

frends

Integration Template

Handbook & Integration
checklist



Frends

This handbook provides an introduction to templates and actionable strategies for integrating business systems across various sectors, ensuring seamless operations and data accuracy.

Data Management & Synchronisation

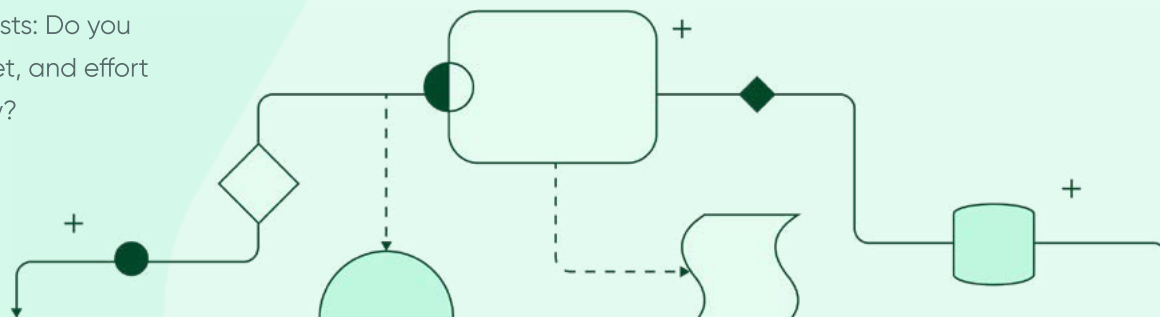
This checklist is designed to help you evaluate the current state of data management in your organization. Simply check the boxes that apply to your business to identify key areas where data inconsistencies, inefficiencies, or manual processes may be impacting your operations. This quick assessment will guide you in recognizing the critical needs for improvement and help prioritize actions to enhance data management and synchronization.

Does your business experience:

- Data Inconsistency: Do manual updates lead to discrepancies between systems, resulting in unreliable data?
- Inefficiency: Do teams spend lots of time on manual data entry, causing occasional errors that slow down processes?
- Delayed Reporting: Is manual work and errors preventing real-time insights and leading to outdated information for decision-making?
- Increased Operational Costs: Do you spend a lot of time, budget, and effort to manage data manually?
- Poor Customer Experience: Is manual work and errors preventing real-time insights and leading to outdated information for decision-making?
- Compliance Risks: Is your business at risk of having inconsistent data handling that can lead to regulatory compliance issues?
- Business Continuity Risks: Are only some parts of your business process visible or managed by a single person?

Does your business critically need to:

- Reduce the amount of errors?
- Reduce the amount of manual work?
- Free team's time to focus on higher value tasks and projects?
- Get real-time and up-to-date and reporting?
- Handle data growth at scale easily?
- Ensure/improve consistent and compliant data handling?



Score Results

0-2 items checked: Low Impact

Your business may already have effective data management and integration processes in place.

Your business appears to have minimal issues with data management and synchronization. It likely has systems in place that effectively reduce errors, streamline manual work, and ensure that data is accurate and up-to-date. The operational costs associated with data management are likely controlled, and customer experience is not negatively impacted by data issues.

Continued monitoring is recommended to maintain this state, with occasional reviews to ensure that the systems remain efficient as the business scales.

Recommendation:

Focus on maintaining current systems and monitoring for any emerging issues. Consider continuing with data analysis using AI/LLM models to gain deeper insights into processed business data, while also ensuring that the systems are capable of supporting the growing demands of data management and processing.



