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CASE **STUDY**

BEST-OF-BREED INTEGRATION: **SALESFORCE CRM WITH NETSUITE ACCOUNTING SOFTWARE**

A major financial services company that provides funding to small and medium-sized companies needed a data-driven, 360-degree view of its business, starting from the moment a prospective client applies for funding and proceeding as the client makes payments, which continues indefinitely.

To support its business objectives, the firm would need a customization of its Salesforce CRM software, plus a seamless integration of that software with NetSuite, its separate cloud-based accounting tool.

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THE **CHALLENGE**

To understand the complexity of the case, it's useful to first understand the firm's unique business model. Although it provides financing to businesses, unlike a traditional lender that expects to be repaid with interest over time, the firm purchases a percentage of its clients' future accounts receivable. Also, while lenders may take months investigating their applicants' past performance and available collateral, the firm offers a simple online application process and makes decisions about funding in as little as 72 hours.

Prospects who apply for funding online are entered into the company's Salesforce system. The application is reviewed by staff, and a decision is made. When the applicant is approved and accepts funding, it becomes a client. Data must then be shared seamlessly and automatically with its accounting system, which is built on the NetSuite platform.

NetSuite is popular with many companies for its sophisticated accounting and enterprise resource planning (ERP) tools. However, though NetSuite does offer a customer relationship management tool, Salesforce is the undisputed best-of-breed CRM solution. Conversely, some feel that Salesforce lacks the sophisticated ERP and accounting solutions that NetSuite delivers.

So it's not surprising that the finance company wanted to access the benefits of both systems. Yet despite NetSuite's suggestion that its software integrates easily with Salesforce out of the box, the truth is that its data-sharing needs — like those of many companies — are far too sophisticated for a simple integration. In fact, many enterprise businesses face a similar challenge to the finance company when it comes to integrating their customer relations management solutions with their accounting software.

> The finance company wanted to access the benefits of both systems, the sophisticated ERP and accounting solutions of NetSuite and undisputed best-of-breed CRM solution of Salesforce.

Without Aptaria's integration, it would have been faced with several less-than-ideal options. It could have chosen not to integrate the two platforms at all. That would have left its customer relationship data separate from its accounting data, forcing employees to manually transfer data between Salesforce and NetSuite whenever a prospect signed the paperwork to accept funding.

Businesses that choose this path often do this by copying text from Salesforce fields and pasting it into NetSuite (or vice versa), inevitably making data-entry errors as they go and wasting hours of time.

Or it might have chosen one of packaged connectors that claim to integrate the two systems out of the box, without significant customization. But these adapters don't work very well for businesses that have complex data-sharing requirements, as the financing firm does.

A third option would have been to rely on expensive middleware that sits between the two platforms and acts as a kind of universal translator. While that may be a reasonable solution for companies that need to integrate many different enterprise applications, when striving to share data only between NetSuite and Salesforce, it makes more sense to build the integration directly from one platform to the other without the need for middleware.

THE **SOLUTION**

NetSuite's SuiteTalk SOAP API makes it possible for developers to build direct integrations with Salesforce, even for businesses with the most complex business logic requirements.

The SuiteTalk API exposes NetSuite's web services, allowing developers to build the integration entirely on the Salesforce side. Post-integration, accounts and contacts are created in Salesforce and then automatically pushed to NetSuite.

Virtually no development work is necessary on NetSuite. Instead, Aptaria's solution built on Salesforce calls on NetSuite whenever critical data is entered into Salesforce, automatically synching with NetSuite on a near-real-time basis.

It sounds simple enough. But the unique data-sharing needs of the financing company made this integration more complex.

First, because each application represents a potential deal for the financing company, its applicants for funding are its prospects. So its Salesforce software needed to be reconfigured to recognize those applications as Opportunities. So Aptaria renamed the Opportunity object in the company's Salesforce system to "Application" object.

> The SuiteTalk API exposes NetSuite's web services, allowing developers to build the integration entirely on the Salesforce side.

However, because applications are really just opportunities until they get approved for funding, a NetSuite record is created only when an application reaches that stage — and then it's created automatically in NetSuite for further processing by the accounting department.

With this architecture, the company can restrict access to NetSuite to only its accounting staff, reducing licensing, training and other costs, while still providing a 360-degree view of the customer to all customer-facing personnel working entirely within Salesforce.com

All three integrations — accounts, contacts, and applications — are synchronized with updates pushed to NetSuite via SOAP calls every 15 minutes. Data on remittances — payments made to the company by its customers — are pulled from NetSuite to Salesforce, also every 15 minutes.

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The graphic below represents each of the distinct data integrations that Aptaria developed for the client. In all, the integration includes transferring nine unique data types, each initiated from Salesforce via SOAP calls to NetSuite.

