

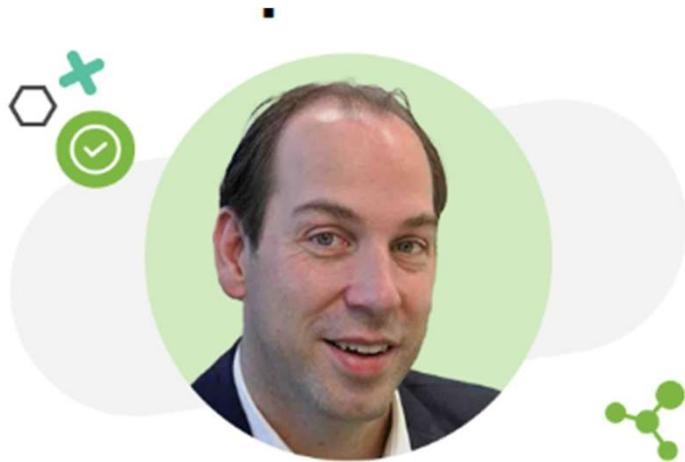
# Why is it important to have extensibility built into your ERP?

Learn why extensibility in your ERP is essential and what is available

UNIT4

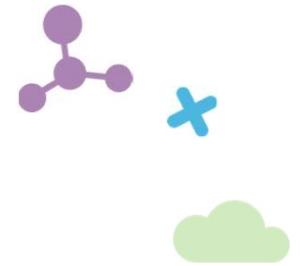


# Your speaker today



**Jeroen Figeo**

Head of Industry Models & Solutions  
Unit4



# Welcome

Join our **30 min webinar** to learn why extensibility in your ERP is essential and what is available through ERPx and ERP Continuous Release.

## High level topics for today:

- Why do you need your platform to be extensible?
  - What tools do we offer to support you?
  - What solutions does Unit4 provide to support you with extending ERPx and ERP CR?
-

01

# What's extensibility?



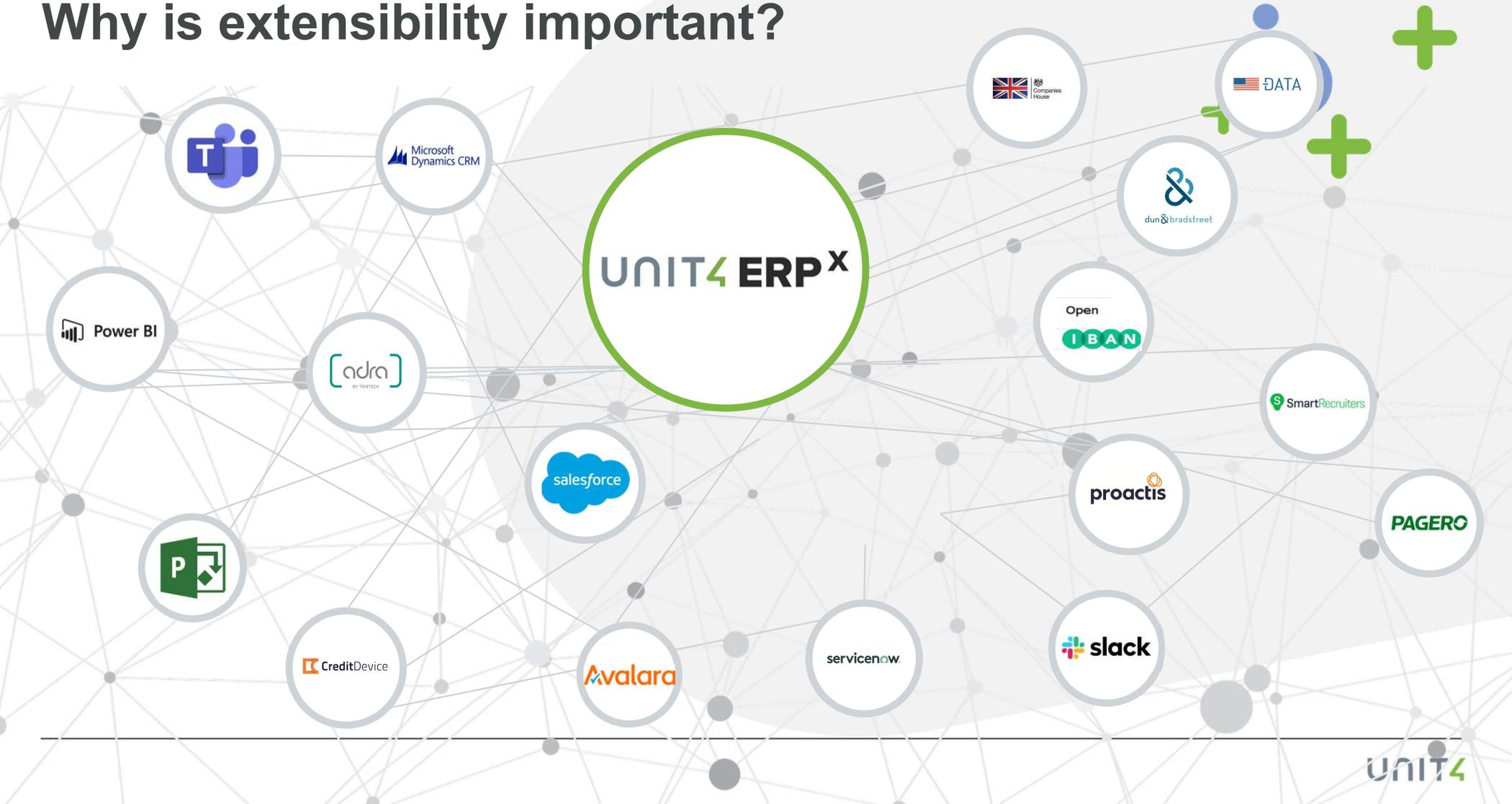
# What do we mean by extensibility?



