SAP-UPM Integration Process Overview

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UPM 24.x

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Contents

Section 1: Overview

ZINFI provides an integration solution between ZINFI UPM and SAP through web services, allowing the channel manager at an SAP instance to share records with partners at a UPM instance. With integration, the channel manager no longer needs to enter identical records in both systems and can monitor partner activities from the SAP instance without requiring a license for each partner.

The solution enables easy and efficient synchronization of leads, contacts, accounts and opportunities between ZINFI UPM and SAP.

1.1 SAP-UPM Connector Architecture

SAP interoperability with ZINFI UPM is based on the SOAP adapter. The integration process:

- Uses SOAP over HTTP or HTTPS connection for exchanging data synchronously.
- Supports requests and events processing.

The integration component architecture shown in Figure 1 below incorporates the technical SOAP adapter that allows these two systems to work together.

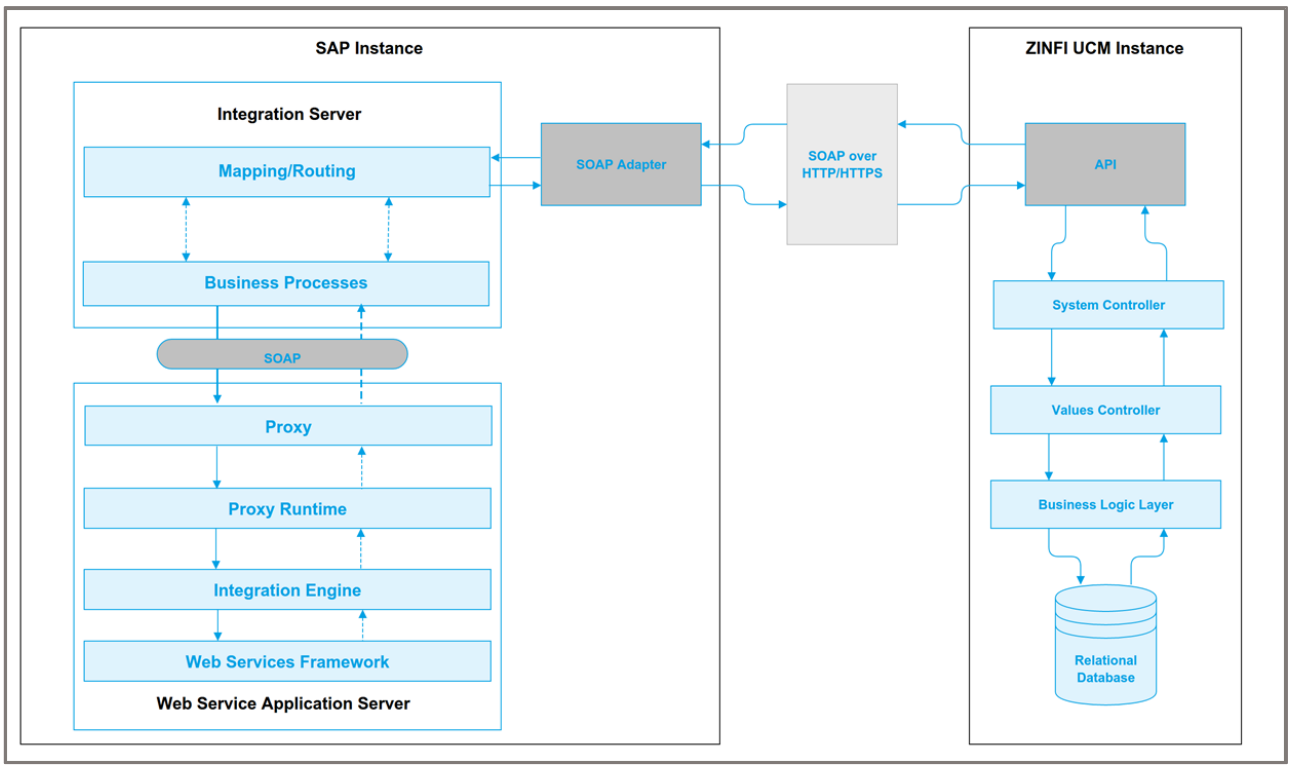

Figure 1

1.2 Integration Process Summary

Process	Summary
Designing Integration within SAP	Create and manage the design objects needed for your integration scenario.
Configuring Integration within SAP	Configure the required integration objects.
Designing and Configuring Integration within ZINFI UPM	Design and configure the relevant integration scenarios, including business objects, mapping, routing and so on in ZINFI UPM.
Handling Messages across SAP and ZINFI UPM	No user actions are involved during message handling. Incoming messages are processed and sent to the relevant receiver; a message can include integration processes.
	Note: It is important where the process flow is initiated. For example, the SAP instance might have to determine the receiver and all relevant steps in getting a message or might have to send the XML/JSON a message using technical adapters to ZINFI UPM or vice-versa.
Monitoring Processes	Monitor message processing, including throughput and performance of the appropriate integration technology.

