

A JITTERBIT EBOOK

# A Proven Approach to NetSuite Integration





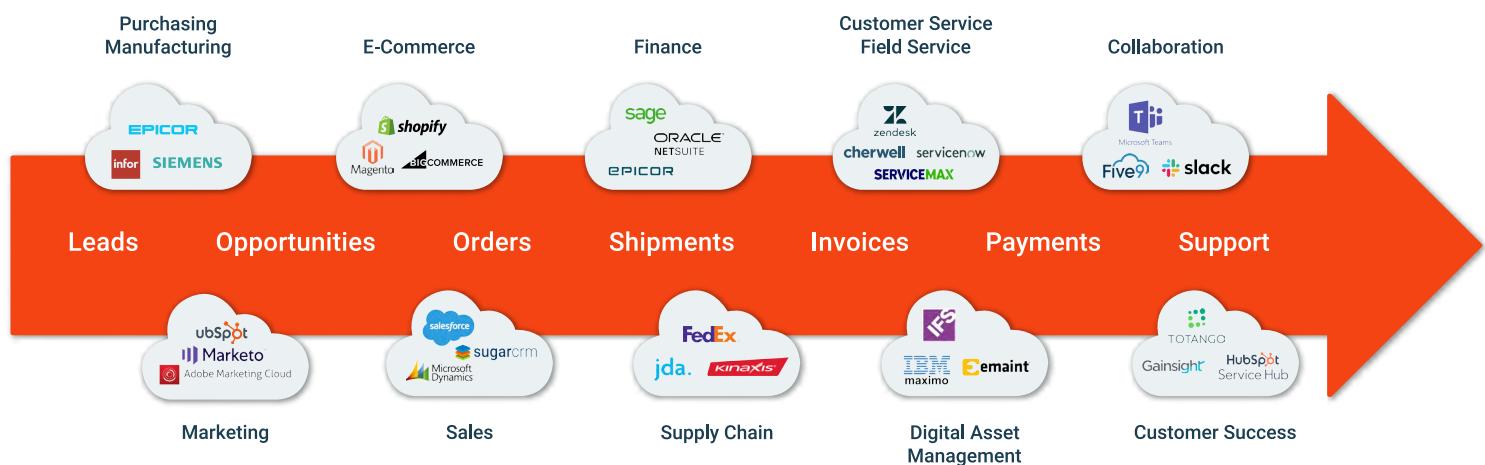
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## Why You Need NetSuite Integration

NetSuite is a powerful cloud ERP solution with the potential to help you operate and analyze your entire business. But most businesses running NetSuite aren't utilizing only NetSuite modules. Rather, they rely on a stable of best-in-class applications that offer the right mix of features, functions, and affordable options for their unique operating environment.

And so, for most companies to unlock the full potential of NetSuite, they must integrate with other systems and applications such as databases, EDI, CRM, Marketing Automation, Payment, and more. The diagram below demonstrates just a fraction of the applications that may impact core business activities.



## A connected, data-driven business. It's every leader's dream!

NetSuite Integration offers a path to link complementary applications and unleash the full potential of a truly streamlined and interconnected tech stack. Imagine... cross-departmental visibility, improved collaboration, 24/7 data reporting, greater efficiency, cost savings, and actionable insights across platforms.

But while the impact to your business upon completion may be transformational, the reality is that **55% to 75% of all Enterprise Resource Planning (ERP) implementation and integration projects fail to meet their intended objectives** (Source: Gartner).

The complexity and scale of NetSuite integration projects can feel overwhelming, but by leveraging the proven approach in this guide, you can unify and organize your team, audit your unique situation, map the integration process, and successfully integrate workflows and data to deliver real value.

# STEP 01

## Unify and Organize Your Integration Team

The foundation of a successful integration is getting everyone on board, articulating the case for integration (why is this project worth it?), championing collaboration, and deploying communication and workflow tools that empower the team.

