

Basics of Integrations

The SME guide to get started with automation



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APIs are the mouths and ears of software - Important to transfer information

Issues with APIs, or their absence, are very underlying problems. You need your software to communicate in order to run your processes effortlessly and effectively. Otherwise, we would be talking about pastimes like copy-pasting or the ominous spreadsheet game now.

APIs are the enablers for communication and information exchange between software. Very much like the human senses. Similarly, software works best when it's connected or also called integrated.

In this guide we will tell you about the different options to get your software communicating. After reading this, you will know what to take into consideration about integrations and APIs.

However, this is not a set of instructions on how to integrate your apps. It requires constant effort to make data transfer 100% reliable and we believe you have more important things to do. Nonetheless, you'll get all the basic ins and outs to judge whether you should integrate your software and what will happen to your business data in the background.

But now. Make sit back and enjoy the read!

Apps, apps everywhere!

In fact, businesses use various software to run their business processes. A sales team uses CRM to manage new customers and do their sales work easily. A webshop platform with different plugins is used to serve the customers and make the desired products conveniently available to a large audience.

In addition to an online shop, products can be sold in a brick and mortar store in which case there's the need for a POS system and warehouse management system. Already we are dealing with multiple registers and databases. Now there's another responsibility every company needs to attend to - accounting.

Some parts of which are often outsourced to the accounting firm, a partner with its own financial management system. Their work is often closely knit to the customers. With a shared access, the firms are enabled to take care of invoicing and paying bills themselves.

Quite fast, SMEs find themselves using 5 different tools! To get the most out of them, the apps need to communicate with each other - preferably automatically and without the need of human intervention to save the most time.

Almost a standard set of systems

- ✓ E-Commerce
- ✓ POS system
- ✓ CRM
- ✓ ERP
- ✓ Accounting

[Check out the apps that we connect](#)

Things causing grey hair due manual, repetitive work

- ✓ Order processing
- ✓ Entering Customer information
- ✓ Updating Product information to many systems
- ✓ Checking stock balances in different apps

Let's face the facts

The biggest problem in managing the whole pack effectively lies in the fact that the different software you would like to use is not built to work together naturally. In many cases though, the provider equipped it with an interface to input or grab data of it. These are called APIs and are fundamental parts of any integration.

If you are responsible for fulfilment in your firm, then you know the trouble. You need to handle the orders, update them when something changes and keep the stock balance in the POS and/or inventory management system up-to-date. If you need to do everything by hand, you feel locked in and can't work as efficiently as you'd like.

The accountant or financial manager on his behalf, has his own headaches too. In the worst case, he's collecting the necessary information from a number of different places and enters them manually into his system.

Needless to point out that all information already exists. It's just not in the right place and is waiting to be transferred. These processes of copying, when done manually, are a real pain and contrary to running things effectively.



Three ways to transfer your data

1. Manual transferring

The most primitive method of transferring data between programmes is to type the information again in two (or more) systems. A good example of this is entering the order data while online shopping. Many platforms allow the customer to save their information. So that they don't have to type everything again the time they order. It would only be fair if the webshop owner would be given a comparable alternative to facilitate invoicing. In the end, an automated data transfer into accounting would also speed up things and benefit the customer.

2. The Excel game (love-hate relationship)

This approach is taking the manual transfer one step further. The data is first gathered in what usually are excel or .csv files and then fixed and formatted to be imported into the other software. This method requires that both systems are able to produce and receive data in the same format or that you manually alter the sheets until you get a match.

3. Automated data transfer and integration

Let's get one thing out of the way before we get into detail here: We won't talk about integration projects here. They are very expensive and mainly just for large corporations which require highly tailored solutions. So they're mostly a thing of the past.

As already mentioned above, software can be connected through APIs. These connections are called integrations. Depending on the interface, the data can be moved in one or both directions.

In today's world, where we love to connect in many ways and try different services, the role of software integrations is important too. Integrations enable you to focus on important tasks and unleash every system's full potential. Together programmes help more than each system combined.



Nooo...

I don't want to hear it!

When it comes to technical terms like APIs & integrations the general bias is this:



It is uncomfortable, something expensive, especially when you end up being between two software houses pointing fingers in random directions. In many cases, neither of the software providers want to take responsibility for the API clutter. Often there are two APIs ready and waiting but someone needs to get them connected.

As indicated above, a smaller sized companies don't have the resources like big enterprises and cheap piecework is often not working at all. If only there'd be a reliable solution for SMEs!

Listen up!

You know that all advertisement and online shopping experiences are individualised for the user. You are only offered the things that are suitable for you. This applies for softwares too, you should only use the solution you need and that is suitable for you.

Manual transfer may have been your cup of tea in earlier stages of your business. Perhaps it's time for a change now.

It is important that you keep your processes lean and avoid unnecessary work. Maybe you already found the perfect fit for you but we urge you to look into future and check if you can make your apps are compatible. If not, you will cap your growth at some point!

Change requires time, especially in a continuously running business. There are always barriers to positive change. Let's look at an example though how you could improve your processes.

Avoid these common traps!

Let's take a look at eCommerce. There might be many ways to run an online business but the key to success is to automate the right parts of process. For this you need to find out what is really happening and identify your opportunities to scale up.

Does the following sound any familiar?

- ✓ The customer places an order on the webshop and gets an email confirmation.
- ✓ The merchant types the customer's name, address and the order content into his accounting system.
- ✓ Now it's time to check on the stock. Are the stock balances in the warehouse system, the accounting and the webshop identical?
- ✓ After this, the merchant collects the tracking codes and shipping details and sends the order confirmation to the dear buyer.
- ✓ Ready to be shipped?! Almost. Don't forget that the shipping status needs to be updated as well.

That's not quite perfect yet, is it?

Let's now imagine how your e-commerce could run if the some parts of the processes were automated. Go through the list and identify your savings potential.

- ✓ The customer places the order on the webshop and gets an email confirmation.
- ✓ All the relevant information is automatically imported into the accounting software and the reports are done automatically.
- ✓ Stock balances are updated automatically across all systems that support this information, including the webshop and inventory management system.
- ✓ The order is shipped automatically by an external fulfilment service or easily from your own storage. Likewise, the shipping information is
- ✓ While all this took place the merchant had the time to work on his latest season sale campaign and generate more revenue.



Flashnode is the best transactional business process integrator in the world. Our goal is to help businesses build the best possible process using the software they prefer.

With the help of automated integrations, we remove manual routine work from our customers' day-to-day business.

We leverage our strong experience of integrations to build reliable integrations that are easy-to-use and convenient for any business.

- ✓ No technical setup required
- ✓ full in-house support
- ✓ Monthly paid integration service
- ✓ Supporting commonly used software by SMEs
- ✓ Constantly building new connections to the most popular cloud-based tools

**Integrations as a service
make it possible to choose
the best apps for a
particular fit at the very
specific moment. Switching
software becomes
effortless and easy.**

Ready for a change?

Find out more on our website www.flashnode.com