

Integration Best Practices

INTEGRATE
AUTOMATE
BE FREE



9.21.2022

Agenda

- Intro
- Explore types of integrations
- Discuss best practices & considerations





Scott Hollrah

Founder/Managing Partner, Venn Technology

- Texas A&M Mays School
- Deep expertise in Salesforce.com and integrations with Sage Intacct
- Diverse experience with industry verticals
- Big picture view of integrations and systems



For us, it's all about people, process, and technology.

This isn't our first rodeo

Our consultants have a lot of experience in business technology across a wide range of industry verticals under their belts.



We take a different approach

Our philosophy begins with people, followed by process and technology. We believe in a holistic approach to each project. Success and adoption happen when all three components come together.



We're qualified to do the work

Our expertise in Sage Intacct and Salesforce.com is backed by successful integrations, continuous learning, and ongoing certifications through the platforms.

Our promise to you

Create solutions that free you to focus on what you're best at.





We're pro at integrating Sage
Intacct to anything with an API.

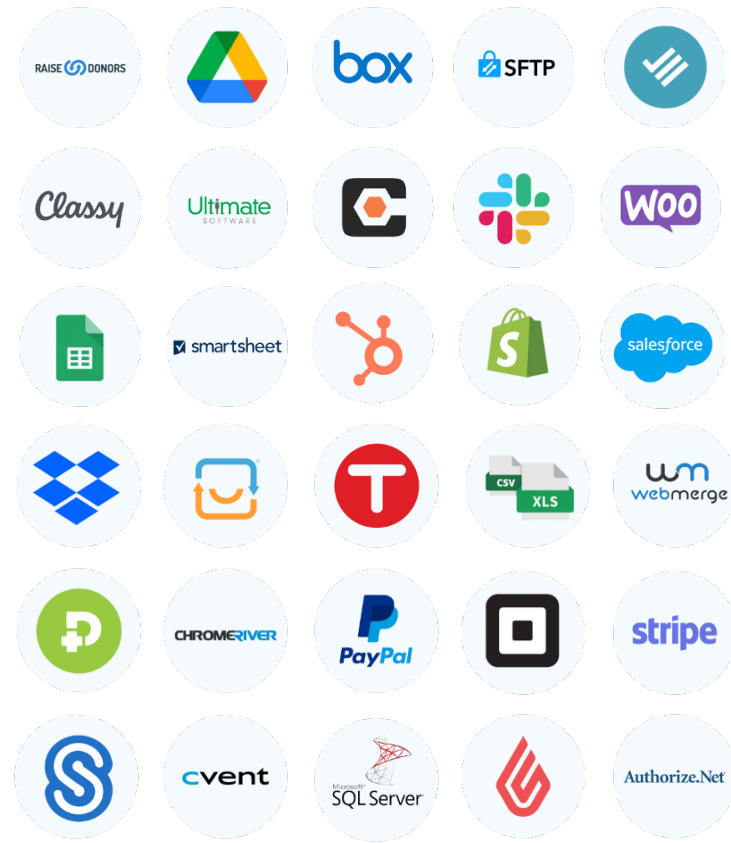
- Trusted Marketplace Partner since 2015
- 2018 VAR Star
- 2021 Partner of the Year: Customer Hero
- Multi - Year Sage Intacct Conference Presenter