0-2

Score Results

3-5 items checked: Moderate Impact

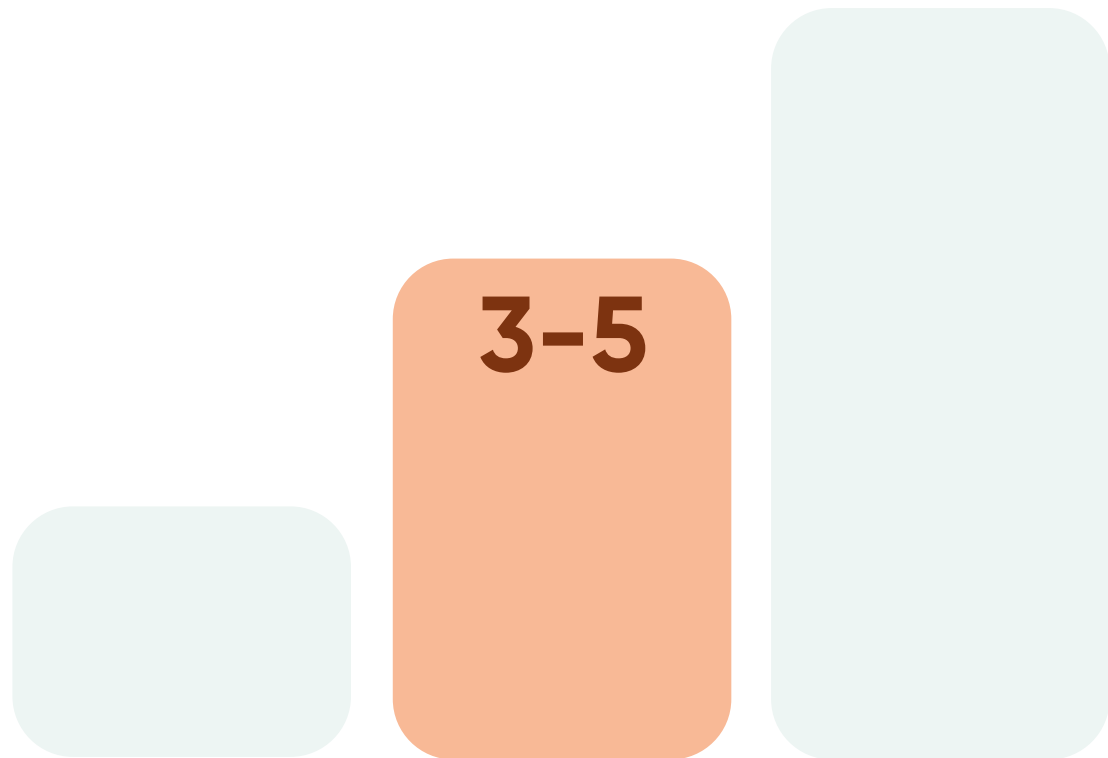
Your business faces some challenges with data management and could benefit from improved system integration.

Your business experiences some challenges related to data management. There may be occasional data inconsistencies, inefficiencies, or delays in reporting. These issues can lead to increased operational costs and may affect the customer experience or decision-making processes.

Addressing these areas might involve automating data entry processes, improving data synchronization across systems, and investing in tools or software that enhance data handling. Improving in these areas can lead to better real-time data availability and reduce the manual workload, freeing up your team for more strategic tasks.

Recommendation:

Consider incremental improvements and possibly upgrading systems to enhance data synchronization and reduce manual workloads.



Score Results

6-8 items checked: High Impact

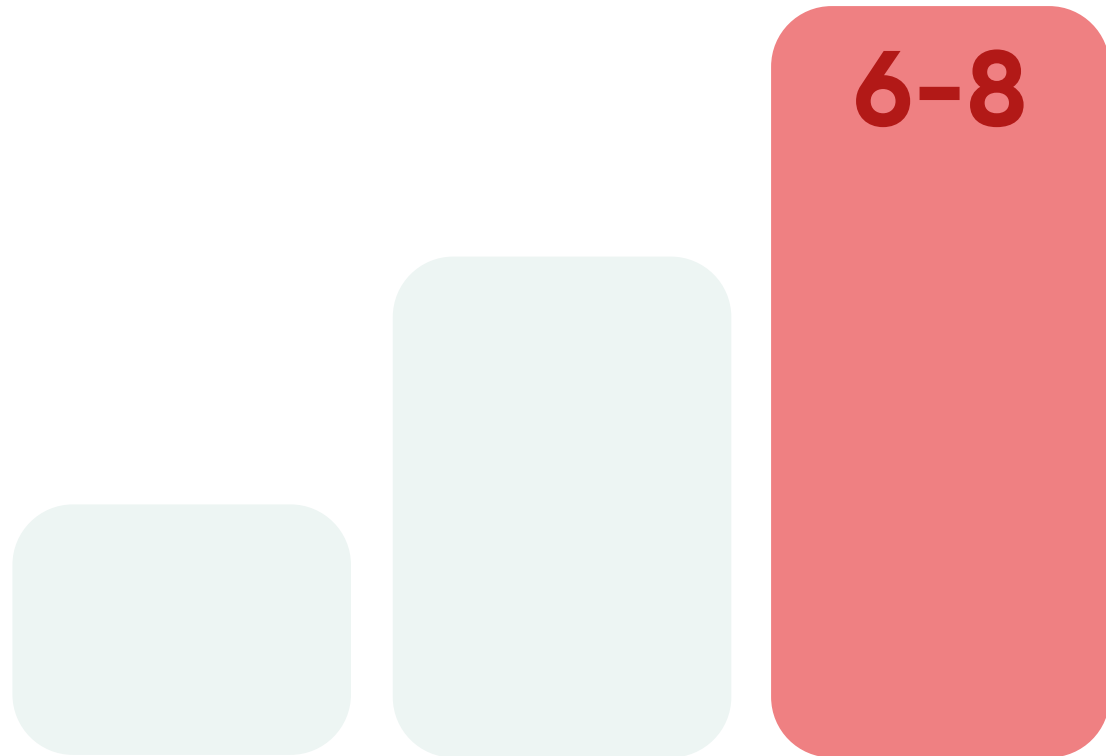
Your business is significantly affected by data management and system integration issues, which could be hampering overall efficiency and decision-making.

