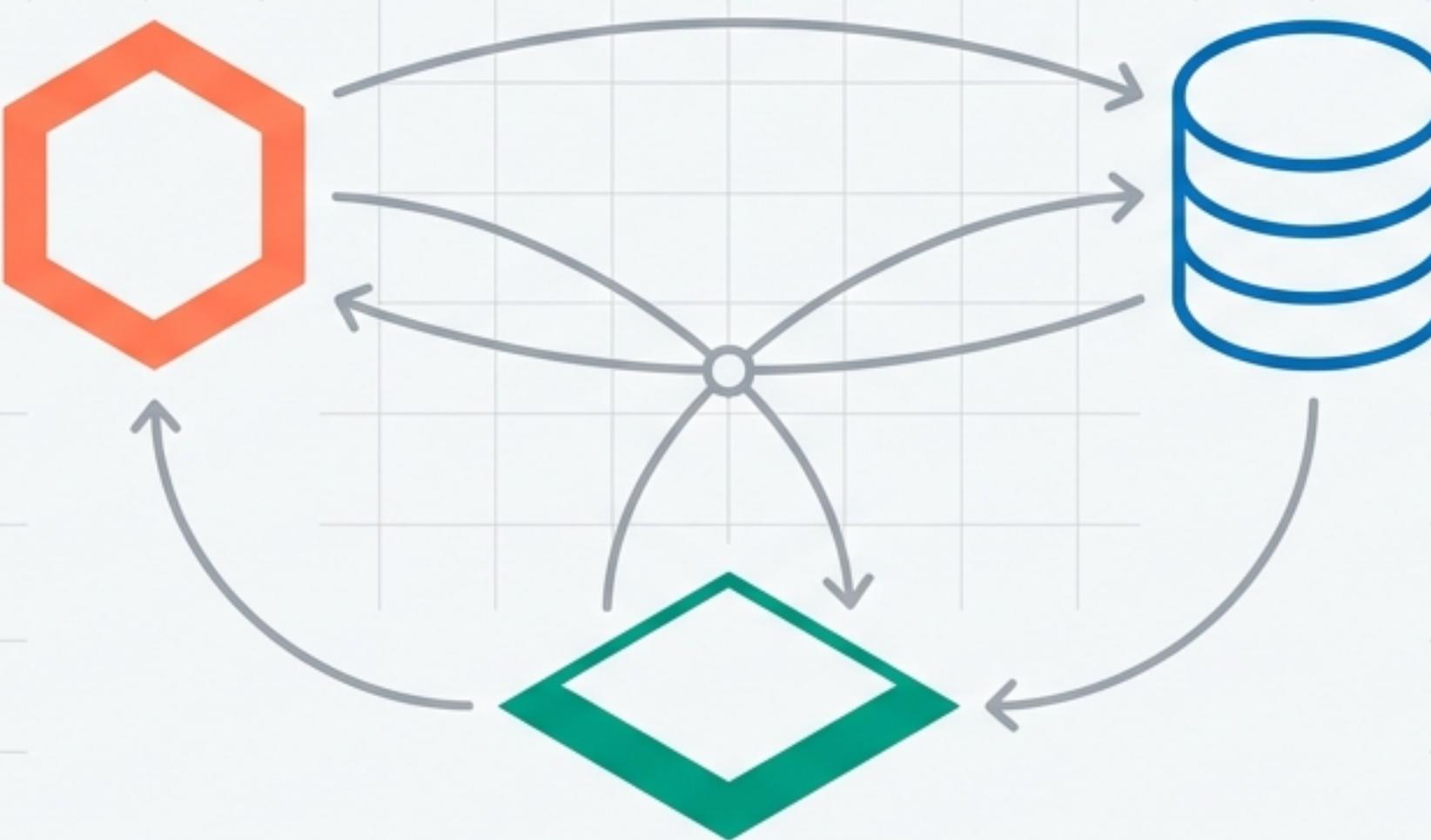


Designing a Scalable Integration Architecture for Taoglass

A proposed blueprint for connecting HubSpot, Tacton, and SAP to streamline quoting, sales, and fulfillment.



Our Goal: To Create a Future-Proofed Blueprint for Key Business Processes

This document outlines a proposed integration design that addresses critical operational challenges identified across the Taoglass sales and fulfillment lifecycle. Our objective is to translate our technical discussions into a clear visual architecture that will:



Solve the multi-distributor quoting challenge by eliminating data duplication.



