# PiSA sales ERP Link

The modern and robust ERP integration

The PiSA sales CRM supports you with a deep, flexible and solid interface to your ERP system. Besides expandable standard interfaces to e.g. SAP or PSI*penta* we provide the latest technologies and several years of project experience in connecting commonly used ERP systems such as Baan, Infor, Sage Bäurer or proALPHA.

The advantages of PiSA sales ERP link

- ✓ seamless integration in your existing IT landscape
- ✓ migration of existing data without loss
- ✓ there is no duplication of work in the systems because of simple, quick and automatic data transfer
- ✓ efficient collaboration between sales, service and financial accounting

Example of a coupling scenario
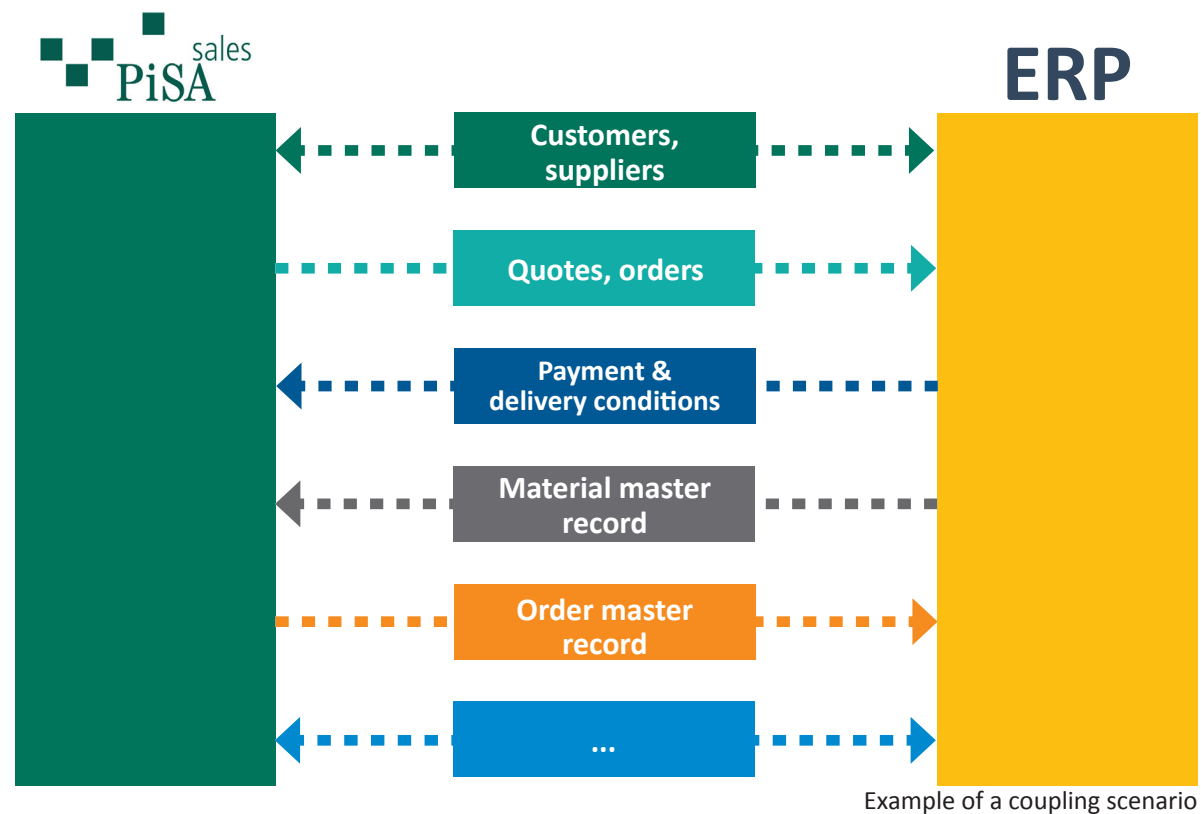
Scope of features

At any time the flexible integration guarantees you a maximum of adaptability in case of changing requirements. The data exchange between PiSA sales and ERP embraces the following features:

