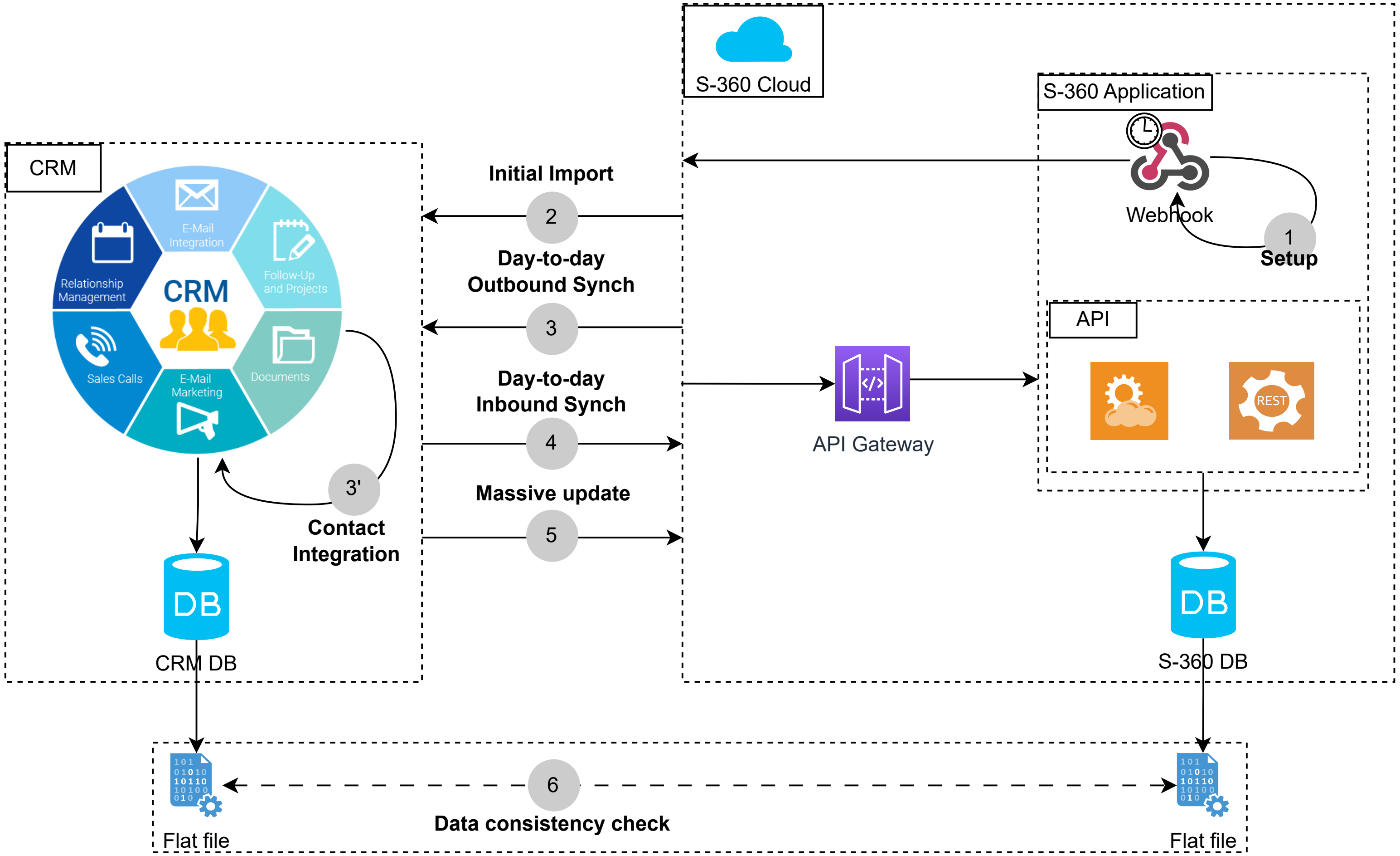
Bi-directional Contact synchronization between S-360 and an external CRM

The S-360 platform offers a comprehensive solution for bi-directional contact synchronization between S-360 and an external CRM system. This synchronization enables seamless contact integration and ensures consistent and up-to-date customer information across both platforms. The reference architecture provides detailed guidelines on integrating S-360 with various third-party CRM systems, outlining the principles and best practices.



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Secutix Reference Architecture

1 **Setup :** To establish communication between S-360 and the CRM system, a specific configuration is required. This configuration can be performed by a Secutix integrator or collaborator with access to S-360 backend. The CRM system needs to provide a designated URL to receive the contacts, which is then defined within the Webhook settings for seamless contact data pushing.

2 **Initial import :** To begin contact synchronization, a specific service request needs to be submitted to SecuTix. This request ensures that all contacts intended for synchronization are appropriately flagged. Once flagged, the contact synchronization process continues smoothly, following the predefined procedures outlined in step (3).

3 **Day-to-day Outbound synchronization :** The previously defined URL is utilized for seamless day-to-day contact synchronization. Contacts created or modified in S-360 are sent every 15 minutes by default, with the ability to adjust the synchronization frequency (between 1 and 1440 minutes) through batch parameterization. It's important to note that this synchronization process has a maximum execution limit of 500 contacts and a payload size restriction of 50 contacts.

3' **Contact integration :** In the process of integrating contacts from S-360, it is crucial for the CRM to handle the incoming contacts without sending them back to prevent the occurrence of an infinite loop.

4 **Day-to-day Inbound synchronization :** The CRM system is empowered to modify contacts within S-360 by making calls to the backend API. It's important to note that rate limits are implemented to prevent overload and ensure system stability. Detailed documentation is available here, providing clear guidelines on these rate limits and their application, allowing for effective contact modifications within S-360 while maintaining optimal performance.

5 **Massive update :** The system does not support a massive synchronization of contact from the CRM because of the throttle limiting the synchronization speed. If such an update is necessary, for example within a renewal process when contacts are flagged in the CRM, you need to contact SecuTix to handle it as a specific request. In such a case, SecuTix can temporarily increase the API rate limit.

6 **Data consistency check :** To ensure data consistency between CRM and S-360, it is important to address potential discrepancies that may arise during the day-to-day Inbound/Outbound Synchronization. In the event of missing or mismatched data in either system, a recommended approach is to perform a flat file export from both databases, including a unique key for each record. These exported files can then be used for systematic data comparison, facilitating the identification and resolution of any inconsistencies. By conducting regular data consistency checks, the integrity and alignment between CRM and S-360 can be effectively maintained.

All the API definitions and limitations, can be found in the Secutix platform website.