



NetSuite Application Integration Checklist

Understand Your Integration Needs

New tools and technologies, such as iPaaS (integration platform as a service), are revolutionizing how organizations can connect their rapidly expanding array of on-premise and cloud applications.

But integration, by its nature, is complex.

And given the wide-ranging capabilities of NetSuite to improve and transform how businesses operate, most NetSuite integration projects involve many applications, all with their own unique owners, data, and workflows.

To get your NetSuite integration project off to a great start and to help simplify the application integration process, we have put together a checklist of important issues to consider as you plan and implement your project.



The People

As with planning any project, your NetSuite project starts with the people involved. Be sure to account for the owners and users of the applications and data. Find out how their insights and perspectives shape the business needs and technical requirements for the project.



Identify who owns and uses the applications and the data involved in your integration project

- How might their usage of the applications and data have implications for how you plan the integrations?
- What limitations are they running into with their applications?
- How might your project change the way they use their applications and data?

Identify who is responsible for managing the data

- Are they different than the owners? If so, why?

Understand how you need to control access to the relevant applications and their data

- Who can change the data?
- Who can only view the data?

Talk to all stakeholders to understand their business goals

- What are all the use cases relevant to your NetSuite integration project? How do they relate?
- What might be conflicting goals among the stakeholders for how you design and manage your NetSuite integrations?

Understand your organization's integration standards and best practices

- Who manages these programs?

The Processes

This is about how the data flows from one endpoint to another. The endpoints can be applications but could also be various steps along the way for staging, vetting or modifying the data before it moves on to other applications. Map out your data flows across the organization.



Identify the endpoints

- Where does the data live?
- Where does the data need to go?

Map what needs to happen to the data as it travels from one endpoint to another

- What are the key touchpoints or stops it will need to make?
- Does the data travel point to point or is it shared?
- In which direction is the flow of data?
- Will it need some sort of validation, access approval, etc.?
- Will the data need to be enriched with data from other sources to make the data more useful?
- When and how is the data reconciled?

Determine the volume, frequency and performance of the delivery of the data required by the various applications

- Will you be moving a lot of data? If so, when will this need to happen?
- Do you have seasonal or periodic spikes in data volumes?
- What performance requirements will there be for the data?
- How frequently does the data need to be updated? Real-time/near real-time or batch updates?

Establish what should happen if there are errors or problems during the integration

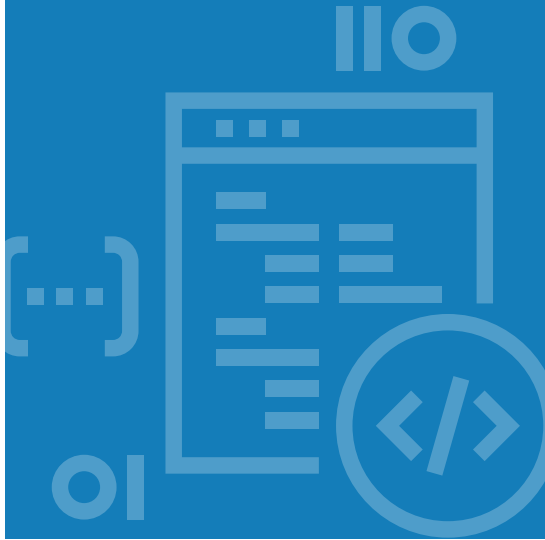
- Who should be notified for different types of errors (data quality, network performance, etc.)

Account for the security, risk and compliance needs for the data as it travels inside and outside the organization

- Does the data need to be PCI compliant or meet other standards?

The Apps

Applications are at the heart of any integration project. This is where work gets done. And a NetSuite integration project is no different. Take your time to understand the applications being integrated, their needs, and how they interact with each other.



Identify the applications involved

- Where do your applications live?
- How do they need to be connected?

Understand how each application might be dependent on the functions of other applications

- When and how does one application need updates from other applications?
- Which application is the process driver?
- Are the applications on-premise or cloud-based? How will these different kinds of applications need to interact?

Identify which applications are centralized or which are distributed

- Do you have different sets of applications performing the same functions across the organization (varying by regions or departments)?
- Will you need to deal with variables among the same types of data, such as different currencies or regional pricing?

Define the access controls you will need for each application and its data

Determine what rules you will need to guide how updates happen among all the applications

- Are there any non-permitted actions?
- Who is in charge of the updates?

The Data

Ultimately, it's all about the data. This is the information that people need.

Applications exist to provide data in the most useful way.

To do their job, applications need the right data at the right place and at the right time.

Determine all the data that is associated with each application

- Is this data shared or similar to the data for other applications? If so, how?
- For each type of data set, which application is the system of record?
- How is the data currently reconciled?
- Who owns the maintenance of these data sets?
- Where do you run risks of duplicate or conflicting data?

Determine the structure of the data for each application

- Is there a hierarchy or other structure to how the data interrelates?
- What are the fields, primary keys, data types and validation rules?
- Is there a hierarchy or dependencies between different records?
- How does the structure and identification of the data vary among the applications that will share the same data?
- Are the data fields and data labels consistent and appropriate for all application interactions?

Assess data quality

- How clean and consistent is the data?
- Will you need to consolidate or reconcile data before integrating?
- Will some data require a one-time migration or ongoing synchronization?

Your NetSuite Situation

While NetSuite integrations share most all the common issues with other data and application integrations projects, they also have plenty of specific requirements and support needs, particular for cloud integration. Assess these requirements upfront to understand how you should prepare and if you have the in-house expertise or need help.



Determine if your company has a cloud strategy

- If so, what is it?
- How will your project need to fit into that strategy?
- Who is responsible for ensuring cloud management best practices?
- How does your organization monitor cloud functions?

Determine your NetSuite expertise

- What staff, tools, systems and processes are already in place for structuring your NetSuite project?
- Do you have the in-house staff to make best use of NetSuite SuiteTalk?
- What external resources or consultants might you need to carry out your project?

Understand the specifics of your NetSuite edition

- What optional features have you enabled in your NetSuite account, such as multiple currencies, transaction types, item pricing, taxation, etc.?
- Are you using the NetSuite OneWorld edition for managing multiple organizational entities in one NetSuite account?

Understand the customizations your organization has implemented in NetSuite

- Are you using custom fields and record types, validations and required fields, or scripting and workflows?
- How might these need to be accounted for in the integration plan and design?

Determine the best methods for connecting to NetSuite

- What are the different use cases and needs for getting info into and out of NetSuite?
- Do you have specific, quick integration tasks (such as near real-time order status updates) that could benefit from RESTlet?
- When might you want to use database connectors or saved searches?

Understand the integration project's licensing implications for your NetSuite account

- Will you use a separate, dedicated NetSuite user for the integrations?
- Will you need NetSuite's SuiteCloud Plus license to support concurrent connections for high volume throughput and parallel processing?

Conclusion

Integration can seem complicated, but it doesn't have to be. With the right platform, integration can be straightforward to implement, manage and scale. Companies that master it will have a distinct competitive advantage by being able to move faster with greater agility. And their employees will be a lot smarter, by having access to the information they need, whenever and wherever they need it.

A successful NetSuite integration can help your organization take a big step towards its integration goals. We hope you find our checklist a good starting point in planning your next NetSuite integration project.

If you would like to find out more about how the Boom integration platform can help speed and simplify your NetSuite integration project, please reach out to our experts.

www.boomi.com
800.732.3602