Your business is facing significant challenges with data management and synchronization. Manual updates are likely to lead to data inconsistencies and errors, which could slow down processes, delaying reporting, and increasing operational costs. These issues might also be affecting customer experience and could pose compliance risks.

It's critical to address these challenges by implementing robust data management solutions, possibly including automation, better system integration, and real-time data processing tools. Ensuring that data is handled consistently and in compliance with regulatory standards will also be important. Prioritizing these changes can lead to substantial improvements in efficiency, cost savings, and decision-making.

Recommendation:

Immediate action is recommended to overhaul data management systems, possibly including new software implementations, staff training, and improved processes to ensure consistent and accurate data handling.



Data Management & Synchronisation

Retail:

Ensuring consistent and accurate customer data across sales platforms and backend databases enhances customer service and personalized marketing.

Example:

Synchronizing customer data between a point-of-sale (POS) system and a CRM platform. When a purchase is made in-store, the customer's information and purchase history are automatically updated in the CRM. This allows the retail business to provide personalized marketing offers based on the customer's previous purchases and preferences, improving customer loyalty and driving repeat sales.

Financial Services:

Synchronizing client data helps maintain accurate financial records and improves client interactions. It also enables automatic decision-making and enhances personalized marketing.

Example:

Integration between a banking CRM and core banking systems ensures that financial advisors have real-time access to client portfolios and transaction histories, enhancing personalized financial advice and compliance with regulatory requirements.

Manufacturing:

Synchronizing supplier and inventory data helps streamline operations and improve decision-making. It also enables networked collaboration across companies and cross-organizational business processes.

Example:

Integrating ERP systems with supplier databases and inventory management systems allows for real-time tracking of inventory levels and supplier performance, reducing downtime and optimizing supply chain management.

Data Management & Synchronisation

Healthcare:

Ensuring that patient information is consistent across CRM systems and medical databases, improving health care provision. It also speeds up patient care, ensures correct treatment, improves care, reduces risks, and enhances personnel utilization.

Example:

Synchronizing patient data between electronic health records (EHR) and CRM systems enables healthcare providers to access comprehensive patient histories, leading to better diagnosis, treatment plans, and follow-up care.

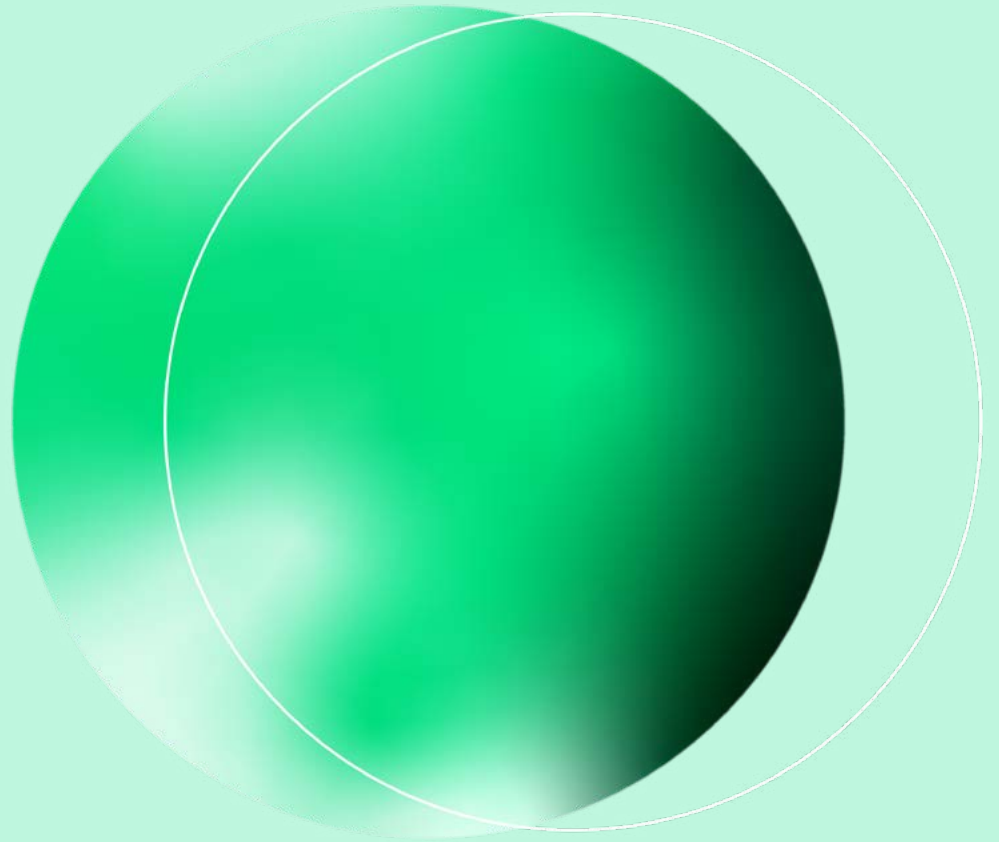
Public Sector:

Ensuring that citizen data is secure, accurate and up-to-date across administrative systems. Data management and process automation help address the service needs of an aging population, meet government reporting requirements, and fulfill the needs for eCity services with limited resources.

Example:

Integration of various municipal databases into a centralized citizen service portal allows for seamless access to public services such as permit applications, tax payments, and community resources. This improves the efficiency of public administration and also enhances the quality of service delivery to residents.

Templates

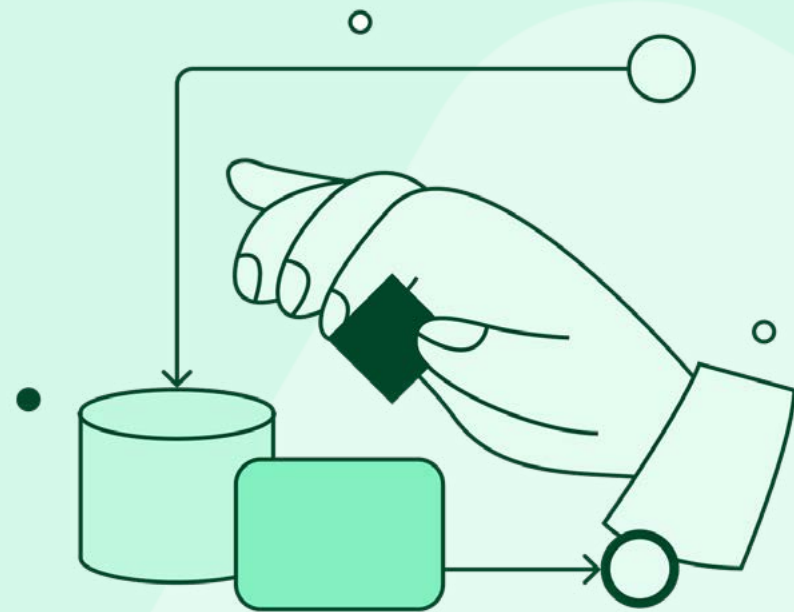


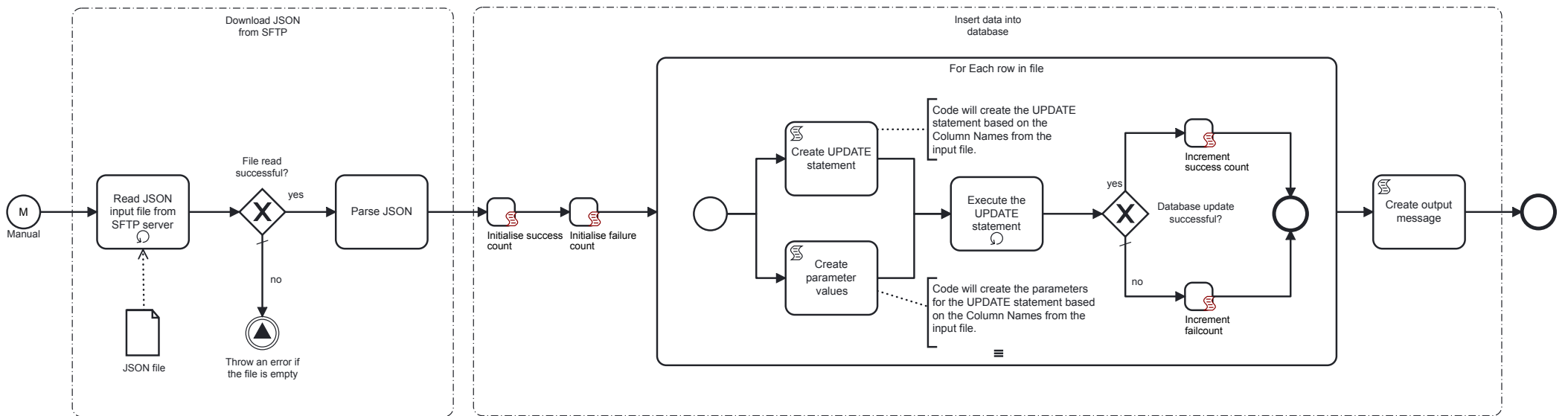
Oracle Database Update

This integration aims to connect to an SFTP server, read a JSON file containing data, and update the specified table in an Oracle database using the data from the JSON file. The process requires that the SFTP server user has the necessary permissions to access the files and that the Friends agent can access and update the Oracle database. The JSON file must have column names that match those in the Oracle database table and should contain the data in key-value format without nested elements. This template specifically performs UPDATE operations in the Oracle database, automating the process of updating records using data from the JSON file stored on the SFTP server.

