The Ultimate Guide to NetSuite Integration and Automation
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Alexis Leon writes in his book, ERP Demystified, that "Having an ERP system is not a luxury but a necessity. It is a must for survival in this competitive world.'

Businesses seem to agree. According to a Panorama report, 81% of organizations have either already implemented Enterprise Resource Planning (ERP) software or are currently in the process of implementing it. I would also argue, however, that having comprehensive ERP integration and automation is also a necessity. And no I’m not talking about a clunky custom integration - I’m talking about intelligent automation between your cloud apps and on-prem solutions with a modern ERP like NetSuite.

NetSuite represented a sea change in the ERP product space. Traditionally, ERP software was on-prem and rather complex, but today more and more businesses are making the jump to cloud-based software. From 2015 to 2016, adoption of cloud-based ERP software jumped from 11% to 27%—and that figure only continues to grow. With cloud adoption continuing to skyrocket, NetSuite represents the best of modern software: cloud-based and comparatively easy for lines-of-business users to learn. Because it’s more accessible than older systems, NetSuite can lead to lots of cost savings.

And, when used correctly, it can also pave the way for your business to be a quicker, more agile organization.

But, no matter how great or cutting-edge a piece of software is, there’s always room to increase its value and make it even easier to use. On average, organizations spend about 6% of their annual revenue on an ERP implementation project (according to Panorama), so it’s crucial that organizations be able to get the most out of NetSuite.

Because there will always be some degree of complexity with ERP software, out-of-box connectors frequently aren’t robust or flexible enough to meet a business’s integration needs. Even the nimblest ERP must manage and support a wide range of processes across your business, so from a technical perspective, integration can be a challenge.
NetSuite integration is also one of the most in-demand integration use cases, because your ERP touches every single part of your business. Maybe you need to move sales information from your CRM into your ERP system; maybe you need NetSuite data to enhance your order and fulfilment process. Or maybe you want to enable real-time financial reporting. Regardless of the specific use case, NetSuite integration is crucial to making it possible.

At Workato, we frequently hear customers and prospects ask: “But can you integrate with NetSuite?” The answer is yes, and we can do it more easily than any other integration tool on the market.

The cloud-based philosophy behind products like NetSuite has inspired the Workato approach to intelligent automation. We are an enterprise integration solution that requires zero DevOps or pre-provisioning, but every integration created with our platform is 100% governable by IT. Our intelligent architecture—with features like RecipeIQ and our Community Recipes—allows teams to roll out and tweak integrations quickly. And we can seamlessly connect NetSuite with thousands of other apps, so you can make the most of your ERP.

And if you work for a nonprofit organization, don’t worry—we have many pre-built integrations for handling donations between the Salesforce Nonprofit Starter Pack and NetSuite.

Most importantly, our connector is Built for NetSuite certified. Our connector can accommodate use cases that many NetSuite users care about and need, including scenarios involving:

- Custom objects
- Custom segments
- Saved searches with joins

In short, our intelligent automation platform:

- Allows for a wide variety of integrations, from app and data integration to APIs and IoT.
- Enables many different personas, from integration specialists to business analysts, to create robust integrations.
- Works like your Instagram—not a camcorder.
- Is Built for NetSuite certified!

But don’t take our word for it—see for yourself! This book is a collection of some of the most innovative NetSuite integration use cases we’ve encountered. You’ll read stories from Workato customers like the mission-driven nonprofit Tides Canada and large, high-tech, international companies like Rapid7. Remember: these stories and scenarios aren’t the limit of what you can do with Workato and NetSuite; they’re examples of how unlimited the possibilities are!
Workato: Empowering Everyone

We founded Workato to create a new type of platform, an Intelligent Automation platform, that addresses the Technology and Social Gaps in today’s dynamic business environments. For companies to meet their digital transformation initiatives, they need a platform that does more to support the technical requirements of digital transformation and works differently to align your organization, business users, and IT with common tooling.

