orders.

Often lost in the process of building an eCommerce website is determining how it will connect and communicate with your back-end accounting system.

Unfortunately, most eCommerce carts, Trading partner EDI requirements, CRM platforms and accounting/ERP systems are designed in isolation and often use dissimilar data formats that don't speak to each other. Order data, inventory updates, shipping numbers, warehouse updates, customer information, contact and account updates, product descriptions, and more – will all require manual data entry back and forth between your accounting system.

Did this year's **Black Friday** and **Cyber Monday** sales have you scrambling to keep up?

If so, 2017 sounds like the perfect time to get your business systems talking to one another. It will make processing orders faster.

Integrating business systems is complex and requires careful planning.

With so many different accounting/ERP systems to choose from, including products from Microsoft Dynamics, Sage, Epicor, NetSuite, Exact Macola, Open Systems, and SAP, it takes careful planning to know how best to integrate *YOUR* ERP with your store, trading partner or CRM

Whether your webstore is built on Shopify, Magento, Amazon, eBay, Miva, BigCommerce, 3dcart, or another eCommerce platform, you can follow this step-by-step planning workbook to map out your integration project in detail. If you're using Salesforce or MS Dynamics CRM to organize your customer information, it will make the implementation phase a lot smoother.

You can also visit our Blueprint Builder to plan your own integration must-haves, at the "field" level.

1. Identify challenges, capture 'musts.'

The first step in any eCommerce / EDI / CRM + accounting / ERP integration project is to identify the challenges that need to be solved and "must haves" that need to be delivered.

In the boxes below, start writing them down.

Challenges

Must Haves

Some ideas to get you thinking:

What needs to be delivered? What are the key milestones and deadlines? How will the solution need to perform? How much is your business willing to pay?

2. Build an engaged integration team.

Syncing or connecting systems successfully takes work. Everyone involved in the project needs to be on the same page from the start. A shared understanding of the project goals and action plan will help to ensure that there is no scope-creep, delays or cost overruns.

In the boxes below, outline the key stakeholders in your integration.

Some example team members needed, to get you started:

Internal departments such as IT, marketing, product? Executives? eCommerce developers? ERP/Accounting vendors? Integration provider?

3. Define requirements… in detail.

Next, work with your internal stakeholders to map out each core business process (touch points and data flows) that you might want to sync.

System 1:

System 2:

Some ideas to get you thinking:

What info is included in each business process (ie: orders)? Are there any key fields that must be brought into one system from the other? In which system does data originate and where does it need to be replicated?

4. Select an integration solutions that fits.

The integration solution that you choose should be the one that best meets the defined business requirements of your project.

Weigh your options below.

- ❑ Provider expertise: have they ‘been there, done that?’
- ❑ Solution type: off the shelf or custom?
- ❑ Connectivity: can it handle the number of connections you need?
- ❑ Scalability: what if you add another store? What if you change CRMs?
- ❑ Frequency: can you pick from real time, interval, batch, and on demand?
- ❑ Testing: will integration be right on the money?
- ❑ Support 24/7: because nothing ever happens during business hours...

5. Know your data and have it ready.

Data preparation can be an effective means to decrease the complexity of an integration project, and in turn, save time and reduce costs.

This final planning component can include a number of different exercises. We encourage you to go “off workbook” but here are a few ideas.

a) Document data types and field sizes of the fields in both systems

b) Clean source data – purge duplicates, correct incomplete, inconsistent records

c) Format data when capturing it in the source system to match it later on in the destination system

d) Add an accounting SKU in an extra field for each product in the eCommerce store so it can be used for matching during integration

e) Match selling units of measure with stock-keeping units of measure, if possible

2017 may just be your business's best year yet.

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About eBridge Connections

eBridge Connections delivers powerful, cloud-based and on premise ERP integration solutions that automate vital business processes and eliminate the need for manual data entry. Our universal integration platform supports over 20 accounting and ERP systems including products from Microsoft, Sage, SAP, NetSuite, and Epicor. With connections to the most popular eCommerce carts and marketplaces, hundreds of EDI trading partners and the leading CRM applications, eBridge Connections has become the integration platform of choice for businesses worldwide.