

Industry: IT & ITES

From Disconnected CRM-ERP Processes to Connected Business Operations

Modernizing Salesforce-NetSuite Integration for a Public-Sector Records Management Company

Project Overview

"A IT & ITES Company in the USA" is a public-sector-focused records management and digitization company that helps government agencies preserve, modernize, and provide secure access to critical public records. The organization needed to strengthen business operations by improving data movement between Salesforce and NetSuite. Salesforce supported sales activities, while NetSuite supported downstream financial and order processes. Without a streamlined integration layer, business teams faced manual effort, delayed updates, and inconsistent visibility across order and billing workflows.

The Challenge

- Salesforce and NetSuite operated with disconnected process handoffs
- Manual intervention was required across sales and finance workflows
- Sales order data synchronization was delayed or inconsistent
- Billing and invoice visibility was slower across business teams
- Cross-system updates created operational friction
- Business users needed more current and dependable information
- The organization needed a scalable integration foundation for future automation

The Turning Point

This organisation needed a secure and scalable integration foundation that could reduce manual work, improve order accuracy, and support smoother coordination between Salesforce and NetSuite.

The transformation focused on:

- Salesforce-to-NetSuite sales order creation
- NetSuite-to-Salesforce billing and invoice synchronization
- MuleSoft-led orchestration and transformation
- CloudHub 2.0 deployment
- Structured exception handling and alerts
- Scalable foundation for future integrations

The Approach: Salesforce-NetSuite Integration Modernization

Phase 1: Sales Order Integration

- Automated sales order creation from Salesforce into NetSuite
- Standardized order data movement between CRM and ERP
- Reduced dependency on manual order processing
- Improved consistency of downstream order information

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Core Systems Connected
Salesforce and NetSuite

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Primary Use Cases
Sales order creation and billing sync

CloudHub 2.0

Deployment Model
Secure cloud-based integration

Bi-Directional
Integration Foundation
Built for future automation

Platforms Integrated



Phase 2: Billing & Invoice Synchronization

- Enabled billing and invoice data synchronization from NetSuite to Salesforce
- Improved visibility for sales and finance teams
- Supported more timely access to billing information
- Reduced manual follow-ups between business teams

Phase 3: Integration Foundation & Operational Readiness

- Used MuleSoft orchestration and transformation capabilities
- Designed integration logic for structured system-to-system updates
- Established the foundation for exception handling and alerts
- Deployed the solution through CloudHub 2.0
- Created a reusable framework for future integration expansion

MuleSoft Integration Advantage

The solution helped to move from disconnected CRM–ERP processes to a more connected operating model.

- MuleSoft-led integration orchestration
- Salesforce and NetSuite connectivity
- CloudHub 2.0 deployment
- Structured data transformation
- Exception handling and alerting foundation
- Scalable architecture for additional use cases

From Manual System Handoffs to Scalable CRM–ERP Integration

Before	After
Disconnected Salesforce and NetSuite workflows	MuleSoft-led CRM–ERP integration
Manual cross-system updates	Automated sales order and billing data movement
Delayed order synchronization	More reliable order data exchange
Slower billing and invoice visibility	NetSuite billing data synchronized to Salesforce
Process fragmentation across sales and finance	More connected operating model
Limited integration scalability	CloudHub 2.0-based integration foundation

The Business Impact

- Reduced reliance on manual cross-system updates
- Improved consistency of order and billing data across Salesforce and NetSuite
- Supported faster and more reliable sales order processing
- Improved billing and invoice visibility for business teams
- Strengthened coordination between sales and finance workflows
- Supported stronger governance through structured integration design

What This Enabled

- More reliable Salesforce-to-NetSuite order processing
- Better visibility into billing and invoice information
- Reduced manual effort across sales and finance handoffs
- Improved operational reliability across CRM and ERP systems
- Stronger readiness for future automation initiatives
- A more scalable integration backbone for business growth

Ready to Modernize CRM–ERP Operations?

Connect Salesforce and NetSuite with scalable MuleSoft integrations

Why ProwessSoft

- Strong MuleSoft integration modernization expertise
- Experience connecting Salesforce and NetSuite for operational workflows
- Ability to design scalable CRM–ERP integration foundations
- Focus on reducing manual effort and improving business data reliability
- Practical approach across orchestration, transformation, exception handling, and cloud deployment

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