**Address the following questions to unify and organize a powerhouse integration team:**

### How deep is our internal NetSuite knowledge and experience?

Take a hard look at your staff, existing systems, and talent. Understand what internal capabilities you can leverage and determine the areas where you need outside expertise.

### What tools and processes are already in place that can drive a NetSuite integration project?

Before you build new systems, buy new software, or revamp processes—refine and repurpose everything you can. Remember that your team already knows the elements currently in place, and reinventing the wheel wastes precious time and resources.

### Who are the users and owners of our applications and data?

Recognize the key individuals throughout your organization who have a stake in the NetSuite integration project. Pull them into conversations early, listen to their needs, hopes and concerns, tap their insights into technical requirements, and – perhaps most importantly – give them clearly defined roles in the project.

### How are we currently using NetSuite and how will this project drive change?

Once you've identified who uses and owns the applications and data that will be affected by the integration project, you can assess implications, consider limitations, and address how the NetSuite integration changes how people work, communicate, make decisions, and manage resources.

### What are the most important business goals we need to achieve with this NetSuite integration?

Integration for integration's sake is almost always doomed to fail. But when an integration team is united behind vital business objectives – and they understand the impact their success can make – they can rally to overcome competing goals, conflicting ideas, and the disappointing day-to-day reality of long, complex project execution to win the day.

# STEP 02

## Audit Your NetSuite Situation

In one sense, all major software integration projects share commonalities, but in another sense, each project scenario is completely unique.

To give your team the best chance of success, you must audit your situation, thoroughly understanding the current reality and future requirements to prepare for the project ahead.

**Important questions to address in your audit include:**

### What are the parameters of your NetSuite account, and how might they change?

NetSuite is the financial backbone of your business, and the features, customizations and future requirements will impact every decision you make throughout the integration project.

Document the structure for managing multiple entities, scripting and workflows, product licensing, user seats, and the optional features and customizations that are enabled. How will these parameters change post-integration?

### How does your company manage data and how might that process change?

Audit your cloud strategy, organization, monitoring, and best practices. Understand the web of data sources your company relies upon and map their dependencies. Assess the present and future for moving data into and out of NetSuite and bridging NetSuite with other applications.

Which applications are housed on-premises, and which ones are on the cloud? Who is managing and accessing data? How and

when? Do you require real-time, near real-time or batch updates? Does data need to be PCI or HIPAA compliant?

### Can you map your data?

It's important to understand your company's data flow across business processes, the different applications in play, and user permissions. The point of data mapping is understanding where data lives, where it needs to go, the stops it makes along the way, and how to ensure it is secure, validated, and reconciled. Data maps should also address points for modifying, verifying, or augmenting data before it moves to another application.

### What are key use cases for applications connecting with NetSuite?

As mentioned earlier, integration for integration's sake doesn't make business sense, but starting with clear and compelling use cases for integration can help you give structure to understand where integration will be most valuable. Based on your use cases, map specific tasks and consider the interconnectivity of data sources to structure a savvy integration project.

# STEP 03

## Map the Integration Process

Best practice checklists can be valuable to help you manage complexity, track progress, and eliminate areas of concern.

**Complete this checklist to map your custom integration process:**

- Select project management tools and appropriately structure your project
- Establish roles and accountability for key tasks
- Identify project priorities so you can focus your time and resources
- Establish key milestones to incrementally assess progress
- Map your integration architecture and ensure the current structure is extensible for future integrations
- Identify all applications to be integrated and set parameters:
  - › How do applications need to be connected to NetSuite – and to each other?
  - › Which applications are process drivers, systems of record, or 'own' specific data?
  - › Are there variables among data sets, or key dependencies to consider?
  - › What data access controls, updates, and security must be taken into consideration?
  - › What data clean-up may need to occur before integrating applications?
- Budget each phase of the project, allowing a margin for unanticipated expenses
- Conduct a risk assessment for the project and mitigate all primary risk factors
- Create a communication plan to ensure collaboration and seamless workflow
- Set tracking mechanisms to monitor, measure, and report progress
- Establish a contingency plan to address errors or problems during integration

Remember, a project of this scale is a journey, not a destination. Expect to continuously test, adapt and improve, adding new integrations and supporting the evolution of your NetSuite integration over time.

