

Turn Your CRM Into An Enterprise Portal

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| Introduction

Integrating customer-facing and back-office systems is essential to maximize each system's output, reduce errors, and improve overall organizational efficiency, but this is only the beginning.

When your systems function in separate silos, busy users have to navigate through multiple windows and systems, manually duplicating data records in multiple systems and having to mentally keep track of their workflow. Unsurprisingly, this switching back and forth between systems leads to frustration, missing or incorrect data, and monitoring becomes impossible. On mobile, the picture is even worse, as users will simply put off more complex tasks which cannot be easily handled on a small screen with touch input, assuming the system is even compatible with their device.

With an increasingly mobile workforce, accessing information on a plethora of devices with varying screen sizes, input methods and corporate control, it is ever more important to provide users with a single source of information that fits your business logic. A recent survey indicated that IT leaders expect tablets to become the dominant technology that mobile workers will use to work and communicate with in the near future¹, and these users are going to have ever more stringent requirements. This whitepaper presents the view that the CRM system of your choice can become the ideal portal.

¹ Computing, *"The Mobility Balancing Act"*, 27 June 2013

1 CRM Integration Scenarios

Using integration to create an enterprise portal can achieve a wide range of business benefits, from automating back-end systems and provisioning their data to front-line staff where and when they need it to providing a flexible, customized view of corporate data for all users.

The following scenarios provide examples of an enterprise portal improving the utilization of enterprise systems:

- Allowing a salesperson to quickly perform a credit check, or see outstanding invoices, before visiting a client.
- Enabling a customer service representative (CSR) to inform a salesperson of an up-sell opportunity, or inform technical support staff of a problem, and book a meeting or even bring them into the conversation, in real-time and all while talking to the customer on social media.
- Allowing users to customize their screens and see the information that is relevant to them, with neither restrictive silos nor information overload.
- Having a single, familiar screen through which all enterprise systems can be accessed and processes automated, and which provides that data seamlessly to any device.
- Facilitating relevant sharing and collaboration, where sharing tools connect into employees' workflows.
- Integrating both external and internal social tools with back-end systems so users have access to their conversations and data, even on the move.
- Being able to get an end-to-end process overview of the progress of a customer from lead creation to cash collection.

Other general examples, as well as industry-specific scenarios, are abundant. All enterprises have their own blend of systems, people, challenges and processes and will choose to integrate their systems in any way imaginable to improve their utilization of their systems.

2 Benefits of Making Your CRM An Enterprise Portal

The benefits of a well-designed enterprise portal extend to all functions in the enterprise

1. Increased Productivity

Employees achieve much more when proper integration is implemented. As the process cycle becomes shorter, less time is wasted on contacting one another or switching between different systems. In addition, employees face fewer distractions and are relieved of unproductive tasks to concentrate on their real missions and their real value in the process.

2. Reduced Expenses

On top of the saved resources otherwise spent on the tedious search for data, more money is saved by significantly reducing the number of errors in all systems and processes. Less time is required to backtrack over faulty processes and to fix poorly entered data. Also, fewer employees are needed to transfer information between users of the different systems.

3. Increased Revenues

No more lost deals or lost opportunities due to inaccurate information that is normally transferred manually from one system to another. More opportunities turn into signed deals because more information about the customer and product availability is accessible at any given moment. With direct access to full customer profiles, purchase histories, and new product shipments, salespeople have greater success in exploiting every up-sell opportunity.

With direct access to the customers' credit and collection history, salespeople are able to carefully craft their relationship with each customer, and even assist in the debt collection effort.

Easier access to data and seamless workflows, especially on mobile devices, mean that users are more likely to use

With so much information at their fingertips, and spending less time searching for information, sales staff can focus on selling, reaching new prospects, following up new leads, and refining the sales pipeline.

4. Improved Customer Satisfaction

When full customer profiles and histories are available to all customer-facing parts of the enterprise, and as order cycles become shorter, the quality of customer service improves dramatically.

