

The Alliance CRM Integration Solution

A complete solution for CRM integration

Introduction

In this paper we will talk about Customer Relationship Management (CRM) and the IBM System i (including iSeries and AS/400) and how we help our customers get the most out of both platforms. We bring extensive experience with the IBM System i platform, web applications, and integration with Internet and server-based CRM solutions. We take a project approach to CRM integration projects because we want our customers to be successful, not just end up with another tool. We bring you all of the resources you need - software, services, project management and training - to actually get the result you want – a successful project and a solution that works!

Our CRM project team brings a broad set of skills to your CRM integration project. We help customers implement SalesForce.com, RightNow, Microsoft Dynamics CRM 3.0, Microsoft Titan, and other CRM solutions, with their IBM System i applications. We understand the complexities of customer relationship management and that each company tailors CRM to work best for their customers. We can help you get your CRM application up and running quickly.

Business objectives

Your business depends on good relations with your customers and suppliers, it's what makes you special. You've deployed a CRM application to manage your customer interactions and to give all of your employees the tools and information they need to improve the customer experience. Now the question is, how do you integrate all of your existing customer information with your CRM solution?

You have a lot of information in your ERP systems that should be visible to your CRM application. Information like order status, inventory status, product shipment status, customer account balance, and much more. How do you get this information into the CRM application to make the customer experience better?

Additionally, now that you've tailored your CRM application to collect important customer information, how do you get that information back to your ERP system? Perhaps a customer wants to add products to an order, cancel an order, or get a call from a sales representative. You can store this information in the CRM application, but now you need to get it back to your ERP system on the IBM platform.

The good news is that most CRM applications now provide excellent tools to let you integrate your line of business applications. CRM applications typically use the web XML data standard. The challenge you face now is how to get your IBM System i

talking to your CRM application. Almost everything about your IBM system is very different than a web-based CRM application. Your IBM system uses DB2 databases to store data, not XML. You use 5250 terminals or 5250 web emulation for user access, not XML web services. And your IBM applications use data structures for storing information that don't match the CRM data structures. How can these systems talk to each other?

A comprehensive solution

Welcome to the Alliance CRM Integration Solution from Patrick Townsend & Associates! We provide a complete set of software and services to make your CRM integration project successful. Our experts understand the complexities of CRM, XML and web services, and the IBM System i application platform. We take a solution approach that helps you with all aspects of your CRM integration project. We provide the project management, software, services, training and support you need for a turnkey solution. When we finish your project you are up and running with data exchange between your System i and your CRM application – problem solved!

CRM application architecture

Most CRM vendors make it easy to tailor the CRM application for your company's special needs. You can add new fields, create special views, tailor reports or create new reports, and so forth. The ability to tailor your CRM application makes it a more powerful solution and most CRM users do some tailoring of the application. This means that almost every data integration project requires some customization for these changes.

The architecture for data integration with most CRM applications is web services using XML. XML is an internet standard for data exchange. CRM applications provide an interchange gateway that allows you to connect to your CRM application and send new or updated information, and receive information back from your CRM database. Data exchanged with web-based CRM applications is usually in the XML data format.

CRM customization

Most users of CRM make changes to the basic configuration to meet their customer information needs. For example, you might add additional fields for customer order history, credit status information, and so forth. CRM applications make it easy to make these enhancements and most CRM customers take advantage of this feature.

Customizing CRM poses a challenge to any integration project. Customizing a CRM application makes it into a new application and defeats any generalized approach to integration. This is why we provide both software and services as a part of our solution. We will identify the enhancements you've made to your CRM solution and incorporate these into the data exchange process. You will be able to leverage your CRM enhancements with data from your IBM applications.

Project management

Project management is crucial to a successful CRM integration project. Before starting the technical part of the integration project it is important to have a good requirements statement, technical definition of the CRM database, and technical definition of the System i application database. These are the first deliverables for your project. The Alliance team will provide a project manager to work with your IT team and users to provide you with the information you need to track and monitor the project.