# STEP 04

## Assess Integration Options

Now it's time to get down to the details. How will you navigate a project to integrate NetSuite with your other platforms, in-house systems, and cloud applications? Before you dive into internal project management nuts and bolts, consider one key question:

**Given the complexity of the NetSuite integration under consideration, do you need to partner with an outside integrator?**

There are three options for NetSuite integration: **custom coding**, a pre-built **connector** for two (or a few) simple applications, or an **integration platform**.



### Custom Code

Custom code allows you to engage a developer or team and build your own custom integrations from scratch. In exchange for flexibility and control, you trade off scalability, and the ongoing cost of managing custom APIs.



### Connectors

Connectors are a good option if you realize that you only need to integrate NetSuite with one or a few outside applications. In these cases, pre-built options can provide simple point-to-point solutions that get the job done.



### Integration Platform

However, businesses often want to take advantage of pre-built connectors for straightforward integrations and need the flexibility to customize and extend integrations as needs evolve. In this case it can be advantageous to partner with an Integration Platform as a Service (iPaaS) provider to unite multiple applications with NetSuite through automated tools, templates, and data synchronization services.



# Now, Which One Should You Choose?

Of course, we recommend Jitterbit solutions for NetSuite integration, and in the pages that follow we'll tell you why. But whether you partner with Jitterbit or not, assess these key criteria to select the right iPaaS vendor for you:

- 1 Is the iPaaS partner you're considering a complete solution with a proven track record?
- 2 Does the iPaaS partner offer pre-built connectors that are easy to use and install for the core integrations that matter most to your business?
- 3 Does the iPaaS partner offer customization side-by-side with pre-built connectors, allowing you to customize, reuse, and build new integrations?
- 4 Are platform interfaces intuitive for your developers and non-technical team members to use?
- 5 Will the iPaaS partner back up their technology with excellent customer service, robust documentation, quick-turn support, and training?
- 6 Is the security of the iPaaS platform strong?

**Before you partner with an iPaaS platform, you should be able to answer YES to all 6 questions above.**

# Automate Business Processes Across the Customer Journey with Jitterbit

Jitterbit's Customer Experience API360 (CX API360) accelerates the automation of business processes across your entire customer lifecycle by seamlessly integrating NetSuite with all your other applications.

The CX API360 methodology, built on Jitterbit's industry-leading API360 framework, leverages best practices from implementing thousands of integrations for customers and partners. Jitterbit's iPaaS solution offers both the ease of use for common integrations and the depth to address complex integrations, making it fast and easy to synchronize data and connect business flows.



