ERP-UPM Integration Process Overview

Ext.prc.002.04 | 08.16.2024

UPM 24.x

ZINFI Confidential & Proprietary
Shared Under NDA

Contents

Section 1: Overview

ZINFI provides an integration solution between ZINFI UPM and ERP through web services, allowing the channel manager at an ERP instance to share records with prospective partners at a UPM instance. With integration, the channel manager no longer needs to enter identical records in both systems and is able to monitor partner activities from the ERP 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 ERP.

1.1 ERP-UPM Connector Architecture

ERP 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 described in Figure 1 below incorporates the technical SOAP adapter that allows these two systems to work together
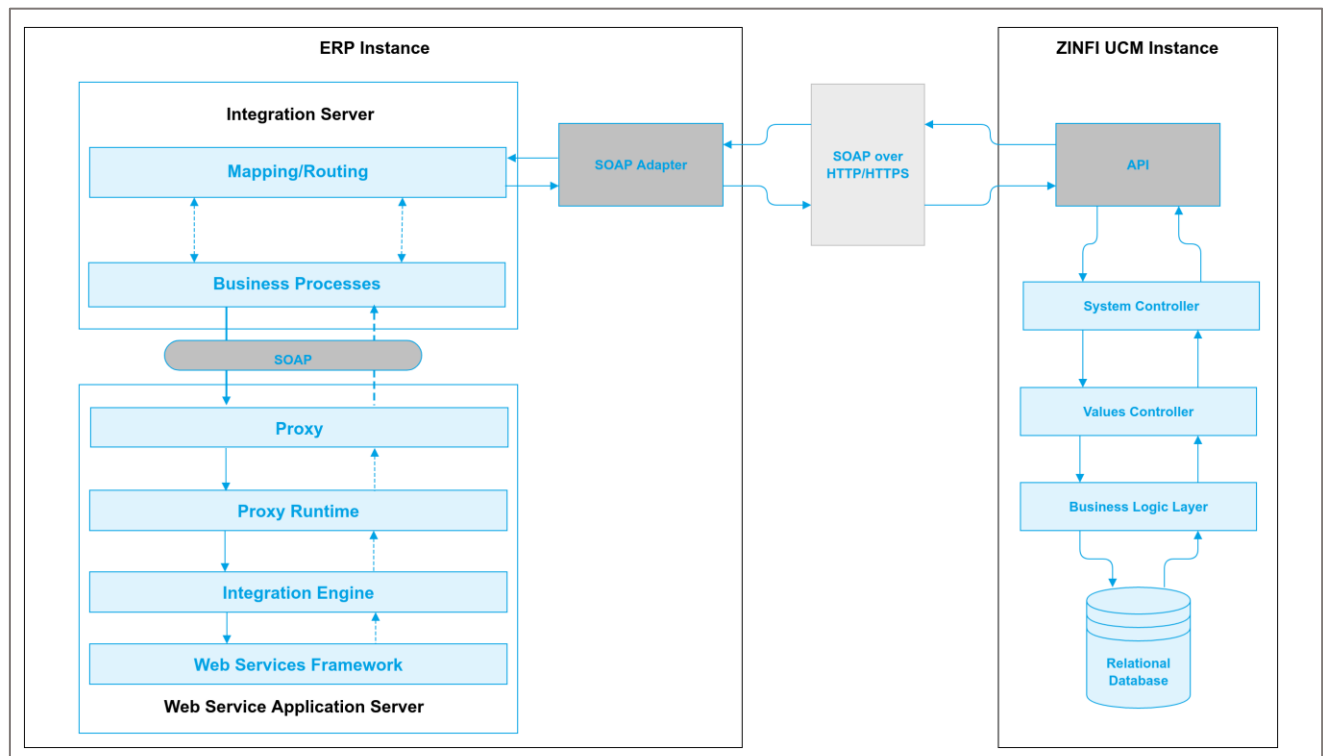

Figure 1

1.2 Integration Process Summary

Process	Summary
Designing Integration within ERP	In this process, you create and manage the design objects you need for your integration scenario.
Configuring Integration within ERP	In this process, we configure the required integration objects.
Designing and Configuring Integration within ZINFI UPM	We design and configure the relevant integration scenarios including business objects, mapping, routing and so on in ZINFI UPM.
Handling Messages Across ERP and ZINFI UPM	This process does not involve user actions. Incoming messages are processed and sent to the relevant receiver. A message can include integration processes while doing this.
	It is important where the process flow is initiated. For example, the ERP 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	In this process, we monitor message processing, including throughput and performance of the appropriate integration technology.