By implementing this integration, businesses can significantly enhance their operational efficiency. The automated update process eliminates the need for manual updates to the Oracle database, reducing the time and effort required from IT staff. This streamlining of the workflow ensures a smooth and consistent process, minimizing the risk of human errors and ensuring that data is always accurate and up-to-date.

This process can handle large volumes of data updates efficiently, supporting business growth without additional manual workload. The system can be easily adapted to different datasets and table structures, as long as the column names in the JSON file match those in the Oracle database. This adaptability ensures that the integration can continue to meet the needs of the business as it grows





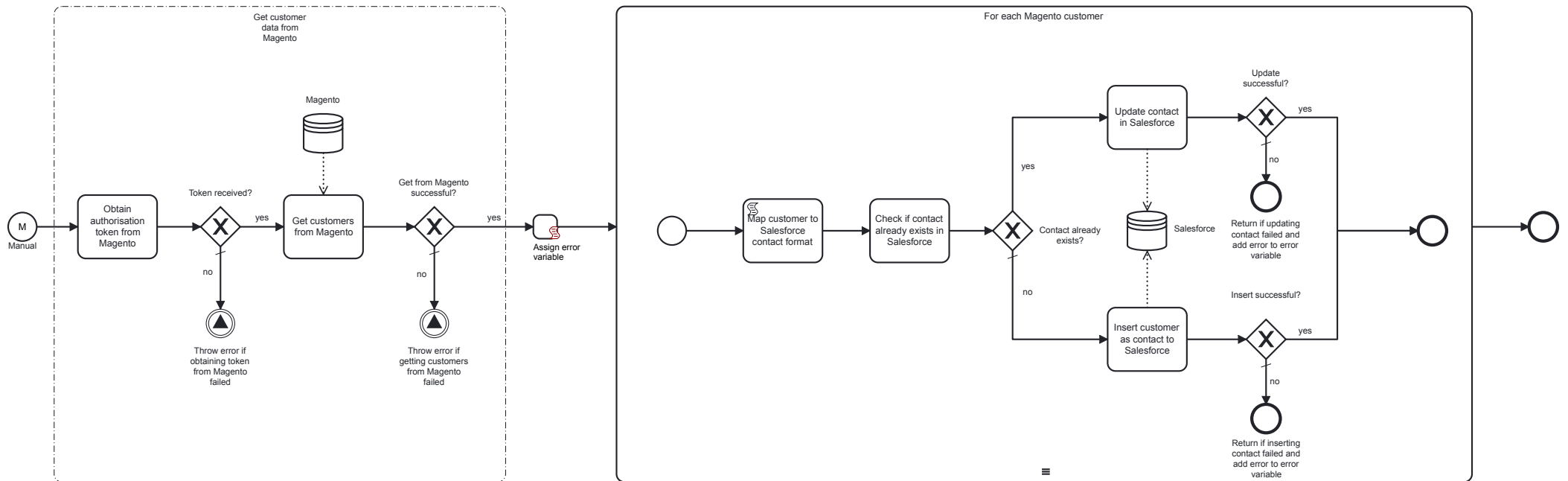
Synchronize customers from Magento to Salesforce

This integration synchronizes customer data from Adobe Commerce (Magento) to Salesforce as Contacts, ensuring customer information is consistent across both platforms. With Magento admin authorization and Salesforce credentials (client ID, secret, and security token), the template fetches customers from Magento and updates Salesforce, inserting new Contacts or updating existing ones based on email comparison. Deleted Magento customers are excluded from the transfer.

Automating this synchronization process significantly enhances operational efficiency. It reduces manual data entry, saving time and minimizing errors, which directly translates into cost savings. By ensuring that Salesforce always has the most current customer information from Magento, businesses can improve their customer relationship management, enabling more personalized and timely interactions.

This integration supports business growth by efficiently handling large volumes of data, thus eliminating bottlenecks associated with manual updates and allowing staff to focus on more strategic tasks.