Connect an app, data, or device

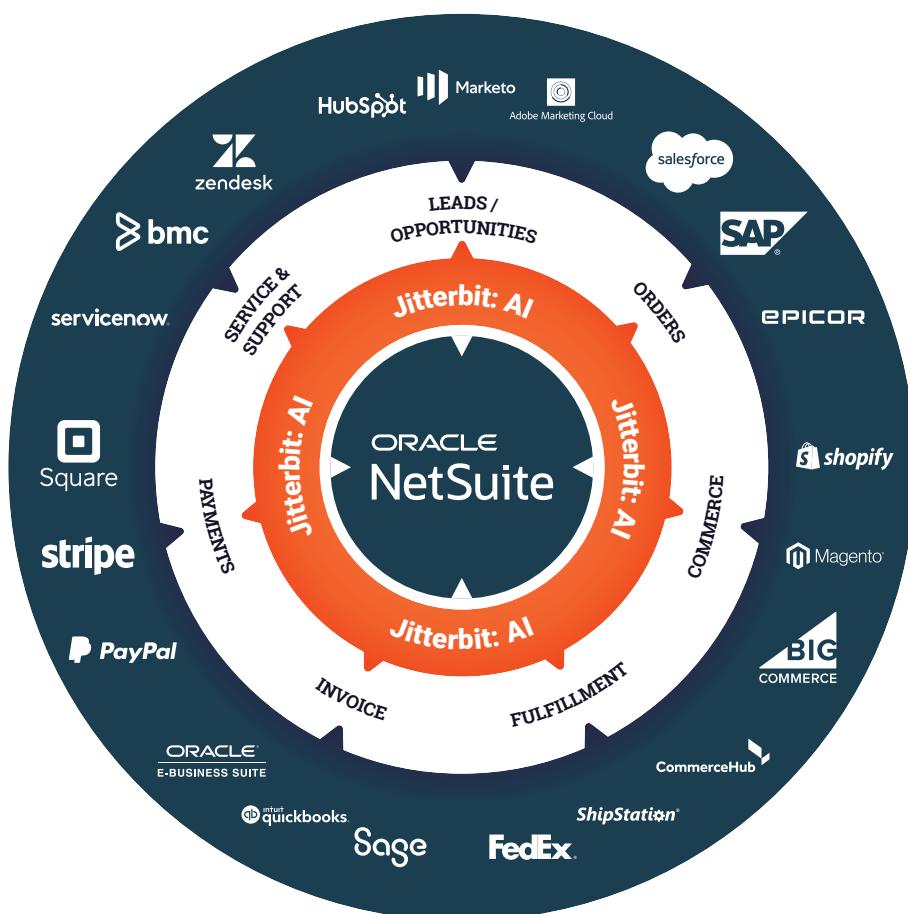


Deploy on-premises, in the cloud, or hybrid



Manage APIs securely and intelligently

*Integrate NetSuite with other applications to enable a 360-degree view of your customers*



# Accelerate Workflows with Templates

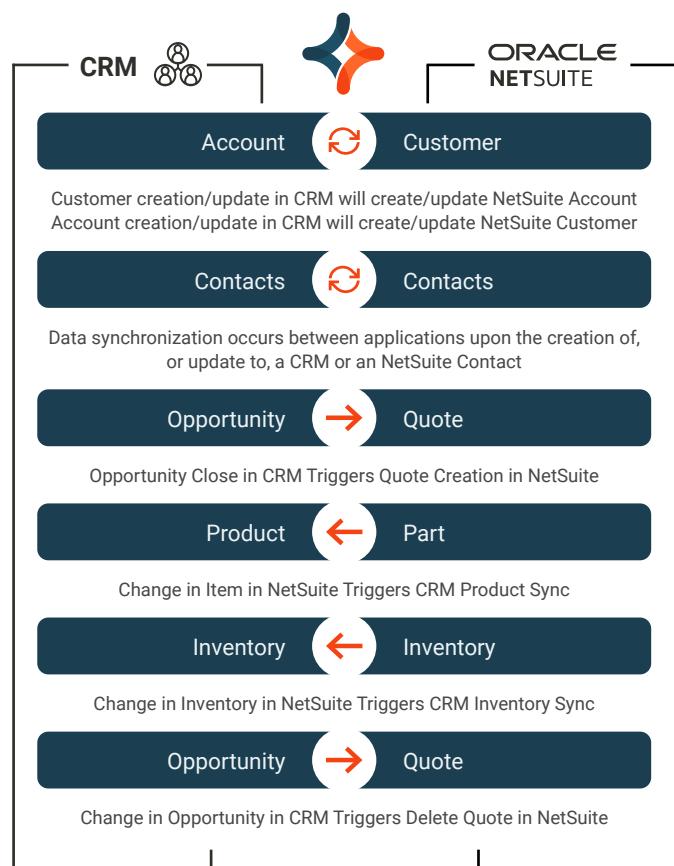
A Jitterbit Process Template solution includes pre-built integration workflows that accelerate connections to commonly used objects, fields, and processes. Process Templates can reduce the time to deploy integrations by 50-80%. The templates are extensible and customizable to meet your unique requirements.