Table 1

Section 2: Case Study

2.1 SAP UPM Integration Flow

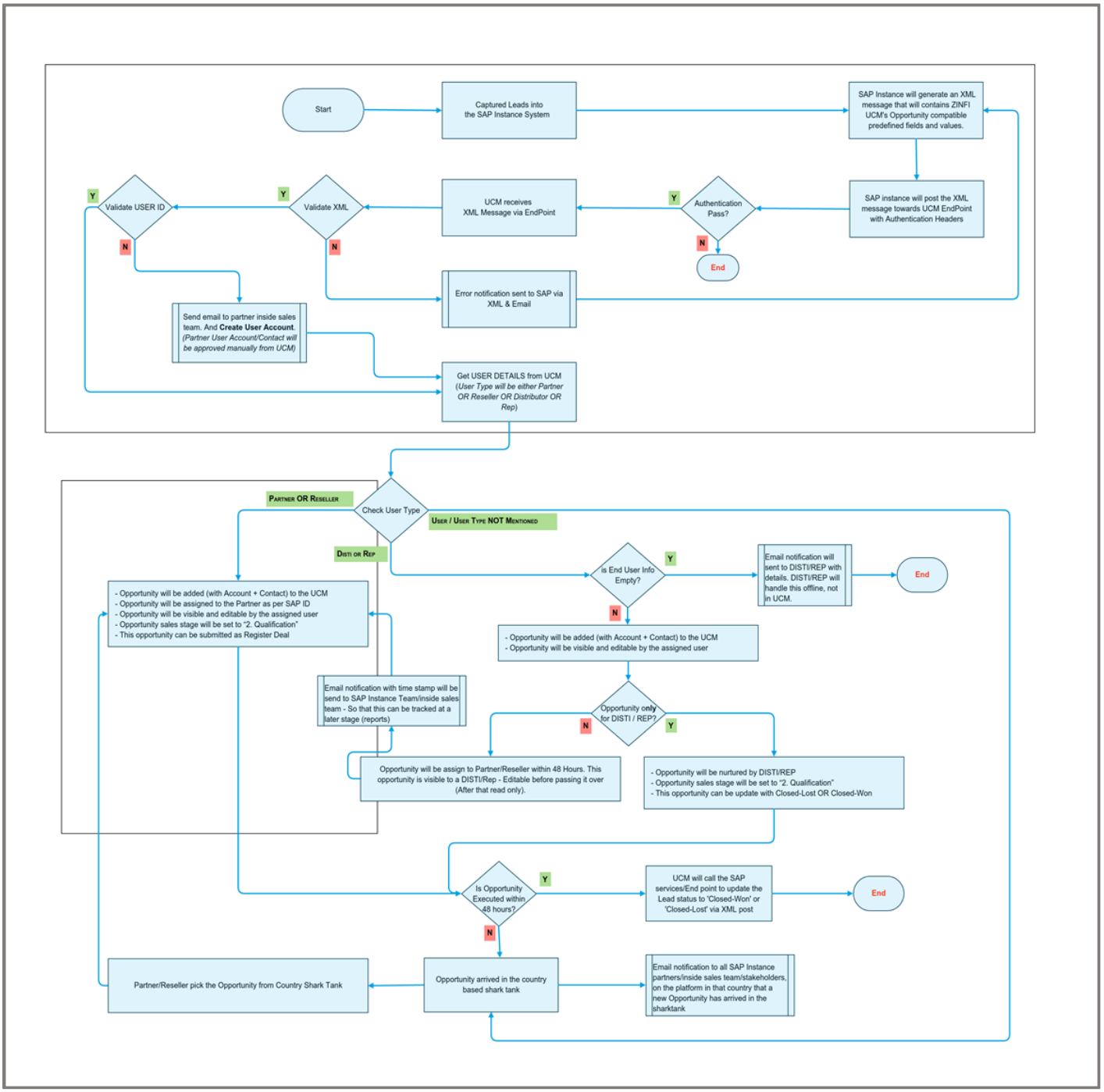

Figure 2

2.2 Integration Use Case Summary

User	System	Use Case	Summary
Channel Manager	SAP	Capture leads	Logs into SAP instance and captures lead info.
		Forward leads	SAP instance posts the XML message to UPM end point with authentication headers.
Channel Partner	ZINFI	View leads	Logs into ZINFI UPM instance. All leads received by the partner are listed on Opportunities page. All leads are sorted by the date and time received, with the most recently received lead at the top.
	ZINFI	Update opportunity	Lands on the Edit Opportunity page. The partner will be able to fill out only the following fields: • Opportunity Name • Estimated Amount • Estimated Close Date • Sales Stage The partner can save with Sales Stage, but Register Deal will only be active once the status is Closed Won or Closed Lost.
	ZINFI	Inform SAP instance team	Email notification with time stamp is sent to SAP instance team/inside sales team, so this can be tracked at a later stage (in reports).
	ZINFI	Save and send	Once the partner clicks on Save / Register Your Deal, the ZINFI UPM sends out an XML message via web services API informing the SAP instance about the lead status (Closed Won or Closed Lost).
Channel Manager	SAP	View opportunities updates by partners	Views the opportunity update from ZINFI UPM, which has called the SAP services/end point to update the lead status to Closed Won or Closed Lost via XML post.

