



The Fast-Growing Business Guide to NetSuite Integration

Learn how to integrate NetSuite with your application stack to get the most out of this powerful cloud-based suite of enterprise resource planning software.



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Integration: Your Foundation for Making the Most of NetSuite

Traditional enterprise resource planning (ERP) software is designed to help you run your entire business. Oracle NetSuite makes it easy, with modules for financials, customer relationship management, inventory management, ecommerce, and more. But many organizations don't use all the NetSuite modules, choosing instead to integrate parts of NetSuite with other best-of-breed platforms like Salesforce, Dropbox, Shopify, and third-party logistics (3PL) software.

Given the wide-ranging capabilities of NetSuite to improve and transform how businesses operate, most NetSuite integration projects involve many applications, all with distinct owners, data, and workflows.

Integration is the key to getting the most from a combination of NetSuite and complementary applications. The payback can be transformational — more efficient business processes, real-time visibility, greater agility for pursuing strategic objectives, and even faster business growth.

This ebook will help you plan for NetSuite integration, to ensure your success with this leading business management platform.



Chapter One: Understand Your NetSuite Situation

Fast-growing companies that want to integrate with NetSuite start the process from all levels of experience.

While NetSuite integrations share many common issues with other data and application integration projects, they also have plenty of specific requirements and support needs, particularly for cloud integration.

You should assess these requirements upfront to understand how best to prepare for the integration journey ahead. Here are some key questions to ask.

1. What is your organization's cloud strategy?

- What does it involve?
- How will your NetSuite integration project fit into that strategy?
- Who is responsible for ensuring cloud management best practices?
- How does your organization monitor cloud functions?

2. What is the depth of your organization's NetSuite expertise?

- What staff, tools, systems, and processes are already in place for structuring your NetSuite project?
- What external resources or consultants might you need to carry out your project?

3. Do you know the specifics of your NetSuite account?

- What optional features have you enabled in your NetSuite account, such as multiple currencies, transaction types, item pricing, taxation, and so forth?

4. What customizations has your organization implemented in NetSuite or will need to implement in NetSuite?

- Are you using custom fields and record types, validations and required fields, or scripting and workflows?
- How might these need to be accounted for in the integration plan and design?

5. Do you know all the key use cases for how your organization needs to connect NetSuite with other applications and data sources?

- What are the different use cases and needs for getting information into and out of NetSuite?
- When might you want to use database connectors or saved searches?

6. Do you understand the integration project's licensing implications for your NetSuite account?

- Will you use a separate, dedicated NetSuite user for the integrations?

“Often when implementing NetSuite, we're working with teams that don't necessarily have much NetSuite expertise in-house. Usually someone who's technically inclined has been assigned to the project, but they're still learning. They're still very new.”

Nick Mortensen,
Director of Development, Eide Bailly

Chapter 2:

Your NetSuite Integration Checklist

A great way to stay organized during this integration process is by following a checklist. This can help manage the complexity and eliminate areas of concern for the team. We've created a checklist that covers the four main components of NetSuite integration: people, processes, applications, and data.



PEOPLE

Your NetSuite project starts with people. Be sure to account for the owners and users of the applications and data. Find out how their insights and perspectives shape business needs and technical requirements.

Talk to all stakeholders to understand their business goals:

- Which of their use cases are relevant to your NetSuite integration project? How do they relate?
- Are there conflicting goals among stakeholders that could affect how you design and manage NetSuite integrations?

Identify who owns and uses the applications and data involved in your integration project:

- How might their usage have implications for how you plan the integrations?
- Are they running into limitations with their applications, and if so, what are they?
- How might your project change the way they use their applications and data?

Identify who's responsible for managing the data:

- Are they different from the owners or users? If so, why?

Understand how you need to control access to applications and data:

- Who can change the data?
- Who can only view the data?

Understand your organization's integration standards and best practices:

- Who manages these programs?



PROCESSES

If you're planning to grow and evolve to adapt to market changes, your business processes must also evolve. That means your integrations should keep pace as well. Integrations directly reflect your business processes. And many organizations don't really understand their business processes at a granular level.

