

Seamless Integration Among Best of Breed Solutions

Scott Hollrah, Founder / Managing Partner



Introduction

- Graduate of the Mays school at Texas A&M
- Worked with many technologies
- Focused on salesforce.com and integrations with Sage Intacct
- Experience: diverse industry verticals
- Big picture approach to integration projects



(214) 762-6891
shollrah@venntechnology.com
venntechnology.com
linkedin.com/in/scotthollrah



Session Objectives

At the end of this session you will be able to:

- Know whether or not to integrate
- Decide which integration approach out of several is best for you
- Know what criteria to consider before embarking on an integration



Self-Evaluation

- What applications does your organization use?
 - Salesforce
 - Raisers Edge
 - Case management
 - Other
- How well integrated are your systems?
 - Scale of 1-10
- If low on the spectrum, tell us how this challenges you and your team.



Today we use LOTS of apps

Classy

apsona
for salesforce



DocuSign



TASKRAY
MODERN
PROJECT
MANAGEMENT

cvent

pd PandaDoc

shopify

RAISE & DONORS



sage Intacct



slack

webmerge



box

WUFOO

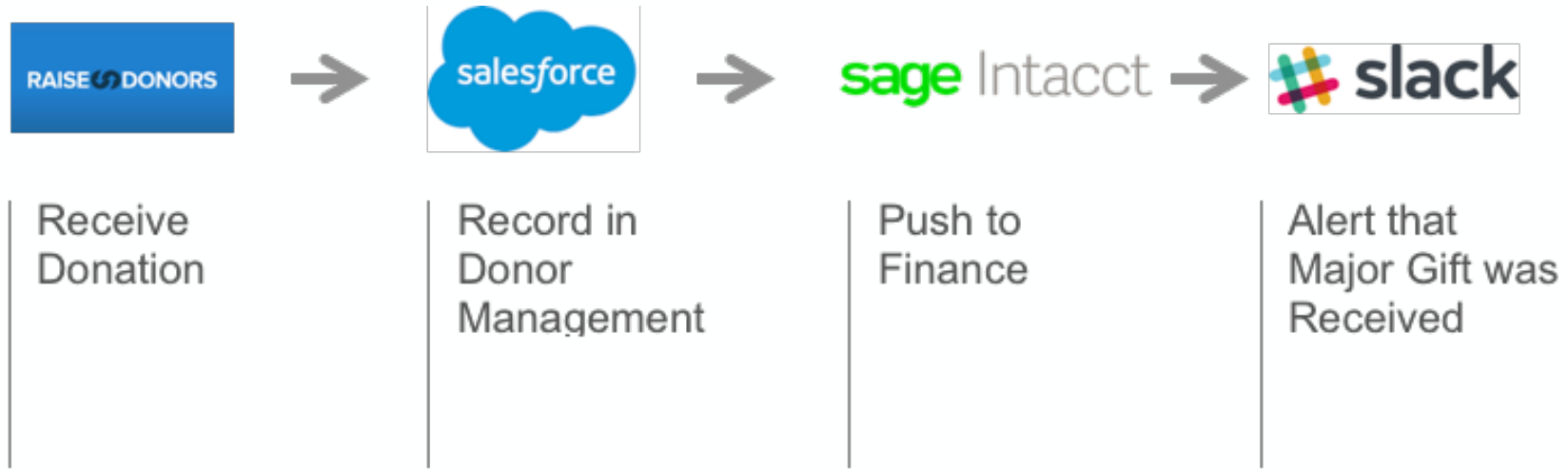
autopilot



stripe



In 2020 things should work together



In 2020 things should work together



Why is it important that things work together?



- **Manual data transfer processes are:**
 - *Time consuming*
 - *Error prone – the more times you “touch” the data the more likely there is for something to go wrong*
- **Lack of timely insight into:**
 - *Revenue*
 - *Expenses*
 - *Program Metrics*



Integration Options – Hand Export / Import*

Pros:

FREE!

Cons:

Time consuming

Formatting

Data Transformation

Error-prone

Duplications (did I already import these?)