Functionally, the Workato platform does the following to address the Tech Gap:

- Dynamic Integrations to handle the scale, speed, and change of today’s integrations.
- Intelligent Process Automation to drive better customer journeys and experiences.
- Intelligent bots to help workers harness their apps and get their work done from chat apps like Slack and Microsoft Teams.
- Provides a Customer 360° view to get complete, correct information about customers where it’s needed.
- Workflow-as-a-Service for smarter, simpler B2B and BPO workflows at sale.
- API Gateway & Services for reuse of workflows; drive API adoption by business users.

Operationally, Workato delivers the digital native experience necessary to fix the social problems slowing down Digital Transformation and empower all.

A Digital Native experience consists of four things:

- Enabling business and IT—not just integration specialists—to create, maintain, and operate powerful automations.
- Driving collaborative, secure, policy-based IT Governance to ensure transparency, security, privacy, and auditability across your digital projects.
- Enabling supportive (rather than just control-oriented) teaming via a role-based collaborative integration project lifecycle, delegated administration, encryption of data, and selective data masking of sensitive fields.
- Harnessing the power of community within your company and across your industry to get better automations done more quickly. Workato has created a GitHub of Automations, with over 150,000 public automations across hundreds of apps that can be cloned, reused, improved, and contributed back into the community.

Workato is the only Intelligent Automation platform and with it, we’ve seen our customers grow exponentially after their first automation.
What is a Recipe?

Workato Integrations and Automations are called **Recipes**.

Recipes are a set of steps in plain English that the Integrator creates.

These recipes power our automations and integrations. When the **Trigger** occurs, Workato will begin following the set of **Actions**.

[Flowchart showing a recipe for a case created or updated in Salesforce creating or updating an issue in JIRA.]

**Trigger**
- New/updated Case in Salesforce

**Action**

1. Search issues in JIRA
2. If JIRA Search issues.Issues.ID is not present then do
3. Create issue in JIRA
4. If JIRA Search issues.Issues.ID is present then do
Chapter 1: Integrating NetSuite with a CRM like Salesforce

Keeping the finance department in the loop with other departments, such as sales and customer support, is key to any business’s operations. While the finance team spends most of their time working with NetSuite, other teams frequently store information in a Customer Relationship Management (CRM) app like Salesforce. That means it can be difficult to have visibility into crucial information, like when the sales team closes a new deal, without having to run a report or manually look at data.

These app silos can also require a lot of duplicate manual data entry. If a customer’s information has changed, for example, finance may need to manually update NetSuite to reflect the changes present in Salesforce.

With Workato, you can solve this problem once and for all. We offer hundreds of pre-built recipes that seamlessly sync NetSuite with Salesforce—or any other CRM you use—to eliminate manual data entry and give you the best look at how your entire organization is performing. Here are a few of our favorite scenarios using Salesforce as a CRM.

Remember, these scenarios can be applied to many other CRMs!

You can also sync NetSuite using Workato to:
Syncing Customer Information Between Salesforce and NetSuite

When your business acquires a new customer, you want to ensure that sales and finance both possess the correct information. And whenever sales updates a customer’s information, finance needs those changes reflected in their system as well.

With two recipes, you can sync customer information between Salesforce and NetSuite. The first recipe begins whenever a customer is created or updated in NetSuite. The recipe checks to see whether that customer already exists in Salesforce. If they don’t exist, then the recipe creates an account for them in Salesforce and updates it with the Customer ID from NetSuite. The recipe then adds the Salesforce account details to NetSuite and updates the “last sync time” field. The second recipe is the same logic in reverse. Whenever you create a new customer or update a customer record in Salesforce, the recipe checks NetSuite for a corresponding account and updates it accordingly.

These recipes feature two potential trigger conditions: the “last sync time” field is blank, or the “last sync time” field does not match the “last modified time” field. When you create a new NetSuite record, the “last sync time” field will be blank, so fulfills the first trigger condition and spurs a sync with Salesforce. And when you create a new Salesforce account, the “last sync time” field is blank, which will trigger a sync with NetSuite.

