

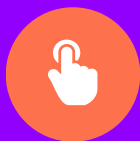
Optimise your business processes

How and why you should integrate HubSpot and SAP

HubSpot + SAP ERP

HubSpot and SAP are two powerful vendors that help companies automate their business processes and improve their customer relationships. In this article, we will show you the benefits and challenges of integrating HubSpot and SAP ERP and how your company can benefit from it.

Benefits



Avoid data silos



Reduce Errors



Increase efficiency through automation

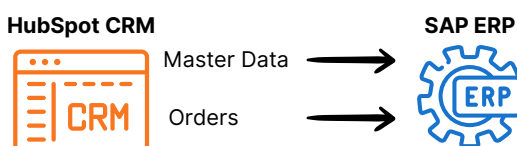
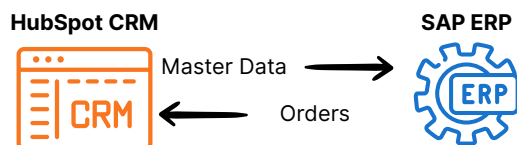
Typical integration scenarios

What is the division of labour between CRM and ERP? Where does each process live? The answer to this will vary depending on the business and sales model.

The primary question at the beginning of any integration project is: Which system is responsible for what? In many companies, the ERP system is the source of truth and is also used for quote generation, for example. But this is not the case in every sales model.

We will first look at three basic variants. These can be built upon by including further data such as profit centre synchronisation, etc.

Uni- or bidirectional interface



1) In many companies, a bidirectional interface is necessary due to the complexity and variety of products. For example, in order to have a direct overview of stock levels when making offers. In these cases, quotes and orders are often created in the ERP. New customers, on the other hand, often come from the marketing automation solution or CRM.

2) Many companies such as software or consulting firms do not have any stocks, and often have a manageable service and product portfolio. Here offers and orders can also be created in CRM, but should then also be available in ERP for service provisioning and billing.

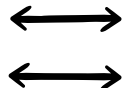
HubSpot CRM



Master Data

Orders

SAP ERP



3) It becomes somewhat more complex if various distribution channels exist in parallel. This can be the case, if the business also sells parts of the products or services directly online. In this case, orders come directly from the shop system into the ERP. In order to maintain a complete customer overview, it is necessary to either transfer this data from the commerce system, or to access the order data in the ERP.

Data transfer

Often an ERP system is already in place and contains historical data that can be of enormous value for CRM and marketing automation. This data enables automated customer classification, identification of cross-selling opportunities or targeted promotion of follow-up products.

How to integrate the systems?

SAP Business One, Business by Design and S/4 Hana cloud systems can usually be accessed via web service interfaces. For this, it is necessary to set up a technical user and a communication agreement in the ERP system. This defines which data and services are available for CRM integration on the part of the SAP system. Objects and fields are mapped between systems, with relevant fields being added on both sides.

The screenshot displays the 'Communication Arrangements' section in SAP Business by Design. It includes a search bar at the top and a table listing various communication scenarios. The table has columns for 'Communication Scenario', 'Communication Type', 'Communication Partner', and 'My Company'. The 'Communication Partner' column lists external systems like HUBSPOT, EXTSYS, and JAVAPOS. The 'My Company' column lists 'Almika Inc.' for some scenarios.

Communication Scenario	Communication Type	Communication Partner	My Company
Analytics Data Upload	Application Integration	EXTSYS	
Analytics DataSources OData	Application Integration	HUBSPOT	
Analytics DataSources OData	Application Integration	EXTSYS	
Business Documents Web Servi...	Application Integration	EXTSYS	
Communication Monitoring Web...	Application Integration	EXTSYS	
Customer Contracts - Managed ...	Application Integration	EXTSYS	Almika Inc.
Diogo's Scenario	Application Integration	HUBSPOT	
E-Commerce Web Shop Integrat...	Application Integration	JAVAPOS	
E-Commerce Web Shop Integrat...	Application Integration	EXTSYS	
Engineering Design Integration			

Image: SAP Business by Design communication agreement (example)

Once this mapping is complete, the next step is to ensure process-related data integrity for each business transaction. The goal is to avoid inconsistencies in the data sets and to maintain the correct relations in both systems for each data set.

<div> <div>SAP</div> <div>Communication Arrangements</div> <div>All</div> <div>Search</div> <div></div> </div>				
<div>HubSpot</div> <div>Business Partner, Customer and Supplier Integration (SAP_COM_0008)</div> <div>Inbound Services</div>				
Service	Application Protocol	Service URL / Service Interface	WSDL/Service Metadata	Additional Properties
Replicate Customers from Client to S/4 System	IDoc			
Replicate Suppliers from Client to S/4 System	IDoc			
Replicate Company Addresses from Client to S/4 System	IDoc			
Replicate Workplace Addresses from Client to S/4 System	IDoc			
Replicate Personal Addresses from Client to S/4 System	IDoc			
Business Partner - Replicate from Client to SAP S/4HANA Cloud	SOAP			
Business Partner Relationship - Replicate from Client to SAP S/4HANA Cloud	SOAP			
Business Partner - Receive Confirmation from Client to SAP S/4HANA Cloud	SOAP			
BP Relationship - Receive Confirmation from Client to SAP S/4HANA Cloud	SOAP			
Business Partner (A2X)	OData V2			
Attachments	OData V2			

Image: SAP S/4 Hana Public Cloud Communication Agreement (example)

For example, if customer numbers are assigned in the ERP, the business partner must first be created in the ERP via API. Once this has been done, the SAP customer number or indices can be taken over and the integration process can create contacts, offers and assign them to the newly created business partner.

What is really necessary?

The guiding principle is: relevance instead of frivolity.

If the company has a handful of new customers per month, automatic synchronisation from CRM to ERP may not be necessary. On the other hand, if the company has several dozen new customers per month, automatic synchronisation makes perfect sense. In this case, the CRM is the leading system and passes the data on to the ERP.

If the majority of orders are placed online, it makes sense to integrate the order data from the eCommerce system or ERP into the CRM, in order to enable behavioural marketing to the customer base. Potential for cross- and up-selling, replacement sales, and tracking cancelled orders is enormous, and can significantly increase turnover. In this case, the ERP is the leading system and passes the data on to a CRM & marketing automation solution.

What are the advantages of an integration?

The connection between your customer relationship management (CRM) and your enterprise resource planning (ERP) system offers many advantages:

1

Efficiency increase

Increased transparency and a better flow of information within your company increases efficiency, duplication of work is avoided and employees can access the information they need faster.

2

Better customer experience

By integrating CRM and ERP data, you get a 360-degree view of your customers. The comprehensive information helps you make better decisions, avoid mistakes and provide personalised customer care.

3

Increased transparency

A connection between CRM and ERP increases transparency in your company. All employees have access to the same information, which promotes collaboration and simplifies internal decision-making processes.

4

Improved data quality

When you integrate your CRM and ERP, you no longer have to manually transfer data from one system to the other. Errors are minimised, workload is significantly reduced and data quality is improved.

5

Improved planning

Use the sales forecasts from your CRM to coordinate production accordingly.

Have you integrated your CRM and ERP yet? Get in touch with us!

Send us an [email](#) or book a meeting with us [here](#).



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About Periti Digital

Periti Digital is a European CRM consultancy that brings clarity and structure by harnessing the power of the HubSpot Platform.