SAP Business One and Salesforce Integration

APPS*e*CONNECT

Synchronization Points

SAP Business One and Salesforce Integration

Accounts

Accounts/Business Partners

New Business Partners within SAP Business One will be synced to Salesforce CRM. Any modification to the Business Partners in Salesforce / SAP Business One will also be synced with the other applications.

The following information is synced between the applications.
- Account Name
- SAP Customer Number
- Default Shipping Address
- Default Billing Address
- Phone
- Industry

The sync works bi-directionally with Add and Update Operations

Contacts

New Contacts from one application will be synced with the other application. Updates to contacts are also synced. Contacts are synced and associated with the right Business Partner or Account.

Following are the key fields which are synced during Contact Sync
- Name
- Owner (if applicable)
- Telephone / Mobile
- Email
- Account Name

The Sync works bi-directionally with Add and Update Operation

Synchronization Points

SAP Business One and Salesforce Integration

Pricebook

Pre-defined price lists are synced from SAP Business One to Salesforce as price-books. One of the price lists must be chosen as the standard price list. Product prices are synced from SAP Business One to Salesforce for these price-books. If the prices are updated within SAP Business One, they are synced with Salesforce.

The sync works from SAP Business One to Salesforce with Add and Update Operations. Single Currency is supported under this sync process. Special Prices are not supported.

Item

Items from SAP Business One will be synced to Salesforce along with their prices. It is possible to filter products to be synced and to sync only the active products.
Following are the key information synced as far as Items are concerned:

- Product name
- Product Code
- Product Description
- Product prices associated with various price-books

The sync works from SAP Business One to Salesforce with Add and Update Operations

Quotes

The non-zero value quotes are synced from Salesforce to SAP Business One. The Salesperson can mark the Quotes which are ready to be synced.
Following are the crucial information synced from Salesforce to SAP Business One.

Quotes Header
- Customer
- Owner (If Applicable)
- Date

- Customer Reference Number
- SAP Quote Number (updated back to Salesforce)
- Validity Till
- Default Ship to

Quotes Line Items
- Product
- Quantity
- Remarks

The sync works from Salesforce to SAP Business One with Add Operations

Sales Order

Sales Order from SAP Business One will be synced to Salesforce when it is created. The Sales Order items are also synced along with the header information.
The following are the crucial fields that get synced from SAP Business One to Salesforce.

Sales Order Header
- Order Number
- Order Date
- Order Value
- Account
- Owner (if applicable)

Sales Order Line Items
- Product
- Unit Price
- Quantity
- Sub Total

The sync works from SAP Business One to Salesforce with Add Operations

Synchronization Points

SAP Business One and Salesforce Integration

Invoice

Invoice information is synced from SAP Business One to Salesforce when the invoice is created. Invoice line items are also synced along with the respective invoices.
The following are the key information that is synced between the applications.

Invoice Header
- Account
- Invoice Number
- Invoice Date
- Invoice Amount
- Owner (if applicable)

Invoice Line Items
- Product
- Unit Price
- Quantity
- Sub Total

The sync works from SAP Business One to Salesforce with Add Operation

Add Ons

Add-Ons
Below Add-On features will involve additional cost

- Multi-Currency – If you maintain your prices in multiple currencies, this feature can help synchronize the product prices in the correct currencies. The Sync works from SAP Business One to Salesforce with Add/Update Operation.

- Inventory – If you want to view inventory within Salesforce, this feature can help you provide visibility of committed and on-hand stock levels of the product across warehouses. The Sync works from SAP Business One to Salesforce with Add/Update Operation.

Synchronization Points

SAP Business One and Salesforce Integration

- Customer Addresses – Manage multiple shipping addresses within Salesforce and SAP Business One for preparing Quotation. The non-default addresses are synced in a bi-directional manner and are available to be used for Quote generation. The Sync works bi-directionally with Add/Update Operation.

- Sales Order Update – If the orders are updated after creation, this feature helps in synchronizing the updates from SAP Business One to Salesforce. The updates also ensure that the line items are kept in sync. The Sync works from SAP Business One to Salesforce with Update Operation.

- Invoice Update on Payment – If you want to show the payment or any other sort of update for Invoices on Salesforce, this feature can help you do so. The updates also help sync the invoice items in an automated fashion. The Sync works from SAP Business One to Salesforce with Update Operation.

After Sales Service
After Sales Service Integration Features will involve additional cost

- Assets – The installed base from SAP Business One is synced as Assets to Salesforce. The assets are also assigned to the correct Account within Salesforce. The Sync works from SAP Business One to Salesforce with Add/Update Operation.

- Service Call – Service calls from one system are synced with the other application. In case a service call is updated or closed, the same is synced with the other application. The Sync works bi-directionally with Add/Update Operation.

- Activities – Activities created in one system is synced with the other application and assigned to the correct owner. The Sync works bi-directionally with Add/Update Operation.

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Integration Case Studies

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