The second trigger condition ensures a fully bi-directional sync. Imagine that your recipes run every day at midnight, so the “last sync time” field is 12:00. If a sales rep modifies an account at 9:15 AM, the “last modified time” won’t be the same as the last sync—but you want your finance department to always have the most up-to-date sales data! In this case, the second trigger condition means that the records will update whenever there’s a modification. Without the second condition, there would be infinite looping within the two recipes; they would continuously trigger off of each other in a feedback loop. These two recipes ensure your customer information is always up to date in both Salesforce and NetSuite, allowing all departments to be better informed and for customers to have a better experience.
If your business uses NetSuite sales orders, it’s important that they’re linked to the right Salesforce opportunities so your sales and support teams have the information they need. In this recipe, the trigger filter dictates that the recipe will only apply to opportunities that are Closed Won and do not have a NetSuite ID already populated.

The recipe begins with a new Closed Won opportunity in Salesforce. Using the details listed in Salesforce, the recipe searches NetSuite for a corresponding customer. Then, for every product associated with the opportunity in Salesforce, the recipe creates a corresponding product in NetSuite. It also creates a new sales order with the customer’s product information or, if the sales order is already present, updates it so it is accurate. Finally, the recipe updates the Salesforce opportunity to reflect the new NetSuite Order ID. Together, these recipes provide a solid foundation for syncing your CRM and NetSuite.

Workato supports a wide range of apps and agile workflows, so if you need to incorporate extra steps, we can help you do it!

One of the best ways to round out a workflow is by incorporating Slack, or another chat app. With Workbot for Slack, a bot we designed to allow you to do work in other cloud apps directly from Slack, you can work with records in either Salesforce or NetSuite without ever leaving the chat console.
For example, you can get notifications in a specific Slack channel every time an order processes in NetSuite. Or, if you want a notification whenever a payment has not been completed in NetSuite, Workato can look up who the account rep is for that customer inside of Salesforce and send the notification to the specific account rep to let them know there is an outstanding payment.

Even more unique, you can execute approvals directly from Slack, and Workato will update the information in Salesforce and NetSuite as appropriate. You can read more about this in the eCommerce chapter on page 28.

If you’ve already connected the two apps, adding Slack to the workflow is an easy way to boost your productivity!
THE CHALLENGE
Addressing the SaaS Explosion
As Rapid7 adopted best-of-breed SaaS apps, they needed to bridge the gap between all of their apps to get actionable insights and to make sure that information is visible across all teams. They wanted to make sure the integration and automation platform they chose could not only automate their cloud apps like NetSuite and Salesforce, but also could create secure and robust integrations that involved Slack.

RESULTS
A Bot-Enabled Ecosystem and Streamlined QTO

- A bot-based strategy for streamlining workflows
- Customer info available in seconds, without hours of research
- Bi-directional NetSuite-Salesforce sync for improved reporting
- Automated Quote-to-Order process

“We’re able to take a signed, approved quote and convert that into a sales order in NetSuite for fulfillment, provisioning, and revenue recognition. We’re consolidating the downstream functions of a sales order – the sales order creation happens in Salesforce and it’s pushed into NetSuite for those back office functions.”

— John Herson, Enterprise Solutions Architect, Rapid7

Rapid7 (NASDAQ: RPD) is a leading provider of analytics solutions for security and IT operations. With over 7000 clients across more than 120 countries, the firm specializes in vulnerability management, app security, penetration testing, IT management, and incident detection.
Chapter 2: Connecting Your eCommerce Apps to NetSuite

eCommerce is one of the most important aspects of many modern businesses. Whether you’re selling directly to the consumer or to other businesses, you want the process to be straightforward, efficient, and hassle-free.