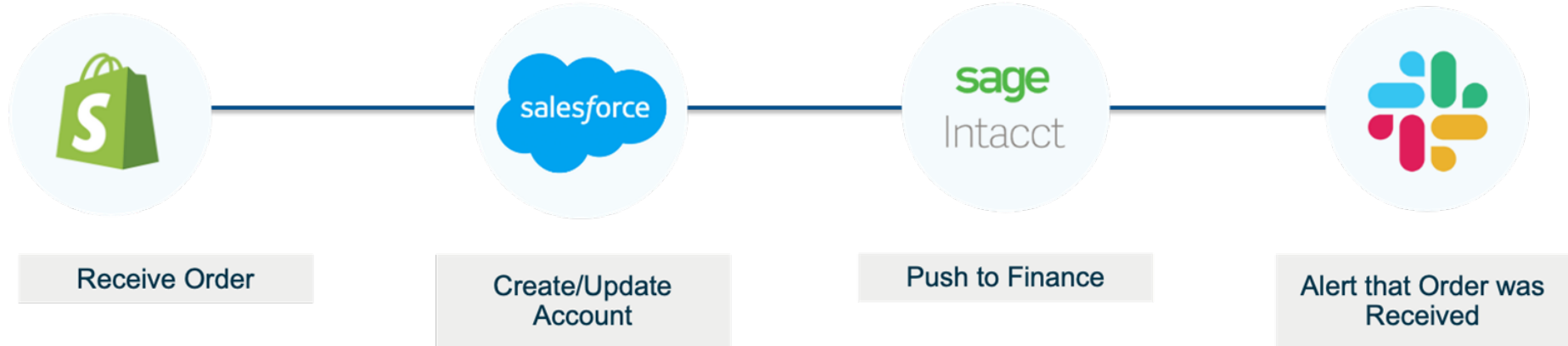
We have a whole practice dedicated
to implementing, customizing, and
integrating Salesforce.

- Sales Cloud
- Service Cloud
- Communities
- CPQ
- Platform customization

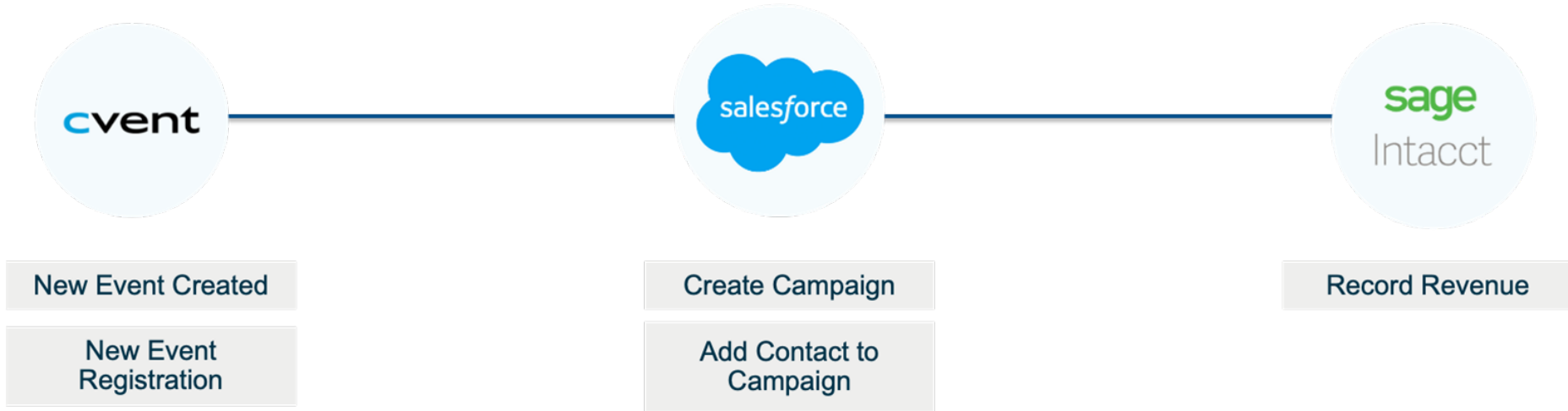
It is 2022



Apps should work together



Apps should work together



Why is it important for things to work together?

Manual data transfer processes are:

- Time consuming
- Error prone - the more you “touch” the data the more risk that something will go wrong

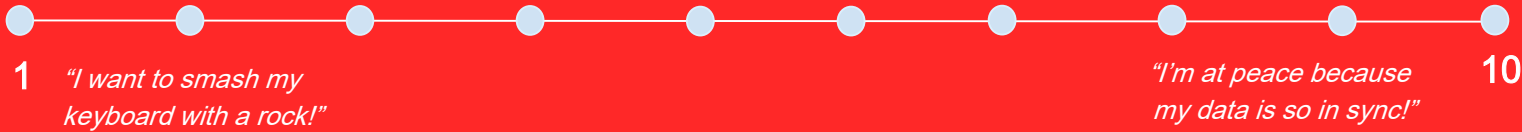
Lack of timely insight into:

- Revenue
- Expenses
- Program metrics



Poll

On a scale of 1 - 10, how well integrated are your systems?



