Getting Started with E-Commerce Integration

Jitterbit

Is Our Playbook For You?

You'll find our guide helpful if your business:

✔ Processes orders manually and is considering hiring staff to keep up

✔ Needs to eliminate manual data entry between e-commerce, enterprise resource planning (ERP), back-end accounting, or customer relationship management (CRM) systems

✔ Needs to be able to scale by easily integrating systems with new retailers, marketplaces, and applications

Understanding E-Commerce Integration

E-commerce integration harmonizes a company's e-commerce website with its back-end accounting or ERP system.

Defining Important Terms

Business systems and processes commonly involved in an e-commerce integration project include:

ENTERPRISE RESOURCE PLANNING (ERP)

ERP refers to the process a company uses to manage and integrate critical parts of its business, including planning, purchasing, inventory, sales, marketing, and finance functions. ERP management systems are accounting packages for tracking and supporting these areas; Epicor, Microsoft, NetSuite, and SAP are well-known ERP solution providers. In the context of e-commerce integration, ERP applications are the back-end accounting systems integrated with e-commerce websites, CRM applications, and EDI trading partners.
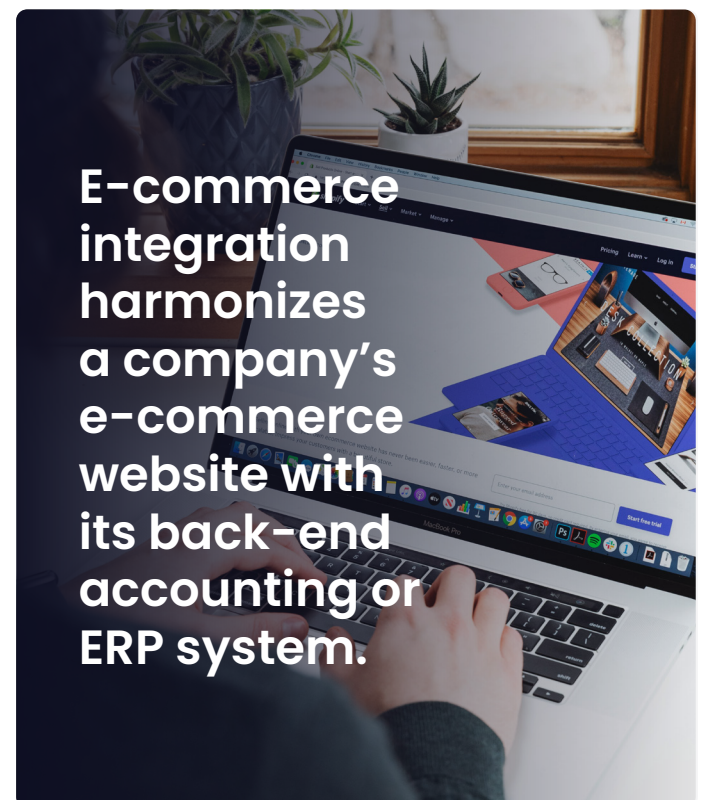
E-COMMERCE

In e-commerce, businesses buy and sell commercial goods and services online. Companies build their online stores on various e-commerce platforms, including Shopify BigCommerce, WooCommerce,Magento (Adobe Commerce), Miva, Volusion, ChannelAdvisor, and others. Online marketplaces like Amazon, eBay, and Walmart Marketplace are also key e-commerce hubs for retailers.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

CRM refers to practices, strategies, and technologies that companies use to improve business relationships with customers and drive sales growth. "CRM" often describes the business systems that entrepreneurs use to grow their businesses, including Microsoft Dynamics, Salesforce, Sugar, and other platforms.

INTEGRATION

Integration refers to the process of synchronizing, linking, or connecting two or more business systems for the automatic transfer of data back and forth between them without the need for human intervention.

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Examining Why You Need Integration

Each business is unique and there are a multitude of demands requiring automated order data flow. But some of the most common reasons for implementing integration solutions include:

DIFFICULTY PROCESSING AN INFLUX OF ORDERS

Data entry is relatively easy for a small handful of orders. **But when business takes off, there's no way to keep pace using manual processes.** If companies relying on manual processes attempt to handle the new workload by adding staff, they often find it costly and ineffective.