Customers enjoy prompt and accurate responses to their queries, and are more satisfied by the level of service they receive. The higher the level of customer satisfaction, the more likely it is that the enterprise will experience an increase in customer loyalty, with repeated purchases and, eventually, an expanding customer base.

As an example, an online customer satisfaction survey could be integrated into the CRM, providing account owners with information in real time. Access to both these responses and customer project and billing information in a single location helps account owners marshal the facts and start a relevant conversation with their customers.

5. Increase Collaboration

When enterprise systems are able to share data seamlessly, the barriers to collaboration within your organization are significantly reduced. When employees are able to communicate in real-time across diverse lines of business and geographies, silos vanish, best practices can be shared and you end up with one purposeful team.

Whether through a built-in social tool such as Salesforce's Chatter or a third-party application, today's organizations increasingly value information sharing among employees. Integrating these internal social tools into all enterprise systems allows all employees working on an account to gain a big-picture view, and pull in the best practices from elsewhere in the business. Not only does this create a sense of community internally, but shows the customer a single, joined-up and experienced organization, creating a feeling of satisfaction and trust.

3 The Integration Challenge

Even when enterprise systems provide full, documented APIs as is the case with Salesforce and SAP among others, creating a working integration is challenging because of their sheer size and complexity.

With many other enterprise systems, this is even more challenging when documentation is lacking or they simply don't integrate well. Even in best-case scenarios, each API is different, vendor-specific and usually highly complex, meaning that a lot of time and effort is required to understand the intricacies of each. This picture becomes even more complex when taking into account that enterprise systems range from on-premise, locally handled installations to completely cloud-based provided as Software-as-a-Service (SaaS) and everything in between.

The actual integration and automation processes require a large amount of customized coding, which is itself highly complex and time-consuming to write, becoming even more complex when changes need to be implemented in the project. Further, upgrading, adding or switching out one enterprise system can require lengthy work to integrate, running just to stand still.

When integration is achieved by complex and lengthy customized coding, there will likely be less room for incorporating proper and unified mechanisms for live process management, monitoring, performance tuning and auditing.

Unless proper integration tools are used, many enterprises find themselves missing out on the benefits and opportunities enabled by integration purely because of the immediate costs and risks that manual integration involves.

4 Overcoming Integration Challenges with Magic xpi

Magic xpi Integration Platform delivers code-free, enterprise-grade integration, business process automation, and data synchronization solutions.



Magic xpi has out-of-the-box optimized and certified adaptors for many popular CRM systems including Salesforce, SugarCRM, Microsoft Dynamics, Sage and more. It extends the capabilities and usage of your existing CRM system, simply and intuitively integrating it with your company's entire range of business processes and enterprise applications, such as SAP, JD Edwards, IBM i, Lotus Notes, accounting, ERP, supply chain management, HRMS, logistics, and more.

- Magic xpi simplifies and unifies the interfaces of both your CRM and other enterprise systems using visual and intuitive design tools, and with no custom coding. It enables the creation of simple or highly complex integration scenarios and business processes involving the two systems, data extraction, transition and transformation, the utilization of any communication protocol, scheduled tasking, monitoring, robust deployment, and more.
- Magic xpi provides you with an accurate and real-time view of your corporate information, and eliminates the need to manually update multiple systems when changes occur.
- Magic xpi's code-free approach enables you to quickly complete your business-critical integration projects and benefit from an immediate return on your investment with much less effort and greatly reduced risk.