Automate the order creation process from PO receipt in SAP to sales order in HubSpot.



Establish a clear source of truth for the product and part number library.

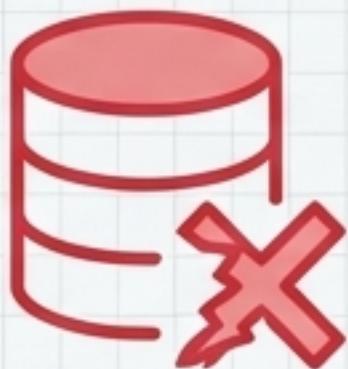


Ensure data security and proper visibility for specialized teams like Aerospace & Defense.

This aligned design will serve as the foundation for developing detailed user stories and project scope.

The Multi-Distributor Quoting Dilemma

Today's process forces a choice between overwriting critical data in Tacton or creating duplicate, conflicting deals in HubSpot.



Data Integrity Risk

Changing a distributor on a Tacton quote overwrites the previous one.



Inaccurate Pipeline

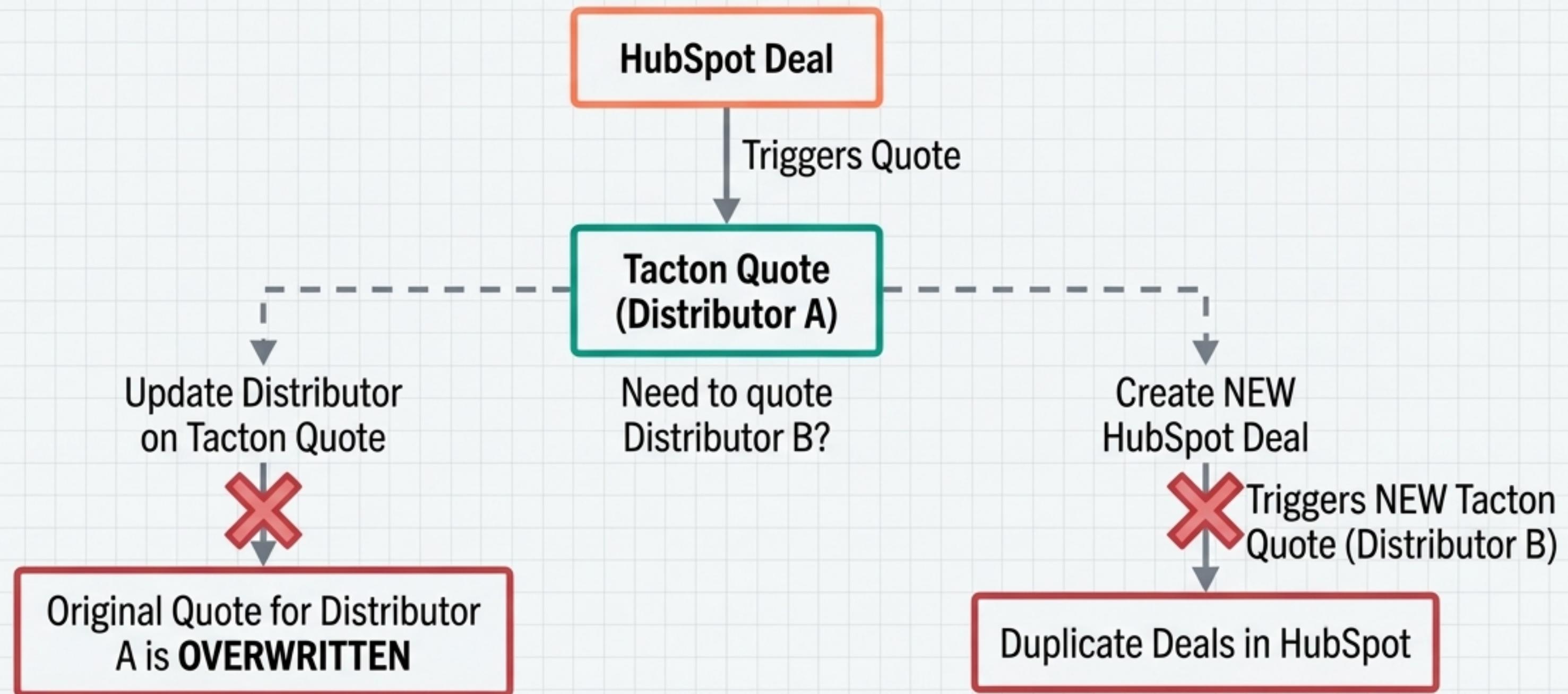
The common workaround—creating a new deal in HubSpot for each distributor quote—inflates the sales pipeline and makes reporting unreliable.



