

Automating Key Business Processes with NetSuite ERP & Salesforce CRM

Do your employees spend significant time re-entering and maintaining customer and order information in multiple systems? Are order details such as requested products or services, pricing, and quantities frequently incorrect? Does confusion ever arise regarding customer status or financial standing? Would your Sales and Support teams benefit from having a single dashboard of complete customer data to answer status and billing inquiries from customers?

If you answered “yes” to any of the questions above, your organization may want to consider integrating NetSuite ERP with Salesforce CRM. The advantages of using a cloud-based integration platform to automate business processes between Finance, Sales and Support are significant, and may include:

- A “360-degree view” of customer order and financial history
- Acceleration and improved tracking of the complete order-to-cash lifecycle
- Reduction in first-call resolution time and acceleration of collections efforts
- Improved business intelligence capabilities
- Elimination of inefficient, error-prone manual double entry of customer and transaction information
- Increased data accuracy

Finance and Sales are mission-critical business functions within companies of all sizes, from small businesses to enterprises. The best practices described in this paper result from lessons learned over hundreds of successful integrations of NetSuite ERP and Salesforce CRM, and they include the common integration touch points and recommended best practices for automating business processes across these applications.

Overview

Cloud-based application integration automates key business processes across multiple applications to provide accurate and timely financial visibility throughout the organization and eliminate inefficient, error-prone and manual data entry. This is achieved by integrating transactional

data between NetSuite ERP and Salesforce CRM. To support this effort, several dependent master data records must be integrated as well, most notably Customers and Products.

Integration will keep both applications in sync so users can be confident they are working with accurate and current information. As new Accounts and Opportunities are entered and won in Salesforce CRM, for instance, that information should flow automatically to NetSuite ERP in a timely fashion. As transactions related to those Accounts and Opportunities are created in NetSuite ERP, they should then be synced back to Salesforce to update relevant information and provide a financial history for the Account and/or Opportunity. In other words, whenever a customer or transaction record is modified in one application, integration ensures that those changes will be synced to the other application.

It should be stated that the goal of integration is not to build an entire finance system in Salesforce and replicate all its accounting business logic and workflow, nor is the goal to do the same in NetSuite. It is easy to get carried away with the customization Salesforce allows related to workflows, validations and triggers. It is best to leave the accounting to NetSuite ERP, and then synchronize the results back to Salesforce for informational and reporting purposes.

Recommended Integration Touch Points

To support integration goals, we recommend the following touch points between NetSuite ERP and Salesforce CRM. Each interface is described in more detail in the next section.

- Customers & Contacts
- Products
- Won Opportunities
- Financial Transactions

Integration Touch Points

The sections below describe the general flow, best practices and other design considerations for each integration touch point. For the purposes of



discussion, this document assumes Salesforce CRM is the origin for new Account and new Opportunity records, however that is not always the case. For a variety of reasons, some businesses prefer to enter new customers and orders directly into NetSuite ERP. Regardless of your company's process, you can still benefit from integration by syncing those customers and transactions back to Salesforce as net-new Accounts and Opportunities, and taking advantage of the reporting and forecasting capabilities that Salesforce offers.

Additional Notes

- The integration should run automatically "behind the scenes" according to a flexible schedule.
- Errors that may occur during the integration should be logged to a centralized, always-accessible console and sent immediately to administrators for investigation via email or other communication method such as RSS.

Customers and Contacts

Knowing who your customers are is an obvious business necessity, yet managing that list between two different applications can be a challenge. Manually maintaining customer status and contact information to ensure that data is accurate, current, and in sync across multiple applications can be a tedious and error-prone task. Ensuring a consistent customer list in both applications is a prerequisite to transaction integration.

Integration Recommendations

Sync only "real" customers. Most companies use NetSuite ERP, in part, to track closed deals. As such, we recommend syncing only those Accounts that have actually done business with

your company. This is commonly defined as an Account having at least one closed/won Opportunity associated with it. Leads and Accounts without a closed/won Opportunity (a.k.a., prospects) should not be synced to NetSuite ERP.

Sync both ways. Changes to Salesforce Accounts should be synced to NetSuite ERP, and changes to Customers in NetSuite should be synced to Salesforce. However, keep in mind that you do not have to sync every field bi-directionally. For example, some companies do not want critical billing information in NetSuite such as bill-to address, terms, billing contact info, payment method, etc., to be overwritten by data the sales team enters in Salesforce. The sync should be configured so that such situations are mitigated.

Swap IDs. Use custom fields flagged as "External IDs" in Salesforce and NetSuite to capture the system IDs and "link" the records that are synced between applications. This greatly simplifies and improves the performance of subsequent updates to those records and determining if a record exists in the other system becomes as simple checking whether that field is populated or not.