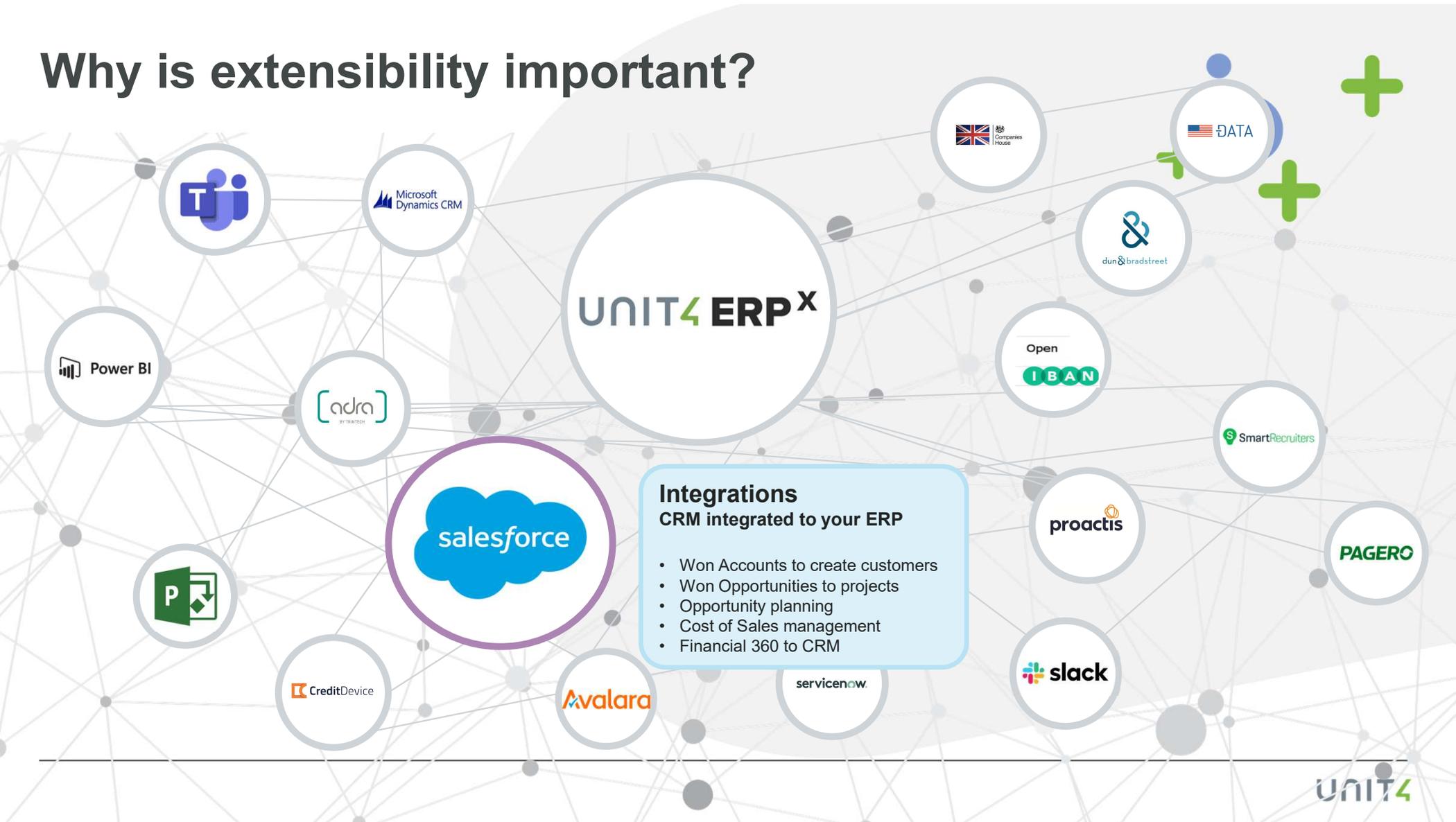
The ability of the software system to allow and accept the significant extension of its capabilities without major rewriting of code or changes in its basic architecture.

Having an extensibility platform not only allows companies to build and run solutions that address needs beyond the standard product but also allows them to bring innovation trends to those same solutions without risking their ongoing operations.