Table 2

2.3 Context Diagram

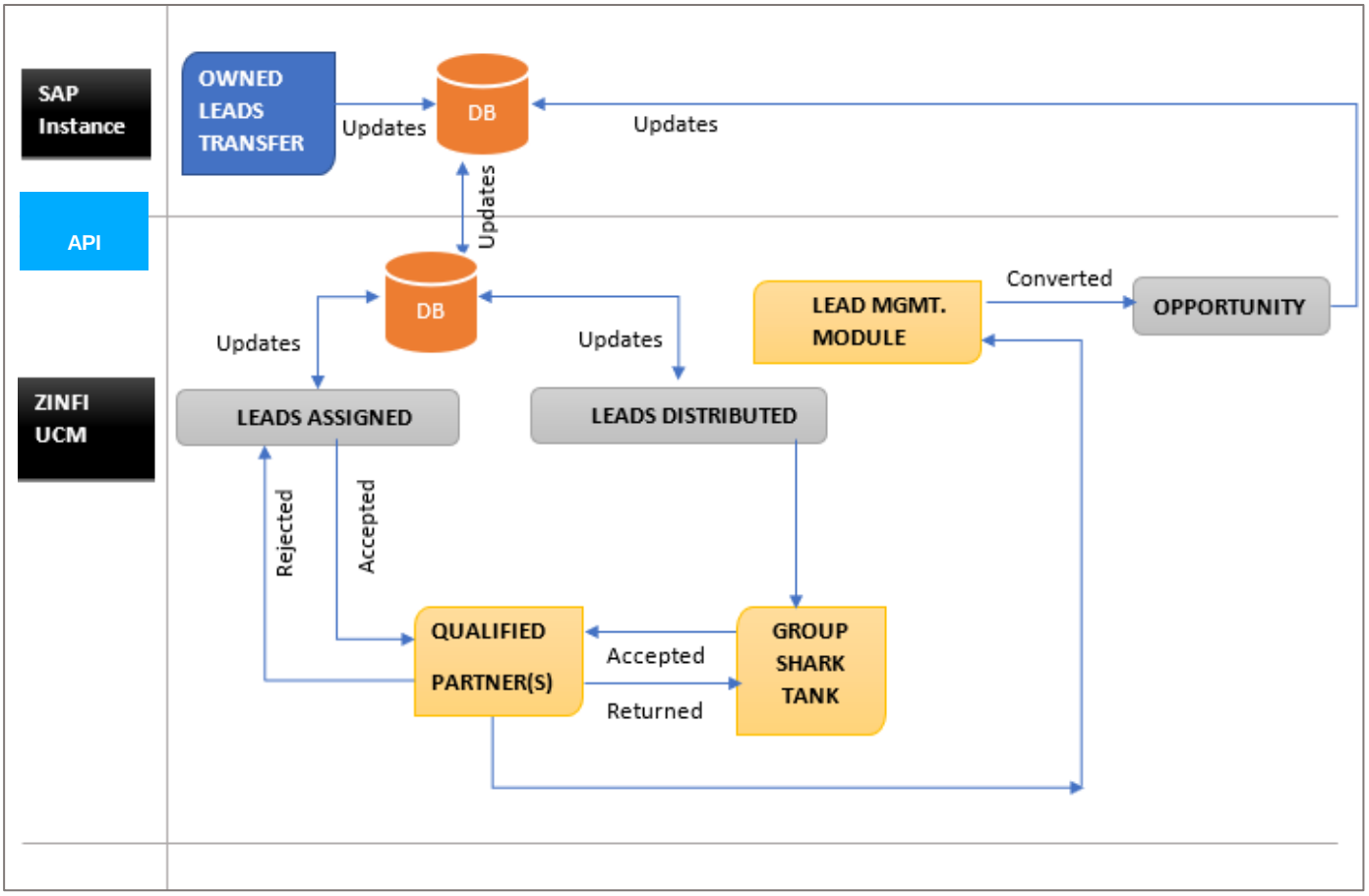

Figure 3

2.4 Process Summary

1. Channel marketing manager/admin captures lead into the SAP system
2. SAP system generates an XML message from captured lead (opportunity in UPM) with the following data:
    a. Security key (to validate the request)
    b. XML string containing account and contact info
    c. UPM user ID (user IDs will be pre-synced with ERP instance)
3. SAP system posts XML message to UPM endpoint
4. UPM end point receives the XML message and performs the following:
    a. System validates the security key
        i. If valid…
            1. System accepts the incoming requests
            2. Proceed to UPM user ID validation (4.b)
        ii. If not valid…
            1. System rejects the incoming request
            2. All processes are terminated
            3. An email will be sent to SAP instance associates – email feedback loop
    b. System validates the UPM user ID in UPM database
        i. If found:
            1. Proceed to validate the XML message (4.c)
            2. System fetches the USER TYPE from UPM Database
        ii. If not found (UPM user ID is created OR UPM admin creates new user ID):
            1. Process is terminated
            2. An email is sent to ERP instance associates for feedback
            3. An email is sent to UPM admin to inform

c. System validates the XML message

   i. If not valid:

      1. Process is terminated

      2. An email is sent to SAP instance associates – email feedback loop

   ii. If valid:

      1. UPM system analyzes the XML and extracts opportunity (account and contact) information

      2. UPM system checks the USER TYPE and starts opportunity processing (4.d)

d. Opportunity processing

   a. If USER TYPE = PARTNER || RESELLER…

      i. The opportunity is added to UPM

      ii. The opportunity is assigned to the partner as per UPM user ID