Only sync data that has changed. For performance reasons, the integration between Salesforce and NetSuite should extract records incrementally to avoid syncing every record, every time. This is most commonly done by selecting only those records whose "last modified date" field has been updated since the last time the integration ran successfully. Alternatively, with a little more work on the Salesforce and/or NetSuite side, a custom "integration status" field may be used to identify which records should be synced based on specific business rules. For example, maybe customer records only need to be updated back to Salesforce if the billing status changes vs.

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an update to some finance-only field like terms or preferred payment method.

Sync Primary Contacts. It is common for numerous contacts with differing roles to exist within one account record in Salesforce, whereas people who use NetSuite may only need access to the primary or billing contact. In this case the integration should only sync the primary Contact record for a given Account. In Salesforce, the primary or billing Contact is typically denoted via the AccountContactRole object with a specific role or by some custom field on the Contact object. As mentioned above, the billing contact information is something that finance teams may not want overwritten when changes are made in Salesforce. Consequently it is common for the contact information to be synced when initially creating the customer in NetSuite but then ignored during subsequent updates. Alternatively, your finance team may want to completely manage the billing contact information within NetSuite. In this case, syncing only the contact information from NetSuite ERP to Salesforce CRM may be needed.

Additional Notes

If customer records exist in both Salesforce and NetSuite prior to the integration, these are additional data migration and matching considerations:

- As with any integration project, you must consider data cleansing to resolve duplicates, naming inconsistencies, etc., to prevent the proliferation of “bad” data.
- A one-time global matching exercise to “link” the existing records (e.g. swap IDs) will need to take place. This could be done formally as part of the integration implementation or informally using utilities like Apex Data Loader and Microsoft Excel.

- If it is necessary to link existing records, think carefully about how you will match like records: by name, by email address, by some proprietary Account Number or Customer ID, and/or more sophisticated “fuzzy logic” techniques matching on things such as name/phone/address.

Products

The product or item catalog is another master data object that should be kept in sync across both NetSuite and Salesforce applications. This allows for Opportunity and finance transaction details to integrate properly.

Integration Recommendations

Choose a system of record. It is best to choose one application to be the system of record and sync products in only one direction. If NetSuite is closely tied to fulfillment of products and services, it should be the system of record. If your product catalog changes frequently and NetSuite is not closely tied to fulfillment, consider using Salesforce as the system of record. If your organization cannot decide which application should be the system of record, consider choosing NetSuite for this role; NetSuite is likely better equipped to handle the complexities around general ledger distributions, inventories, taxes, etc.

Taxes. The best practice is to rely on your ERP – in this case, NetSuite – to handle taxes and then sync only the list or sales price.

Multiple price books. If your product catalog has multiple price books or schedules, the integration should maintain those lists and create multiple Pricebooks and accompanying Pricebook Entries in Salesforce.

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Additional Notes

If you have product records existing in both systems prior to the integration, there are additional data migration and matching considerations:

- As with any integration project, you must consider data cleansing to resolve duplicates, naming inconsistencies, etc., to prevent the proliferation of “bad” data.
- A one-time global matching exercise to “link” the existing records (e.g. swap IDs) will need to take place. This could be done formally as part of the integration implementation or informally using utilities like Apex Data Loader and Excel.
- Matching items should be considerably easier than matching customers because there will typically be a common Item Number/Product Code/SKU value to match.

Won Opportunities

Automatically transferring order information when a new Opportunity closes greatly accelerates billing and collection efforts and improves the accuracy and timeliness of financial cash flow reports.

Integration Recommendations

Only closed/won Opportunities. Since NetSuite only needs to track actual deals, only

Opportunities in a closed/won Stage should be synced between NetSuite and Salesforce.

Sales Order or Invoice? An important decision that will need to be made prior to the integration implementation is the type of transactions the Opportunity sync should create in NetSuite. Most often this will manifest as a sales order or invoice depending on your sales model, although we have seen Opportunities synced to create estimates and even credit memos in NetSuite. If your organization’s sales model is static, the transaction type can be predefined in the integration. If there is any variability in the types of transactions Opportunities should create in NetSuite it’s best to devise a way to make this determination as seamlessly as possible. The simplest way to achieve this is to add a custom picklist field in the Opportunity record and ask Sales personnel to select the type. Alternatively, the integration could perform a more sophisticated determination based on other various attributes of the Opportunity.

Do not forget the Products. Most financial applications require at least one transaction detail line, and NetSuite is no exception. This is usually mapped straight from the Opportunity Product records. However, if Opportunity Products are not enabled in your organization’s instance of Salesforce, you will need to determine a way to add line item information. This can be as simple as “hard coding” a static product in the integration itself (e.g. always map to item “Consulting Services”) or using custom fields on the Opportunity header for the end user to enter/select the Product-related information.