# Why is extensibility important?



# Why is extensibility important?



# Why is extensibility important?

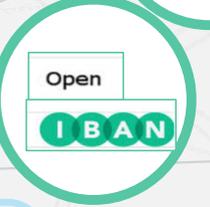
UNIT4 ERP<sup>X</sup>

Customer request

## Customisation

### Customer creation task app

- Request for a new customer
- Fetch external data for collections and validations
- Run as mobile app
- Submit for approval when ready



# Why is extensibility important?

UNIT4 ERP<sup>X</sup>

Close project

## Process automation Automatic project closure

- Project status is set to closed when all associated work orders (sub-projects) have been completed



Microsoft Dynamics CRM



DATA



dun & bradstreet



Power BI

[adra]  
BY TRINTECH

Open

IBAN

SmartRecruiters



proactis

PAGERO

CreditDevice

Avalara

servicenow

slack

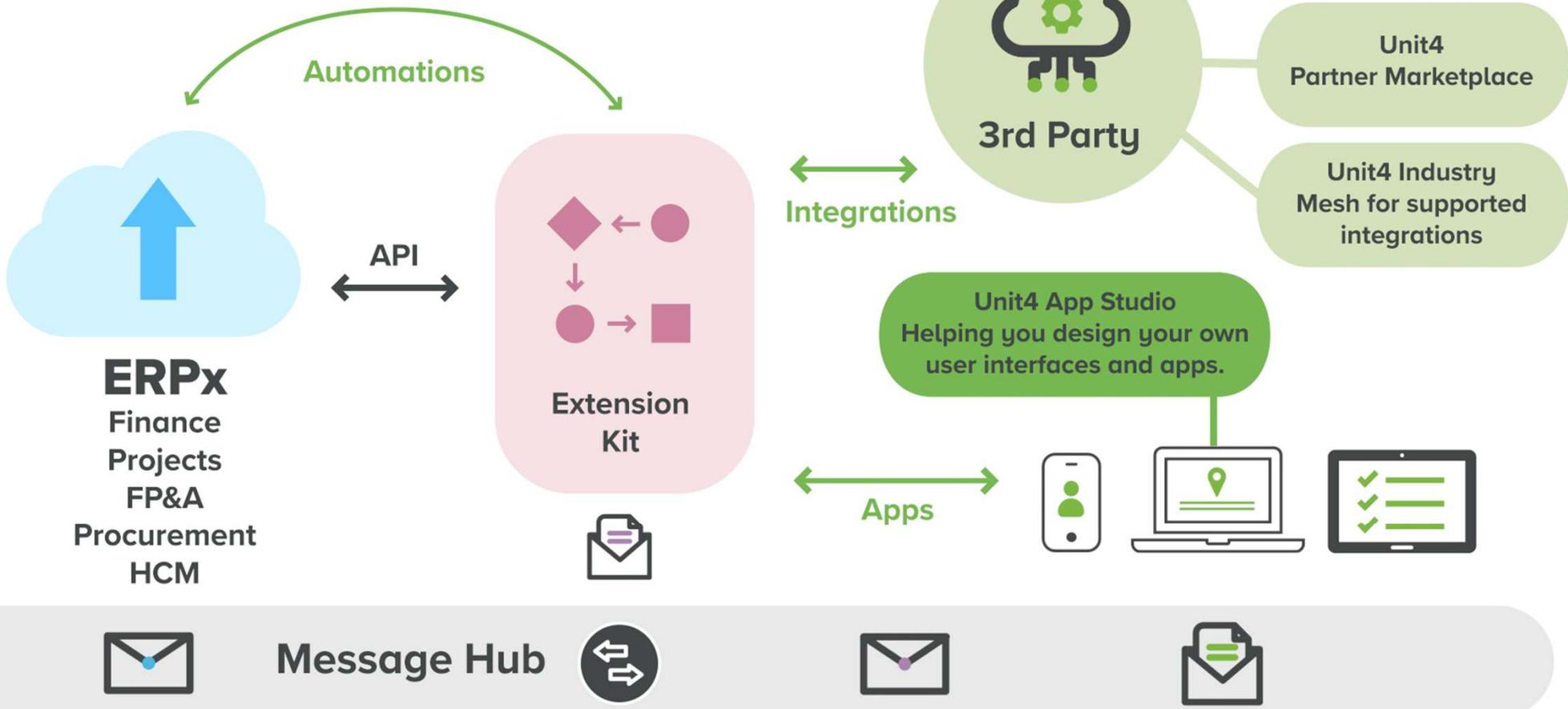
UNIT4

02

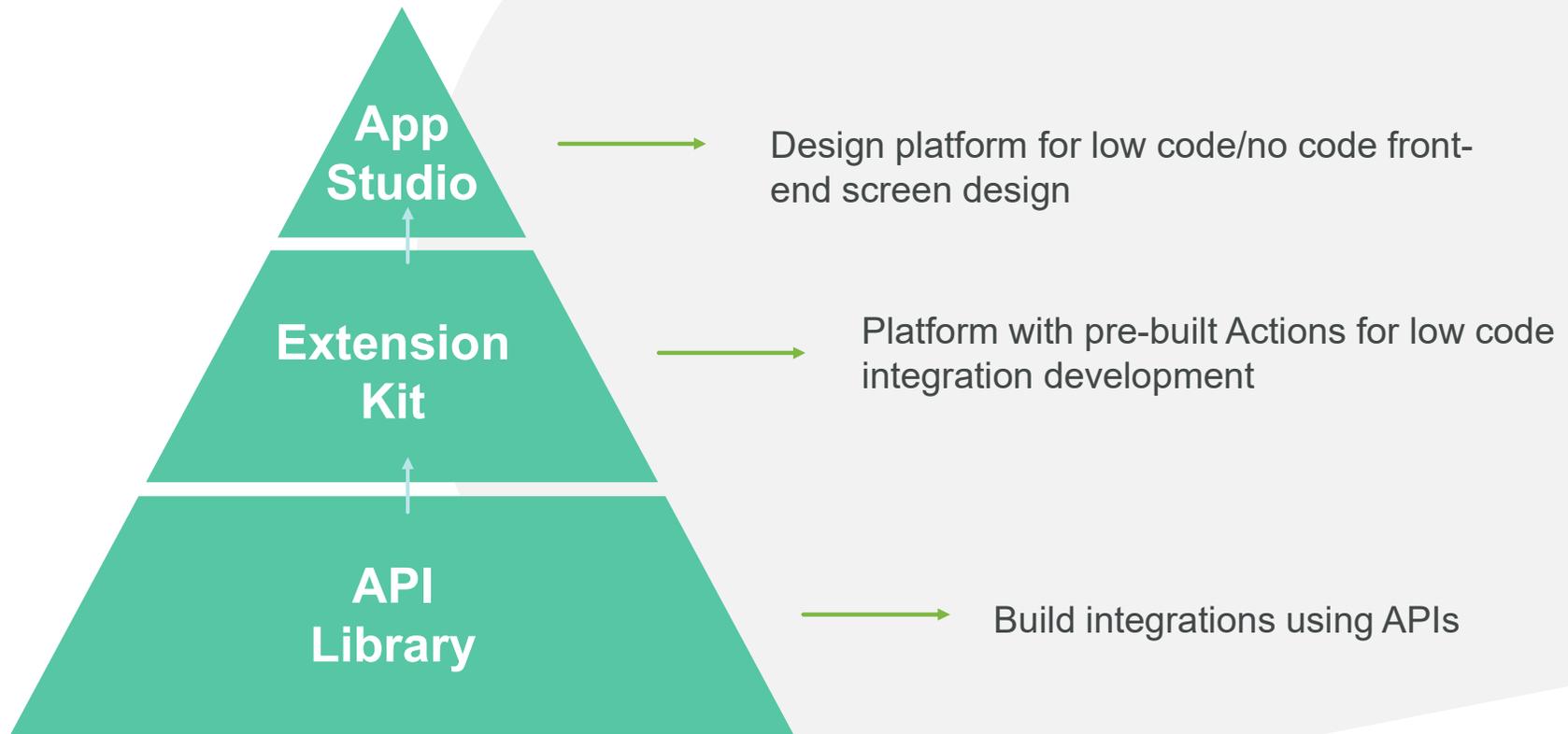
What does your ERP platform offer?



