OBARA | **DALLAS** DIGITAL SERVICES

Upgrading Obara Mexico's ERP Connector

CASE STUDY

CHALLENGE

Obara Mexico relies on the Made2Manage (M2M) ERP system for industrial manufacturing management and utilizes the "Facturación" (billing) module of ClickBalance to process invoices and transfer certification stamps to Mexico's IRS. Initially, an Obara-specific Connector application was developed by Intuitive Mexico to facilitate invoice transfers between M2M and ClickBalance. However, with ClickBalance's expansion and the introduction of a general release API, the original Connector became incompatible, disrupting critical financial document submissions to the Mexican government.

SOLUTION

To resolve the issue, we conducted interviews with multiple sources to identify a professional services technology expert capable of executing the solution effectively. A qualified professional was selected to design and develop a new Connector application tailored to work seamlessly with ClickBalance's general release API. The updated solution included:

Data Extraction
Pulling invoices from the M2M database efficiently.

Data Formatting
Structuring invoices in the required format for ClickBalance.

API Integration
Implementing robust API calls to submit invoices to ClickBalance's general API.

IRS Compliance
Ensuring that ClickBalance successfully forwards documentation to the IRS via the CFDI Web Service Portal.

Automation & Reliability
Enhancing automation to minimize manual intervention and reduce errors.

RESULTS

✓ Successful re-establishment of seamless invoice transfers between M2M and ClickBalance.

✓ Compliance with Mexican IRS regulations through CFDI Web Service Portal submissions.

✓ Improved processing efficiency and reduced manual workload for **Obara Mexico's** finance team.

✓ Future-proof integration that aligns with ClickBalance's API standards, ensuring long-term stability.

✓ Effective execution of the solution by a professional services technology expert, guaranteeing success.

CONCLUSION

By modernizing the Connector application and leveraging a professional services tech expert, we enabled **Obara Mexico** to maintain uninterrupted compliance with government regulations while streamlining their financial processes. This upgrade ensures that **Obara Mexico** can continue leveraging both M2M and ClickBalance without disruption, optimizing their ERP workflow for sustained efficiency and compliance.

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