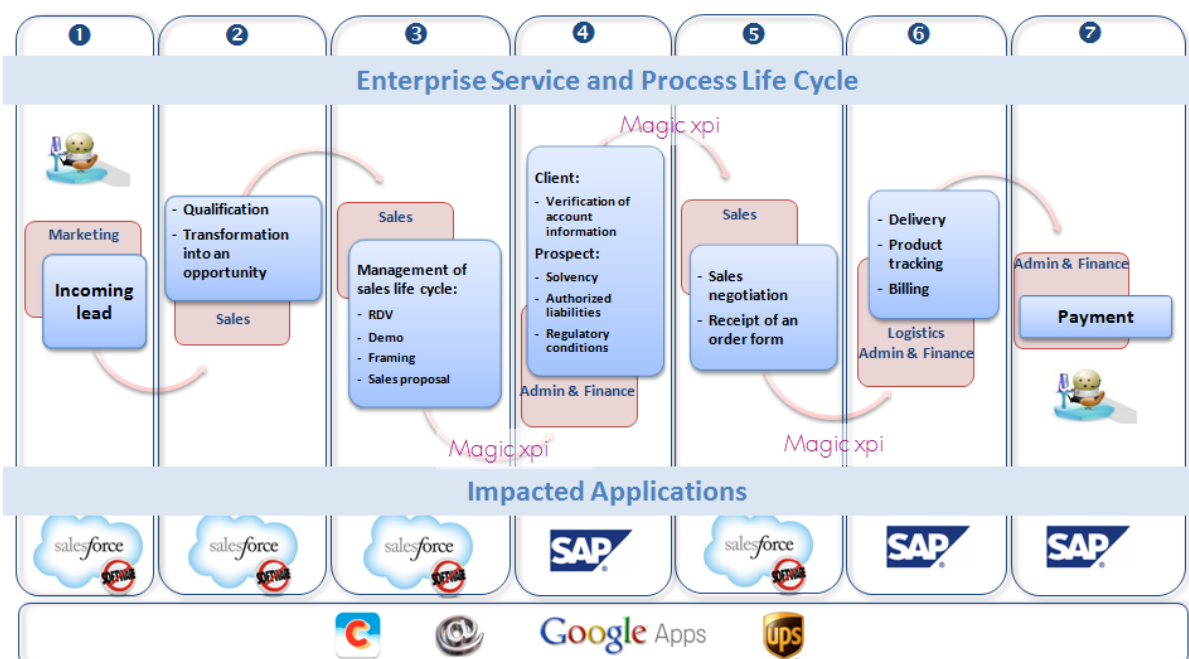


Figure 1: An example of Magic xpi and the integration lifecycle, from lead to cash

1. Simplified Connectivity

Magic xpi's dedicated connectors enable the project designer to work with a unified interface and easily combine enterprise systems in various business processes, as well as utilizing any other connector or service that is supported by Magic xpi.

Magic xpi's connectors hide the complexity of the actual programming interface of each system, enabling the project designer to better handle and work with the various entities and their related methods.

By means of drag-and-drop and easy configuration, Magic xpi flows are designed to extract information from multiple systems and manipulate data in these systems. Data can be extracted, transformed, and loaded from one system to the other using highly intuitive data mapping capabilities.

2. Connector Certifications

It is extremely important, when dealing with central and complex systems, that the chosen integration tool is certified by the vendors of each system for the proper use of their API.

Magic xpi is fully SAP-certified. Moreover, Magic xpi has already been recognized by SAP, receiving the Solution Partner Leadership in Innovation Award, followed by the ISV Partner Quality Excellence Award. Magic also received the SAP Business One Global Solution Partner Award for Leadership in Innovation.

Salesforce.com awarded Magic with its integration award for outstanding achievements in integrating Salesforce.com and SAP in a customer project.

3. Reflecting Customised ERP and CRM Implementations

Magic xpi offers a generic approach to enterprise systems by enabling any object, including customized objects in a specific implementation, to be easily handled and manipulated.

4. Easy Configuration Of Multiple Deployment Environments

Using its external resources configuration, Magic xpi enables the execution of a given project to be performed in different environment configurations. In this way, the same project can be executed on testing, staging, and live production configurations.