Azure Document Intelligence

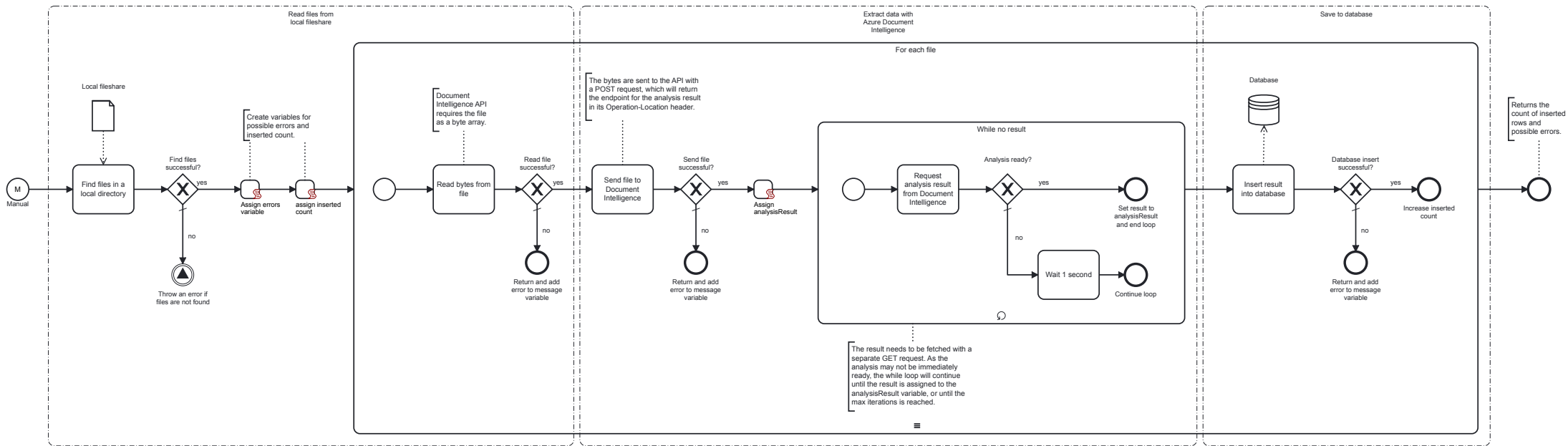
Extract data and save results to database

This integration automates the extraction of data from documents stored in a local fileshare using Azure Document Intelligence, and seamlessly inserts the extracted data into a Microsoft SQL database. By accessing the necessary files, processing them with Azure's powerful AI capabilities, and storing the results in a structured format, the template ensures that data is readily available for business analysis and decision-making.

Automating this data extraction and storage process significantly improves operational efficiency. It eliminates the need for manual data entry, reduces the likelihood of errors, and accelerates the time-to-insight for business-critical information. By ensuring that data is consistently captured and stored in a database, businesses can enhance their data management strategies and make more informed decisions based on accurate, real-time data.

This integration supports business scalability by efficiently processing large volumes of documents and ensuring that data is managed in a consistent and reliable manner. This allows businesses to eliminate bottlenecks associated with manual data processing, enabling staff to focus on higher-value tasks that drive growth.