1 *"I want to smash my keyboard with a rock!"*

"I'm at peace because my data is so in sync!" 10

Poll

If you had to guess, how many applications do you think your organization uses today?




- a. 5 or fewer
- b. 6- 15
- c. 16- 30
- d. 31- 50
- e. More than 50

HubSpot CEO Yamini Rangan

INBOUND 22

The average company has
242 SaaS
apps today

Source: Productiv - The State of SaaS Sprawl 2021 Report



“The thing is having this many tools, that’s not the problem. The real problem is that they’re disconnected. As a result, your data is disconnected, your teams are struggling and your customer experience, that’s suffering.”





How do we get there?

4 Ways to Integrate Systems

Export/Import



Pros

- Its “FREE”

Cons

- Time consuming
 - Formatting
 - Data Transformation
- Error-prone
 - Duplications - “Did I already import these records?”
 - Mistakes in formulas/corrupt macros

Packaged



Pros

- Can be quick to implement
- Software publisher makes updates/adds functionality over time

Cons

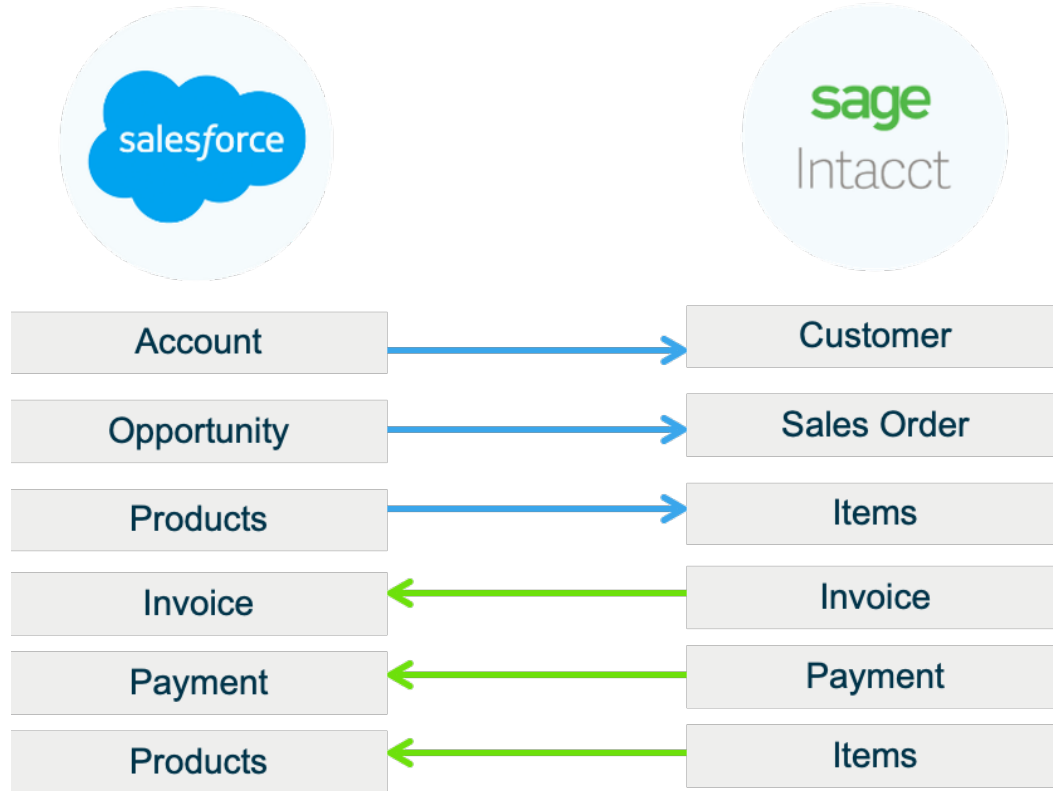
- Doesn't always meet the business requirements
- May not play well with system customizations