There’s a lot of backend work that goes into creating a smooth eCommerce experience, and integrating with your ERP is no small part of the process. Here are several ways that Workato customers have used our platform to connect NetSuite to their eCommerce apps.

Syncing Customers and Contacts with eCommerce apps like Magento

A key aspect of managing your eCommerce activities is making sure that all teams have accurate and up-to-date customer information. The easiest way to ensure this is by creating a bi-directional sync between NetSuite and your eCommerce platform, such as Magento.

Similar to the Salesforce-NetSuite sync mentioned earlier in this book, Workato can create a new contact in NetSuite every time a new customer is created in Magento. This process can incorporate deduplication logic, so that Workato updates existing contacts and customers instead of creating new, duplicate records.
Syncing Available-to-Promise Information Between NetSuite and eCommerce Apps

A crucial part of any successful eCommerce operation is making sure that items listed for sale are actually available. Inventory can change quickly, so it’s important to make sure your eCommerce platform—such as Magento—is up-to-date with the most recent product availability information from NetSuite.

Workato can sync both apps automatically, either in real-time or on a schedule, depending on your business needs. This integration not only eliminates the need for manual updates, but it also decreases the likelihood that customers will purchase items that are unavailable or on backorder. It also means that your eCommerce app can display expected delivery dates to customers, so they have the most accurate information before they make a purchase!

Automating Order Fulfillment

For many enterprises, the order fulfillment process is a key opportunity to make a good impression on customers. But it can be tricky to execute seamlessly; there’s a lot of information that must move between your eCommerce app, your ERP system, and other programs like your service management app.
These recipes ensure a smooth process from order all the way through refund, keeping customers happy. Additionally, the process allows all parties to seamlessly move through the RMA process without experiencing manual work or the need to log into another app.

Step 3: Recording Return Requests
If a customer wants to initiate a return, a CS agent will record the request in ServiceNow if it’s by phone or a new ServiceNow case will be opened automatically if they do it through the website. This triggers a Workato recipe that automatically creates a Return Authorization Request in NetSuite that is pending approval. The agent can initiate the return directly from ServiceNow instead of switching apps. And when the returned goods arrive from the customer, the pending Return Authorization Request will already exist in NetSuite.

Step 4: Approving the Return and Granting a Refund
Upon receiving the returned goods, a manager can approve the return by clicking “Refund” in NetSuite. The approval will trigger a Workato recipe that updates the order case status in both ServiceNow and Shopify. This automatic update lets the customer know immediately that she has been refunded via Shopify; it also informs the CS agent via ServiceNow that the return has processed.
Order Fulfillment Approval from Slack

You can enable secure approvals from inside of Slack using Workato’s Workbot. Armed with proprietary technology called Verified User Access, Workbot is the only bot that can securely perform approval workflows in Slack. You can use Workbot to orchestrate any approvals that normally are performed in NetSuite, inside of Slack. For example, you can approve or reject new orders; you can approve or reject refund requests, or you could mark items fulfilled from Slack. Verified User Access ensures that only people who are authorized to make these approvals are able to do so in Slack by asking them to authenticate with their NetSuite login the first time they try to take action.

What is Verified User Access?

Verified User Access is a first-of-its-kind, patented feature developed by Workato that allows Workbot to verify users in Slack before allowing them to take actions, subsequently correctly attributing the user taking the action inside of business apps.
THE CHALLENGE

Turning One-Time Customers Into Loyal Repeat Buyers

Magento is connected to the company’s ERP and contains all their customer’s purchase information. Consulting Firm, Hoosh Marketing, used Workato to create automatic daily campaigns on a timer. Every day, the recipe searches Magento for all the customers who made a purchase one year and ten days ago. The recipe then moves those customers into a new Marketo campaign, and it sends out the email. Eight days later — 2 days before the anniversary or birthday — the recipe sends a follow-up email. This is a great loyalty marketing hack you can add to your NetSuite eCommerce workflows.