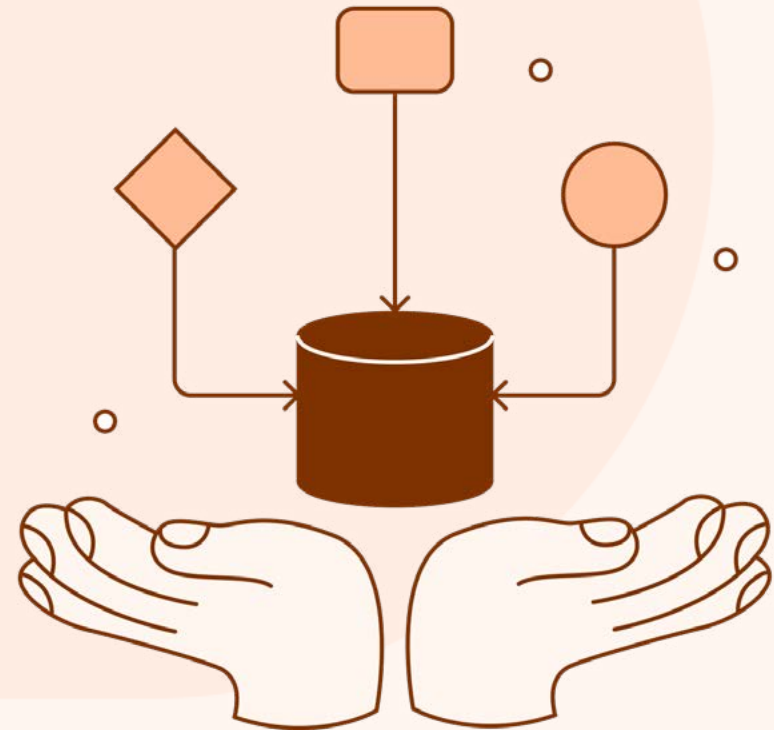
Shopify to HubSpot

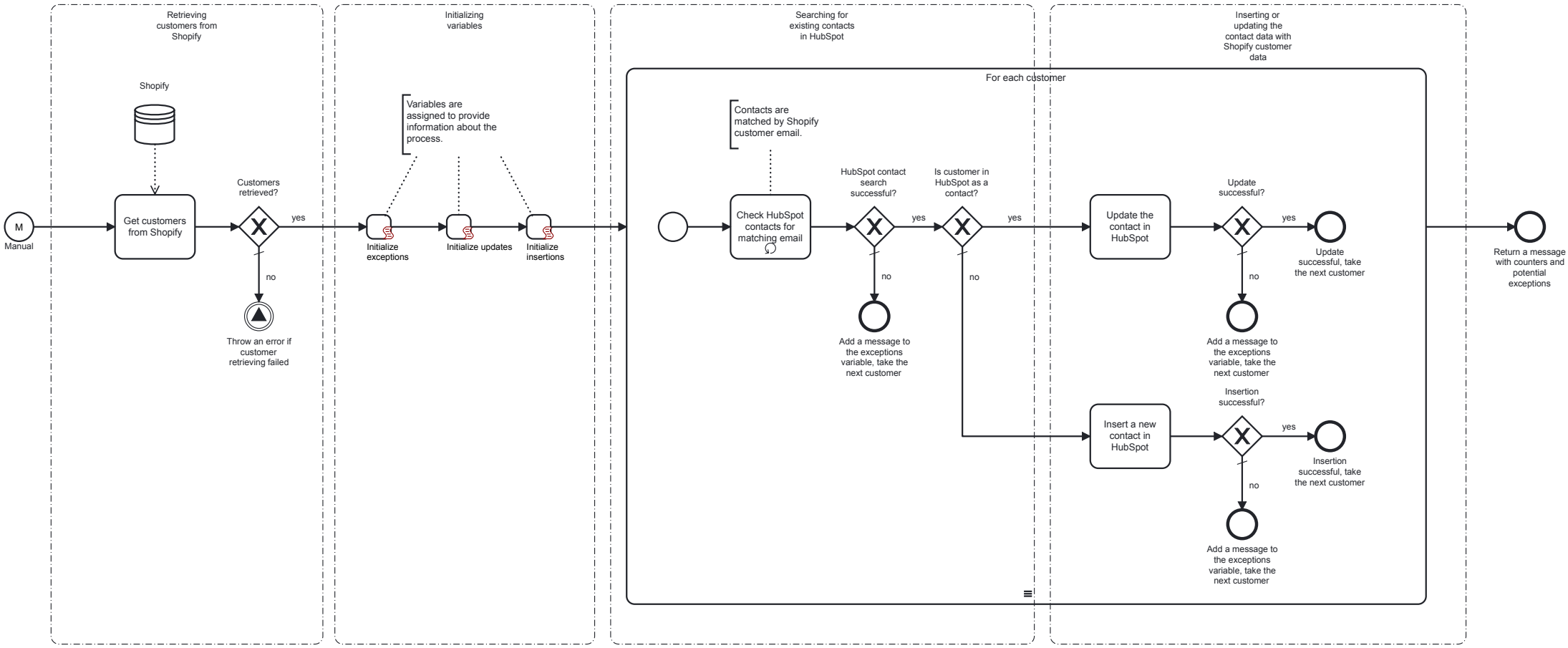
Inserting Customer Data from Shopify to HubSpot CRM

This integration aims to synchronize product information and pricing between Adobe Commerce (Magento) and Dynamics365, ensuring both platforms maintain consistent and up-to-date information. Automating this synchronization significantly impacts business operations by enhancing efficiency and accuracy. It eliminates the need for manual data entry, saving valuable time and reducing errors, thereby ensuring data consistency and reliability. With real-time updates, businesses can make informed decisions and provide customers with accurate product availability and pricing, enhancing the overall customer

The integration supports scalability, efficiently handling large volumes of data to accommodate business growth without additional manual workload. Its flexibility and adaptability to changes in product data structure and pricing models ensure it remains valuable as the business grows.

Improved inventory management is another key benefit, as this integration centralizes the system for managing inventory and pricing information. This centralization simplifies inventory control and guarantees timely and accurate pricing updates, which are crucial for effective sales and marketing strategies.