When system integrators or other NetSuite consultants start an integration engagement, they'll begin by gaining an understanding of a company's data, its business processes, the different systems in play, and how information will flow among various endpoints.

Endpoints can be applications, but they can also be various stops along the way for staging, vetting, modifying, or enriching data before it moves to other applications. Make sure you map out your data and process flows across the organization.

Identify the endpoints:

- ☐ Where does the data live?
- ☐ Where does it need to go?

Map what should happen to the data as it travels from one endpoint to another:

- ☐ What are the key touchpoints or stops data will need to make?
- ☐ Does the data travel from point to point, or is it shared?

- ☐ In which direction does the data flow?
- ☐ Will it need validation, access approval, etc.?
- ☐ Will the data need to be enriched with data from other sources?
- ☐ When and how is the data reconciled?

Determine the volume, frequency, and performance of data delivery required by your various applications:

- ☐ Will you be moving a lot of data? If so, when?
- ☐ Do you have seasonal or periodic spikes in data volume?
- ☐ What levels of performance are needed from processes that rely on this data?
- ☐ How frequently does the data need to be updated? Real-time/near real-time or batch updates?

Establish what should happen if there are errors or problems during the integration:

- ☐ Who should be notified for different types of errors (data quality, network performance, etc.)?

Account for security, risk, and compliance, both inside and outside the organization:

- ☐ Does the data need to be PCI-compliant or meet other standards?



APPLICATIONS

Applications are at the heart of any integration project. This is where the work gets done. A NetSuite integration project is no different. So it's important to understand the applications being integrated, their needs, and how they interact with one another.

Identify the applications involved:

- Where do the applications live?
- How do they need to be connected to one another and to NetSuite?

Understand how each application might depend on the functions of others:

- When and how does one application need updates from other applications?
- Which application is the process driver?
- Are the applications on-premises or cloud-based?
- How will these different kinds of applications need to interact?

Identify which applications are centralized or distributed:

- Do you have different sets of applications performing the same functions across the organization (varying by regions or departments)?
- Will you need to deal with variables among the same types of data, such as different currencies or regional pricing?

Document the rules you will need for each application and its data:

- Define the access controls.
- Are there any forbidden actions?
- Who is in charge of the updates?



DATA

For organizations that want to excel, data-driven decisions are not a luxury. They're the baseline.

You want to mine your data and find your data gold. But your data is all over the place — in multiple applications, in the cloud, and on-premises. And if you want to make good, data-driven decisions, you need information flowing among all the applications that run your business.

In this environment, integration becomes a key to competitive survival. And not just integration itself but an integration strategy that will serve you over the long term as your business, market, and customers change.

Determine all data associated with an application:

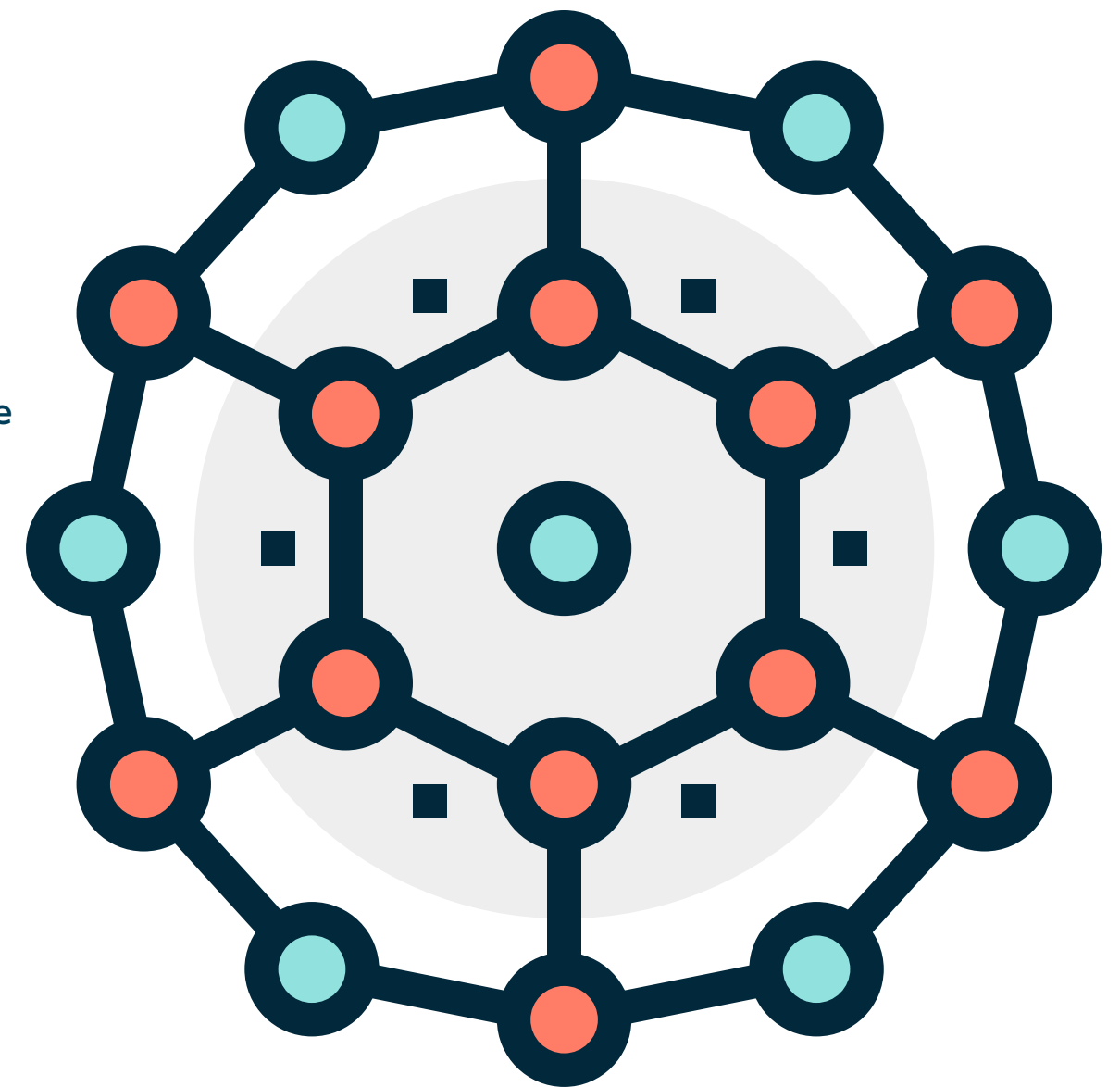
- ❑ Is this data either shared or similar to data for other applications? If so, how?
- ❑ For each data set type, which application acts as the system of record?
- ❑ How is the data reconciled?
- ❑ Who maintains the data sets?
- ❑ Where do you run the risk of duplicate or conflicting data?

For each application you plan to integrate, determine its data structure:

- ❑ Is there a structure, such as a hierarchy, to how the data interrelates?
- ❑ What are the fields, primary keys, data types, and validation rules?
- ❑ Is there a hierarchy or dependencies among different records?
- ❑ How does the structure and identification of the data vary among the applications that will share the same data?
- ❑ Are the data fields and data labels consistent and appropriate for all application interactions?

Assess data quality:

- ❑ How clean and consistent is the data?
- ❑ Will you need to consolidate or reconcile data before integrating?
- ❑ Will some data require either a one-time migration or ongoing synchronization?



Chapter 3:

Pitfalls and Recommendations

While we were pulling together the information for this guide, we talked to the Boomi Professional Services team along with some of our leading system integration partners about their experience with NetSuite integration. From those discussions, we came up with a list of pitfalls that often plague NetSuite integrations, and recommendations for making the integration process easier and the results more effective.

PITFALLS

PITFALL #1: REAL-TIME INTEGRATION

A focus on real-time integration isn't always a pitfall, but it can be. That's because while real-time has its place, it's often unnecessary. Moreover, many systems will not support real-time interactions without custom development. In addition, a real-time response requires more API calls.

For example, if you're pushing information from a CRM into NetSuite every time a deal closes, that may be fine with a sales staff of five, closing five deals a day. But what if that staff grows to 500? That's a lot of API calls, processing power, and load on your system. Would it hurt the business to batch that information and push it through every two hours? In most cases, the answer is no.

