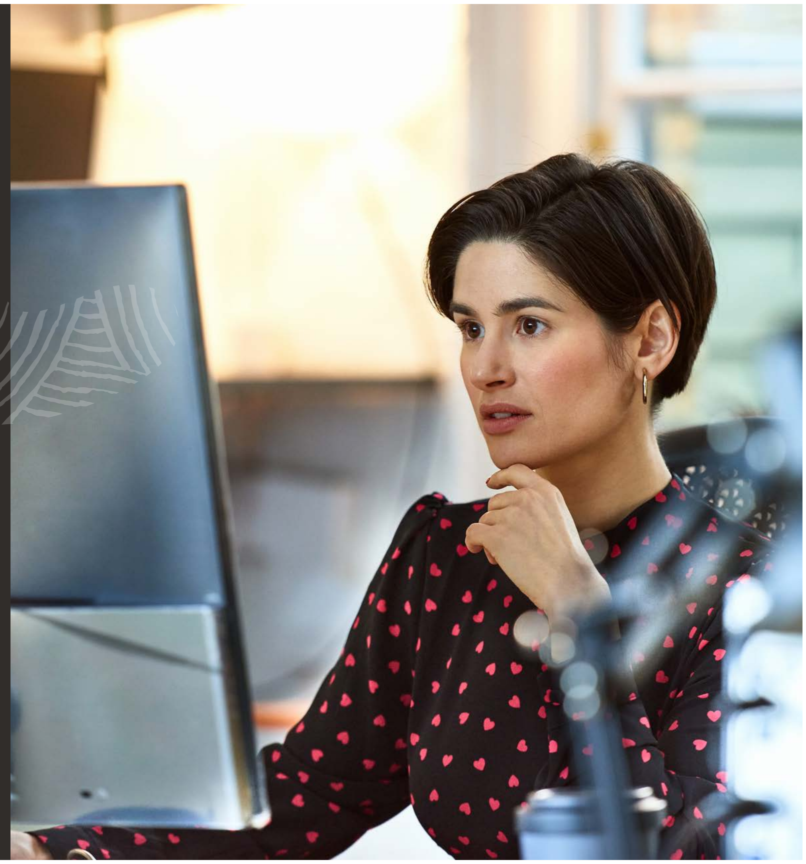
Automate Processes Across Sales, Finance and Order Management

NetSuite Salesforce Connector



The NetSuite Salesforce Connector automates the exchange of data between NetSuite and Salesforce, eliminating errors from manual data entry. The pre-built integration flows automate business processes across sales, order management and finance. When a Salesforce opportunity is won, an order in NetSuite is automatically created. In addition, the connector provides sales with visibility into a customer's account such as customer invoices, fulfillment of an order and customer payments from within Salesforce.

Key Benefits

- Pre-built connector reduces integration project time and maintenance. No need to worry about APIs or coding.
- Faster opportunity-to-cash process for operational efficiency and shortens the days to close.
- Eliminate duplicate manual data entry errors.
- Sales has better customer visibility with financial transactions data.
- A single licensing and support model allows simplified purchasing, installation and support.

Bi-directional Connector

Built on the Oracle Integration Cloud (OIC), the connector integrates NetSuite with Salesforce by automating the order process. It synchronizes customer account information so users can see the same information from either NetSuite or Salesforce. Once the connector properties and security are configured, a validation step ensures the information is set up correctly to minimize execution errors.

ERP and CRM Integration

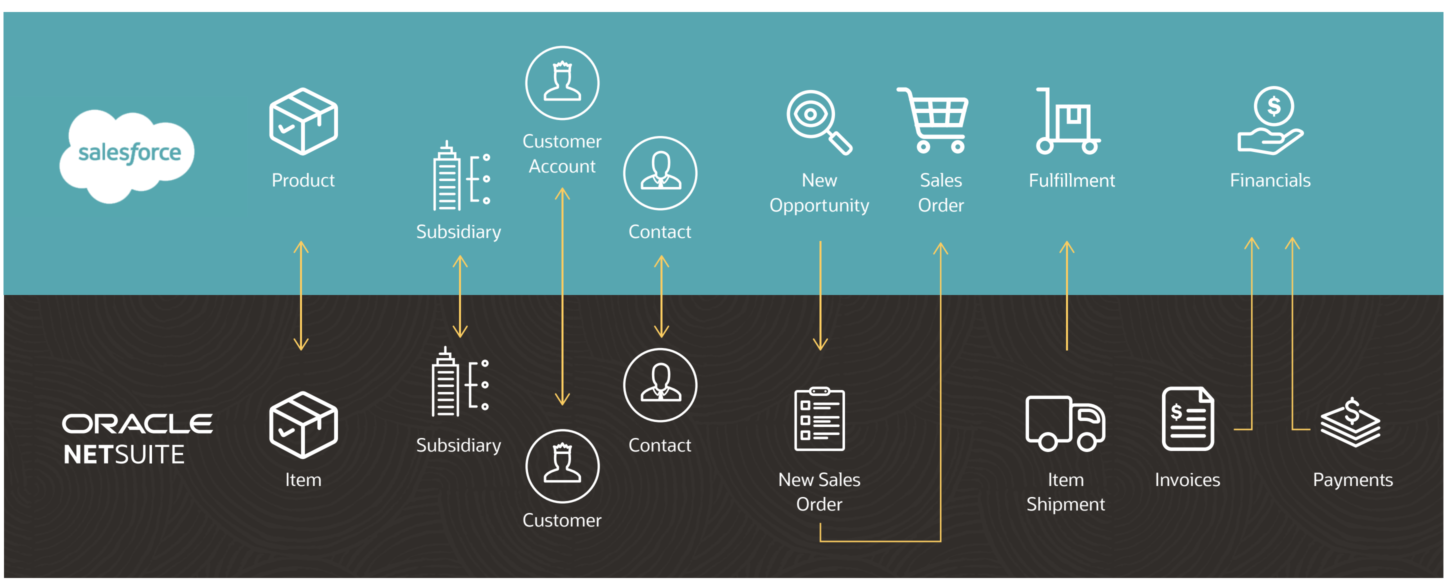
By automating the flow of data between NetSuite and Salesforce, the connector eliminates the need for finance to manually input order data into NetSuite. The integration instantly shares all the necessary information needed by sales and finance to perform their jobs like approving an order, billing the customer or tracking payments. Likewise, the sales department no longer needs to contact the finance department to continually ask about the status of an order. Salesforce will instantly show relevant data from NetSuite directly inside Salesforce.

Real-Time Financial Information in Salesforce

In addition to visibility into the financial records on an opportunity and account, a sales representative can view a customer's account to see the total outstanding balance, days past due and customer line of credit. Further, the bi-directional connector allows for data updated in NetSuite to be reflected in Salesforce, such as a change of address.

On the NetSuite side, the connector:

- Automatically creates a new customer if none exists, with related contacts.
- Transposes opportunity details and product lines to a sales order.
- Attaches file attachments associated with opportunities, such as executed agreements, to the sales order.
- Makes related records visible in Salesforce, such as invoice, fulfillment and payments once an order is approved and processed.



Bi-directional exchange of information between Salesforce and NetSuite.