

## Connect OpenAir to Salesforce Sales Cloud

One of the challenges in your project-based organization is getting your sales and services teams on the same page. By integrating the two systems, you create an environment that removes barriers of “your data” and “my data” conflicts that create miscommunication and unreliable reporting.

Top Step understands these challenges and how to set you on a path to improving your sales to services process by integrating between your OpenAir and Salesforce.com environments. By automating data flows between systems, you can concentrate on generating revenue and managing profitable projects

### What Data Is Exchanged?

- Seamless movement of Opportunity data from Salesforce.com into OpenAir projects
- Sending account information in Salesforce.com to Client information in OpenAir
- Converting product lines into budget transactions for order line level detail tracking
- Movement of contact information from Salesforce.com to OpenAir for invoicing
- Movement of selected project and client data points back into salesforce.com

### Common Questions

*Can the integration access custom Salesforce objects?*

Yes

*Can metrics and other project metadata information be sent back to Salesforce from OpenAir?*

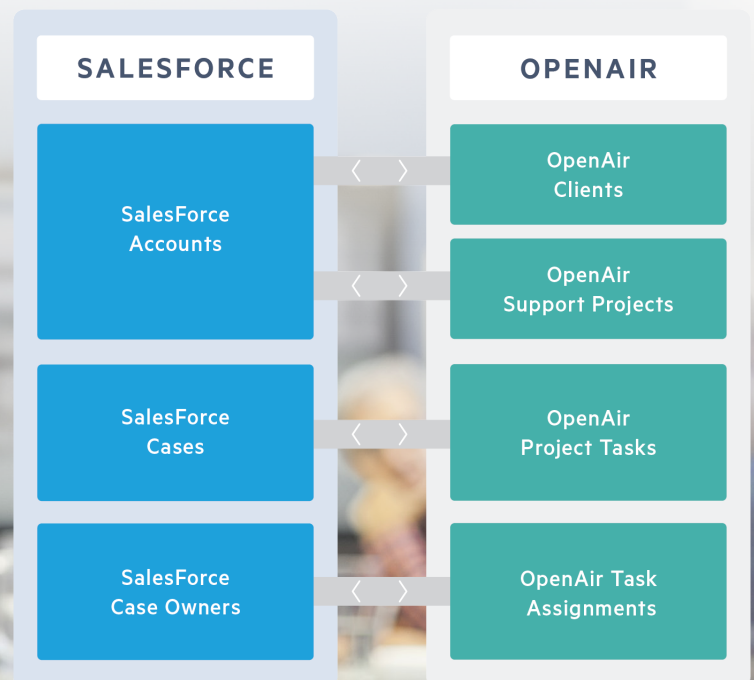
Yes

*We also use NetSuite, 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.

## 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.