Manual Reconciliation

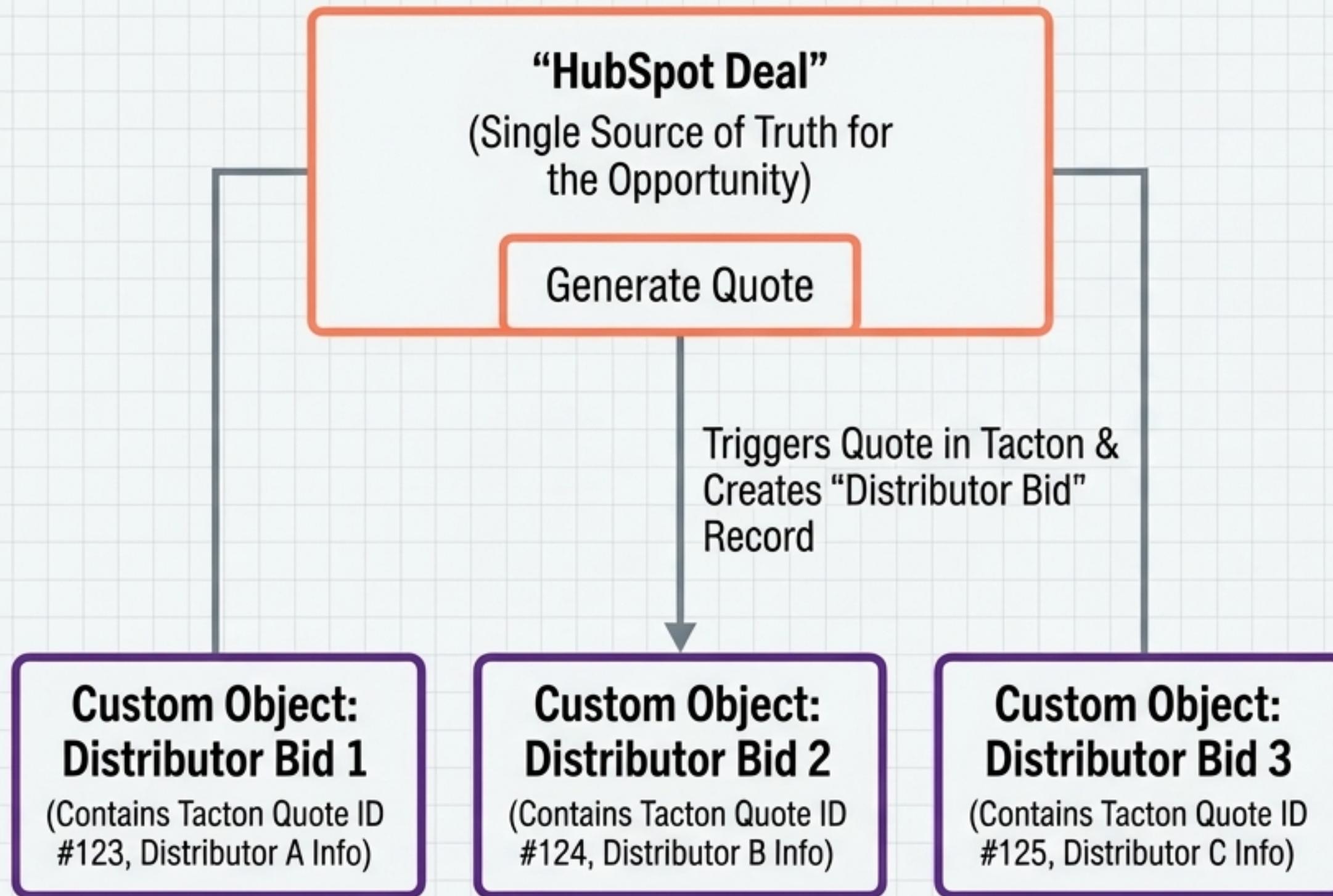
Sales teams must manually track which quote and deal corresponds to which distributor, leading to administrative overhead and potential errors.

