

Industry: Financial Technology (Fintech)

From Manual CRM-ERP Updates to Real-Time Business Data Synchronization

Modernizing Salesforce-NetSuite Integration with MuleSoft

Project Overview

A leading Financial Technology (FinTech) company in North America needed to automate the exchange of business-critical data between Salesforce CRM and NetSuite ERP across accounts, contacts, orders, projects, invoices, credit memos, products, and customer status.

The existing process depended heavily on manual updates between Salesforce and NetSuite, creating delays, duplication of effort, billing inconsistencies, and limited real-time visibility across sales, finance, and operations teams.

The Challenge

- Manual data entry between Salesforce and NetSuite
- Delayed synchronization of accounts, contacts, orders, invoices, and product status
- Billing contact and dunning recipient inconsistencies
- No real-time customer suspension visibility in Salesforce
- Multi-subsidiary complexity across US, Canada, UK, and Denmark
- Manual tax code and currency handling across regions
- Limited monitoring, error visibility, and operational alerting
- Need to deliver within available Anypoint Platform credits

The Turning Point

The transformation focused on:

- Salesforce-to-NetSuite account, contact, order, and project sync
- NetSuite-to-Salesforce customer status, invoice, credit memo, and product sync
- Event-based processing
- Multi-subsidiary and multi-currency mapping
- Dynamic tax code handling
- Slack-based error alerting
- Anypoint Monitoring for integration visibility

The Approach: Event-Based CRM-ERP Integration

Phase 1: Salesforce to NetSuite Synchronization

- Automated Salesforce Account sync to NetSuite Customer records
- Synced Account Contact Relationships to NetSuite Contact records
- Automated contact inactivation when ACR records were deleted
- Created NetSuite Sales Orders from activated Salesforce Orders
- Synced Salesforce Projects to NetSuite Job records

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Integration Interfaces Delivered
Accounts, contacts, orders, projects, customer status, invoices, products

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Core Systems Connected
Salesforce CRM and NetSuite ERP

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Regions / Subsidiaries Supported
US, Canada, UK, and Denmark

Bi-Directional Data Synchronization
Salesforce ↔ NetSuite

Platforms Integrated



Phase 2: NetSuite to Salesforce Synchronization

- Synced customer suspension status from NetSuite to Salesforce
- Synced invoices and credit memos from NetSuite to Salesforce
- Updated product active/inactive status between NetSuite and Salesforce
- Enabled finance and sales teams to access more current account, billing, and product information

Phase 3: Operational Reliability & Monitoring

- Implemented Slack-based integration error alerts
- Added retry mechanisms with exponential backoff
- Used Object Store-based deduplication to prevent processing loops
- Enabled Anypoint Monitoring dashboards for message volume, response times, and error rates
- Added NetSuite Integration Message writeback to avoid duplicate alerting

MuleSoft Integration Advantage

The solution delivered immediate business value while respecting platform credit constraints.

- Event-based Salesforce–NetSuite synchronization
- CloudHub 2.0 deployment And Anypoint Monitoring visibility
- Bi-directional CRM–ERP integration
- Dynamic tax and currency mapping
- Slack-based operational alerting and Object Store deduplication

From Manual CRM–ERP Handoffs to Real-Time Operational Alignment

Before	After
The challenge involved manual data entry between Salesforce and NetSuite.	Automated bi-directional Salesforce–NetSuite sync
Delayed account, contact, and order updates	Near real-time event-based synchronization
Manual billing contact and dunning recipient updates	Automated contact and recipient mapping
Manual tax and currency handling	Dynamic tax code and currency lookup
Limited customer suspension visibility	NetSuite suspension status reflected in Salesforce
No structured error visibility	Slack alerts and NetSuite Integration Message writeback

The Business Impact

- Accelerated order-to-cash by automating NetSuite Sales Order creation
- Improved billing accuracy through contact, dunning recipient, tax, and currency automation
- Enabled real-time customer suspension visibility in Salesforce
- Reduced operational dependency on manual checks and reconciliations
- Improved integration reliability with retry logic, deduplication, and alerting

What This Enabled

- Accurate customer and billing information across CRM and ERP
- Faster sales order creation and billing readiness
- Reduced risk of incorrect invoices and billing recipients
- Stronger operational monitoring and faster issue response
- A scalable foundation for future CRM–ERP integration enhancements

Ready to Modernize CRM–ERP Integration?

Connect Salesforce and NetSuite with scalable MuleSoft integrations that accelerate business operations.

Why ProwessSoft

- Strong expertise in MuleSoft-led CRM–ERP integration
- Experience connecting Salesforce and NetSuite for real-time business operations
- Ability to design event-based integrations within platform and cost constraints
- Practical implementation of tax, currency, contact, and subsidiary mapping
- Focus on monitoring, reliability, error handling, and production readiness

Talk to Expert