5. Mobile Integration Of CRM And Back-Office Systems

Magic's mobile enterprise application platform incorporates Magic xpi Integration Platform to provide a highly productive means of connecting to and from any enterprise application, whether installed locally or deployed as cloud-based SaaS. A single mobile application can provide real-time synchronization between mobile front-end and back-end systems, while retaining a unified user experience.

6. Advantages Of In-Memory Data Grid Computing

Magic xpi leverages In-Memory Data Grid (IMDG) Computing for rapid handling of batch processes and extreme resilience. This technology has been deployed by the biggest internet services including Google, and now other enterprises can reap the benefits through Magic xpi.

5 Magic xpi Implementation Scenarios

The following examples describe actual Magic xpi implementations that meet specific integration requirements.

1. Integrating ERP Discount Values Into CRM Opportunities

On entering the details of a sales opportunity, salespeople need to know the up-to-date discount criteria for each item or each customer. Magic xpi is used to expose ERP discount information as a standard Web service. The CRM is then configured to call this web service with the customer or item identification, receiving in return the relevant discount information.

In this way, salespeople can update the sales opportunity in the CRM with the assurance that the discount details are accurate. The risk of future errors or discrepancies is therefore significantly reduced.

2. Automatic Conversion Of Opportunities Won Into Actual Orders

When an opportunity is closed as a won deal, a corresponding order needs to be created in the ERP system. Magic xpi is used for automating this business process, relieving the sales and operations staff from having to perform this conversion manually. On completion of the conversion of an opportunity into an order, Magic xpi is used to extend the process by logging the event in a log database and notifying the relevant stakeholders of the conversion.

Magic xpi's visual data mapper enables the conversion of data from any structure and format to another. In a single dialog box, the project designer can easily and quickly map each source data item to a corresponding target data item. The mapping options include the ability to join and separate values and add logic and conditions to achieve exact target formatting.

6 The Enterprise Portal: Beyond Integration

Magic xpi's advantages as the preferred tool for turning a CRM system into an enterprise portal go beyond mere bi-directional integration.

As well as supporting fine-tuned connectivity with ERP and CRM systems, Magic xpi supports a wide array of services and communications standards, and is designed to work with additional enterprise-level systems, such as Google Docs, Microsoft Exchange, IBM Lotus Notes, Microsoft Office, Microsoft SharePoint and more.

This wide support of services, standards and applications enables you to extend the integration initiative across the entire enterprise, allowing users' workflows to move seamlessly between systems without ever leaving a familiar environment, whether in the office or on mobile.

Here is just a glimpse of what enterprises can further achieve with Magic xpi:

- Better data availability and accessibility: Ensure 24/7 access and availability to your mission-critical data assets by replicating cloud-based data in on-premise storage.
- Cross enterprise automation: Implement more automated business processes across every system in the enterprise.
- Better reporting and forecasting: Apply business intelligence (BI) systems to gain a better view and understanding of orders, sales opportunities, regional dynamics, and more.
- Enable regulatory compliance: More easily handle the requirements of regulatory and government compliance demands.

7 Conclusion

Enterprises invest a lot of time and money in selecting, purchasing and implementing best-of-breed systems. It is crucial for enterprises to exploit such systems to their maximum potential, and significantly raise the productivity of every function in the enterprise.

Using the CRM system as an enterprise portal, integrating all front- and back-end systems with business process automation is a key factor in reaching new levels of enterprise productivity and efficiency. However, such complex integration and automation must be performed using an integration tool that enables risk-free, easy implementation and robust process execution.

| About Magic Software Enterprises

Magic Software Enterprises ([NASDAQ: MGIC](https://www.nasdaq.com/quote/MGIC)) empowers customers and partners around the globe with smarter technology that provides a multi-channel user experience of enterprise logic and data.

We draw on 30 years of experience, millions of installations worldwide, and strategic alliances with global IT leaders, including IBM, Microsoft, Oracle, Salesforce.com, and SAP, to enable our customers to seamlessly adopt new technologies and maximize business opportunities.

For more information, visit www.magicsoftware.com.



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