

| White Paper

More than Magento and Prestashop: How to develop your e-commerce business?



Summary

- E-commerce website: from a pure player strategy to multi-channel sales
- E-commerce players: how to choose the right ERP?
- ERP software and e-commerce platform: friends for life!
- How to increase your e-commerce sales?
- Insert your Odoo/Prestashop or Odoo/Magento connector
- ERP E-commerce connection: don't waste time!



Introduction

Are you an e-commerce player and would like to expand into other distribution channels? You use Magento or Prestashop today, but are you aware that this will not be enough for your new project? The connection of an ERP to your e-commerce site is essential... But other questions then arise:

- Which ERP software to choose?
- How to connect your e-commerce platform with this ERP?
- What are the essential parameters to be taken into account?
- On which partner should you rely?

In this white paper, we give you advice on how to tackle the problem from the right end and avoid costly integration errors.

Have a good reading!

E-commerce website: from a pure player strategy to multi-channel sales

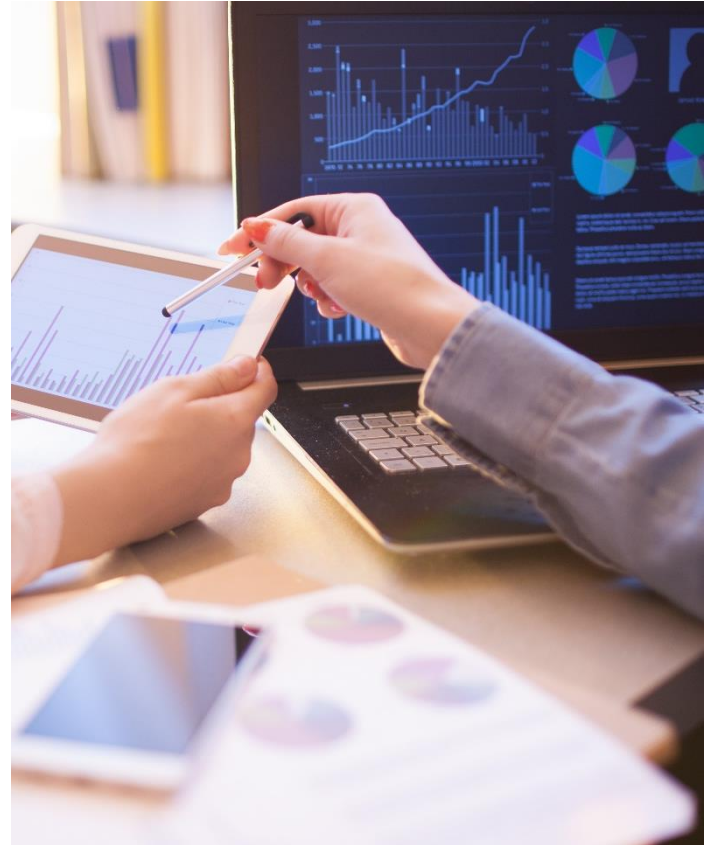
You are a pure e-commerce player and the growth of your company is well proven. To go further, why not diversify your sales channels? To do this, a multi-channel strategy must be developed. Here are some elements of success to deploy it effectively.



Redesign your overall strategy

To develop your company's sales, it is essential to be prepared (points of sale, marketplaces, distributors...).

First, take a step back from your current strategy. You will not necessarily target the same customers and offer the same offers depending on the distribution method: so set new objectives for each channel.



Adjust your internal organization

Once your strategy is established, reconsider your internal organization. It is essential to remove barriers between different distribution channels: your teams must also work in multi-channel mode.

To facilitate processes, the issue of data accessibility is becoming a priority. It is therefore important to consider the implementation of new management tools. Indeed, your e-commerce site becomes a distribution channel among others, and no longer the center of your company's information system.



Anticipate the growth of your business

By multiplying the number of points of sale and your presence in marketplaces, you will logically increase your sales.