PITFALL #2: BAD DATA

If the data coming into the system isn't clean, the integration will suffer. Fortunately, when implementing NetSuite, you have a great opportunity to clean your data as it's moved into the system, and then put controls on it, so you limit what people can put into the system. You can enforce correct email addresses, enforce correct phone numbers, and implement an integration with postal services to validate physical addresses.

PITFALL #3: DYSFUNCTIONAL PERMISSIONING

Your integration tool should be treated as if it were a NetSuite user. Make sure the tool has access to the information it needs to integrate. But don't give it unlimited access with an admin license that has create, read, edit, and delete permissions. That's both a security nightmare and an invitation to unintentional accidents like deleting an entire GL!

PITFALL #4: PARENT/CHILD

Often an organization hasn't thought through which system will be the parent and which will be the child. For example, if an account is created in Salesforce and then reflected in NetSuite, Salesforce is the parent. Changes should be possible only from Salesforce. Or if the reverse is true, and accounts are created in NetSuite, then NetSuite is the parent.

Do not allow changes from both systems. This would create "race conditions," where two changes "race" to the target system, but there's no business rule to determine which one takes precedence. Proper design architecture should eliminate race conditions.

PITFALL #5: FLAWED PROCESSES

Even the best integration cannot fix a flawed process. During the design phase, fix processes that are inefficient and no longer serve the organization's long-term goals. The longer you wait, the harder fixing those processes will become. Change management around business processes is always one of the most difficult aspects of any technology project.

RECOMMENDATIONS

RECOMMENDATION #1: ERROR MESSAGES

Make sure integration error messages go to the right people, and make sure that they're visible from NetSuite, not just from the integration tool. Employees will be working in NetSuite much more than in the integration tool, if at all.

RECOMMENDATION #2: BUSINESS LOGIC

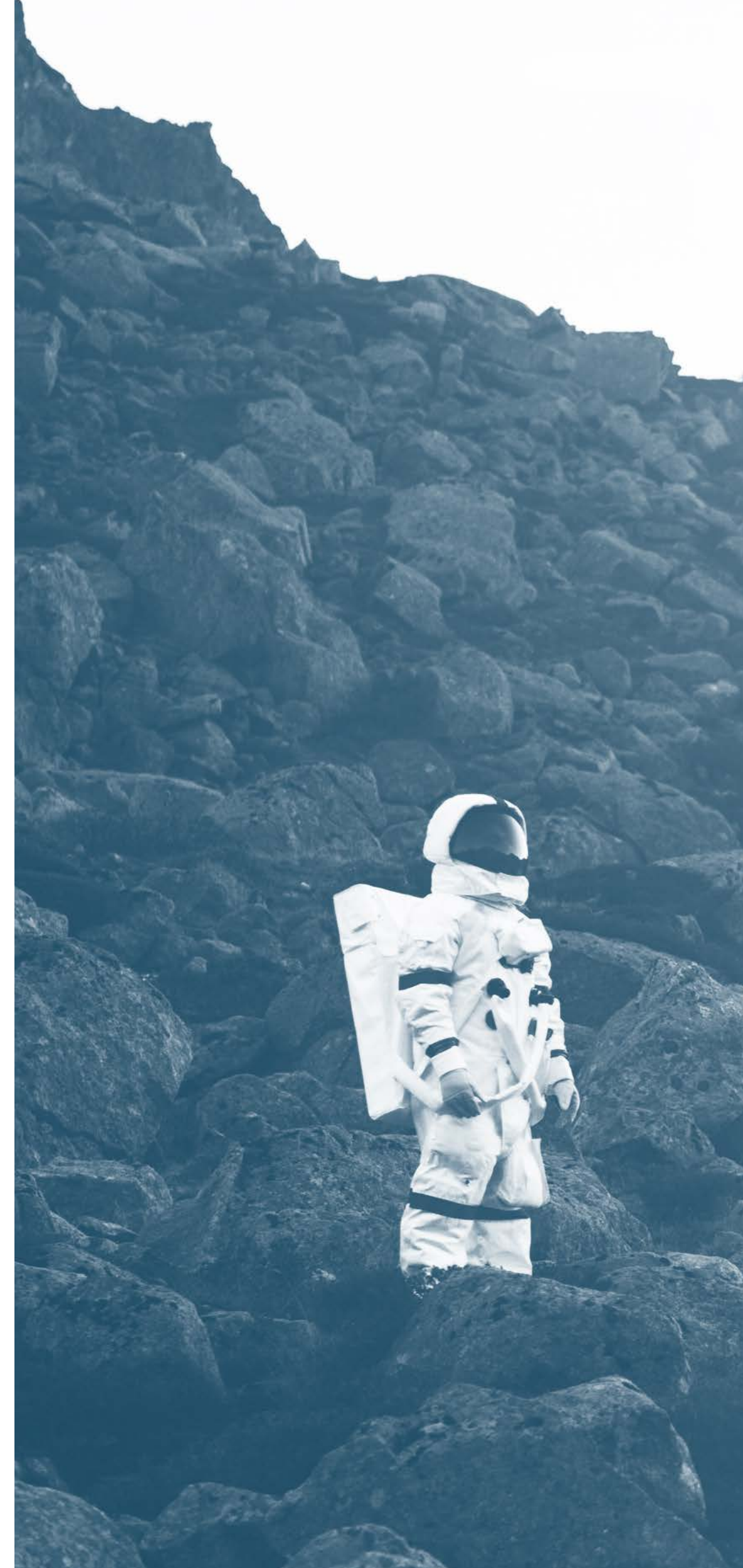
If your company doesn't have an integration admin — that's usually smaller companies — put the integration business logic in NetSuite, not in the integration tool. That way, your NetSuite admins will be able to handle changes more easily. Logic should be implemented where the expertise resides.

