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Salesforce-NetSuite CPQ to Billing Process Template

BUSINESS PROBLEMS SOLVED:
- Automatically process your orders and invoices in Salesforce CPQ & Billing and NetSuite
- Synchronize data and processes quickly and easily between systems

PROCESS TEMPLATE PACKAGE:
- Two endpoints: Salesforce CPQ, NetSuite
- Seven pre-built integration use cases
- Implementation and post-implementation delivery services (optional)

VALUE TO CUSTOMERS:
1. Easy setup for customer's integration projects (days, not weeks or months)
2. Automate creation of Sales Orders and Invoices in NetSuite when an Order is sourced from Salesforce
3. Sync objects such as Contacts, Products, Price Books, Orders, Invoices, Payments, and Fulfillment with equivalent objects in NetSuite
4. 50-80% faster time-to-value with a pre-packaged CPQ & billing process template
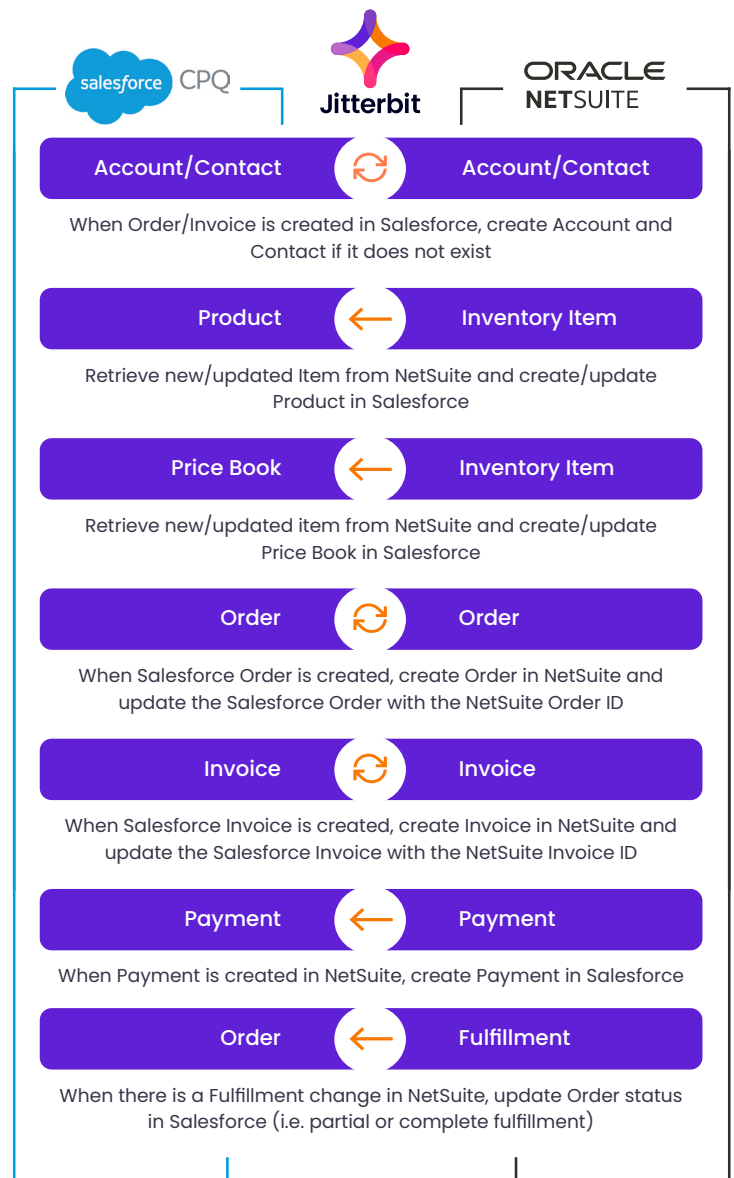5. Standard objects are used for this template to minimize additional customization