Your company must be able to absorb future growth in both production and customer service.

To do this, you need flexible tools to manage your business and link it across all distribution channels.

Put customer relations at the heart of your approach

It is essential to understand consumer expectations and place them at the heart of your strategy. Create a consistent **multi-channel customer experience**: they like to have the choice, take the time to think, look for information on the Internet before finalizing the purchase.

The main part of the approach is to create complementarity between the different sales channels. They will not all have the same goal:

- the online shop will remain your preferred sales channel;
- the physical stores will make it possible to highlight your presence on the local market and to establish a close relationship with the end customer;
- the marketplaces will allow you to expand your customer base and your visibility on the Net.



Choose the best tools

You currently have Magento or Prestashop and this is perfectly suited for managing your online store.

However, as part of a multi-channel sales strategy, the e-commerce platform will not be able to fulfil the role of an information system and ensure consistency between the various distribution channels, logistics, after-sales service, etc.

The best solution is to set up an ERP software and connect it with your e-commerce platform. The ERP will make it possible to automate logistics, manage stocks, update product repositories....

The information will be updated in real time, while avoiding multiple re-entries and the risk of errors between the e-commerce platform and the ERP.



This will facilitate communication and information transmission between the different teams. In order to choose your solution, do not hesitate to consult our article on this subject (E-commerce players: how to choose your ERP?).



Work with the best partners

A project of this magnitude must be well supported. To choose the partner who will integrate your ERP software and connect it to your e-commerce platform, it is necessary to ask yourself the following questions:

- ➔ the integrator's experience: before you start, consult his references;
- ➔ the typology of its customers: collaborate with partners who work with companies of the same size as yours;
- ➔ the relationship between the integrator and the ERP publisher: is it a privileged partner?
- ➔ support: will you be on your own once integration is complete or will a long-term relationship develop?

You now have all the information you need to develop an effective multi-channel strategy. It's up to you!



E-commerce players: how to choose the right ERP?

Your successful business, whose main sales channel is based on your online store, is likely to grow exponentially. You had already made the winning choice to rely on one of the leading e-commerce platform technologies: Magento or Prestashop.

But the management functionalities offered by your e-commerce site are now reaching their limits. To "industrialize" your activity and processes, the implementation of an integrated management solution becomes essential. No more multiple re-entries, loss of information and lack of reliable and aggregated indicators: think ERP software!

What are the main criteria to take into account when choosing the GOOD ERP that will support your development? Our answer in 5 essential criteria...





#1: Adaptability

Your business is booming. You are even planning to move in the short or medium term on multi-channel sales complementary to your e-commerce site... In short, even if you have strong ambitions, you do not know exactly where you will be in a few months... Your future ERP will therefore have to adapt to this state of affairs!

You can leave aside the toolbox type software packages that naturally attract all VSEs and SMEs because it is ready to use. But not very progressive, they will not be able to follow your "massive" development projects!

On the other hand, choosing an ERP for large accounts (SAP R3, Sage X3, Microsoft Nav, etc.) would be a loss both financially and in terms of deployment time.

You should therefore opt for a middle-market solution. Indeed, they were created with the aim of providing medium-sized companies with the flexibility and power of "Key Account" solutions, but with more realistic deployment times and budgets.



#2: Evolutivity

Your business context is constantly changing: new products, increased international competition, fluctuating markets... You must therefore adapt to these paradigm shifts very quickly to avoid finding yourself on the side of the road.