Here are some examples of a few of Jitterbit's NetSuite Process Templates:

## ORDER TO FULFILLMENT



## OPPORTUNITY TO ORDER



Example: BigCommerce, Magento, Shopify

Example: Salesforce, Dynamics 365 CRM

Find a complete list of [Process Templates here.](#)

# Sync Data Fast with Hundreds of Recipes

Jitterbit's Integration Recipes are pre-built integration mappings that move data in one direction between similar objects across two applications or systems.

You can use recipes as building blocks to accelerate integrations by using them in Process Templates, or in custom integrations.

**There are 500+ Jitterbit Integration Recipes available for a wide range of applications, including integrations like:**



Sync HubSpot Contacts  
to NetSuite Customers



Sync Workday Workers  
to NetSuite Employees



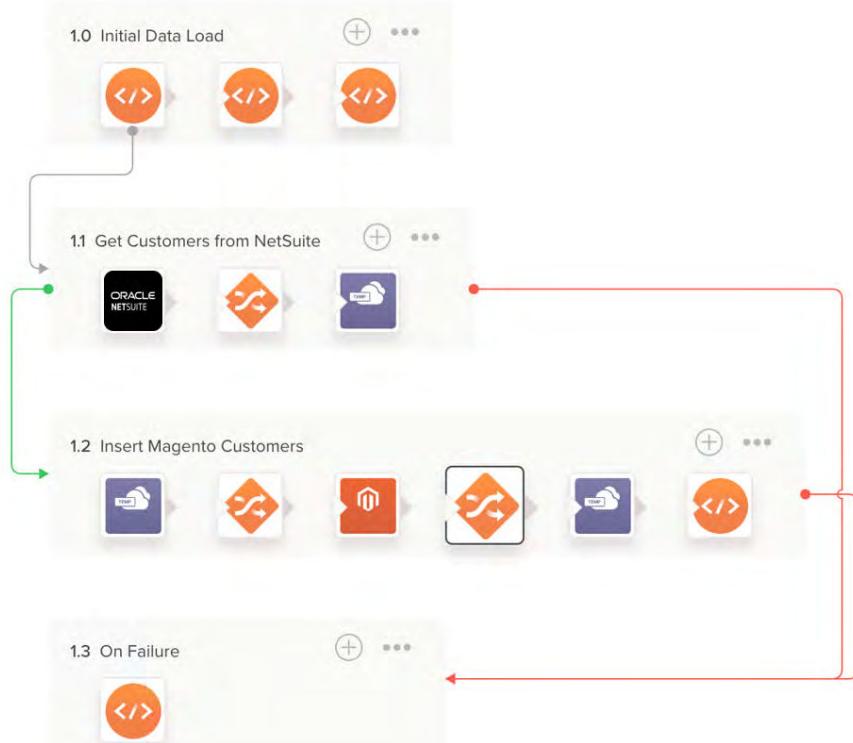
Sync SugarCRM Contacts  
to NetSuite Customers



Migrate Square Customers  
to NetSuite Accounts

Find a complete list of [NetSuite Integration Recipes here.](#)

# Connect to Anything with the NetSuite Connector



Explore the [complete list of NetSuite Connector capabilities](#).

**Use the NetSuite Connector to link any cloud or on-premises application or data source to NetSuite.**

- › Add or delete records, update existing data, or retrieve data in NetSuite for use in Jitterbit integrations
- › Access all available services, operations, and messages as defined in the NetSuite WSDL
- › Support two-factor authentication and token-based authentication
- › Use advanced functionality such as using NetSuite functions, the asynchronous setting, and NetSuite customer segments

## CASE STUDY

# Bigbelly powers renewable waste management with integration and workflow automations

Bigbelly, a world-leading smart waste and recycling solution provider, wanted to streamline its business processes across disjointed application environment.