Current State: A Fractured Quoting Workflow



Key Takeaway: This process creates a single point of failure, forcing manual workarounds that compromise data quality in HubSpot.

Future State: One Deal, Multiple Bids



Key Benefits

- Maintains a single, accurate Deal record in HubSpot.
- Provides full visibility of all distributor quotes related to one opportunity.
- Eliminates data duplication and overwriting.
- Creates a scalable model for complex bidding scenarios.

The Project & Order Lifecycle Challenge

The journey from a closed-won deal to a fulfilled order is currently manual, disconnected, and time-consuming.



1. Manual Order Entry:

When a Purchase Order (PO) is received in SAP, it requires a team member to manually create a corresponding Sales Order in HubSpot.



2. Difficult Deal Association:

It's a manual effort to find the correct HubSpot deal associated with an incoming PO, especially on multi-bid distributor deals.

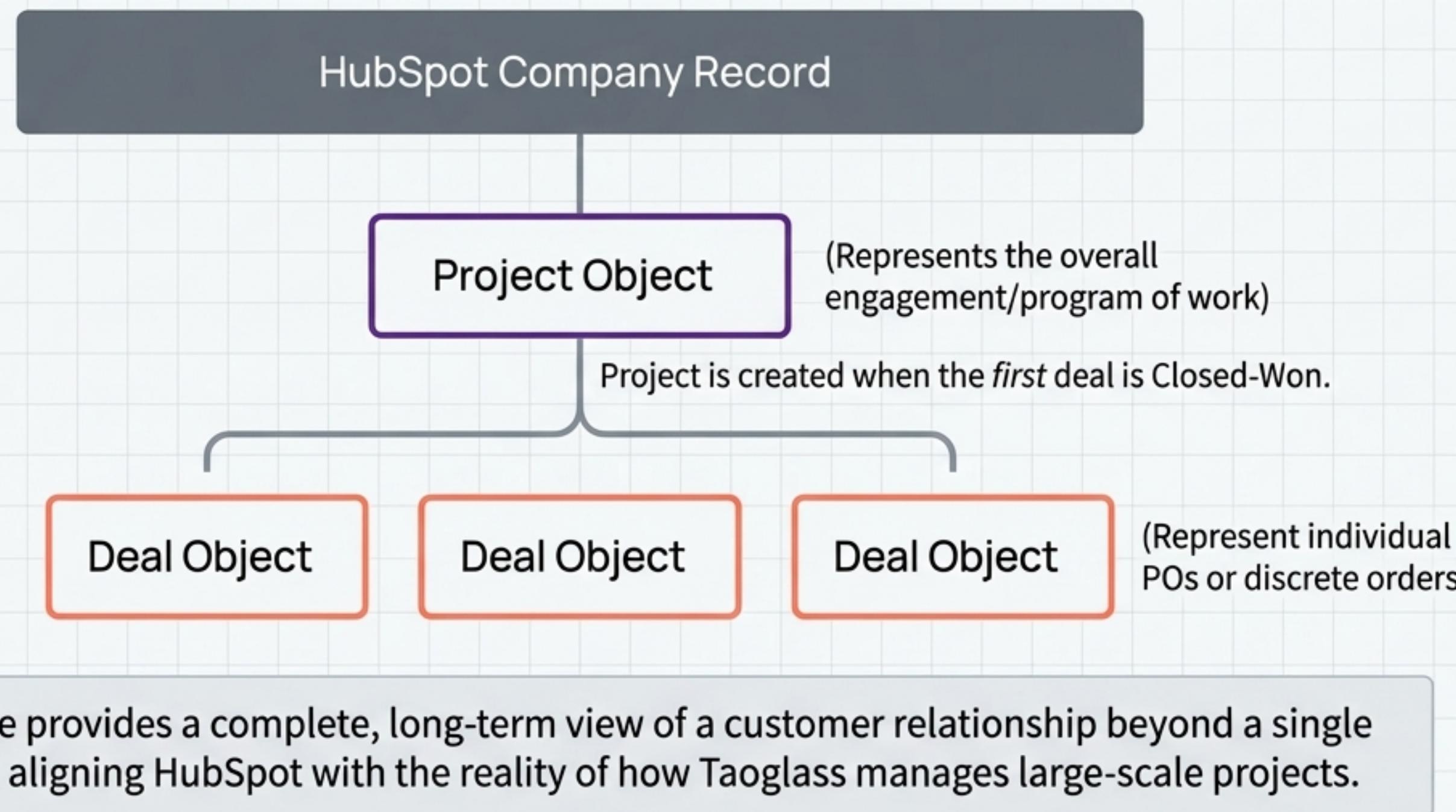


3. Lack of a ‘Project’ View:

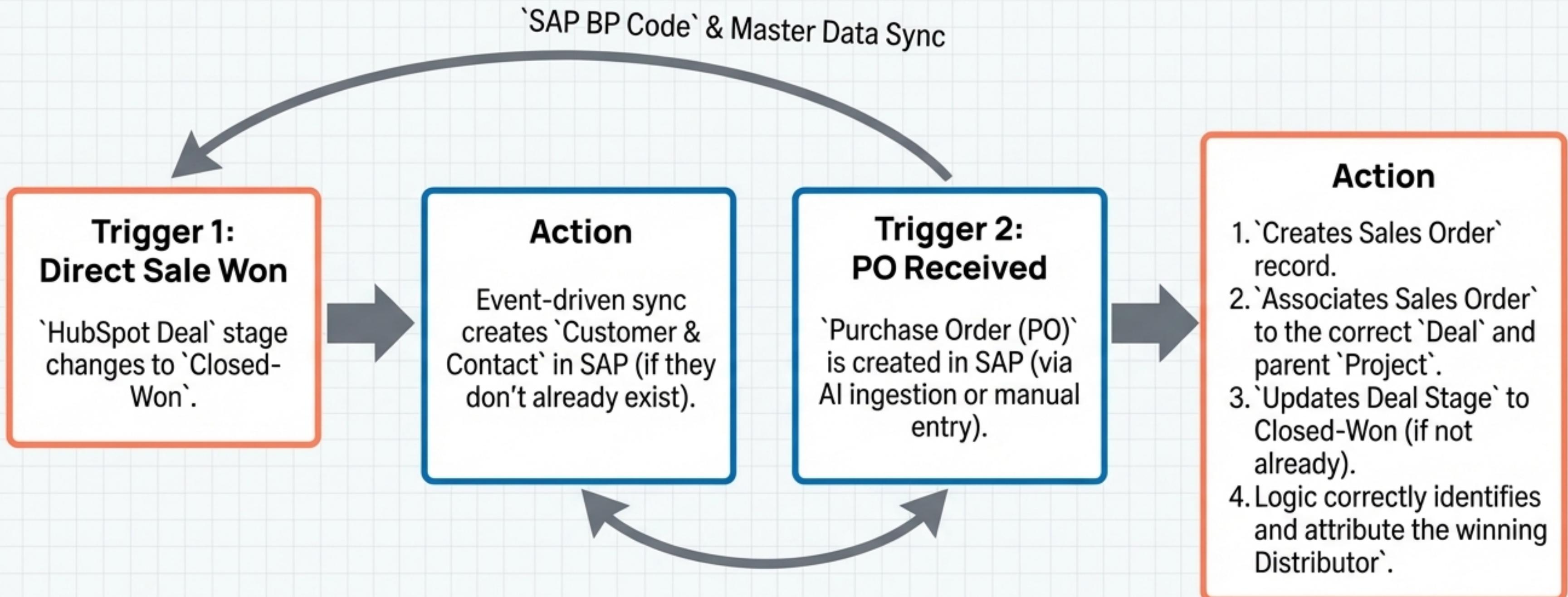
The current ‘deal-centric’ view doesn’t easily support long-term customer projects that may involve multiple POs and orders over time.

Solution: Introducing a Project-Centric Data Model

We propose using a “Project” object to act as the master container for the entire customer engagement lifecycle, from the initial win to all subsequent orders.



Future State: An Automated Order Fulfillment Flow



Benefit: This automation saves significant time, eliminates manual entry errors, and ensures real-time data consistency between sales and operations.

The Product & Part Number Lifecycle

A lack of a clear data master and defined workflow for new part numbers creates risk of misalignment between Tacton, SAP, and HubSpot.

To ensure sales, engineering, and finance are all working from the same information, we must define a clear, unidirectional flow for product data. The key questions to answer are:



Where do new product configurations originate?