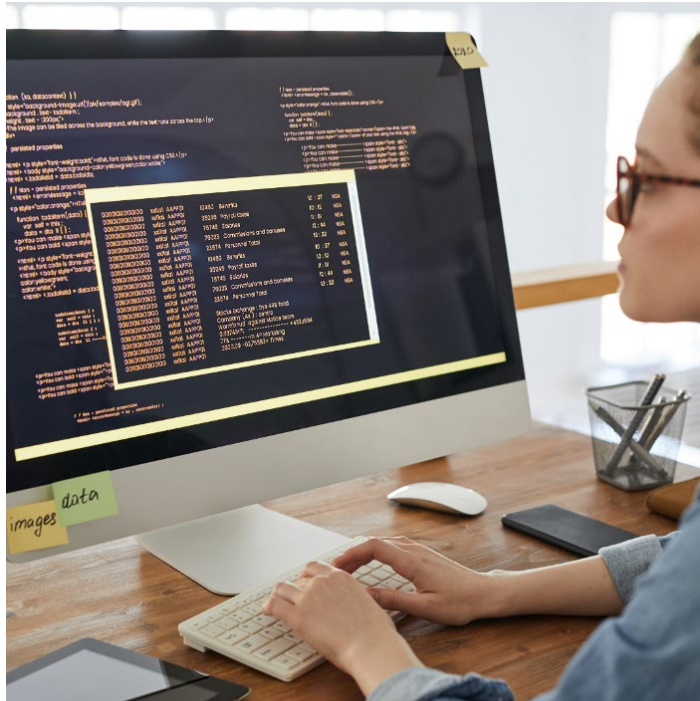
My “MailChimp Story”



Packaged Integrations



Custom Code



Pros

- Get exactly what you want as long as the API's support it

Cons

- Typically the most expensive option
- Time consuming to implement
- Lacks flexibility
- Requires an experienced developer to maintain and modify



iPaaS/Middleware

workato



tray.io



Pros

- Get exactly what you want as long as the APIs support it
- Extensibility to multiple systems
- Retry mechanisms built in or easily configured
- Flexible

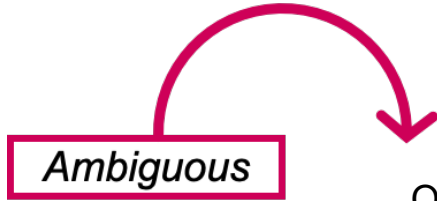
Cons

- Ongoing cost of the tool
- No functionality updates from the publisher

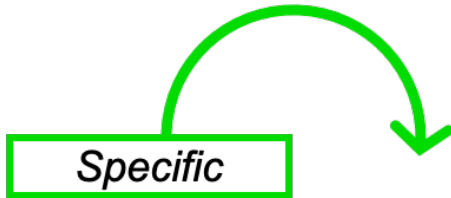


Considerations & Best Practices

No Vague Requirements



Our CRM and accounting system need to be integrated.