The Alliance project manager assigned to you will provide weekly status reports on the progress of the project, and will answer any questions you have. In addition to routine status reports the Alliance project manager will provide a weekly conference call so that you can keep remote users and management informed on the project status.

The goal of the Alliance project team is to insure a successful implementation of your integration project. Your project manager will be your primary point of contact.

Requirements definition and system assessment

The first phase of the CRM integration project will document your objectives and assess your current CRM and System i applications. This assessment will identify any modifications you've made to the CRM application, document the current CRM field usage, and document the sources of data in your System i applications. The purpose of this requirements definition and assessment is to provide you with a project plan, schedule, and resource estimate. We will use the results of this phase to provide you with an estimate of the cost of the project, and you will use the results of this phase for resource planning and project budgeting.

Alliance software for XML and SOA integration

The Alliance CRM Integration solution includes licenses to the Alliance XML/400 software package. This package provides the core software and communications engine for data conversion and XML web services. An Alliance project includes three licenses for your IBM System i environment: One LPAR license for your production system, one LPAR license for a development system, and one LPAR license for a high availability system. Additional licenses can be purchased for customers with multiple production or test systems.

The software licenses included with the Alliance solution are integrated with the entire project and are not subject to future upgrade fees or license fee changes. The Alliance project team will upgrade the software or apply fixes as needed. Any changes to your CRM system and which require changes to the interface will be undertaken by the Alliance team at no additional charge.

Customizing XML maps and translation

The Alliance solutions team will review your CRM data requirements and modify the basic XML translation maps for any changes you've made to your CRM application. These changes might involve changes to field lengths, new fields added to CRM, and

new data groups. The Alliance technical team will extract current XML schema definitions from your CRM implementation and incorporate this information into the Alliance mapping and translation routines.

Automating CRM integration

The Alliance solution team will work with your users and IT team to determine how frequently you need to update your CRM information. In some cases you will want near real-time update of CRM or ERP information. In other cases a batch upload approach will work best. The Alliance team will document your requirements for data exchange and design processes to automatically implement the exchange.

ERP and application integration

If you are extracting data from your System i ERP application to send to the CRM application the Alliance solutions team will identify the data extraction requirements and help you identify the source of the data in your ERP application. If needed, the Alliance solutions team will retain ERP specialists for this part of the project.

In most cases the best approach is to extract the data from the ERP application to temporary intermediate files that can then be converted to CRM XML format for upload to the CRM database. In some cases the volume of transactions, or the data exchange requirements, require a real time extraction and upload process. The Alliance solutions team will analyze your requirements and develop the appropriate solution for you.

External data feeds and cross-platform integration

In more complex user environments it may be necessary to pull data from multiple platforms and servers in order to update your CRM application with the correct information. The Alliance solutions team can provide the right technical resources to make this possible. The technical team can integrate data from your Windows, UNIX, Linux, and mainframe platforms. If you run applications on multiple System i platforms the technical team can help you with data consolidation from these systems.

The Alliance solutions team is experienced in coordinating the different technical resources to make an integration project successful. Our relationship with IBM Global Services and other contract resources allows us to create technical teams with a diverse set of skills. Our knowledge of middleware products such as IBM MQSeries and TCP/IP sockets allows us to create real-time, cross-platform solutions.

Performance

As you increase your use of CRM you will increase the number of transactions that flow between your IBM System i platform and the CRM web servers. Alliance is designed to help you manage performance and scale to meet increasing transaction volumes.

To protect the privacy of your information the interface to your CRM application is based on the SSL (Secure Sockets Layer) protocol. This protocol provides for encryption of all information exchanged between the IBM System i and the CRM web server. The Alliance solution uses the native i5/OS SSL APIs for the SSL encryption. This means that if you install the IBM hardware encryption accelerator support (4758 or 4764 hardware feature) Alliance will automatically use this hardware acceleration.