Table 1

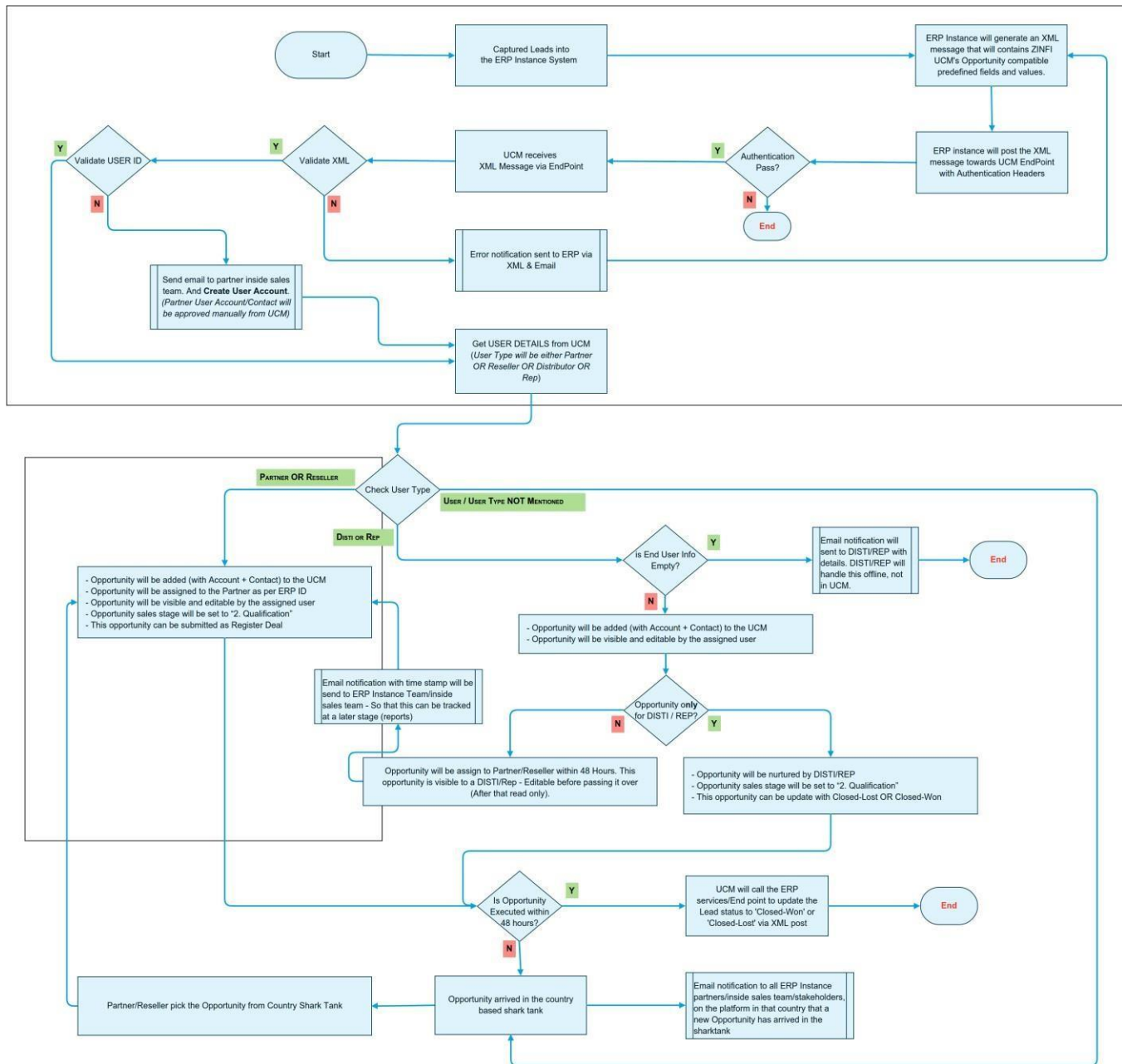# Section 2: Case Study

2.1 ERP UPM Integration Flow

Figure 2

2.2 Integration Use Case Summary

User	System	Use Case	Summary
Channel Manager	ERP	Lead capture	Logs into ERP instance and captures lead info.
		Forward leads	ERP instance posts the XML message to UPM end-point with authentication headers.
Channel Partner	ZINFI	Lead view	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 latest received lead at the top.
	ZINFI	Update opportunity	The partner lands on the Edit Opportunity page. The partner will only be able to fill 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 ERP instance team	Email notification with time stamp will be send to ERP instance team/inside sales team, so this can be tracked at a later stage (in reports).
	ZINFI	Save and send	Once the partner hits Save / Register Your Deal, the ZINFI UPM sends out an XML message via web services API informing the ERP instance about the lead status (Closed Won or Closed Lost).

Channel Manager	ERP	Views opportunities update by partners	Views the opportunity update from ZINFI UPM, which called the ERP services/end point to update the lead status to Closed Won or Closed Lost via XML post.