# Unit4 - meeting your needs now and in the future

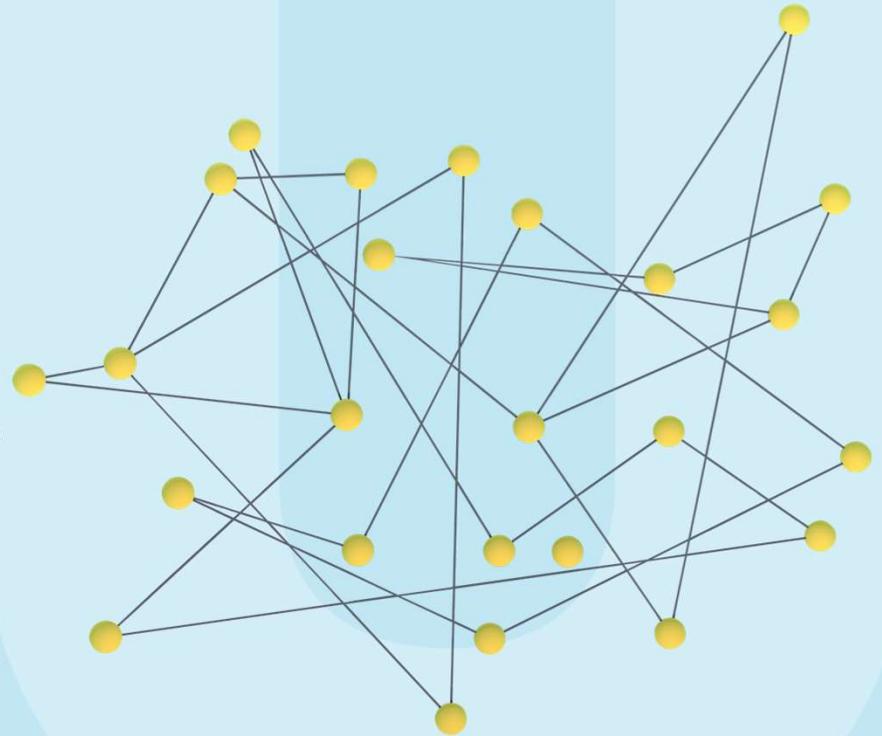


## Tooling available to support extensions in ERPx



03

## Extension Kit



# Automation as a Service: Extension Kit

## What is it

As part of the Unit4 People Platform, the Unit4 Extensions Kit delivers low/no-code automation as a Service, extending the capabilities of the Unit4 apps.

## How does it work

Each Extension Flow consists of a trigger, one or multiple actions, and a set of conditions. Extension Kit listens to the trigger and then automatically runs the actions if the conditions are met.

## Benefits

- Allows for rapid innovation and extensibility without coding
- Organisations can connect Unit4 Financials easily with key information sources and 3<sup>rd</sup> party software providers.
- Non-intrusive customization ensuring they will work with supplier updates/upgrades.