RESULTS

Fully Automated Email Marketing Campaigns

Magento is connected to the company’s ERP and contains all their customer’s purchase information. Consulting Firm, Hoosh Marketing, used Workato to create automatic daily campaigns on a timer. Every day, the recipe searches Magento for all the customers who made a purchase one year and ten days ago. The recipe then moves those customers into a new Marketo campaign, and it sends out the email. Eight days later — 2 days before the anniversary or birthday — the recipe sends a follow-up email. This is a great loyalty marketing hack you can add to your NetSuite eCommerce workflows.

• Better targeting of customers
• Cultivates repeat business
• ROI of 900% in just a few weeks
• Can easily extend workflow to include NetSuite for added productivity

“We helped Edible Blooms set up the integration using Workato, and it is both simple and genius. They saw an ROI of 900% in just a few short weeks.”

— Fab Capodicasa, Founder, Hoosh Marketing
Chapter 3: NetSuite Integration for Nonprofits

A well-integrated ERP system is especially crucial for nonprofit organizations. Because nonprofits are accountable to their donors, they need to make sure they abide by financial best practices and can generate accurate reports.

Many nonprofits also try to run as lean an organization as possible, so they’re always looking for ways to do less with more. Intelligent automation can be a great help in this regard, as it can lessen the burden of administrative work, allowing staff to focus their energy on mission-related tasks. Here are some of the most innovative ways you can use Workato to integrate NetSuite for your nonprofit.

Processing Donations with NetSuite and your CRM

If your nonprofit relies on donations for all or part of its revenue, you need to make sure you accurately log those donations. Workato makes it easy to track donations across both NetSuite and your donor management system, such as Salesforce. With several pre-built Workato recipes, you can create a workflow that begins whenever a new cash sale is logged in NetSuite.
Managing Donor Relationships with NetSuite and Your CRM

It’s also crucial for any nonprofit to maintain strong relationships with donors. Contacting a one-time donor at the right touchpoint, for example, can encourage them to become a repeat giver. And sending personalized reminder emails can help make seasonal giving campaigns more successful.

To maintain good relationships with your donors, you need to make sure their information—such as name, email address, and phone number— is always up-to-date in both your donor management system and NetSuite. Integration can drastically simplify this process.

For example, you can use Workato to automatically sync new Salesforce contacts with NetSuite. This scenario is similar to the Salesforce-NetSuite sync covered in Chapter 1 of this book, and it’s a powerful integration for nonprofits looking to run a lean operation!
THE CHALLENGE

Future-proofing with Best-of-Breed Apps

As a nonprofit, Tides Canada constantly seeks to improve its operational efficiency. To optimize its operations, the organization decided to transition to best-of-breed apps, including Salesforce and NetSuite. To accurately forecast and report, the nonprofit needs access to up-to-date information from both systems.

RESULTS

A Lean, Green Nonprofit Machine

Affordable and reliable integrations
Accurate and timely Reports
Ability to add workflows and apps as the org grows
Saves the cost equivalent to 1-2 full time employees

"Integration was the last step in switching to NetSuite and Salesforce, and it was super fast. It took only a couple of months to setup."

— Anne Johnston, COO, Tides Canada

Tides Canada is a recognized national leader in social change philanthropy. The organization has supported over 2,500 initiatives; notable work includes conservation of West Coast marine and wildlife habitat, the protection of the Great Lakes, and support for Indigenous leadership. In 2016, the nonprofit raised $20 million and has granted over $175 million since the organization’s inception in 2000.
Chapter 4: Tracking Financial Transactions

Of all the teams in your business, you probably associate NetSuite most closely with the finance and accounting team. After all, NetSuite is an ERP! But even for the most tech-savvy accountant, NetSuite can be a daunting tool to use—especially if you’re tracking individual line items or thousands of journal entries.

Integration can enhance NetSuite and make it easier to use for your accounting team. Here are some clever ways you can use Workato to eliminate manual data entry, ensure high-quality data, and enhance your financial reporting.