Table 2
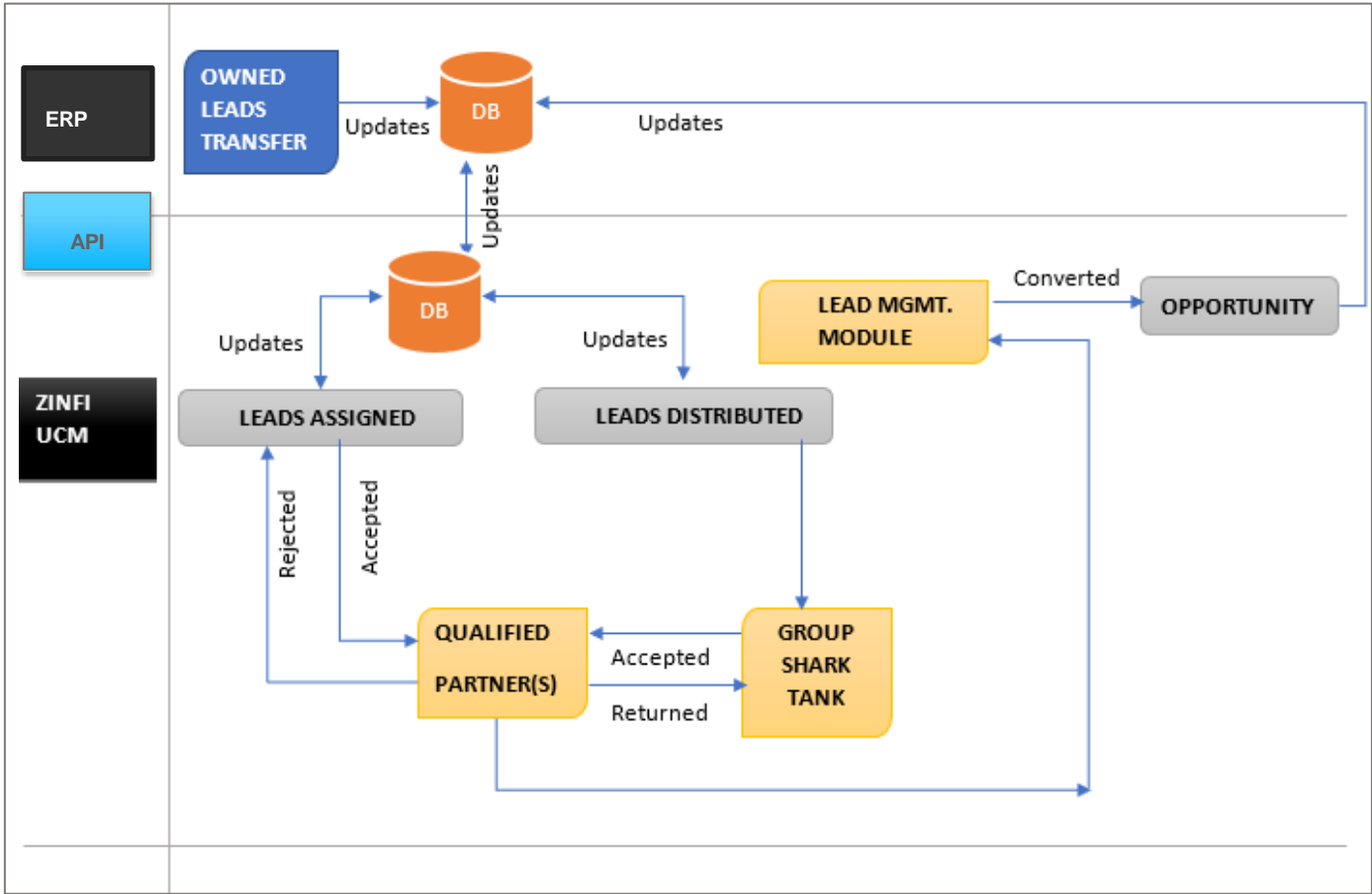
2.3 Context Diagram

Figure 3

2.4 Process Summary

1. Channel marketing manager/admin captures lead into the ERP system

2. ERP system generates an XML message from captured lead (opportunity in UPM) with following data:

    a. Security key (to validate the request)

    b. XML string (that containing account and contact info)

    c. UPM user ID (user IDs will be pre-synced with ERP instance)

3. ERP system posts XML message to UPM endpoint

4. UPM endpoint 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 ERP 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 ERP 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 will continue

Section 3: Features and Benefits

ZINFI's solution for integration between ERP 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 ERP 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 ERP and UPM. Other ERP-UPM integration uses include:

- Synchronizing leads between ERP and ZINFI UPM

- Sending data for won opportunities in UPM to ERP for final approval

When ERP and ZINFI UPM are properly integrated and configured, organizations are able to streamline and fully automate their business processes. Companies further benefit from ERP 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