

Connect OpenAir to Salesforce Service Cloud

This integration was implemented to solve for customer service reps needing to track time in OpenAir against cases in Salesforce.com Service Cloud. Each customer had a OpenAir customer service project in OpenAir and each case assigned in Salesforce.com creates a task and assignment on the CS project. Customer service reps can see and enter time in OpenAir against the project task.

What Data Is Exchanged?

- Salesforce.com Accounts sync with OpenAir Customers
- Salesforce Cases sync with OpenAir Tasks
- Salesforce Case owners sync to OpenAir task assignments Salesforce users sync with OpenAir users

Common Questions

Can you create tasks within OpenAir Projects from Salesforce Cases?

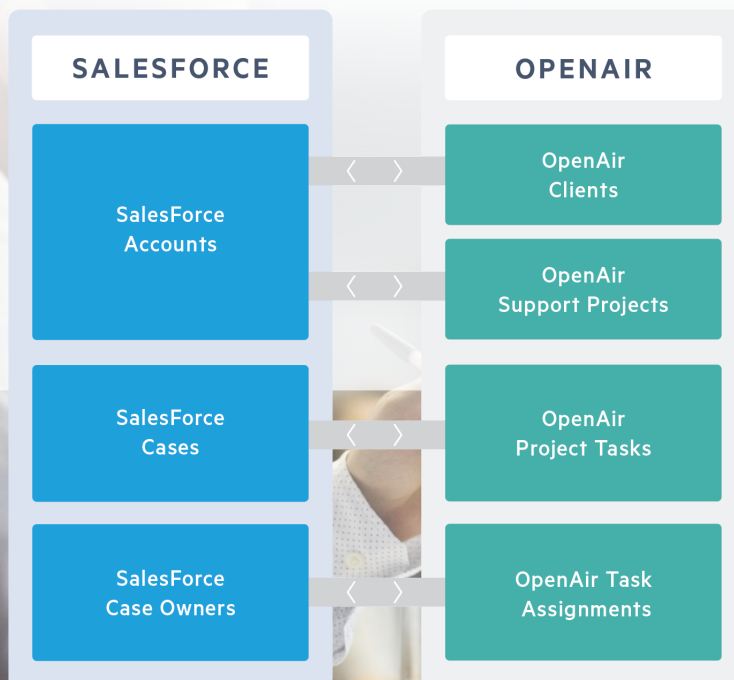
Yes

Can we customize this integration to have data from OpenAir back to Salesforce case?

Yes

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.