## Challenges

- › Legacy and disjointed application environment
- › Inaccurate data, limited visibility across its business operations, and a lack of effective reporting capabilities
- › Reliance on manual efforts and heavy use of spreadsheets

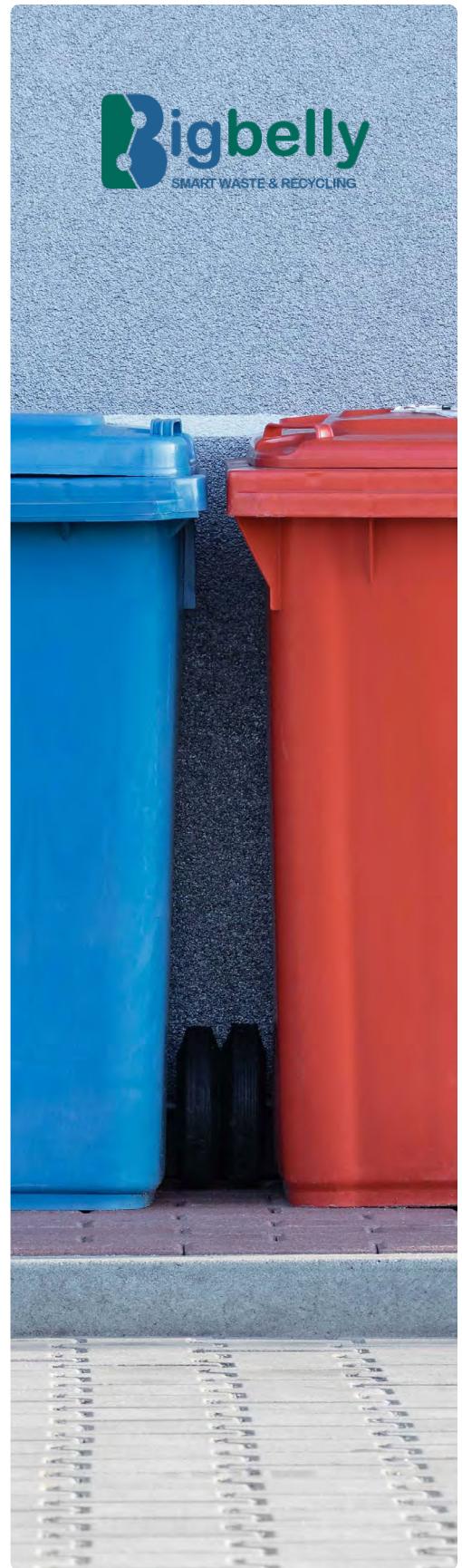
## Integrations

- › To help Bigbelly streamline its business processes, Keystone, a Jitterbit partner, implemented a NetSuite ERP system and connected its legacy applications by custom coding the integrations
- › In the project's subsequent phase, Keystone eliminated the time consuming coding work, deploying the Jitterbit Harmony platform to quickly and easily integrate the company's NetSuite and Salesforce environments
- › The Jitterbit integration created streamlined, automated workflows encompassing Bigbelly's key accounting, sales, manufacturing, and order fulfillment activities

## Successes

- › Improved accuracy, visibility, and accessibility of its data for users across the enterprise
- › Application environment that runs with very little administrative support with easy-to-use interface

[Read the full case study here.](#)



## CASE STUDY

# Alvaria Transforms Business Operations

Alvaria, a global leader in delivering contact center, customer experience, and workforce engagement technology solutions was battling operational silos and wanted seamless integration and automation across their key systems.

## Challenges

- › Operational silos, corrupted data, and inaccurate reporting caused by outdated business and IT processes
- › An outdated IT department and inefficient business processes were slowing workflow operations
- › A manual quote-to-cash process and inaccurate forecasting that often resulted in quarterly funnel losses