      iii. The opportunity is visible and editable by the assigned user

      iv. The opportunity sales stage is set to “2. Qualification”

      v. The partner receives an email

      vi. This opportunity can be submitted as Register Deal

   b. If USER TYPE = DISTRIBUTOR || REP…

      vii. The opportunity is added to UPM

      viii. The opportunity is assigned to the CMM (can be configurable)

      ix. The distributor/rep receives an email

      x. The opportunity appears in the Opportunity Inbox for further assignment; after assigning to partner, steps beginning at 4.d.a.i continue

Section 3: Features and Benefits

ZINFI's solution for integration between SAP and UPM allows organizations to:

- Scale and govern access to enterprise data with improved policies, security and traffic management
- Give business partners simplified access to back-end services and complex landscapes
- Use insights from advanced analytics to accelerate innovation and open new revenue streams

Integration between SAP and UPM is used primarily to synchronize data between the two systems. For instance, information is made available in a timely manner for financials, performance management and various business functions managed by both SAP and UPM. Other SAP-UPM integration uses include:

- Synchronizing leads between SAP and ZINFI UPM
- Sending data for won opportunities in UPM to SAP for final approval

When SAP and ZINFI UPM are properly integrated and configured, organizations are able to streamline and fully automate their business processes. Companies further benefit from SAP and UPM integration in the following ways:

- Elimination of the need for dual data entry, saving time and money
- Fewer data redundancies and errors caused by manual data entry
- Enhanced agility to act on new information quickly
- Reduced software licensing costs: partners operate from their individual UPM instances, while the channel manager/OEM operates from ERP

