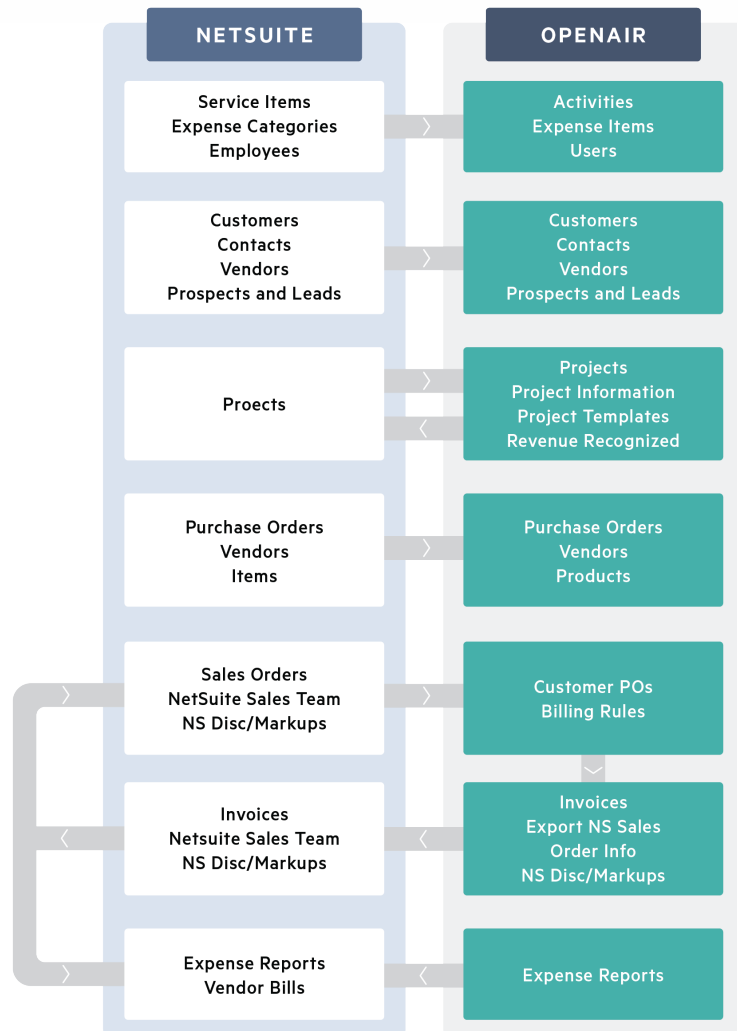## Connect OpenAir to NetSuite Financials

Gain an end-to-end benefit of both systems through integration and remove duplication of effort in data entry.

- Leverage the strength of each System's intended purpose
- Tight integration provides powerful organizational collaboration
- Accelerate lead-to-cash process
- Greater overall ROI due to efficiencies and automation
- Improve quality and accuracy of data
- Improve speed at which data is available
- Visibility of data across the enterprise

What Data Is Exchanged?

This is just a sampling of what can be done:

- Push lead, prospect, contact, and customer information to OpenAir
- Use OpenAir project templates in NetSuite to pre-populate projects with commonly used tasks, billing rules, loaded costs, revenue recognition rules, auto-bill settings, and project approvers
- Transfer OpenAir invoices to NetSuite while project is in progress
- Send revenue % complete data to ARM for revenue calculation

NETSUITE	OPENAIR
Service Items Expense Categories Employees	Activities Expense Items Users
Customers Contacts Vendors Prospects and Leads	Customers Contacts Vendors Prospects and Leads
Proects	Projects Project Information Project Templates Revenue Recognized
Purchase Orders Vendors Items	Purchase Orders Vendors Products
Sales Orders NetSuite Sales Team NS Disc/Markups	Customer POs Billing Rules
Invoices Netsuite Sales Team NS Disc/Markups	Invoices Export NS Sales Order Info NS Disc/Markups
Expense Reports Vendor Bills	Expense Reports

Common Questions

We also use Salesforce.com, is there a way to easily integrate the 3 systems?

Yes, you can capture customer and project information from Salesforce.com, pull it into OpenAir, and push it to NetSuite.

Is it possible to create a single sign-on?

Yes, once implemented, you can access your OpenAir account from within NetSuite ERP.

It sounds like there is a lot of data that can be shared between the systems, how can we ensure we are following a best practice?

Integration with NetSuite ERP sounds intimidating because of all that can be done. Top Step has integration project experience and we know how to maneuver around problems and pitfalls. By leveraging our experience we can help you through the process more quickly and efficiently.

Benefits of OpenAir Integration Services

- Dedicated team experienced in OpenAir and integration best practices

- Leverage the strength of each systems intended purpose

- Improve speed at which information is available

- Increase communication accuracy across your business units

Our Approach

We follow a simple and straightforward approach that delivers a superior solution.

1

Business Model Alignment and Design

- Use of workshops to identify system ownership by department.
- Review of data ownership by system.
- Determine data workflows, frequency, and integration technology/software.

2

Integration Build Out and Validation

- Gather field specifics from each system for mapping and transformation needs.
- Configure and connect integration technology to end systems.
- Establish use case and testing scenarios to confirm performance, design, error handling, and more.

3

Deploy and Monitor

- Support migration to a production environment with live data.
- Assist with data alignment needs and system outage coordination.
- Establish monitoring activities to ensure continued success.

Integration Tools We Use

We primarily utilize NetSuite OpenAir's native APIs to connect OpenAir to other systems. We also have deep experience with Dell Boomi AtomSphere® and NetSuite OpenAirCONNECT with additional leading integration products continually being evaluated and added to our tool set. Our integration experience combined with our expertise in NetSuite OpenAir allows us to help you quickly and smoothly design and implement the data integration exchanges for your specific PS business model.

About TOP STEP

Top Step improves business efficiency and productivity for Professional Services business operations. We help you achieve your profitability goals allowing you to focus on building your business. Our experts have extensive experience in professional services business operations, project management, and professional services automation with both local and global Professional Services organizations. We are proud to be awarded "Best of the Best" by SPI Research and have been ranked as one of the fastest growing companies by Consulting Magazine and Inc. 5000.

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