RECOMMENDATION #3: ARCHITECTURE

Look beyond any single integration to your organization's overall goal. Even with an iPaaS, it's easy to end up with multiple point-to-point integrations. Your integration architecture should be extensible beyond any single integration.

RECOMMENDATION #4: DO DATA TRANSFORMATIONS IN THE INTEGRATION LAYER

Data transformations can be done in NetSuite, but they increase the load of the API call, which degrades performance, especially at scale. Performing transformations in the integration layer instead will reduce the load on NetSuite.



Chapter 4: Case Studies



Corkcicle

Consumer goods maker streamlines key order and distribution processes with Boomi and NetSuite, improving the accuracy of its data and accelerating its expanding operations.

BUSINESS GOALS

Florida-based Corkcicle makes insulated drinkware, coolers and other products that keep beverages ice cold or toasty warm. To ensure operational excellence, Corkcicle needed to efficiently scale its business while ensuring fast, accurate order management and distribution across its wide network of applications and partners.

TECHNOLOGY CHALLENGES

Corkcicle had been relying on a mix of outdated integration tools that were costly, cumbersome and inflexible. Integrations between NetSuite and separate sales order entry applications, as well as third-party logistics (3PL) distribution partners, remained problematic. Order management and distribution issues threatened to undermine the business with higher costs, delays and dissatisfied customers. Corkcicle recognized that managing its data and connecting NetSuite to its other key applications was critical to its success.

HOW BOOMI HELPED

Corkcicle selected the Boomi AtomSphere Platform to address its immediate challenges and provide an integration infrastructure to support future growth. Boomi provides Corkcicle with agile, reliable cloud-native integration that's eliminated order and distribution problems while easily scaling to ever-growing order volumes. Boomi connects NetSuite with sales order entry tools from Brandwise and Aleran, ensuring that orders are accurately routed into NetSuite. And Boomi exchanges order and fulfillment information between NetSuite and 3PL warehouses in Georgia, Texas and China.

RESULTS AND BUSINESS OUTCOMES

By using Boomi to build and manage its integrations, Corkcicle has realized a host of business improvements, including:

- Improved accuracy and speed in critical order and distribution processes
- Eliminated hassles and cost of troubleshooting integration problems
- Accelerated integration development 2X to 3X compared to custom coding
- Future-proof flexibility to handle any integration scenario

“
Boomi is a Swiss Army knife that gives us flexibility to innovate.
Tying Boomi in with NetSuite helps us streamline our growth and quickly tackle any operational problems that may occur.