SALESFORCE TO NETSUITE **INTEGRATION**

salesforce

SALESFORCE.COM

MASTER FOR:

- Account
- Contact
- Applications

READ ONLY FOR:

- Remittance

Accounts Sync – PUSH
(synchronous)

Contact Sync – PUSH
(synchronous)

Funding Event – Application (Opportunity) – PUSH Sales Order
(synchronous)

Funding Event – Line Item(s) – PUSH Sales Order Line Item
(synchronous)

Funding Event – Application (Opportunity) – PUSH Purchase Order
(synchronous)

Funding Event – Line Item(s) – PUSH Purchase Order Line Item
(synchronous)

Funding Event – PULL Sales Orders
(hourly batch)

Funding Event – PULL Purchase Orders
(hourly batch)

Remittance – PULL by LastUpdatedDateTime
(daily batch)

NETSUITE

MASTER FOR:

- Remittance

READ ONLY FOR:

- Account
- Contact
- Sales Orders
- Purchase Orders

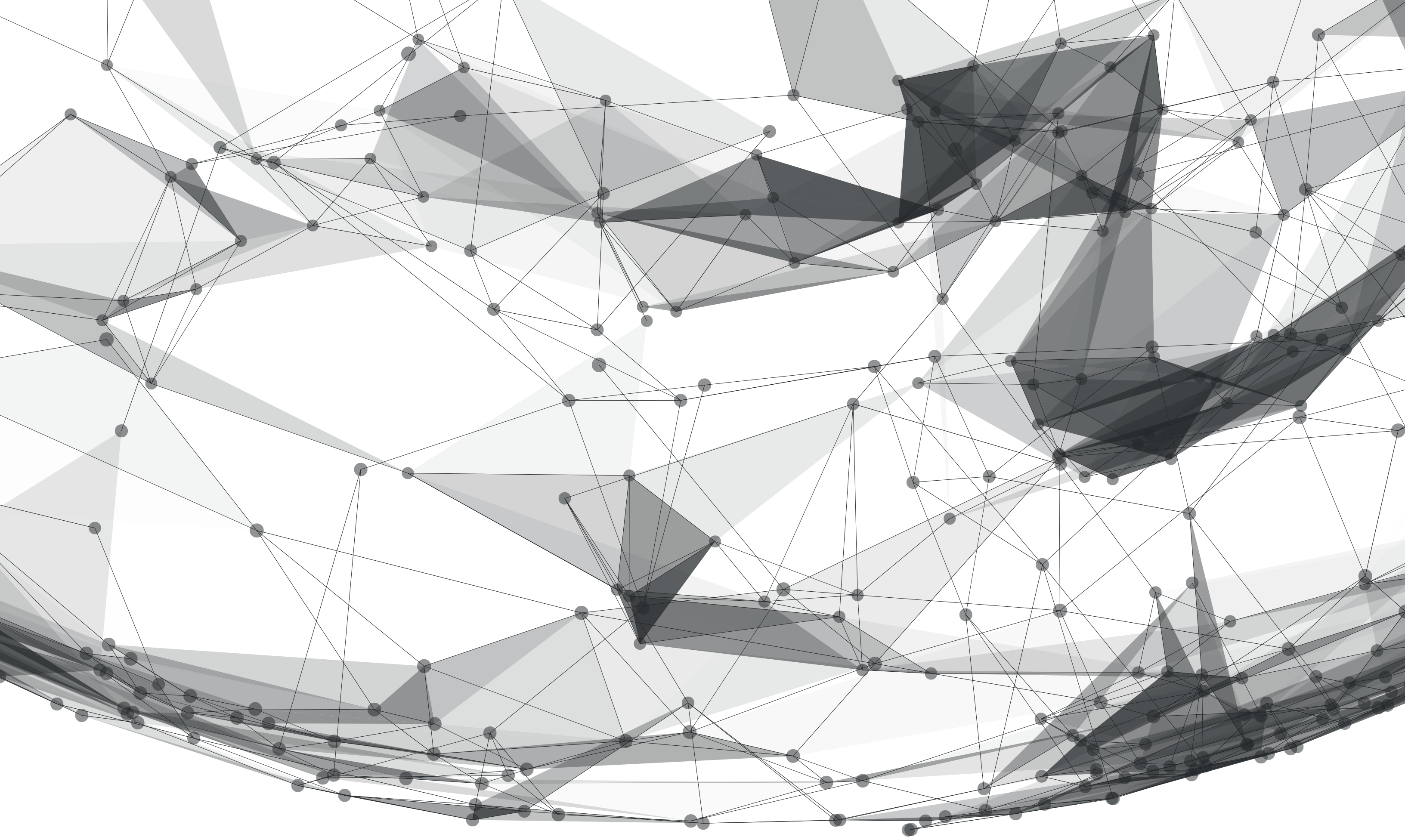
Yet simply synching data between Salesforce and NetSuite isn't enough, for two reasons. First, the financing firm often works through brokers who are owed a commission when the deal is approved. So in addition to creating the standard sales order, Aptaria's software also creates a separate record to advise accounting to pay the commission.

Second, the sales orders themselves needed customization, because each sales order includes line items that define particular fees associated with funding that business. So the integration software has to push the necessary data to NetSuite to create those line items on each purchase order. The financing company's case was particularly intricate due in part to the sheer number of data types that needed to be integrated between NetSuite and Salesforce.

Yet even as this case was especially challenging, many midsized and larger businesses have sophisticated data-transfer needs requiring deep knowledge of the Salesforce platform.

Companies that prefer these two best-of-breed solutions, but need them to work seamlessly together, must carefully consider about how to integrate them so data is exchanged automatically, and without error.

The SuiteTalk API exposes NetSuite's web services, allowing developers to build the integration entirely on the Salesforce side.



ABOUT **APTARIA**

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salesforce silver cloud alliance partner

As one of 16 U.S.-based Salesforce-certified PDOs, Aptaria creates customized Salesforce solutions for companies and organizations of all sizes, including Fortune 500 clients.

Since 2002, we've applied our deep knowledge as a Salesforce consulting partner to deliver cloud-based solutions.

For more information about this case, or a deeper conversation about your own data-integration needs, **reach out to us**.

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