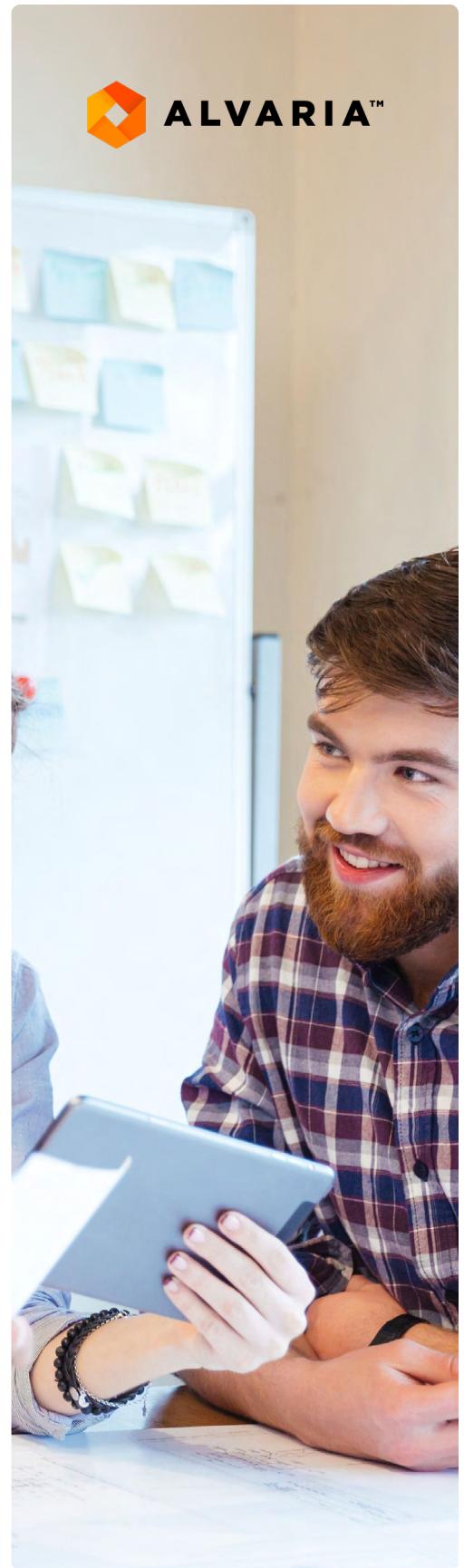
## Integrations

- › With a goal of operating within a distributed cloud environment, Alvaria implemented Jitterbit Harmony to provide seamless integration and automated workflows between Salesforce, NetSuite, Apptus, and other key systems
- › Jitterbit seamlessly connects and transforms these accounts, opportunities, and quotes from Salesforce into customer and sales order data in NetSuite. Once an order is fulfilled, Jitterbit connects that data back to Salesforce and automatically creates assets and opportunities for renewable maintenance

## Successes

- › Improved visibility into CPQ to Billing cycle and improved forecasting accuracy
- › A fully connected cloud environment, allowing for more accurate forecasting, faster quote turnarounds, and an improved customer experience

[Read the Alvaria case study here.](#)



## CASE STUDY

# Red Luxury Integrates Systems Across Multiple Acquisitions

Jewelry and watch company Red Luxury acquired and developed a number of brands, transforming them into profitable companies through their successful distribution channels. Each of the companies Red Luxury acquired had its own legacy infrastructure and its own ERP. Red Luxury needed a way to streamline business processes across the companies, for existing acquisitions and to support future ventures.

## Challenges

- › No consolidated way to manage stock inventory across offices, companies, and countries
- › Inefficiencies due to multiple companies operating in silos
- › Heavy reliance on manual processes across the quote to cash cycle

## Integrations

- › With the help of partner BAE360, a company that works with SMEs to accelerate global growth through software solutions, Red Luxury rolled out NetSuite across its portfolio of companies
- › Then the team used Jitterbit to integrate NetSuite with other solutions, such as e-commerce platform Magento and logistics software

## Successes

- › Integrated NetSuite into 8 brands, for use across acquired companies
- › Streamlined processes from purchasing to inventory, and from e-commerce to logistics
- › Eliminated manual processes, leaving one full-time person free to work on other growth-centered tasks

[Read the Red Luxury case study here.](#)