FINDING THAT SCALABILITY IS LIMITED

When people are keying data in by hand, scaling an e-commerce business is virtually impossible. **With integration and automation, staff can focus on higher priority tasks.**

STRUGGLING TO DELIVER A GOOD CUSTOMER EXPERIENCE

Instead of dealing with back-order issues, companies with integrated processes can **easily manage inventory, track shipping, and allow customers to access order history.**

DEALING WITH A BACKLOG OF ORDERS WAITING TO BE PROCESSED

When businesses fall behind in data entry, orders pile up, and **customers have to wait for purchases to be shipped.**

HIRING MORE DATA-ENTRY RESOURCES IS COSTLY

Hiring someone to do data entry all day long between systems is **expensive and not an ideal business investment.**

KEEPING INVENTORY RECORDS UPDATED IS DIFFICULT

Without a process in place for updating inventory records in real time, **businesses run the risk of selling items that aren't actually in stock.** Plus, inventory levels need to readjust when companies process returns.

GETTING NEGATIVE REVIEWS

When customers are unhappy with slow service or faulty order processing, they won't hesitate to **write negative online reviews or take their business elsewhere.**

Learning More About CRM Integration

Integrating CRM with ERP systems is central to many e-commerce integration efforts.

CRM

Does your business track client data in a CRM like Salesforce or Microsoft? You need to **accurately replicate customer data** to and from your CRM system and your ERP or accounting system. For example, in an integrated environment, a "Customer Ship To" field update in your CRM will automatically push to your ERP. And canceling a sales order in your CRM will flow to the back-end ERP, **saving time and eliminating error.**

Getting Your Data Ready for Integration

System integration involves planning and preparation to effectively link data.

Looking at Your Processes

With manual processes, receiving an order through an e-commerce store often looks something like this:

1

You receive a sales order online and go into your accounting or ERP system to create a record of the order.

A typical sales transaction produces this flow of data, from customer order to ERP.

2

You search for the customer in your accounting or ERP system and if you're unable to find an existing record, you have to enter in the information.

3

You adjust your inventory levels to account for the purchase. Doing so is more difficult than it sounds—your product IDs in your online store don't accurately match the stock keeping units (SKUs) for items in your ERP system.

4

After you sort out the SKU problem, you start to package up the item to be shipped to your customer.

5

You note the shipping information and go back into your e-commerce platform and send it to your customer for tracking purposes.

6

If you use a CRM application for your business, you then manually update your accounts to reflect the sale you just made.

If this sounds familiar, chances are good that you're pretty tired of either doing all the manual data entry between systems or spending money on staff to key in order data. To make matters worse, errors are inevitable with all of that re-keying of data.

Your inventory levels never seem to be accurate, you accidently shipped 300 items to a buyer instead of 30, and you missed fulfilling an order that got lost in the hundreds you process each month. And the 20 percent of your orders that end in returns only complicate matters more.

The answer? Get to know your data, clean it up, and prepare for integration.

Recognizing the Types of Data Involved in Processing an Order

To get to know your data, you need to identify the types of information typically involved in processing an order.

Order data often includes:

- Customer first name
- Customer last name
- Product ID
- SKU
- Customer e-mail address
- Customer billing address
- Customer shipping address
- Customer phone number
- Product details (size, color, quantity, price, etc.)
- Shipping/tracking information

Knowing what transaction information is important allows you to determine the data processes you need to automate. The person setting up your organization's e-commerce integration must have a solid understanding of the data that has to be involved.

