



NetSuite and Salesforce CRM Integration



Synchronization Points

NetSuite and Salesforce CRM Integration

ERP CRM Integration



Account / Customer Sync

- Customers created in NetSuite ERP will be synced to Salesforce CRM as Accounts. Similarly, Accounts created in Salesforce will also be synced to NetSuite as Customers.
- The following details are the key information synced between the two platforms:
 - Name and general information with the NetSuite Customer Number
 - Default address details and additional addresses
 - Associated price levels
 - Any additional custom field can also be synced.



Contact

- Multiple contacts can exist under a customer/account in NetSuite/Salesforce and can be bidirectionally synced between the two platforms to ensure accurate customer/account record assignment.



Price Level and Price Books

- Pricelists created in NetSuite will be synced with the Pricebooks in Salesforce which contains the respective product prices.
- Base price level of items will be synced as standard price in Salesforce.

This is a uni-directional sync process as NetSuite.



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Item

- Items created in NetSuite will be synced to Salesforce CRM with the respective item attributes containing custom fields.
- The pricebooks entries will be created for the respective item and its price-level combination.
- Products marked as inactive in NetSuite will also be marked as inactive in Salesforce.



Estimate

- Quotes created in Salesforce will be synced to NetSuite as Estimate, with the line item and price details.
- Sales reps from NetSuite will also be synced to Salesforce with the expiry date details, ensuring downstream processes like commission calculations, price changes, etc. are fully intact



Order

- Orders created in NetSuite will be synced to Salesforce as Sales Order.
- If the order is made in respect of a quote, it will be synced to the quotation record in Salesforce.
- The order will also sync with the accurate account and will come along with the line item



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Invoice

- Invoices created in NetSuite will be synced to Salesforce as Invoice (custom object). It will be automatically synced to the related Sales Order and Account



Payment

- Customer payments posted in NetSuite will be synced to Salesforce under respective invoice, helping the Sales reps to check A/C receivables when following up with the customer.



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Save Time and Effort

Seamlessly connect business-critical applications and save huge amount of time and effort by automating business processes

Boost Productivity

Eliminate the need for manual data entry, resulting reduced risk of errors, increased productivity, quality and a happier workforce

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Without APPSeCONNECT, I don't think we could have grown our website to where it is now. In terms of what is out there in the market, it is the cheapest option that would deliver a reliable service.

Erika Weihmayer
Prana Biovegan



The product is easy to work with. Through out the process, APPSeCONNECT was very accommodating of our specific requests.

Victoria Schweistein
Lumondi Inc

Integration Case Studies



Hernon

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