# Unit4 Extension Kit – What is it used for?

## Process automation: automate repetitive work

- **WHEN** a new nominal account is created in Company X **THEN** create the same account in company Y including all details
- **WHEN** a new budget is created **THEN** distribute across multiple entities
- **WHEN** all work orders of a project are completed, **THEN** the associated project is closed
- **WHEN** a new booking value is created **THEN** add it to a value matrix for accounting

## Integration: move data between applications and services and act on it

- **WHEN** a bank statement is available on your FTP site **THEN** import and process it
- **WHEN** a new customer is registered **THEN** check the customer credit rating using Dun & Bradstreet **AND** record the result on the customer record
- **WHEN** a new customer is created **THEN** enrich it with data from the UK Companies' house
- **EVERY Night** check if there are new accounts created or modified in Salesforce **THEN** send the customer data to the ERP
- **WHEN** a new supplier is registered **THEN** check sanction lists against it

# Unit4 Extension Kit

## How does it work?

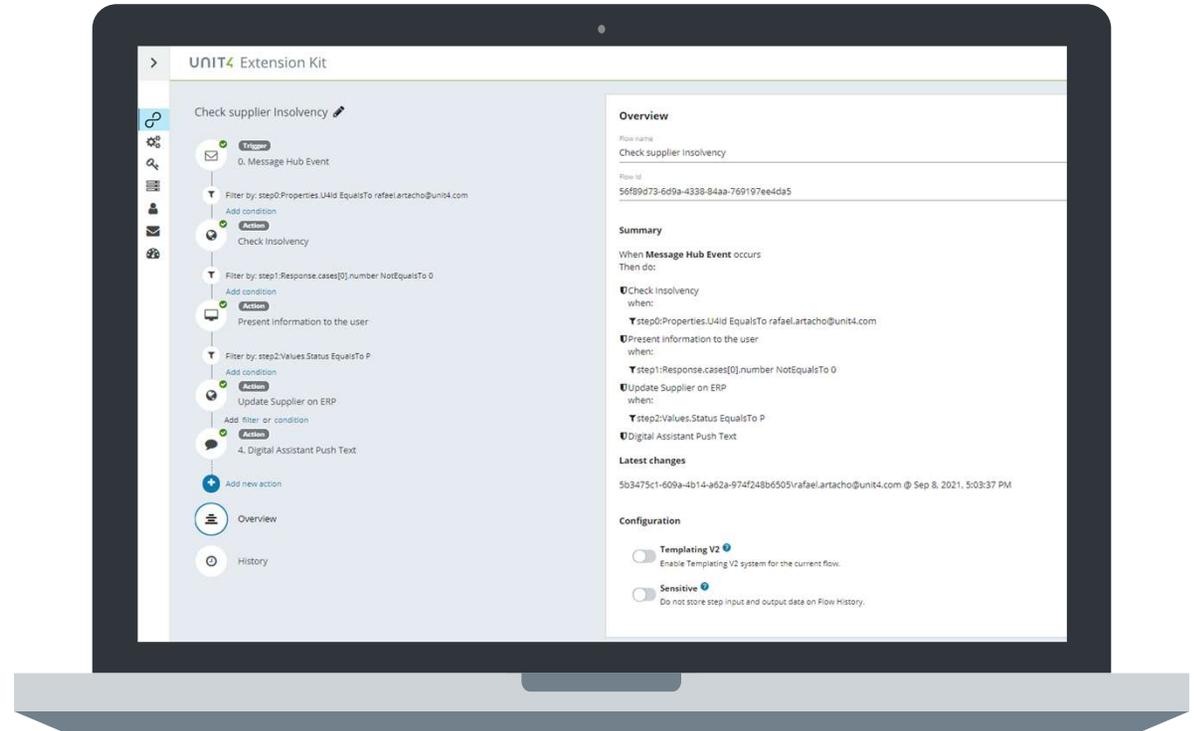
Extension Kit Flows are created and managed in the portal

Each Extension Flow consists of:

- One trigger
- One or multiple actions
- A set of conditions



Extension Kit listens to the trigger and then automatically runs the actions if the conditions are met.



# Definitions

## EK Flow:

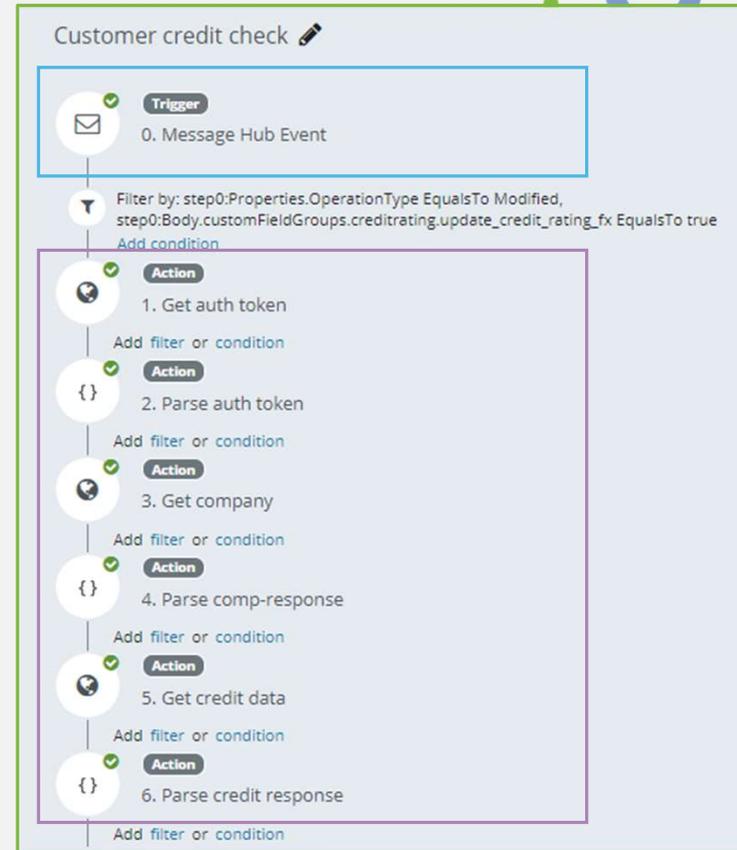
An automated workflow that connects apps and services together. Each Flow consists of a trigger and one or more actions.

