

salesforce

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NETSUITE

Case Study

Salesforce-NetSuite Integration Improved a Nonprofit's Lead-to-Invoice Process

Webuters integrated **Salesforce Nonprofit Success Pack (NPSP)** with NetSuite for its client, a leading global nonprofit. By customizing the Salesforce NPSP package and seamlessly integrating it with NetSuite without disrupting the existing system. This integration resulted in the elimination of manual efforts to map and track financials, manage financial insights, and determine where the fund is invested. Read this case study to learn how integration of Salesforce and NetSuite has improved the financial accuracy, speed, and quality of work at a nonprofit.



The Customer and the Goal

They are a global non-governmental organization (NGO) with headquarters in New York City and operations all over the world. They make a significant contribution to environmental certification for long-term sustainability in forestry, agriculture, and tourism. They run a training and certification programme to train farmers and people, as well as provide a certificate seal that informs consumers about business practices based on certain standards they set.

They were recognized as an international alliance of farmers, forest communities, businesses, and consumers dedicated to creating a world in which people and nature coexist in harmony.

The client came to Webuters for Maximizing Fundraising, Compliance and Accounting by integrating the leading **NetSuite ERP (Enterprise Resource Planning)** and **Salesforce CRM (Customer Relationship Management)**. This would help them move information between departments automatically, which has been a slow process. The manual processes such as emailing and using spreadsheets were replaced by NetSuite ERP with Salesforce CRM integration.



Challenges Encountered

NetSuite integration was made more challenging by the nonprofit's specific data-sharing requirements.

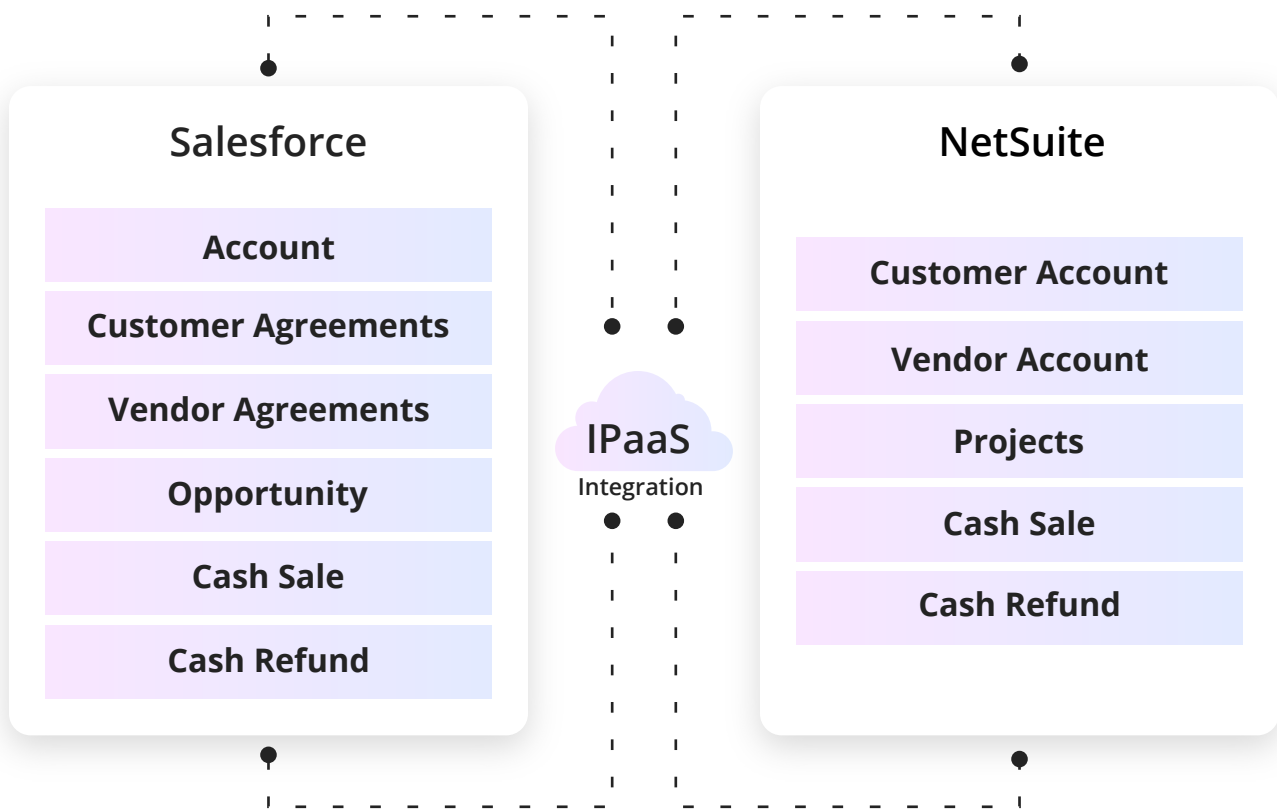
- The organization raised funds through the Classy application, an online fundraising platform. Moving prospects to the Salesforce system was a time-consuming process.
- The routine work of reviewing applications, approving the prospect and the funding/donations/gifts, and then moving it to a customer or a vendor included manual efforts.
- It took time to share the data further on the company's accounting system, which is built on the NetSuite platform.
- The manual efforts required to synchronize data with the accounting system built on the NetSuite platform.
- Overall, the nonprofit was having difficulty mapping and tracking its financials. It took time and effort to manage financial insights and track where the fund came from and where it was invested