BUSINESS BENEFITS:
- Quickly implement Salesforce CPQ & Billing integration between Salesforce and NetSuite for fast time-to-value
- Increase accuracy and reduce manual processes and costly errors
- Pre-packaged synchronization between Salesforce and NetSuite
- Establish Salesforce as the single source of truth for Contacts, Products, Price Books, Orders, Invoices, Payments, and Fulfillment
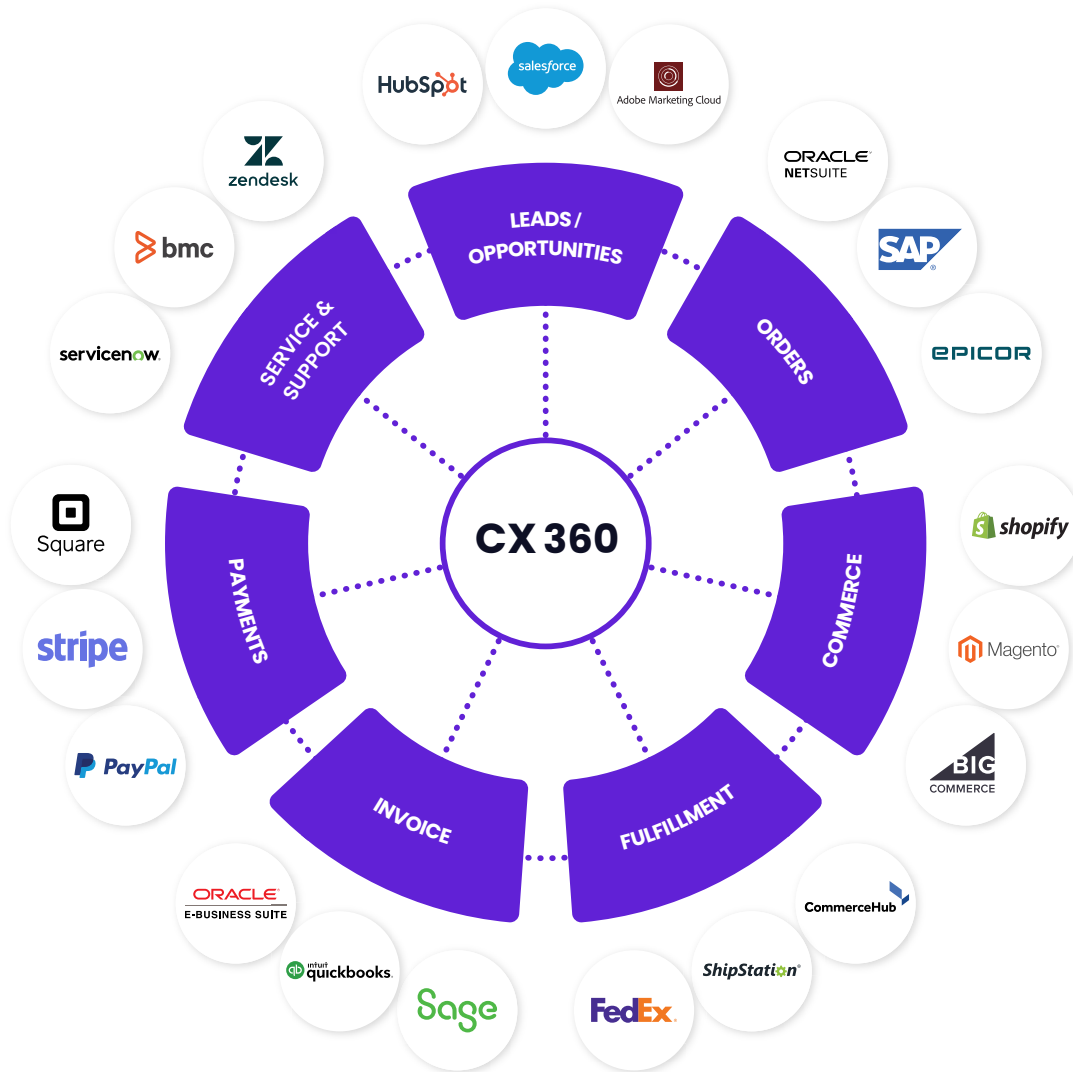
Introduction

Improve the speed and accuracy of your orders and billing with Jitterbit's Salesforce-NetSuite CPQ to Billing Process Template. A pre-built process template connects data and processes between applications right out of the box, significantly reducing integration efforts. Synchronize Contacts, Products, Price Books, Orders, Invoices, Payments, and Fulfillment between systems. Automatically process and create your orders and invoices, reducing time-consuming manual processes and costly errors. Update the order status based on whether orders are partially or completely fulfilled. Connect your CRM and ERP systems quickly and easily with reusable integrations that speed implementation and streamline business processes.

This template includes pre-built integration use cases that connect the following objects and fields between Salesforce CPQ and NetSuite:

Account/Contact ⇄ Account/Contact
When Order/Invoice is created in Salesforce, create Account and Contact if it does not exist

Product ← Inventory Item
Retrieve new/updated Item from NetSuite and create/update Product in Salesforce

Price Book ← Inventory Item
Retrieve new/updated item from NetSuite and create/update Price Book in Salesforce

Order ⇄ Order
When Salesforce Order is created, create Order in NetSuite and update the Salesforce Order with the NetSuite Order ID

Invoice ⇄ Invoice
When Salesforce Invoice is created, create Invoice in NetSuite and update the Salesforce Invoice with the NetSuite Invoice ID

Payment ← Payment
When Payment is created in NetSuite, create Payment in Salesforce

Order ← Fulfillment
When there is a Fulfillment change in NetSuite, update Order status in Salesforce (i.e. partial or complete fulfillment)

The *API Lifecycle* of a Customer

CPQ & Billing

Orders and invoices need to be processed as efficiently and quickly as possible, with 100% accuracy. Providing a seamless customer order and billing experience requires integrating data and processes across multiple systems – automatically processing and creating orders and invoices between your CRM and ERP system. With Jitterbit's Salesforce-NetSuite CPQ to Billing Process Template, you can use pre-built integration use cases to jumpstart integrations in your order lifecycle, reduce the time required to connect and automate your systems, and accelerate your time to market.

✦ Jitterbit

Jitterbit empowers businesses to optimize their connectivity and scalability through a single integration and workflow automation platform. Our mission is to turn complexity into simplicity so your entire organization can work faster and more efficiently.

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