Alliance HTTP and HTTPS commands and APIs are designed for multiple, simultaneous operation. This means that you can improve performance by running multiple data exchange applications at the same time. The Alliance solutions team will analyze your transaction volume and design an approach that will take advantage of these features.

The Alliance web services implementation does not use ODBC for connections to the database, but uses native System i database interfaces. This improves overall performance and allows for the best security implementation.

Security

The Alliance software product used with the CRM solution is Alliance XML/400, a native IBM System i application. The Alliance software provides several levels of security. For web service connections to your CRM application Alliance uses the native System i SSL APIs. This means that the digital certificates and application configuration for SSL is controlled by native IBM System i security. All Alliance APIs and commands allow native System i security management through object level authority. You can use IBM System i best practices for your security management.

Testing, QA and production migration

The Alliance solutions team will work with your IT development and IT operations group to meet your testing and QA requirements. When you are satisfied with the accuracy and reliability of the CRM integration implementation the Alliance team will assist you in migration to your production environment. After migration to production the Alliance team will monitor the solution to resolve any problems or performance issues.

Training

The Alliance CRM Integration solution includes technical training for your IT development and operations teams. The training will demonstrate how the Alliance XML/400 software is configured and maintained. It will also cover topics related to routine application maintenance, operation, and backup. Additional training at our site or yours is available under an additional services contract.

On-going support

On completion of the CRM integration project you will continue to receive on-going support for the solution. The Alliance solution includes a service agreement for the first year of operation that is renewed on an annual basis. This agreement includes

support for software upgrades when needed, changes to the data formats when required by the CRM vendor, and routine customer support via our web and telephone support group.

The Alliance CRM Integration solution components

The Alliance solution for CRM includes software, services, and training for your IT organization. The solution includes the following components:

- Project management
- Technical assessment of the CRM and ERP systems
- Up to three licenses to the Alliance software (production, test, and backup)
- Services to tailor XML translation maps
- Implementation of data exchange processes
- Training of the IT development team on software configuration and implementation
- Consultation with IT operations on maintenance and backup
- Testing and QA assistance
- Production migration assistance
- One year of software support and maintenance

Many CRM integration projects will involve multiple data exchange requirements, different application integration requirements, programming for ERP data extraction, and additional training. The Alliance solutions team will work with you to specify all of your requirements into the solution and provide you with project resource requirements and pricing. Please contact your sales representative for solution pricing information.

Pre-requisites

Data exchange with a CRM application requires a subscription or license to the CRM solution. The Alliance software requires an IBM System i, iSeries, or AS/400 with operating system version V5R1 or later. An outbound connection from the IBM System i platform to the Internet or to your CRM server is required.

Getting started

Getting started is easy. When you contact your sales representative you will be scheduled for an initial project review session. In this session we will discuss your project requirements, technical resources, and project time line. We will provide you with information about the Alliance solution approach. At the end of the session there should be a common understanding about the scope and feasibility of the project. The Alliance solutions team will then create a proposal for your project. There is no charge for this initial project review.

The company

Patrick Townsend & Associates provide data security and web service solutions on a variety of platforms. In business for more than 20 years, the company is uniquely positioned to help with web service integration with your CRM solution.

Patrick Townsend & Associates, Inc.
406 Legion Way SE
Suite 300
Olympia, WA 98501 US
Voice: (360) 357-8971
Voice: (800) 357-1019
International: +1 360 357 8971
Email: [info @ patowndsend.com](mailto:info@patowndsend.com)
Web: www.patowndsend.com

Trademark notice: Salesforce is a trademark of Salesforce.com. RightNow is a trademark of RightNow, Inc. Microsoft, Microsoft Windows, and Microsoft Dynamics CRM are trademarks of Microsoft Corporation. IBM, System i, iSeries, eServer, AS/400, Websphere, Websphere MQ, and MQSeries are trademarks of IBM Corporation. Alliance XML/400 and Alliance CRM Integration Solution are trademarks of Patrick Townsend & Associates, Inc. All other trademarks are the property of their respective owners.