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Cleaning Your Data

Cleaning your data can make the process of implementing your integration smoother and more efficient. Consider the following:

- Purge duplicate fields and customers. **Having redundant data makes integration take longer.**

- Correct incomplete or inconsistent records. If you're going to replicate data across multiple systems, **make sure that data is accurate.**

- Ensure that your e-commerce platform, CRM application, and accounting or ERP system are **updated.**

- If possible, add an accounting SKU in an extra field for each product in your e-commerce store. **Doing so reduces the number of translations needed.**

- Match selling units of measure with stock-keeping units of measure. For example, if you sell a dozen pens in your store as one unit, **make sure your ERP doesn't reflect one unit as one individual pen.**

Performing these tasks will speed implementation, but don't worry about getting your data into perfect shape. **An expert integration provider can translate data for you.**

Solving Your E-Commerce Challenges with Integration

At some point, keeping up with a growing order volume becomes unmanageable and you need a new strategy.

Identifying Objects

In an e-commerce integration, an object is a specific category of data that will become part of an automated data flow. Identifying the objects that are necessary for your integration is a critical part of the project.

Objects involved in e-commerce integration often include:

- Inbound sales orders from an e-commerce platform into an ERP system

- Outbound inventory quantities from an ERP system to an e-commerce platform

- Outbound shipping details from an ERP system to an e-commerce platform

- Outbound product data from an ERP system to an e-commerce platform

Determining Your Project's Scope

The following steps can help you clarify the scope of your e-commerce integration project:

APPOINT YOUR MAIN CONTACT PERSON

Your designated contact person for the project needs to understand the data that's important to your business, be easy to reach, have time available to answer questions throughout the integration process, and have administrator-level access to the platforms and systems you're integrating.

DETERMINE A REALISTIC TIMELINE

Keeping in mind that e-commerce integrations are complex, establish a deadline for project completion. If you're basing your deadline on an event like Cyber Monday or a new website launch you will need to plan ahead.

SET A BUDGET

An e-commerce integration solution pays for itself, but most organizations need to establish a budget to get the implementation done.

Choosing an Integration Solution

In choosing an integration solution, it's important to find a platform designed to enable data flow between all of the systems that are critical for your business, including e-commerce platforms, ERP applications, and CRM environments.

You'll no longer need to build individual connectors between systems. Instead, your integration platform will pull data from one location and connect it with as many other systems as you require, using carefully coded and pre-established translations and business rules.

An automated integration solution allows data to flow between the systems (or connectors) your business is using.

Growing and Upgrading Easily

The right integration solution allows you the **freedom to upgrade or change your systems as needed.** As you grow your business, you can easily upgrade your accounting package, make changes to your e-commerce platform(s), or add more marketplaces.

Improving Speed and Accuracy

Your integration solution should enable data to flow automatically from one system to another with ease. As a result, **core business activities will be faster and more accurate.** You'll process orders more quickly and minimize time spent administering returns and exchanges.

Creating Returning Customers

When your business is running smoothly, your customers will receive their purchases quickly. If they want to return or exchange an item, they'll be able to do so with little to no hassle. **They'll feel confident in your business and will be likely to return to your site to shop.**

Employing Best Practices for E-Commerce Integration

Keep the following best practices in mind to help your e-commerce integration project run smoothly:

✓ Set realistic goals about your timeline, budget, and expectations.

✓ Appoint a main point of contact to take responsibility for managing the data involved in your integration solution. Connect your integration specialist to the person owning your data.

✓ Clean up your data before starting your integration.

✓ Update your business systems before integration.

✓ Work with a seasoned provider offering the expertise to handle the solution setup, maintenance, and any customization work involved.

✓ Choose the right platform. Don't get stuck with a solution that has limitations—allow your business the freedom to scale.

Moving Forward

Jitterbit delivers powerful cloud-based integration solutions to automate your vital business processes and eliminate the need for manual data entry. You can connect any and all e-commerce marketplaces to your ERP, back-end system, and CRM with our integration platform. Additionally, pre-built connectors, recipes, and templates help to streamline the implementation process.

With decades of experience in the e-commerce space, Jitterbit has the capabilities and knowledge to help you grow and easily add more marketplaces, retailers, and applications to meet your changing business requirements. And when you need to create a custom integration or manage your Jitterbit integrations, we've got a team for that, too.

For more information, please visit **www.jitterbit.com.**