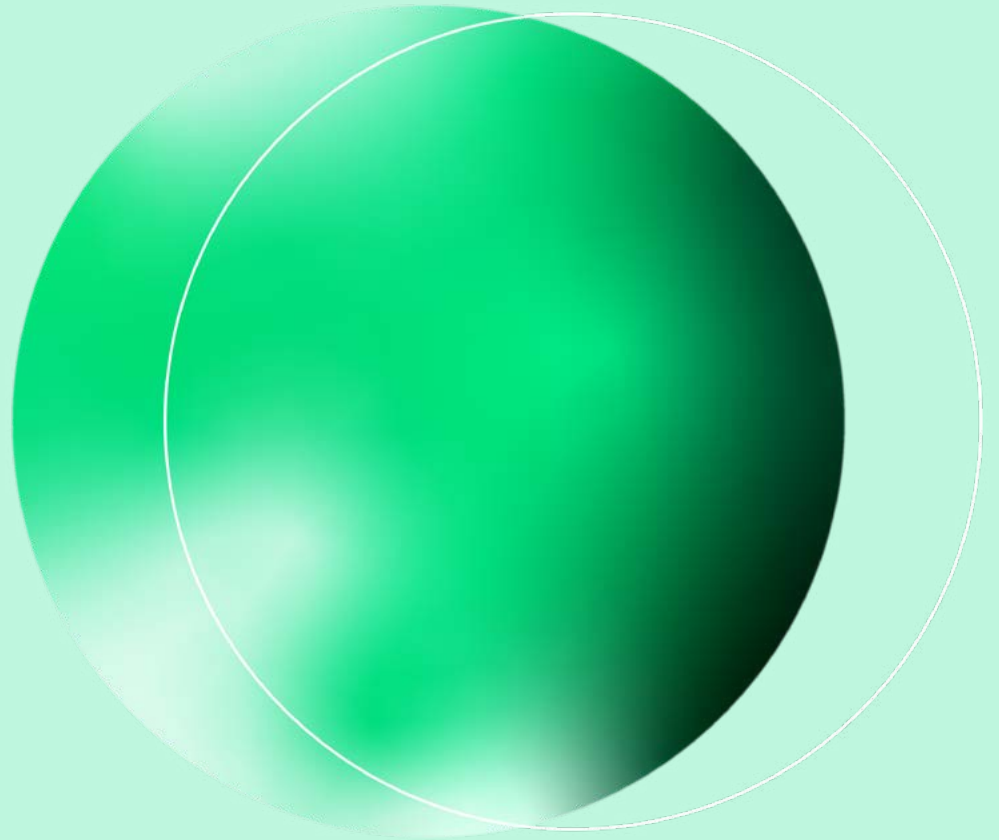


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Project Workshop Template



Example

Project Name:

Shopify to HubSpot Customer Integration

Objectives:

Sync customer data from Shopify to HubSpot

Automate the customer data update process

Key Stakeholders:

Project Manager

IT Team

Marketing Team

Sales Team

Requirements and Specifications

Key Functional Requirements:

Extract customer data from Shopify

Transform data to match HubSpot's format

Load data into HubSpot

Key Non-functional Requirements:

Ensure data accuracy

Maintain data security and compliance

Main Data Requirements:

Customer Name

Email Address

Purchase History

Example

Integration Details

Source and Target Systems:

Source: Shopify

Target: HubSpot

Essential Data Mapping:

Shopify Customer Fields to HubSpot Contact Fields

Main Interfaces/APIs:

Shopify API

HubSpot API

Risk Management

Top Risks:

Data Mismatch Issues

API Rate Limits

Mitigation Strategies:

Regular Data Validation

Implementing Retry Logic for API Calls

Example

Testing and Quality Assurance

Testing Approach:

Unit Testing

Integration Testing

User Acceptance Testing

Critical Test Cases:

Data Sync Accuracy

Error Handling

Deployment Plan

Deployment Strategy:

Deploy to Staging First

Full Deployment During Low Traffic Hours

Backup Plan:

Backup Existing Data Before Deployment

Support Plan:

Post-Deployment Support for 2 Weeks

Post-Implementation Review

Success Criteria:

100% Data Sync Accuracy

No Major Issues Post-Deployment



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solution architects.



About Frends

Frends iPaaS (Integration Platform as a Service) enables the development, management, and security of all integrations and process automation on a powerful low-code platform with over 4,300 end-users globally. You can build, secure, and manage APIs and integrations in a fast, easy, and transparent way, ensuring a seamless and compliant experience. Built on Microsoft .NET, the Frends platform was established in Finland in 1988 and has rapidly expanded in the Nordic region's domestic markets and internationally, now covering more than 16 countries. The Frends group comprises companies in Finland, Sweden, Poland, Germany, and Singapore, delivering a trusted and efficient integration experience.

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Fast, Easy, Transparent

The Frends Experience