Mistakes in formulas / corrupt macros



** Sometimes the only option — beats hand keying data*



Integration Options – Packaged Integrations



- **Pros:**

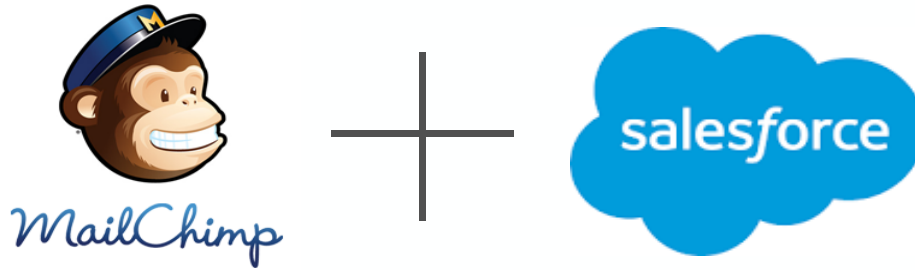
- Can be quick to implement
- Software publisher makes updates / adds functionality over time

- **Cons:**

- May not be suited for the desired use case
- Do not always play well with customizations



The Solution – Integration Options



Here's my "My MailChimp Story"



Integration Options – Packaged Integrations



sage Intacct



Integration Options – Custom Code

Custom Code/Point to Point/Web Services

- Pros:
 - Get exactly what you want
- Cons:
 - Usually the most costly option
 - Time consuming to implement
 - Not flexible
 - Requires experienced coder to modify



```
ret = op  
  
for ( var a i  
    var val =  
    if ( val  
        ret +  
    }  
    return ret +  
  
},  
functionArgs:func  
    var l = fn.le  
    if ( !l ) ret
```



Integration Options – Middleware

workato



- Pros:
 - Get exactly what you want
 - Extensibility to multiple systems
 - Faster to implement than custom code
 - Most flexible
 - Error handling / retry mechanisms
- Cons:
 - Not packaged
(i.e. no updates from a publisher)
 - Ongoing investment tool



Integration Options – Robotic Process Automation (RPA)



- Pros:
 - Get exactly what you want
 - Extensibility to multiple systems
 - Faster to implement than custom code
- Cons:
 - Not packaged (no updates from a publisher)
 - Ongoing investment in the integration tool



Integration Options – Robotic Process Automation (RPA)

Invoice#1_95783341_Alfa Star Co.pdf - Adobe Acrobat Reader DC

Home Tools invoice#3_95783341... x

125%

Logo

Invoice #: 95783341

Company: Alfa Star Co

Contact Person: alex.chan@expressorint.com

Invoice Details:

Description of Services / Product	Quantity	Unit Price	Amount	Currency
SW development as per release # 4.1	1	4700	4700	USD
SW development as per release # 4.3	1	11500	11500	USD
SW development as per release # 4.4	1	18000	18000	USD
TOTAL (including VAT)			34200	USD

Payable to:

Beneficiary name: Marint Limited

Account number: 450-390-86764023

SWIFT code: CITIMX

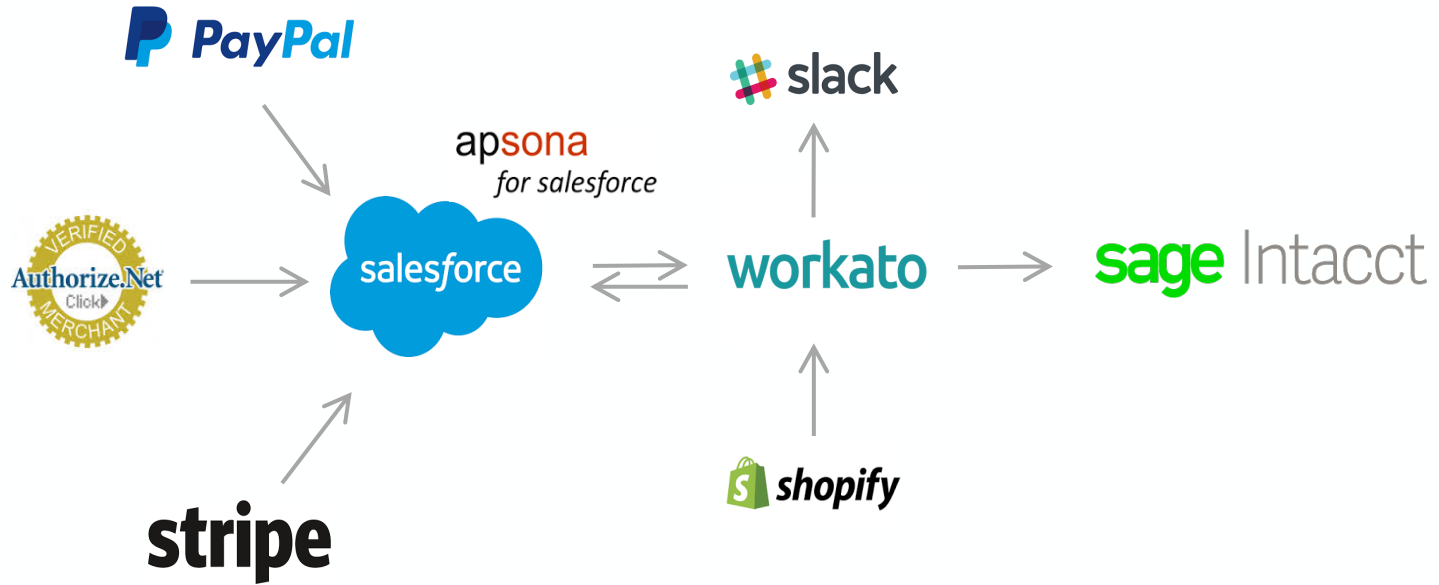
Using OCR:
SW Robot identifies invoice type to process as per set up algorithm