Note: Use the “HasOpportunityLines” field on the Opportunity header when querying records to simplify this process.

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Order-specific addresses. If the bill-to or ship-to information for a given Account varies from Opportunity to Opportunity, you will need to devise a way to capture that information in the Opportunity record; in Salesforce, this information doesn’t pull from the associated Account record and it will be important to people in your organization who use NetSuite. The most common approaches are to either create custom bill-to and ship-to fields on the Opportunity object itself, or make use of the OpportunityContactRole object and include the address information on a Contact record. Of the two, the custom field approach is often more straight-forward for end users.

Syncing changes. Subsequent changes to the Opportunity or Opportunity Products can be synced to NetSuite, but only until the transaction has been invoiced in NetSuite. Once invoiced, changes should not be synced to NetSuite to avoid a discrepancy between what may have been sent to the customer and what is currently in the application. Ideally, this should be enforced in Salesforce via field and page layout permissions for end users.

Note: If the Opportunity was initially synced as an invoice, no changes would ever be possible. If a transaction needed to be modified after it was invoiced, it is common to have a manual remediation process for the finance team to “back out” or delete the transaction and then resync the Opportunity.

Finance Transactions

The final step in the integration is to close the loop and report the relevant finance transactions such as invoices, payments, and credit memos back to Salesforce. This gives sales and service reps a complete picture of the Opportunity lifecycles and the financial standing of Accounts.

Note: Because Salesforce CRM does not include standard objects for things like invoices and payments, you will need to create custom objects for each record type you wish to sync to Salesforce CRM.

Integration Recommendations

Invoices. Finance invoice records should be synced back to Salesforce. Create a custom object to capture information from NetSuite, including invoice number, invoice date and amount. Depending on the level of detail you wish to make available to Salesforce users and reporting, the invoice detail line information may also be synced by creating another custom object as a child of the invoice object.

Link invoices back to the Opportunity. Invoices synced to Salesforce should reference the original Opportunity record (via a Lookup relationship), to allow end users to easily navigate between the records. If your business operations include partial or consolidated billing (meaning there could be multiple invoices for a single Opportunity, or multiple Opportunities billed on a single invoice), you can configure a many-to-many relationship in Salesforce using an “intersecting” custom object that has Lookup relationships with both the Opportunity and Invoice objects.

Other transaction types. For maximum transparency into a customer’s financial history, sync the other relevant finance transaction types

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into their own custom objects. These transactions should be linked to either the Salesforce invoice or Opportunity, depending on their specific relationship. If your Salesforce users do not need to see details for every transaction type, you could choose to simply update the invoice record directly. For example, when a payment or credit memo is applied to an invoice, instead of creating another custom record in Salesforce, simply update the outstanding balance of the invoice.

One way only. Finance transactions should be entered in NetSuite by the Finance team, not in Salesforce. As invoices are sent, payments are received, and refunds are credited, those records should be synced to Salesforce for informational and reporting purposes. There are many accounting calculations and business rules that happen in the background in NetSuite for these transactions; to replicate those in Salesforce would be overkill. Again, let NetSuite do the accounting work and Salesforce do the reporting.

Missing Opportunities. If invoices are created in NetSuite that do not correspond to an Opportunity in Salesforce, the integration can create a new Opportunity for that invoice. This is often desirable from both reporting and forecasting perspectives.

Sample Work Flow

A typical work flow between Salesforce and NetSuite looks like this:

1. A new customer Account is created or converted from a Lead in Salesforce. (Note that the Account will not be synced to NetSuite until it has a closed/won Opportunity associated with it.)
2. A new Opportunity is created for that Account.
3. The Opportunity is updated to a closed/won Stage.

4. The Account and Opportunity information is then synced to NetSuite: a new customer record is created along with a new sales transaction or invoice.
5. If the Opportunity or sales transaction is modified in one system, those changes are synced to the other system up until the point of invoice.
6. Once invoiced in NetSuite, the invoice information is sent back to Salesforce and linked it to the original Opportunity.
7. As payments, credit memos, or refunds are applied to that invoice in NetSuite, a summary of those transactions is captured in Salesforce. The invoice's outstanding balance is modified accordingly in Salesforce.

About Dell Boomi

Dell Boomi, a business unit of Dell (NASDAQ: DELL), is the first integration solution built in the cloud, to fully exploit the value of the cloud. Organizations of all sizes—from small businesses to the largest global enterprises—trust Dell Boomi to quickly connect any combination of cloud and on-premise applications. Leading SaaS players and enterprise customers such as salesforce.com, NetSuite, Taleo, oneworld, AAA, and NASDAQ rely on Dell Boomi to accelerate time to market, increase sales, and eliminate the headaches associated with integration.

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