Xtract IS & ERPConnect

Theobald Software builds a secure data bridge between SAP and MS Dynamics

The challenge of bidirectional data transfer between SAP IS-U and MS Dynamics 365

EWF considers automated, data-based business processes to be one of the key factors towards ensuring its successful position in the highly competitive energy market. In order to manage its processes even more efficiently and to align its sales organization to address areas with interesting market potential, EWF implemented a CRM industry solution based on MS Dynamics 365. A suitable interface solution was needed so that this could be supplied with up-to-date data from the SAP IS-U accounting system and simultaneously write it back from the CRM to the SAP system.

> "The data bridge between our accounting system SAP IS-U and MS Dynamics 365 is essential to our efforts to bring our business into the digital world and streamline it. Therefore, Theobald Software's interfaces are essential to our business as they provide stable and convenient bridges between the systems."

Ziad Iqbal, CRM-Consultant, Energie Waldeck-Frankenberg GmbH

The Solution: Xtract IS und ERPConnect

The energy services provider was recommended the SAP interface specialist Theobald Software as a capable "bridge builder". **Xtract IS** component suite is used to extract data from SAP and feed it into the CRM solution. With the help of the suite, SAP extraction processes can be integrated directly into Microsoft's integration services. SAP tables and queries can be addressed efficiently using configurable queries. A total of ten different connector elements can be used.

EWF solved the requirement to import data from MS Dynamics 365 back into SAP IS-U with the .NET Assembly **ERPConnect**, which is certified as an "SAP Certified Integration with SAP NetWeaver". This makes it possible to develop robust SAP interfaces without complex infrastructure or additional middleware. Different classes are available for each type of SAP object in order to make the design and implementation of the interfaces as convenient as possible (e.g. function blocks, SAP queries, IDocs, RFC servers, BW cubes, etc.).

Ziad Iqbal recalled, "We were able to achieve a good connection not only due to the sophisticated interfaces, but also thanks to the

Project overview

Company
Energie Waldeck-Frankenberg GmbH

Challenge
Data exchange between SAP IS-U and a MS Dynamics 365-based CRM industry solution for the energy industry

Solution
Xtract IS, ERPConnect

Time to deploy
A few days

Added value
Rapid implementation, minimal programming effort, ease of use, high level of data availability, and simple access to data

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technically experienced support staff who provided personalized service. I was able to open a support ticket very quickly and directly by contacting a Theobald employee, and it was processed swiftly."

Areas of application and benefits

The sales team uses the SAP IS-U data loaded in the CRM for tasks such as streamlined application processing for around 20 different funding programs that EWF uses to help its customers purchase energy-saving devices and innovative systems.

In addition, the CRM system can now be used to assign SAP business partners, which are stored in SAP as separate billing centers but who logically actually belong together, to an EWF customer at a higher level. Patrick Otto, manager responsible for IT process development and application support at EWF, explained: "If, for example, municipalities have various contracts with us, we can call up a consolidated view of them in the CRM interface to get a quicker overview of the business relationships."

In the future, all front office processes at EWF customer service centers will also be mapped in the CRM system. Here, too, Theobald interfaces will ensure the reliable and secure transfer of SAP data.

In the medium term, the energy service provider is aiming to fundamentally simplify data processing by using ERPConnect: The goal is that employees in specialist departments will be able to edit data directly in the CRM system. The changes are then to be validated in SAP IS-U and corresponding feedback is to be given to the CRM system that the changes have been adopted.

Project overview

The client
Energie Waldeck-Frankenberg GmbH (EWF) is a fast-growing energy service provider with around 340 employees and based in northern Hesse. The company provides electricity, natural gas, heat, and water to more than 90,000 households in the districts of Waldeck-Frankenberg, Kassel, and Schwalm-Eder, covering a service area of 1,742 km², and it is responsible for the operation, maintenance, and expansion of these supply networks. In addition, the EWF supports municipalities in the areas of project management, energy efficiency, and sustainability, and it operates key public infrastructure facilities such as public pools and local public transportation systems. Learn more at www.ewf.de.

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