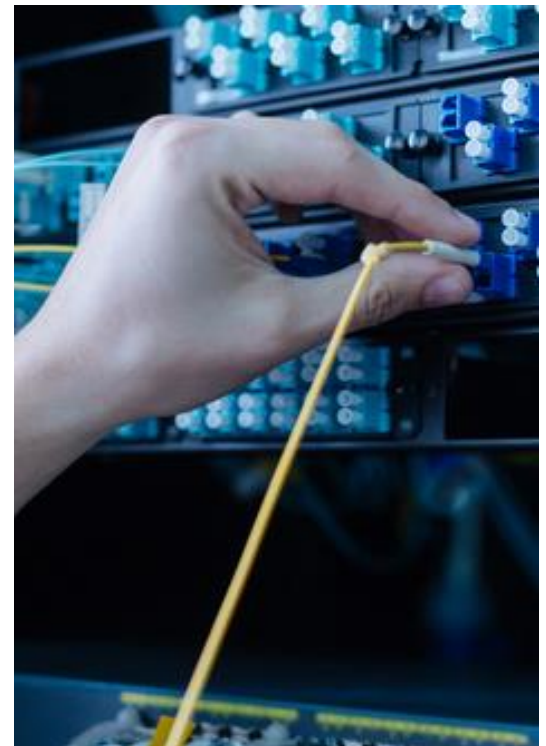
To answer this question, we strongly advise you to look towards open-source, which offers unrivalled development and scalability compared to so-called "classic" **software solutions**. Odoo, the **ERP** revolution for mid-sized companies, is an excellent alternative.

#3: Scalability

Your company will most certainly have to face more and more transaction flows, more and more sustained interactions with your suppliers and service providers; not to mention the new internal resources that will contribute to your development.

Your ERP solution must therefore meet these future needs with the possibility of multiplying, if necessary and on demand, your user licenses.

You should also opt for a solution whose hosting and maintenance could be delegated to a service provider (ideally the one who will assist you in setting up your project). The latter will ensure you an availability rate and performances much higher than a "home-stay" accommodation.



#4: Interoperability

To ensure the success of your project, ERP and e-commerce platform must communicate automatically and securely, via a Magento ERP connector or a Prestashop ERP gateway. Similarly, it will be necessary to build bridges with your other business applications.



The objective, as you will have understood, is for your ERP software to become the center of your Information System.

Article to be read soon on our blog: the parameters on the Magento and Prestashop ERP connectors to take into account.

#5: Support

Choosing your integrator is easy. Work with a partner:

- ➔ aware of the stakes, problems and specificities of e-commerce;
- ➔ able to advise you on the approach and the software solution;
- ➔ and able to challenge you and support you in the long term.

So, your choice is made?



ERP software and e-commerce platform: friends for life!

You have decided to develop other distribution channels, in addition to your e-commerce site. So you have chosen an ERP software (Odoo, in this case) but you are still wondering if there is an interest in connecting your ERP to your e-commerce platform. Here are some of the answers....

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Easy product management

Today, to update the products on your online store, you create product sheets manually, with reference, photos, prices, description and stock. This process is tedious and time-consuming. Especially since you have already entered this information in your ERP software.

- ➔ To avoid re-entering and reduce the number of errors, you can create a gateway between your e-commerce platform and your ERP. Thus, in case of addition of new products or modification of existing products, the update on your e-commerce site will be done automatically and instantly. Your ERP software thus becomes the sole source of your data.



Inventory management becomes child's play

When an order is placed on your e-commerce site, the stocks are updated in the backoffice of your e-commerce platform.

To ensure the most accurate stock, you need to make regular inventories to match your actual and virtual stocks. However, your warehouses are not necessarily in the same city or country, so it is complicated to monitor stocks and ensure a reliable quantity.

- ➔ If you create a gateway between your ERP software and Magento (or Prestashop), stock movements will be updated automatically, reducing discrepancies and errors. It also allows you to anticipate disruptions and better manage your production.





Customer management, a real gold mine

All customer information collected through your online store is valuable to your business. However, they may be lost or misunderstood when you want to integrate them into your information system.

→ Thanks to the gateway between Odoo and Magento or Prestashop, the information will be automatically recorded in your central tool. This makes your data secure and reliable and frees you from time-consuming processes. As customers are not limited to a single point of sale, you will be able to automatically reconcile all the data collected to refine your product offer and marketing strategy.