Creating a Trustworthy General Ledger in NetSuite

One of the most difficult aspects of managing an organization’s finances is making sure that your system of financial truth (i.e. NetSuite) is as accurate as possible. General ledgers provide a bird’s eye view of your business’s finances, but to do so, they must synthesize complex information from many other sources, such as your CRM, payroll, eCommerce, and procurement apps. This can be hard to do intelligently, because manual data entry is prone to mistakes and blunt, out-of-box integrations can create unwanted duplicates.

Workato offers a more intelligent, nuanced approach to syncing other apps with your general ledger. You can define complex business logic and build recipes based on that logic, so you can trust that your ledger won’t have errors or duplicates. Workato has pre-built connectors for hundreds of apps, so no matter what your app ecosystem looks like, you can create an up-to-date, error-free General Ledger in NetSuite.
THE CHALLENGE
Streamlining Accounts Payable

Accounts payable (AP) is a key part of Quick Base's accounting infrastructure. To track finances, the accounting team uses a Quick Base app fit to match their procure-to-pay (P2P) process in conjunction with NetSuite. The Quick Base P2P app is responsible for the company's entire procure-to-pay process, but NetSuite is the accounting system used for bookkeeping. Keeping the two apps in sync, however, proved challenging, and the lack of integration affected many core accounting functions.

RESULTS
Saving Two Days of Work Per Month

To solve this problem, Quick Base designed an automated workflow using several Workato recipes. The integration creates an AP subledger in NetSuite, eliminating the need to manually book AP every month. Once a bill is entered into Quick Base, Workato creates a corresponding bill in NetSuite and posts it to AP, where it stays until it’s paid.

- Customized AP subledger for easy tracking
- More accurate reporting
- Error-free data sync between apps
- Real-time snapshots of vendor spend
- No need to manually book AP every month

"Once we saw the platform's capabilities, our heads were spinning. This was something we were definitely missing: a quick way to implement integrations and connect systems. Now we use it for almost everything."

— Ryan Murray, Senior Application Developer, Quick Base
Did you know that according to the Project Management Institute’s 2015 study, the average large IT project runs 45% over-budget and 7% behind schedule—all while delivering 56% less value than expected? And that’s just IT; projects across all departments are notoriously difficult to keep on schedule and under budget.

Part of the problem is that project information is contained in silos; it lives in project management apps, which makes it difficult to access for people who aren’t directly involved in that specific initiative or department.

Integrating your project management apps with NetSuite can help solve this problem by making up-to-date project information instantly accessible. For example, you can use Workato to sync timesheets and expenses from your project management app—such as Asana—to NetSuite. You can also use a similar integration to connect NetSuite with a timesheet app such as Replicon, so you can adequately plan for and track project expenses like labor.
Chapter 6: Creating a 360° Customer View

One of the most important benefits of integration and automation is that it allows you to create a holistic view of every customer in one place. This is especially important for teams like customer support (CS), who must directly interface with customers when issues arise.

By syncing apps like NetSuite, Zendesk, and ServiceNow with Salesforce, you can create a robust picture of how a customer is doing at any point in time. Syncing NetSuite data like invoice numbers, open orders, and financial status allows support staff to troubleshoot problems more easily. It can even be a boon to your sales team, who have a more accurate picture of a customer’s financial status.
Conclusion

NetSuite truly represents the next generation of ERP software. But with such high costs associated with ERP implementation, it’s crucial that your organization make the most of everything the program has to offer.

Intelligent automation is the most powerful, most agile way to connect NetSuite with your other apps—whether they’re cloud-based or on-prem. We hope the use cases highlighted in this book inspire you to reimagine your everyday workflows, from accounting to project management and beyond!

Visit [www.workato.com/integrations/netsuite](http://www.workato.com/integrations/netsuite) to learn more or jump right in with a free trial.