- ✓ transfer of mass data, e.g. the initial migration of all customer master data from the ERP system
- ✓ automatic update of data in the PiSA sales CRM, if data maintained in the ERP system (cyclical or at any point of time)
- ✓ automatic update of the data stock, stored in the ERP system by using a regularly running job, that starts e.g. if customer addresses, quote or order data have been changed in the PiSA sales CRM
- ✓ query of single attributes, e.g. to enter an order created in the PiSA sales CRM equally into the ERP system, the order number assigned by the ERP system can be interrogated directly and used as reference
- ✓ detect status information, e.g. if the workflow determines that the delivery status of an order in the ERP system has to be updated in the CRM system too
- ✓ request selected records, e.g. to get billing data from the ERP system for an order which is recorded in the PiSA sales CRM

Exchange of neutral data stock

The following standard master data, transferred between the PiSA sales CRM and the ERP system, are specified exactly up to attribute level. Depending on the amount of data stored in the ERP system, the number and type of all required interface attributes will be adapted and expanded.

- ✓ customers' master data like prospective customers, regular customers or suppliers (unidirectional transfer, e.g. if new and existing contacts are recorded in the ERP system); changes in data sets which are already matched with the ERP system are updated in the ERP system, too
- ✓ terms of payment and delivery from the ERP system which are necessary for quotes
- ✓ contacts maintained in the PiSA sales CRM can be passed to the ERP system on demand, e.g. in-voice recipient
- ✓ material master data from the ERP system, e.g. for the price calculation during the process of preparing an offer
- ✓ price lists, which were updated in the ERP system, can be involved in the sales process in the CRM system, too
- ✓ quotes including scope of delivery, e.g., if your staff do not transform quotes to orders in the PiSA sales CRM
- ✓ orders including scope of delivery, e.g., if you create new orders in the PiSA sales CRM and then transfer them to the ERP system, special order data can be imported from the ERP system, e.g., if the order status should be displayed in the CRM system

The technology behind PiSA sales ERP link

The basis of the PiSA sales ERP link technology is a generic ERP connector. It uses modern and standardized interface technologies. Its core features are:

- ✓ bidirectional exchange of data between the ERP system and PiSA sales, based on XML, an integrated XSLT processing unit converts the data and the data structure
- ✓ writing access to functions of SAP business objects, based on JCo BAPI using Remote Function Calls (RFCs)
- ✓ data exchange in a neutral data format using interface tables in a database
- ✓ file-based data exchange using CSV files (e.g., if the data transfer is initialized asynchronous by the ERP system)

XML engine

With the help of the PiSA sales XML engine a XML document of every desired data record can be created. If there are structured data in the ERP system, an automatic mapping process can be initiated to transform the data into XML documents automatically. The XML documents are well-suited for data exchange in both directions. The required rules for transforming data are defined as XSL stylesheets.

Synchronous communication using BAPIs

Within this scenario the PiSA sales CRM applies predefined Business Application Programming Interfaces (BAPIs) as standard methods. This way it is guaranteed that only current BAPIs are accessed. The neutral interface is definite and when implementing a new release there is no need to customize the interface. Important properties of the interface are:

- based on the JCo BAPI interface
- data-driven technology based on XML
- one XML mapping file per BAPI method
- no programming necessary

The data exchange is bidirectional and initialized by the PiSA sales CRM. The interface is accessed using function calls which already exist in the PiSA sales CRM and are defined as XML files. Every function consists of several RFCs. The XML file defines how to execute the RFCs.

Synchronous communication via interface tables

The data exchange between PiSA sales and the ERP system is executed at database level by using interface tables (transport table and confirmation table). The tables define a neutral data format for information exchange between both systems. You benefit from the following advantages:

- independence of implementation details because of abstraction
- minimal time and effort in case of new software releases or modifications of the business logic
- data reliability during extrapolation of exchanged data in the interface table
- minimizing your error rate: exchanged data are marked and reset automatically after correction

Asynchronous communication via CSV

If it is necessary to initiate the data exchange asynchronous by the ERP system, CSV files are used. The system detects the difference between existing and the latest data and creates a CSV file using PiSA sales rules. After this the data are transferred to PiSA sales with the help of the integrated standard CSV import scanner. To ensure a trouble-free data exchange within this scenario, it is necessary to provide CSV files from the ERP data, which are conform to the PiSA sales CSV format.

We will be pleased to advise you!

www.pisasales.de/en
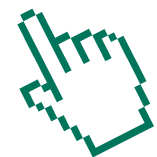
PiSA sales GmbH
Fredericiastraße 17-19
D-14050 Berlin

Tel: +49 (0)30 810 700-0
Fax: +49 (0)30 810 700-99
info@pisasales.de
www.pisasales.de/en

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