Logistics management: the end of the puzzle

When a customer places an order on the site, it must be prepared and then delivered to the carrier. The e-commerce platform makes it possible to manage this process and inform the customer. However, this information must be entered in the ERP to be able to process orders internally: purchase order, preparation form, delivery note, invoice....

Thanks to the gateway between Odoo and Prestashop (or Magento), the different stages of preparation and shipment of the package will be synchronized between the two tools. Your customer will be informed instantly by email and on his personal online space.

Accounting management: as easy as pie

The e-commerce platform generates an invoice with each order shipment. However, the accounting department must point out e-commerce transactions every day and enter them in Odoo, as invoices are platform-specific.



- ➔ The gateway between your ERP software and your e-commerce site, allows you to transmit your accounting data automatically and securely. Customer invoices are generated on Odoo and transferred to your customer's personal space. This makes your accounting easier.

In short, connecting Odoo with Magento or Prestashop will allow you to aggregate all the company's data in a single tool. By reducing time-consuming tasks, your teams will gain in efficiency and motivation.



How to increase your e-commerce sales?

Customer relations are at the heart of any company. And the stakes are even higher for e-commerce players. Indeed, without physical interactions, it is essential to stand out, attract the customer and build loyalty by offering an irreproachable service. In order to optimize and perpetuate this relationship, ERP software has its role to play.





Earn your customer's loyalty

Customer relationship begins as soon as the customer visits your website. To retain him and attract his attention, he must quickly find the information he needs about the products, but also about the company in general. The customer needs to be reassured at all times: it is up to you to show him that your company is reliable.

Thanks to the gateway between Odoo and your e-commerce platform, you guarantee your customer reliable information in real time: stock, price, product novelty... You therefore gain your customer's trust and, in the long run, his loyalty.

Opt for simplified commercial management

Once the order is placed on the site, the gateway between Magento (or Prestashop) and Odoo is done automatically. In the case of a B2B transaction, a quote will be generated via Odoo, allowing you to accept or reject certain orders. In the event of cancellation of an order, the customer will be notified directly and automatically by email and via his customer area.

In B2C transactions, payment is generally made directly on the e-commerce platform. The generated purchase order will be transformed into an invoice via your ERP software, sent by email to the customer and available in his customer area.

The connection between your ERP and your e-commerce platform allows you to inform your consumer at each step of the commercial relationship. Thus, in the event of a stock shortage or refusal to take charge of the order on your part, he will be automatically informed by email and via his personal space.



Optimize your logistics



Once the order has been placed and uploaded to Odoo, the logistics process is triggered. First, a preparation form is generated for picking. Once the order has been prepared, it is given to the carrier. At each step of the order preparation process, the ERP software transmits the information to the e-commerce platform, automatic emails are sent to the customer and all the information is available in his customer area.

Thus, the customer can follow in real time the progress of his order and has all the necessary information: shipping date, package number, estimated delivery date... By reassuring your customer, you increase his satisfaction, his confidence and therefore your sales.

Deliver quality after-sales service

In the event of a return or non-conformity of the order, management is simplified thanks to Odoo's integration with Magento or Prestashop. First, the customer will contact the company by email or ticket generated via the online store. The company can then take charge of the problem and try to find a satisfactory solution.



For an optimal service, the implementation of workflows is a relevant solution. Upon receipt of the customer's request, an automatic "Acknowledgement of Receipt" response will be sent to the customer.

Thus, he is informed that his request has been taken into account. This process is reassuring, the customer feels considered and knows that a response from the company will come.

Then, it is essential to respond in a personalized way to the customer and to find the best possible solution within a reasonable time (generally 48 to 72 hours after ticket creation). You can find in Odoo, the history of its order at a glance and thus solve the problem effectively.

