SOLUTION GUIDE:

3 Ways to Integrate Your CRM with Your ERP

Stop chasing customer data!
Learn 3 proven ways to synchronize your customer and order information, streamline sales, and get the insights you need for customer success.

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

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

For manufacturing companies, an ERP solution 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 one another, so you end up recognizing only parts of your customer story.

When CRM and ERP systems are not integrated effectively, the result is a less-than-seamless 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 about 3 alternative integration solutions for turning the process of finding and sharing customer and order data into a seamless experience.

The Roadmap to CRM and ERP Integration

Before:

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 other issues.

The 'Back Office' not wanting the 'Front Office' in their system, creating productivity roadblocks.

After:

Your CRM and ERP are successfully integrated

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 the 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 it is 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) without re-keying, to transfer key data such as New Customers, New Orders, Address Updates, etc.

3. **Configurability**
   The approval steps, default values, process logic, etc. 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 must suit your budget to ensure 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 must be able to maintain the integration, even as your CRM or ERP makes updates to their products.

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

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

10. **Easy-to-Use**
    Users need to love it or they won't use it. Making the integration easy to use reduces 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 system 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 organizations to accept than others.

Pros

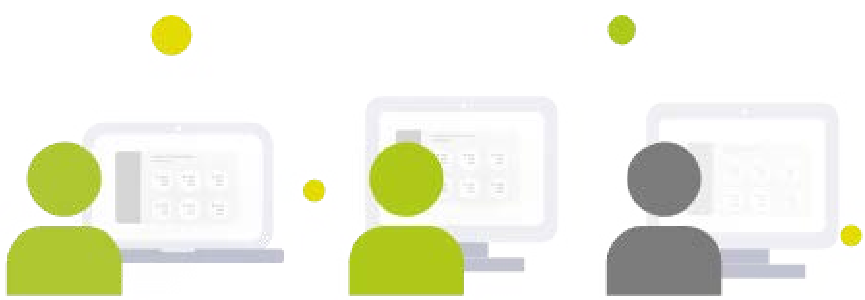
- System is tightly integrated
- Real-time data sharing
- Less customization time needed
- Often technically a more simple solution – no bolting things on the side of other things

Cons

- This can be a very costly and disruptive solution
- You may end up with a good ERP and a poor CRM or vice versa (it is difficult 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 face challenges in implementation and user motivation in adopting the new CRM or ERP

Solution #2:
Build a Custom Integration

If no one has already built an appropriate integration between your particular combination of ERP and CRM, 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 present challenges, mainly in terms of 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**
- **The solution can truly be fit to your process(es), not the other way around**

Cons

- **Since this is a one-off solution, you'll have to learn all the 'gotchas' for yourself**
- **Only one or two individuals are likely to know how it works**
- **Shelf-life might be limited 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 your 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 pressing need.

Based on our experience with custom integration projects for SYSPRO and CRM, we knew that no two use cases are alike, so we developed CRM Connector for SYSPRO to fit as many integration scenarios as possible.

Pros

- **Cost-effective**
- **Robust because many companies use it**
- **Comprehensive enough to handle a vast array of common configurations of CRM/ERP, and options for integrating the two (we've '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 your unique requirements)**
- **Designed for environments with large data sets – hundreds of thousands of customers, products, and configurations, and millions of prices, invoice lines, etc.**

Cons

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

Compare the Solutions

	1 New Platform	2 Custom Integration	3 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	?	?	✓

CRM Connector for SYSPRO ticks all the boxes!

Synchronize Information and Streamline Business Processes

CRM Connector for SYSPRO is designed to connect your CRM to your ERP systems

To develop our pre-built integration solution, we implemented a series of Design Parameters with flexibility in mind.

Design Parameters

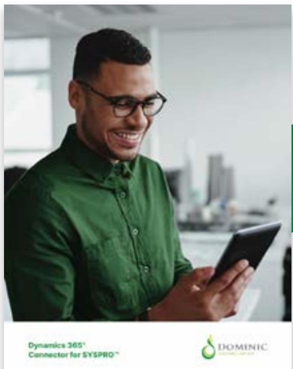
- **Must integrate with both On-Premise and Cloud versions of CRM.**
- **Must pass data between between CRM and SYSPRO in both directions:**
  - From CRM to SYSPRO
  - From SYSPRO to CRM
- **Must utilize the full validated and robust interfaces provided by SYSPRO and CRM:**
  - E.Net for SYSPRO
  - CRM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

Give Your Sales, Customer Service and Marketing Teams a Data Advantage

Learn more about

CRM Connector for SYSPRO,

the pre-built integration from Dominic Systems



Download Product Sheet

Request a

Free No-Obligation Audit

of your CRM/ERP Integration requirements

Visit https://www.dominicsystems.com/crm-erp-audit/
or email:
CRM4SYSPRO@dominicsystems.com

About Dominic Systems

Dominic Systems Limited (Dominic) is a full-service consulting company – a trusted advisor for medium-to-enterprise-sized customers looking to leverage the power of the cloud to quickly and effectively improve business processes. Since 2010, Dominic has grown in key focus areas of Customer Engagement (CE) and Customer Relationship Management (CRM) Applications, enabling us to provide the very best comprehensive services.

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