

Spending your summer doing an eCommerce to ERP integration?

YOUR
INTEGRATION PROJECT PLANNING
WORKBOOK

Hit print &
grab a pen

Surfs up.

In the process of building an eCommerce website, often how it will connect and communicate with your back office systems is skipped.

Slow communications between systems can equal fines or suspensions from your customers or your friends at Amazon, ebay, Shopify, Magento and BigCommerce (to name a few).

Unfortunately, most eCommerce platforms and accounting/ERP systems are designed in isolation and often use dissimilar data formats that don't speak to each other effectively.

This boils down to one thing:

systems integration becomes complex and requires careful planning and the proper technology to be implemented successfully

1. Identify challenges, capture ‘musts.’

The first step in any eCommerce + 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

Ie: integrating shipping between ebay store with SAGE package

Must Haves

Ie: Fast transaction (less than 1 minute)

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 the business willing to pay?

2. Build an engaged integration team.

Systems integration projects are usually successful when everyone involved is on the same page from beginning to end. 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.

Five empty rectangular boxes arranged horizontally, intended for listing key stakeholders in the integration project.

Some ideas to get you thinking:

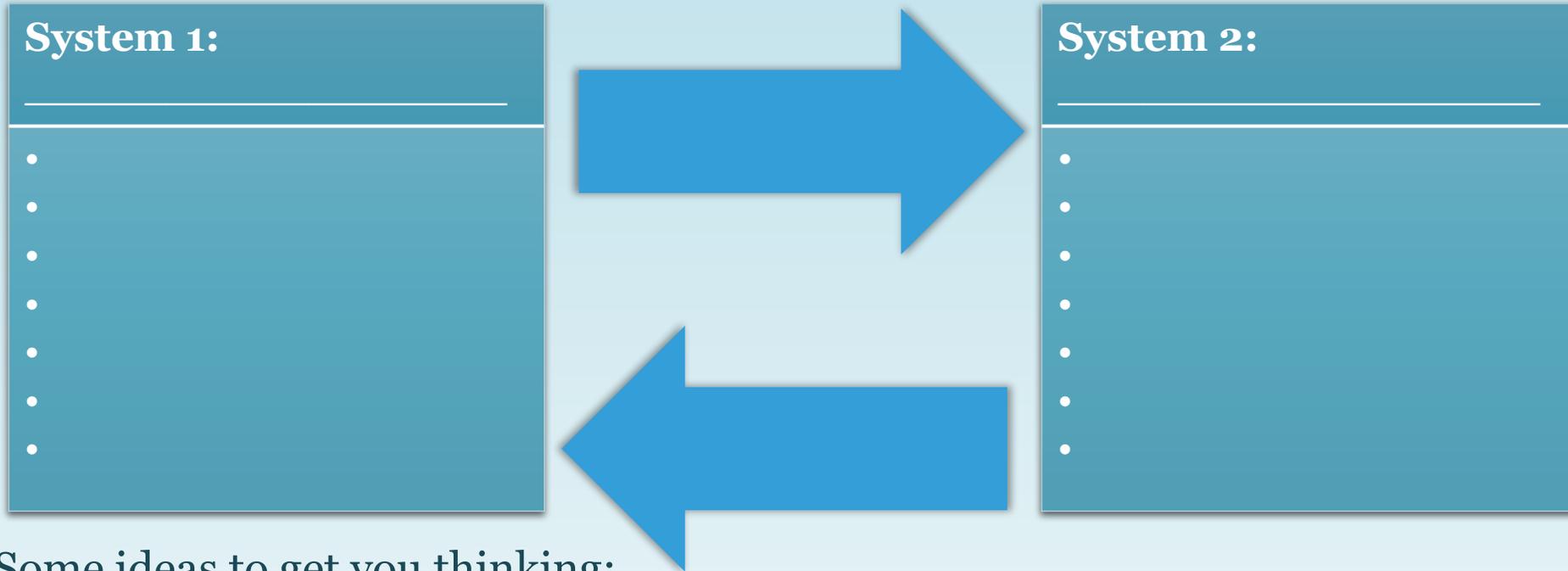
Internal departments such as IT, marketing, product? Executives? eCommerce developers? ERP/Accounting vendors? Integration provider?

3. Define requirements... in detail.

Not sure which touchpoints you need? [Try our blueprint online.](#)

Next, work with your internal stakeholders to map out and document each of the core business processes (touchpoints and data flows) that are being considered.

Start mapping your integration.



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?
- 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

You may just make it to the beach, after all.

- Find other companies that are 2 steps ahead of you
- Ask questions over live chat now

About eBridge Connections

www.ebridgeconnections.com

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.

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