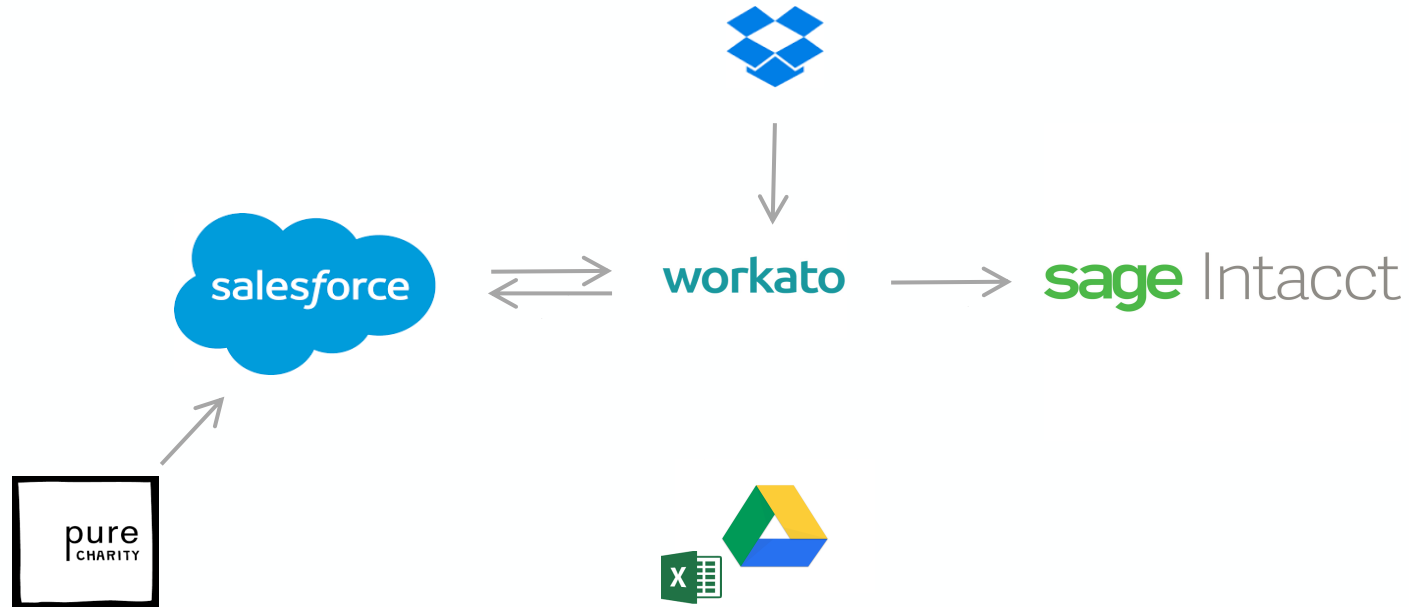
Integration Examples



Integration Examples – Financial with eCommerce



Integration Examples – Financial & Operations



Considerations



Considerations

Begin with the end in mind:

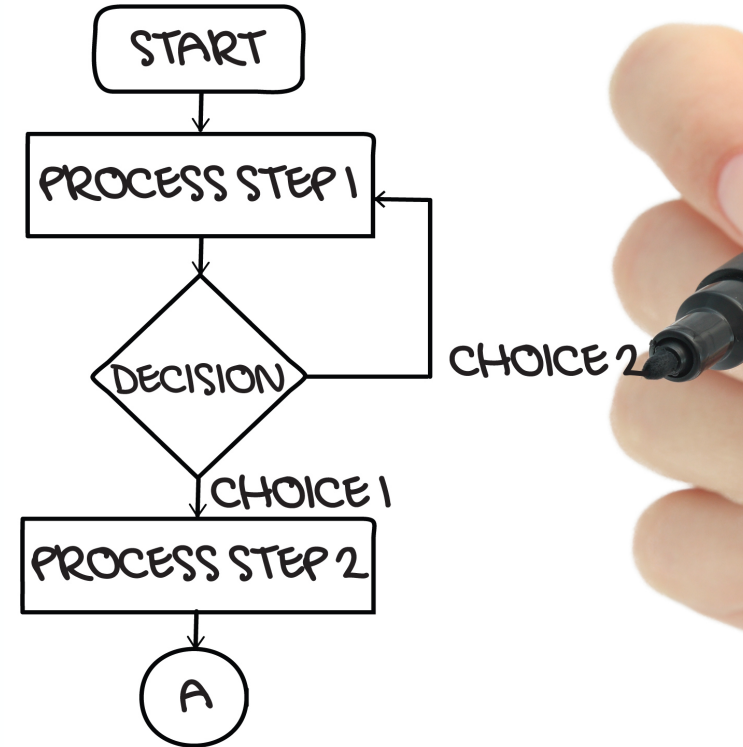
- Can you finish the following sentence:
 - When properly integrated, our systems will...
- Example:
 - sync all of our customer data across systems so that users can see full order / payment history in each app
 - provide access to summarized journal entries for all donations on a daily basis



Considerations

Process

- How well defined are your business processes?
- Is everyone on the same page?
- Where does the integration begin/end
- Should your integration run:
 - *Automatically based on a trigger event*
 - *By button press*
 - *After operations/accounting review*
 - *On a schedule*



Considerations

What is the quality of your data?

- If you have a mess in one system you will have a mess in two systems after integration is complete
- Do you have:
 - Duplicates
 - Incorrect data
 - Missing pieces
- Common ID's across systems



Demo



End to End Donor Integration

Page Editor | RaiseDonors x Raise Donors Integration Demo x Ealy Household \$100 Raise Do... x Plum Corporation x Plum Corporation x +

https://www.intacct.com/ia/acct/frameset.phtml?sess=TR-YBB0V8F8d_kT7MwUJKV30V3w_#

Apps Gmail: Email from ... QuickBooks Intacct Login Mac Rumors: Appl... Lifehacker - Tips ... Venn Technology ... WSJ Fox News - Break... Engadget Salesforce Partne... Venn Time Sheets Salesforce Web A... Other Bookmarks

Company Type: Sales demo

Plum Corporation Top level

Beta UI On Off Send Us Feedback Paulk Michael ?

Applications Favorites

GU - Journal Transactions

Add Delete Done Export

All Manage views

☐ Include private Advanced filters Clear all filters

1 2 3 4 5 > > 17 (1 - 20 of 327)

No	Reference number	Description	Date	State	Delete
Edit View 345	006400000FGWqSAAH	Ealy Household \$100 Raise Donors 2018.11.09	11/09/2018	Posted	Print Excel
Edit View 344	006400000FGWbSAAH	Bramblett Household \$100 Raise Donors 2018.11.09	11/09/2018	Posted	Print Excel
Edit View 336	006400000FEZJXAAH	Mckittrick Household \$50 Raise Donors 2018.10.18	10/18/2018	Posted	Print Excel
Edit View 335	006400000FEZ4oAAH	Schwab Household \$250 Raise Donors 2018.10.18	10/18/2018	Posted	Print Excel
Edit View 334	006400000FEY1AAP	Antonio Household \$125 Raise Donors 2018.10.18	10/18/2018	Posted	Print Excel
Edit View 333	006400000FEYAJAP	Montanye Household \$25 Raise Donors 2018.10.18	10/18/2018	Posted	Print Excel
Edit View 332	006400000FE7A2AAL	Eck Household \$25 Raise Donors 2018.10.09	10/09/2018	Posted	Print Excel
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Edit View 315	a5J2900000099qEAA	TR-000000016 - 2018-09-17	08/17/2018	Posted	Print Excel

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Thank you!

Questions