Whatever your distribution channel, your goal is to take care of your customer. However, e-commerce companies must do even more to build a relationship of trust with their consumers. By connecting your ERP software with your e-commerce platform, you guarantee a simplified follow-up of all processes (from order taking to after-sales service).



Insert your Odoo/Prestashop or Odoo/Magento connector

So you decided to connect your Odoo ERP software with your Magento or Prestashop e-commerce platform. The goal? Facilitate your commercial management and centralize all information within a single tool. To do this, there are a few parameters to take into account.



Step 1: if you have not yet chosen between Magento and Prestashop

The connection between Odoo on the one hand and Magento or Prestashop on the other hand is relatively similar. However, Magento is more complex and scalable. Indeed, we can create product attributes that can be retrieved on Odoo software, while it is not possible to do so with Prestashop.

This provides more flexibility to recover the Product data that the company needs. If you have not yet decided between Magento and Prestashop, now is the time to ask your ERP integrator for advice.



Step 2: define the scope of your project

It is important to understand the scope of the project in order to offer the right features to your customers.

For example, it is essential to understand which Product data will be synchronized between the two tools.

Warning: the product repository does not always look the same between Odoo and Magento or Prestashop. Specific developments will undoubtedly be to be expected (in particular in the case of multilingualism or multishop).

Step 3: Install the connector



Might as well tell you right away: no, this step is not done in a few clicks! In any case, not if you want your data to synchronize optimally.

The installation of an Odoo connector with Prestashop or Magento allows data to be synchronized between the two tools. What are we talking about?

→ Product synchronization: this is the heart of your project. Products can be synchronized from the ERP to the e-commerce platform and vice versa. But it is not

automatic: the user can synchronize the data manually or program them (for example, synchronize the product data every day at 5pm).

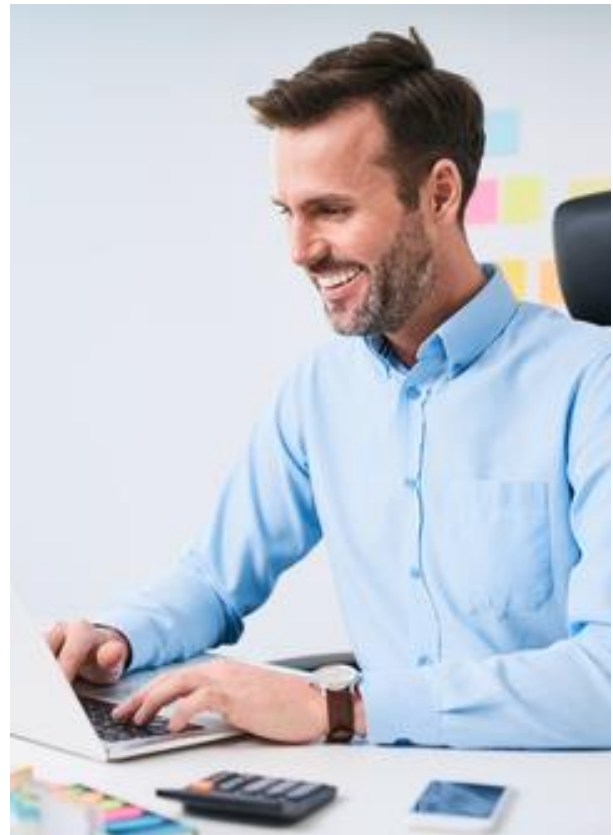
As soon as a price, image or product feature is changed in the ERP, the data will be updated on the e-commerce platform after synchronization. This avoids double entry of information.

- ➔ Synchronization of orders: as soon as an order is placed on the e-commerce site, the related information is transferred to Odoo software in real time. This synchronization is unidirectional: the data is transferred from Prestashop or Magento to Odoo.

When the order is processed in the ERP, the status will be updated in the e-commerce platform (example: order cancellation). In this way, the customer will be informed directly by workflows.