Blake Thomas,
Partner, Corkcicle

”

Sprinklr

Social media management vendor streamlines order-to-cash by integrating NetSuite and Salesforce.

BUSINESS GOALS

With sales volume soaring, Sprinklr, provider of the world's leading social media management suite, needed to provide finance and sales personnel with the right data to be more efficient and productive. Streamlining manual order-to-cash processes was a top priority. So was ensuring that sales reps have timely, accurate data to reply to customer inquiries. Sprinklr also wanted to strengthen financial reporting on revenue, costs, customers, products, and profitability. Achieving those goals was critical to continue its rapid growth.

TECHNOLOGY CHALLENGES

To automate order-to-cash, Sprinklr had to connect its NetSuite OneWorld enterprise resource planning (ERP) platform with Salesforce Sales Cloud. That integration would spare finance and sales teams from the time-consuming work of looking up information in one system, entering it into another, and then consolidating it in spreadsheets if needed. Previously, Sprinklr used a NetSuite-centric integration tool, but it lacked the necessary flexibility and scale.

HOW BOOMI HELPED

Sprinklr selected the cloud-native Boomi AtomSphere Platform based on its "sweet spot" — blending ease-of-use with robust flexibility to handle complex integrations. For example, Boomi makes it easy for Sprinklr to access its proprietary platform's API to connect with NetSuite for reporting.

RESULTS AND BUSINESS OUTCOMES

With Boomi, Sprinklr has:

- Eliminated the need to manually enter order-to-cash data, saving 300 hours a year
- Improved the sales team's responsiveness by giving it up-to-date customer invoices
- Enhanced financial analytics by integrating NetSuite with the Sprinklr platform

“
Boomi is the sweet spot between the ease-of-use of low-code development and the flexibility needed for complex integrations.
It can handle any kind of integration challenge we throw at it.

Eric Luehmann,
Global Director of Business Applications, Sprinklr

”

Eve Sleep

Ecommerce company focused on sleep wellness automates unwieldy manual processes, perfecting its ordering system and boosting efficiency.

BUSINESS GOALS

To remain competitive in the age of ecommerce, sleep products retailer Eve Sleep needed to offer a perfect customer experience – but it stumbled on ordering and delivery processes. So it decided to use NetSuite ERP to streamline supply chain management, align with the company's CRM, and sync its website and inventory.

TECHNOLOGY CHALLENGES

Until early 2019, Eve Sleep used software from ecommerce giant Magento, relying on an offshore development team. All its integrations were hard-coded as custom modules in Magento, which resulted in a complex, time-consuming integration process. To address this issue, the company turned to NetSuite and Boomi.

HOW BOOMI HELPED

Eve Sleep immediately realized value with the Boomi AtomSphere Platform:

- Inventory was harmonized with the website to keep track of all orders and satisfy customer demand.
- A competitive edge was gained by streamlining customer-facing processes that included order consolidation, order modification, and automated refunds.
- Processes were thoroughly tested before going live, resulting in a robust, fail-safe design.

RESULTS AND BUSINESS OUTCOMES

With help from Boomi, Eve Sleep has solved its ongoing problem of "business as usual" processes that should work but often failed. The company now can offer the perfect customer experience, with accurate website ordering, timely deliveries, and fast customer service.

“
Boomi helped us score some big wins and improve everything from customer call resolutions to delivery times.
”

Steve Davies,
Operations Director, Eve Sleep

Boomi for NetSuite Integration

Boomi partners closely with NetSuite to help more than 600 joint customers around the world say yes to faster, simpler, and more efficient integration among business units, customers, and partners. Together, we create highly connected and agile hybrid IT infrastructures. These support the rapid pace of modern business and its demand for constant innovation.

With Boomi's best-in-class data and application integration capabilities, NetSuite customers can improve process efficiencies, while making data securely and transparently available both inside and outside the organization.

The Boomi AtomSphere Platform capabilities include integration, data discovery and cataloging, EDI, a data hub, API management, and low-code workflow automation.

To learn more about how Boomi can help you future-proof your data and applications environment, visit <https://resources.boomi.com/hvhg-it>