

Optimise your business processes

How and why you should integrate HubSpot and SAP

HubSpot + SAP

HubSpot and SAP are two powerful vendors that help companies automate business processes and improve customer relationships. In this article, we will show you the benefits and challenges of integrating HubSpot and SAP and how your company can benefit from it. **More data, more insights, more Sales!**

Benefits



Break down silos, create networks



Reduce error-prone manual entry



Increase efficiency through automation

How to start?

Each SAP integration is somewhat different. So, it make sense to ask yourself a couple of questions at the beginning.

What is the division of labour between CRM and ERP? Where does each process live? The answer to this will vary depending on the business and sales model.

The primary question at the beginning of any integration project is: Which system is responsible for what? In many companies, the ERP system is the source of truth and is also used for quote generation, for example. But this is not the case in every sales model.

We will first look at three basic variants. These can be built upon by including further data such as profit centre synchronisation, or live warehouse stock level information etc. But what is really necessary?

What is really necessary?

The guiding principle is relevance instead of frivolity.

If the company has a handful of new customers per month, automatic synchronisation from CRM to ERP may not be necessary. On the other hand, if the company has several dozen new customers per month, automatic synchronisation makes perfect sense. In this case, the CRM is the leading system and passes the data on to the ERP.

If the majority of orders are placed online, it makes sense to integrate the order data from the eCommerce system or ERP into the CRM, in order to enable behavioural marketing to the customer base. Potential for cross- and up-selling, replacement sales, and tracking cancelled orders is enormous, and can significantly increase turnover. In this case, the ERP is the leading system and passes the data on to a CRM & marketing automation solution.

When trading physical goods stored in warehouses, it's important for the salespeople to see each SKU's stock level and location in real time.

Typical integration scenarios

HubSpot CRM



Master Data →
← Orders

SAP ERP



1) In many companies, a bidirectional interface is necessary due to the complexity and variety of products. For example, in order to have a direct overview of stock levels when making offers. In these cases, quotes and orders are often created in the ERP. New customers, on the other hand, often come from the marketing automation solution or CRM.

HubSpot CRM



Master Data →
Orders →

SAP ERP



2) Software or consulting firms do not have any stock and often have a manageable service and product portfolio. Here, offers and orders can also be created in CRM, but should then also be available in ERP for service provisioning and billing.

HubSpot CRM



Master Data ↔
Orders ↔

SAP ERP



3) It becomes somewhat more complex if various distribution channels exist in parallel. This can be the case if the business also sells parts of the products or services directly online. In this case, orders also come directly from the shop system into the ERP. In order to maintain a complete customer overview, it is necessary to either transfer this data from the commerce system or fetch the order data, including e-commerce contacts, from the ERP.

Old data? - bring it across!

Often an ERP system is already in place and contains historical data that can be of enormous value for CRM and marketing automation. This data enables automated customer classification or targeted promotion. With regards to up-sell, cross-sell and re-sell, this historic data can be an absolute goldmine.

How to integrate the systems?

SAP Business One, Business by Design, S/4 Hana, and C4C cloud systems can usually be accessed via web interfaces. To do this, it is necessary to set up a technical users or communication agreement in the ERP system. This defines which data and services are available for CRM integration from the SAP system. In the case of Business One, the service layer function or the B1IF integration framework can be used.

In most cases its recommend to use an additional integration platform to orchestrate the sync. If a product such as SAP CPI or PI/PO is available in-house, this a great benefit. This is particularly useful if other SAP products such as C4C (Cloud for Sales) or CPQ are used and HubSpot is used as the marketing automation platform.

Otherwise, AWS Lambda Workflows can take over this task and orchestrate the data synchronization.

The flow is key to maintain integrity and to avoid duplicates. For example, if customer numbers are assigned in the ERP, the business partner must first be created in the ERP via API. Once this has been done, the SAP customer number or indices can be taken over and the integration process can create contacts, offers, line items and assign them to the newly created or already existing business partner.

Once the data flow, data mapping, and trigger criteria have been defined, it's time to open up the systems by creating communication systems, scenarios, and arrangements in SAP.

Service	Application	WSDL/Service Metadata	Additional Properties
Replicate Customers from Client to S/4 System	IDoc		
Replicate Suppliers from Client to S/4 System	IDoc		
Replicate Company Addresses from Client to S/4 System	IDoc		
Replicate Workplace Addresses from Client to S/4 System	IDoc		
Replicate Personal Addresses from Client to S/4 System	IDoc		
Business Partner - Replicate from Client to SAP S/4HANA Cloud	SOAP		lkreplic
Business Partner Relationship - Replicate from Client to SAP S/4HANA Cloud	SOAP		shipsui
Business Partner - Receive Confirmation from Client to SAP S/4HANA Cloud	SOAP		lkrepli1
BP Relationship - Receive Confirmation from Client to SAP S/4HANA Cloud	SOAP		shipsu1
Business Partner (A2X)	OData V2	api.s4hana.cloud.sap/sap/opu/odata/sap/API_BUSINESS_PARTNER	
Attachments	OData V2	https://my403793-api.s4hana.cloud.sap/sap/opu/odata/sap/API_CV_ATTACHMENT_SRV	

Image: SAP S/4 Hana Public Cloud Communication Agreement

Application and User Management - Communication Arrangements

Communication Arrangements

You can view, create, and edit communication arrangements between your company and customers or suppliers with whom you wish to exchange business data.

All Communication Arrangements

Edit | New | Delete | Check Completeness | Edit Credentials | Reactivate | Edit API Keys | Download Tenant Certificate

Communication Scenario	Communication Type	Communication Partner	My Company
Analytics Data Upload	Application Integration	EXTSYS	
Analytics DataSources OData	Application Integration	HUBSPOT	
Analytics DataSources OData	Application Integration	EXTSYS	
Business Documents Web Servi...	Application Integration	EXTSYS	
Communication Monitoring Web...	Application Integration	EXTSYS	
Customer Contracts - Managed ...	Application Integration	EXTSYS	Almika Inc.
Diogo's Scenario	Application Integration	HUBSPOT	
E-Commerce Web Shop Integrat...	Application Integration	JAVAPOS	
E-Commerce Web Shop Integrat...	Application Integration	EXTSYS	
Engineering Design Integration			

Image: SAP Business by Design communication agreement

What are the benefits of an integration?

The connection between your HubSpot and SAP systems can offer many benefits to your business:



Increase efficiency

Increased transparency and a better cross-departmental flow of information within your company increases efficiency, duplication of work is avoided and employees can access high quality and complete information faster.



Better customer experience

By integrating HubSpot and SAP data, you get a holistic view of your customers. The comprehensive information helps you make better decisions, avoid mistakes and provide personalised customer care.



Boost Sales

Knowing exactly who bought what and when can help you identify upsell, cross-sell and re-sell potential. This information can be used for customer segmentation and very targeted marketing campaigns.



Improved data quality

When you integrate your CRM and ERP, you no longer have to manually transfer data from one system to the other. Errors are minimised, workload is significantly reduced and data quality is improved.



Save license fee

By moving some processes from ERP to CRM we've seen some significant savings in license fees on customer side. The ROI on this is sometimes just several months.


At Periti we have done many HubSpot <-> SAP integrations in various flavours for the above mentioned products. Reach out to us request a case study or a customer reference call.




Get in touch with us!

Request one of our HubSpot SAP Case Studies or book a meeting with us [here](#).



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About Periti Digital

Periti Digital is an Elite Status European HubSpot consultancy with offices in Dublin, Munich, Lisbon and New York. We have delivered complex CRM Projects and Custom Integrations across Europe.

A Full Service Consultancy,