## Trigger:

The component that starts a flow.

## Action:

A task the flow performs after it is triggered.

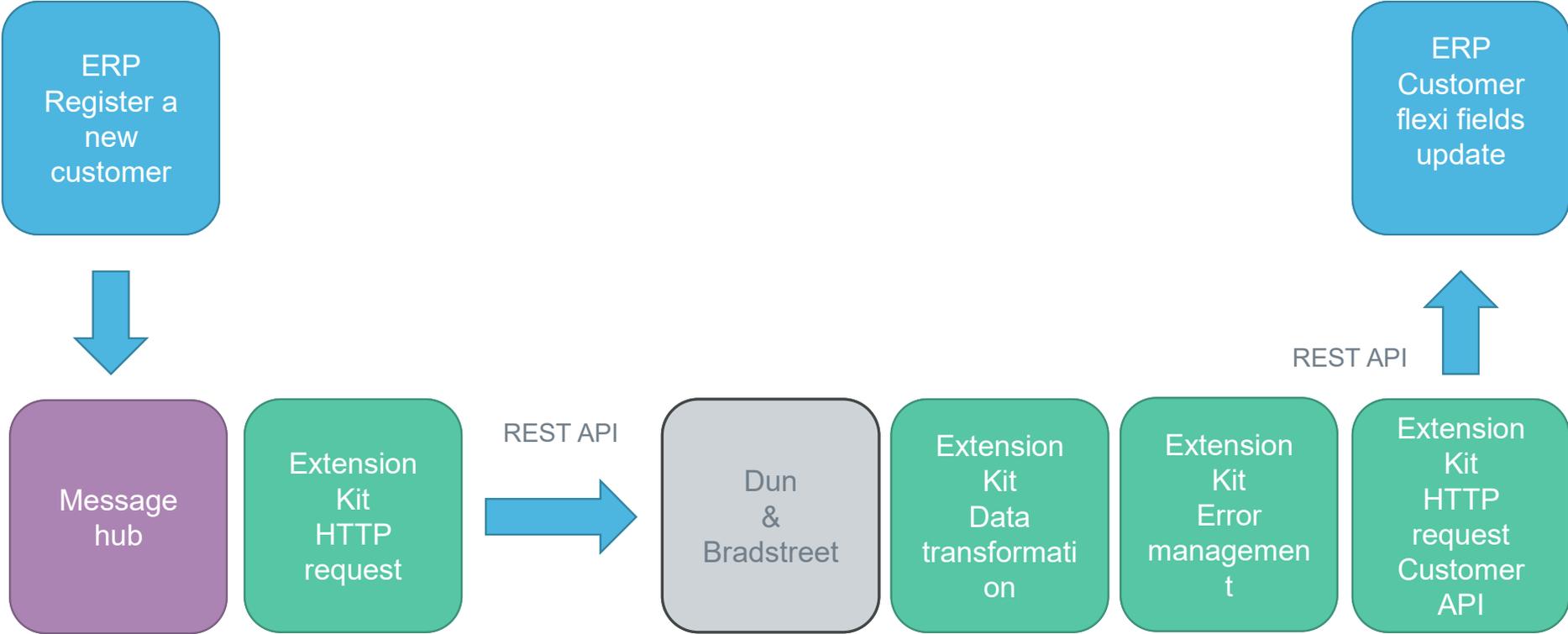


04

# Insight in your customers creditworthiness



# Example: Customer Dun&Bradstreet integration



# Extension Kit - Flow diagram





DEMO

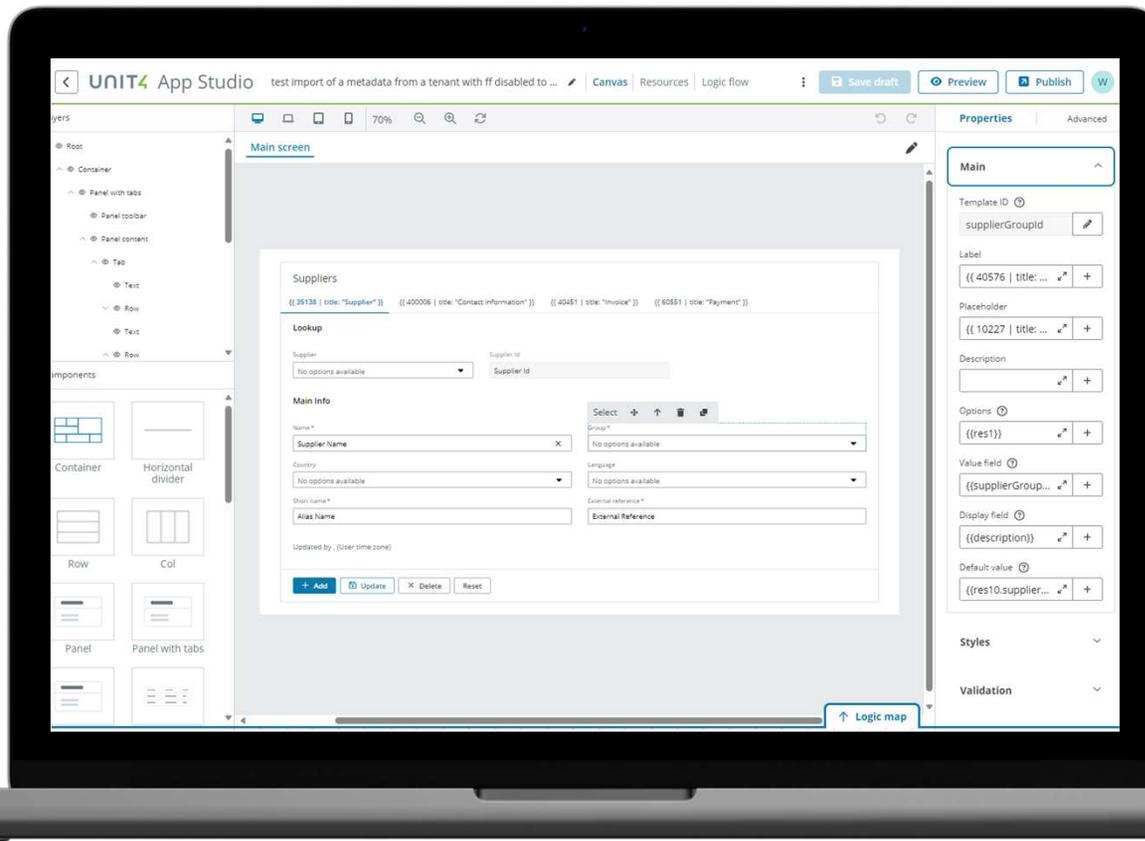


05

## AppStudio



# Custom Innovation



## What

Configure, customize, integrate and extend any capability provided in the core product

## Outcome

Respond and drive change to gain a competitive market advantage without disruption

# Touchless customer creation

## Why?

Remove the administrative burden of creating new customers

## What?

Get validated customer data from external data sources based on the organization name and country

## Integration data flows

- Chamber of Commerce / Company House
- Dun&Bradstreet credit checking
- Sanction list validation
- IBAN bank account number validation

The screenshot shows a web form titled "Importing companies" with the following fields and values:

General Information	Address	Financial Information	Paydex Information
Entity Type Corporation	Address Johan de Wittstraat 156	D-U-N-S Number 493765199	Paydex Score 64
Company Business Name Unit4 Group Holding B.V.	City Dordrecht	Financial Rating HHZ	Payment behavior days 19
Industry Code 6719 - Holding company	Postal Code 3311 KJ	Credit Limit 75000 EUR	Payment behavior result Beyond terms
Number of Employees 4	Country Netherlands	Registration Number 82220123	
Start Date 2021-03-17	Telephone (+31) 882471777	Vat Number NL862381319B01	