Solution – Salesforce - NetSuite Integration

The integration of Salesforce CRM with NetSuite ERP was the appropriate solution to the nonprofit's problems. If the two systems had not been integrated, the client would have been forced to use separate systems that separated the company's accounting data from its customer relationship data. Because there was no connectivity, employees had to manually transfer data between Salesforce and NetSuite.

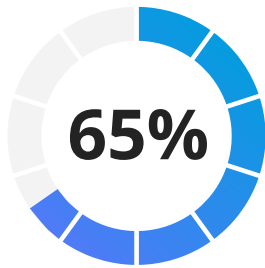
Webuters used **IPaaS Integration** to connect Salesforce and NetSuite using **REST API** calls as a solution. Data from Salesforce was gathered using IPaaS Integration, which was then mapped to NetSuite utilizing NetSuite web services. This overall integration has the potential to make NGO operations much easier.



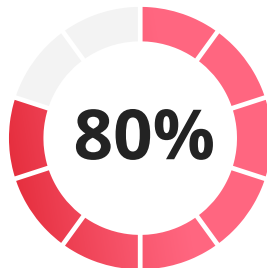
Each of the data integrations developed by Webuters for the client is depicted in the diagram below. Overall, the integration involves transmitting six distinct data types from Salesforce to NetSuite via IPaaS calls.

For this integration, simple data synchronization from Salesforce to NetSuite was insufficient. Using IPaaS as a middleware for field mapping and custom logic, we send the correct data to the mapping tables and then to the appropriate systems for matching. As both Salesforce and NetSuite are highly customizable applications, they each have their own limitations with data acceptance when used together, so we used middleware (IPaaS) to make it possible.

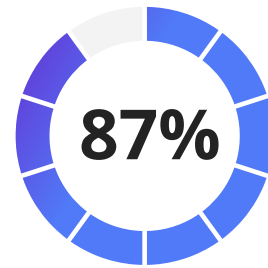
Winning the Game



**Operation
Improvement**



**Manual
work reduced**



**Data
accuracy**

The integration of NetSuite ERP and Salesforce CRM benefits the nonprofit's overall business process. It not only reduced the cost of licensing, but it also made the financing process more efficient and quicker. The business benefits from a faster and more efficient lead to invoice processing with improved data accuracy due to automation.

This integration has also helped the nonprofit organization reduce overall system costs by consolidating their various systems into one platform. The integration has also resulted in a significant increase in productivity.