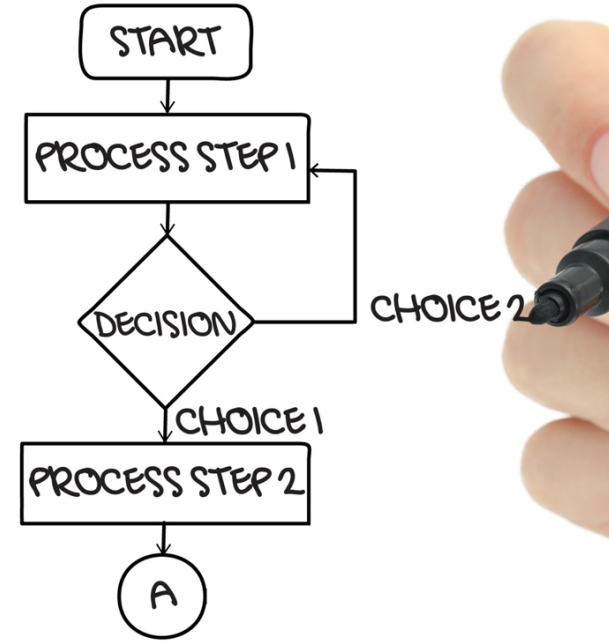


Our CRM system needs to send closed won opportunities to our accounting system as Sales Orders including all relevant customer master data and applicable items. Paid invoices should sync from accounting to CRM so that Sales knows who has paid and who hasn't.



Process Consistency

- How well defined are your processes?
- Is the whole team on the same page?
- Where does the integration begin & end?
- Should the integration run:
 - On a schedule
 - Based on a trigger event
 - With a button press



Data Quality

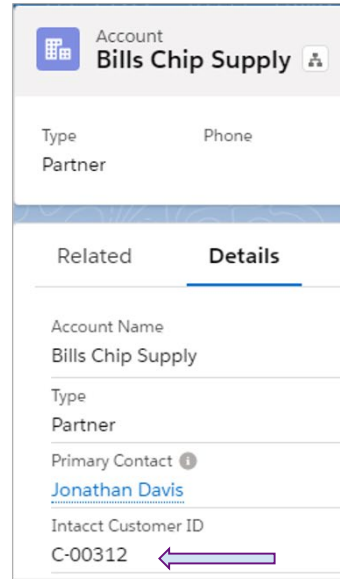
Garbage In = Garbage Out

- Duplicates
- Missing Data
- Inaccurate Data



Common ID's

- Establish a baseline of common ID's for master data:
 - Customers
 - Vendors
 - Products/Items



Account
Bills Chip Supply

Type: Partner Phone:

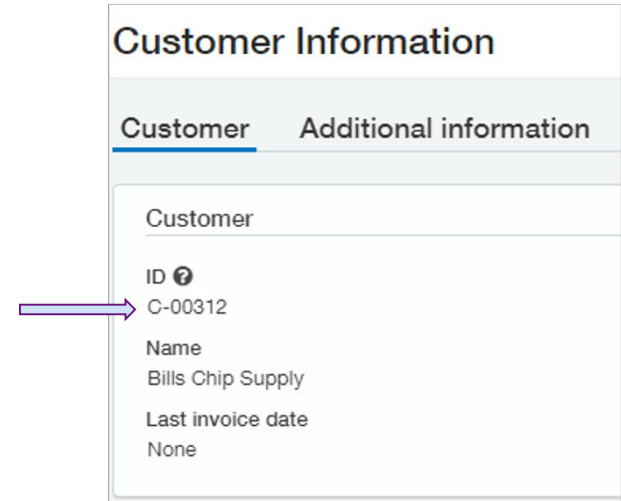
Related **Details**

Account Name
Bills Chip Supply

Type
Partner

Primary Contact ⓘ
[Jonathan Davis](#)

Intacct Customer ID
C-00312 ←



Customer Information

Customer Additional information

Customer

ID ⓘ
C-00312 →

Name
Bills Chip Supply

Last invoice date
None



Governor/System Limitations

- **API Calls** - to ensure that one customer does not monopolize resources in the data center limits often exist on the number of API calls that can be made in a given period of time. Consider your volumes and whether real time vs. scheduled batches may be better.
- **Simultaneous Connections** - when multiple jobs are running at the same time how does the system handle concurrent requests?
- **Maintenance Windows/Outages** - what happens to the integration during scheduled downtime or an unplanned outage?



TEST TEST TEST

- Identify edge cases
 - Define processes for handling
 - Mitigate the upstream risk where possible
 - Data validations
 - Lock record editing where applicable
- Put the system through its paces
 - Create well defined test scripts/scenarios
 - Consider running concurrently with your legacy process and your automation
 - Production source system to test environment for target system





We're here to help
venntechnology.com