DEMO



# Unit4 integration offerings

## Extension Kit

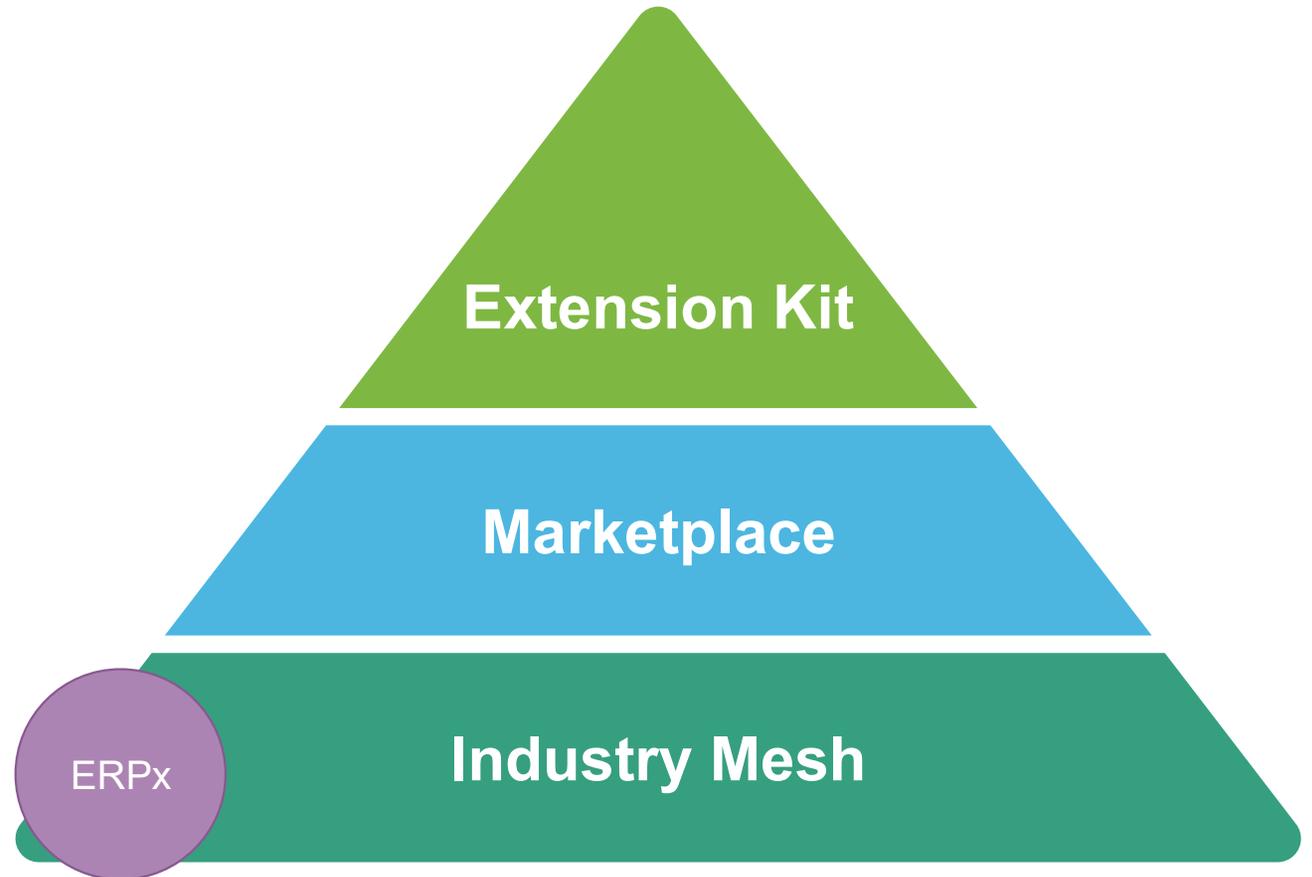
Low code / No code integration toolset to build integrations yourself using APIs.

## Marketplace

Prebuilt, turnkey integrations to 3<sup>rd</sup> party apps build by Unit4 partners and maintained by them

## ERPx

Prebuilt, turnkey integrations to most common used apps in your industry ecosystem. Updated and maintained by Unit4



# Unit4 Marketplace

All Products ▾

## Your people experience storefront

Welcome to Unit4 Marketplace – the storefront for all Unit4 products and all our partner developed apps and solutions. Here you'll be able to quickly find everything you need to extend your Unit4 investment, accelerate time to value, resolve business challenges, and connect to a best-in-class partner ecosystem.

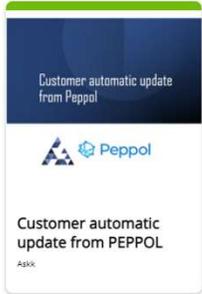


### Partner Apps



ELMA - Lookup  
with Wanda  
TELLIT SOLUTIONS

Tellit ELMA-Lookup  
Tellit Solutions



Customer automatic update  
from Peppol



Customer automatic  
update from PEPPOL  
ASKK



eSigning by  
Arribatec.

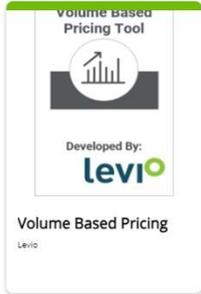


Arribatec eSigning  
Arribatec



Monitoring  
customers & suppliers  
TELLIT SOLUTIONS

Tellit Monitoring  
Tellit Solutions



Volume Based  
Pricing Tool



Developed By:  
levi

Volume Based Pricing  
Levio

# Recap

- Extension Kit and Message Hub are available for integrations and process automation
- Extension Kit supports any type integration between a 3<sup>rd</sup> party app and ERP
- Support for file-based, XML and API-based integrations
- Extension Kit provides data transformation and mapping options
- REST APIs library available to use in integrations and automations
- App Studio allows you to build custom screens, forms and task apps

Q&A





# Want to learn more?

Join also our upcoming webinars:

Nov. 23: [Utilizing APIs to improve the user experience in Unit4 ERP](#)

Nov. 29: [What is possible with Unit4 Industry Mesh?](#)

Dec. 6: [Purpose-built Extensions - How to deliver new capabilities and value](#)

You can also visit this dedicated [webpage](#) on Industry Mesh and download the [factsheet](#).

You will receive the links in an email after this webinar together with the recording.

The image shows a screenshot of the Unit4 Industry Mesh webpage and a factsheet. The webpage header includes the Unit4 logo and navigation links. The main heading is "Optimize and grow your digital ecosystem with Unit4 Industry Mesh". Below this, there is a section titled "Integrate your cloud apps and data" with a sub-heading "Delivering integration across business-critical applications". The factsheet, titled "Unit4 Industry Mesh", provides a detailed overview of the solution, including its benefits and pricing. The factsheet is divided into sections: "Unit4 Industry Mesh offers the best of both worlds...", "Key Benefits", "What's included in Unit4 Industry Mesh?", and "What's more?". The factsheet also includes a table with columns for "Core Mesh" and "Plus Mesh".

**Thank you**  
for your time and for  
listening.

Reach out to your Account  
Manager for next steps.