Which system serves as the master record for inventory and part numbers?



How does product data reliably get to the sales team in HubSpot for reference?

Solution: A Unified Product Data Flow with SAP as the Source of Truth

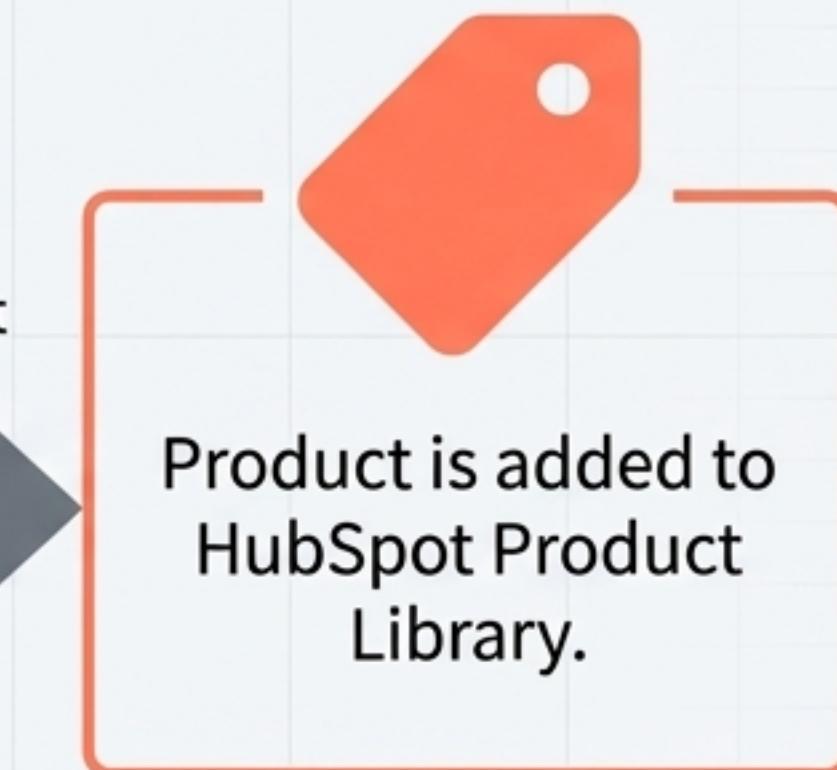
Step 1: Origination



Step 2: Master Record



Step 3: Sales Reference



SAP is the Inventory Source of Truth.

Important Annotation: Product *components* live only in SAP and Tacton. The final, sellable product is what syncs to HubSpot for sales team reference.

Securing Sensitive Aerospace & Defense (A&D) Data

Challenge

How can we prevent non-A&D personnel from viewing sensitive A&D-related activities (emails, notes, meetings) logged on shared Company and Contact records?

Solution: Leverage Native HubSpot Permissions

We will implement a robust permissions structure using HubSpot Teams to segregate data and activities.