- ➔ Synchronization of customers: the synchronization of this information makes it possible to recover the prior art of the entire relationship with the consumer. By retrieving information from your Magento or Prestashop platform, your ERP can have consolidated customer information from all distribution channels. This will allow you to better know your target audience and adjust your marketing strategy.

These three synchronizations are the most important. However, there are other additional synchronizations: VAT, payment methods, languages and currencies used on the site... Feel free to ask your ERP integrator for advice to make the right choices!



Step 4: Train your employees

Once the Odoo/Prestashop or Odoo/Magento connector is installed, it will be necessary to train your employees in the different functionalities of the tool. Your users will need to know where they can retrieve synchronized data and how to do so.

If they were already using Odoo on a daily basis, they will have to forget the old habits, because new reflexes will have to be acquired.

Once again, do not hesitate to ask your ERP integrator about it. It will be the guarantor of an effective transition for all the services involved.



In conclusion, it is imperative to properly tie up the project in order to set up all the necessary synchronizations thanks to the Odoo / Magento or Prestashop module. To reassure yourself in the implementation of this major project, do not hesitate to call on an expert from the Odoo ERP...



ERP E-commerce connection: don't waste time!

"Every day you lose, it's a lost sale." You are convinced that the future growth of your company depends on the ad hoc integration of ERP software into your Magento or Prestashop e-commerce site... But how can you prevent the project from taking too long?

Make way for efficiency! Discover in a few minutes the key success factors for the rapid and successful deployment of your ERP project and a successful integration with your Magento or Prestashop e-commerce platform.

Three, two, one... Let's go!



1 / Choose the best partner

For the success of your project to integrate your ERP with your Magento or Prestashop e-commerce, have a specialist in the field assist you from the beginning of the project. He will have to answer the following triptych of skills:

- ➔ knowledge of the e-commerce market
- ➔ expertise in Magento or Prestashop e-commerce platforms
- ➔ expertise on the chosen ERP and information system



The benefits: you no longer have to worry about the "dark side of force", you can concentrate on your core business while benefiting from the experience of a reliable partner from the very beginning of your project.

2 / Choose the best methodology

Pay attention to the methodology your partner will propose to you. Because to ensure a rapid and efficient deployment, it is of paramount importance: framing phase, roadmap, training, delivery...



Agile methods are to be preferred, or even very strongly recommended, for this type of project since they allow to work in an incremental way and therefore very operational for visible results quickly.

Benefits: an operational ERP E-commerce connection much faster, without compromising your future scalability and scalability needs.



3 / Do not mix up speed with precipitation

Your ERP is becoming the central point of your Information System. It is therefore necessary to think about the project as a whole (needs, challenges, anticipated evolutions, implementation of Magento or Prestashop ERP connectors, etc.) from the outset so as not to see it drag on for too long...

A serious ERP integrator will help you to define your project correctly beforehand so that the deployment process does not encounter problems later on. It is better to think before acting, otherwise you would risk finding yourself in the middle of the ford for many months... and your sales would inevitably suffer!

But don't worry: once you're up and running and supported by the right provider, you'll only have to wait a few weeks to appreciate the substantial benefits of your ERP E-commerce connection: time savings, centralized information, better data management.



About Captivea

Captivea improves profitability of companies quickly and easily by deploying the best software in the world!

We implement CRM, marketing automation, ERP and custom development.

We use industry leading software, that is flexible, easy to deploy, and easy to use, that we can customize to the needs of each our clients.

We have deployed Salesforce, SugarCRM, Odoo and more...

We have deployed Salesforce, SugarCRM, Odoo, Microsoft Dynamics, Zendesk and Mautic.

We help companies in each steps of deployment by analysis, installation, settings, customization, support and maintenance.

Our clients appreciate our technical and business expertise, the relevance of our project method, and also the quality of the human relationships that we build together.



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