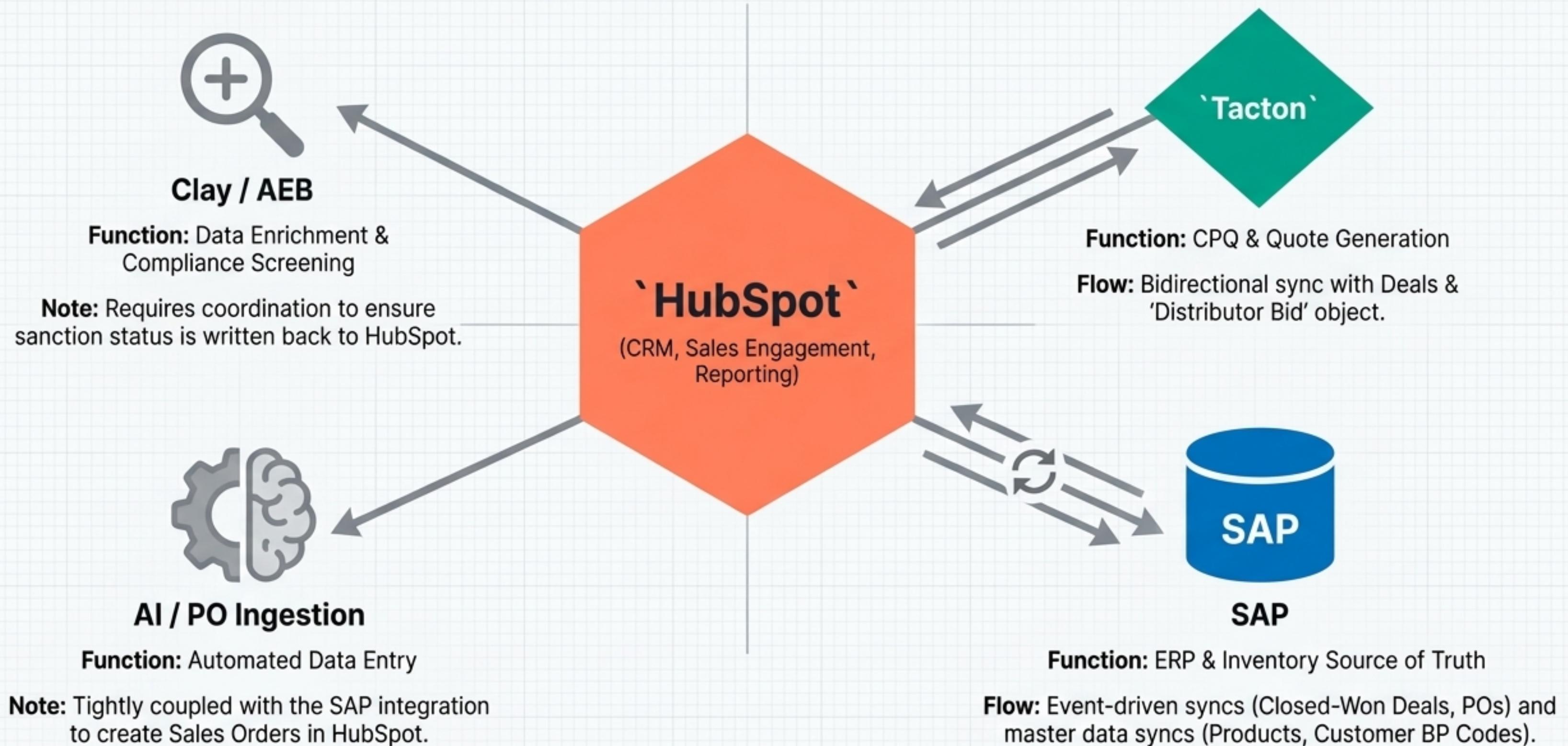
-  Create a dedicated ‘A&D Team’ in HubSpot.
-  All A&D-related Deals, Calls, Notes, and Meetings will be owned by the A&D Team.
-  Permission sets will be configured so that only members of the A&D Team can view these specific engagement objects.



Result

This provides a secure “quarantine” for sensitive A&D communications without requiring complex workarounds, using the platform’s built-in security features.

The Complete Integration Ecosystem at a Glance



Coordinating a Multi-Initiative Rollout

The success of this architecture depends on careful coordination with parallel technology initiatives.

Track 1: HubSpot Architecture (This Project)



Custom Object Build

Tacton Integration

SAP Integration

This initiative depends on the SAP integration being in place to receive PO data and create Sales Orders.

Track 2: AI PO Ingestion (Cadre Initiative)



Track 3: Clay / AEB Integration (Cadre Initiative)



Coordination Point: Requires alignment to define how AEB sanction flags are written back to HubSpot to prevent redundant checks.

We must establish a clear coordination strategy, defining timelines, resources, and communication channels between all project teams to ensure a smooth, successful rollout.

The Path Forward

To maintain momentum, we recommend the following immediate next steps



Validate Architecture with Business Process Owners



- **Action:** Schedule a joint solutioning session with Louise to review and refine the proposed "Distributor Bid" model and overall process flows.



- **Goal:** Secure business stakeholder buy-in on the proposed design.



Develop Detailed Scope and User Stories



- **Action:** Translate this high-level architecture into detailed technical requirements and user stories for the Tacton and SAP integration components.



- **Goal:** Create an actionable backlog for the development team.



Finalize the Cross-Initiative Coordination Plan



- **Action:** Formalize the timeline, dependencies, and roles & responsibilities across the HubSpot, AI, and AEB project teams.



- **Goal:** Ensure all teams are aligned and working towards a common set of integrated milestones.