

NetSuite & HubSpot:

*Integrating and actioning ERP data
in HubSpot.*

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Bridge the Gap

HubSpot & NetSuite Make a Powerful Duo

Integrating NetSuite with HubSpot is a powerful way to bridge the gap between your enterprise resource planning (ERP) and customer relationship management (CRM) systems, unlocking a new level of efficiency and insight across your organization.

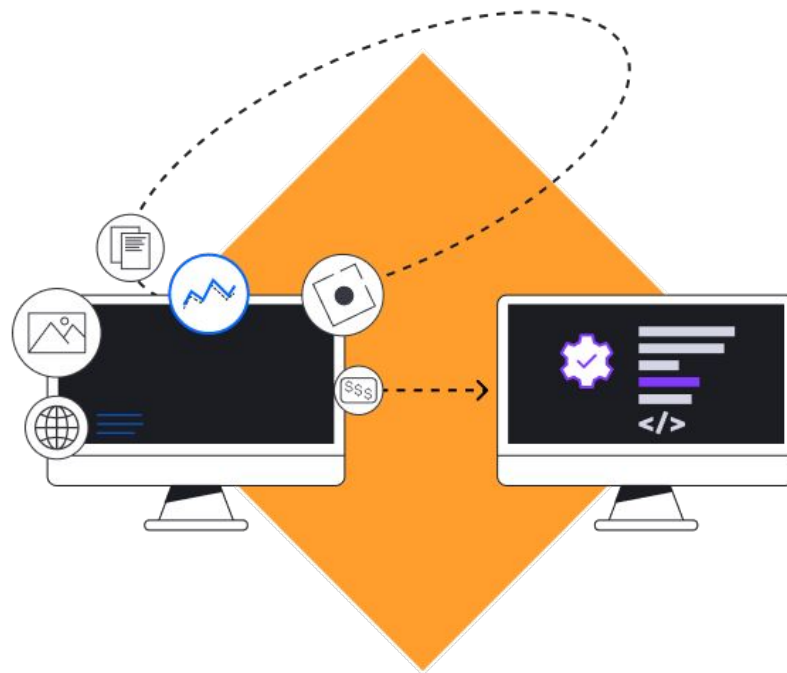
This guide is designed to provide you with a comprehensive overview of how to seamlessly connect NetSuite's robust financial and resource management capabilities with HubSpot's advanced marketing, sales, and customer service tools.

Integration Options

Integration Options for NetSuite & HubSpot

Integrating NetSuite with HubSpot can be achieved through various methods, each with its own set of features and considerations. Follow along as we go through the primary options for integrating these two platforms including:

- Custom API Integration
- Third-Party Integration Platforms
- NetSuite SuiteApps
- HubSpot Data Sync



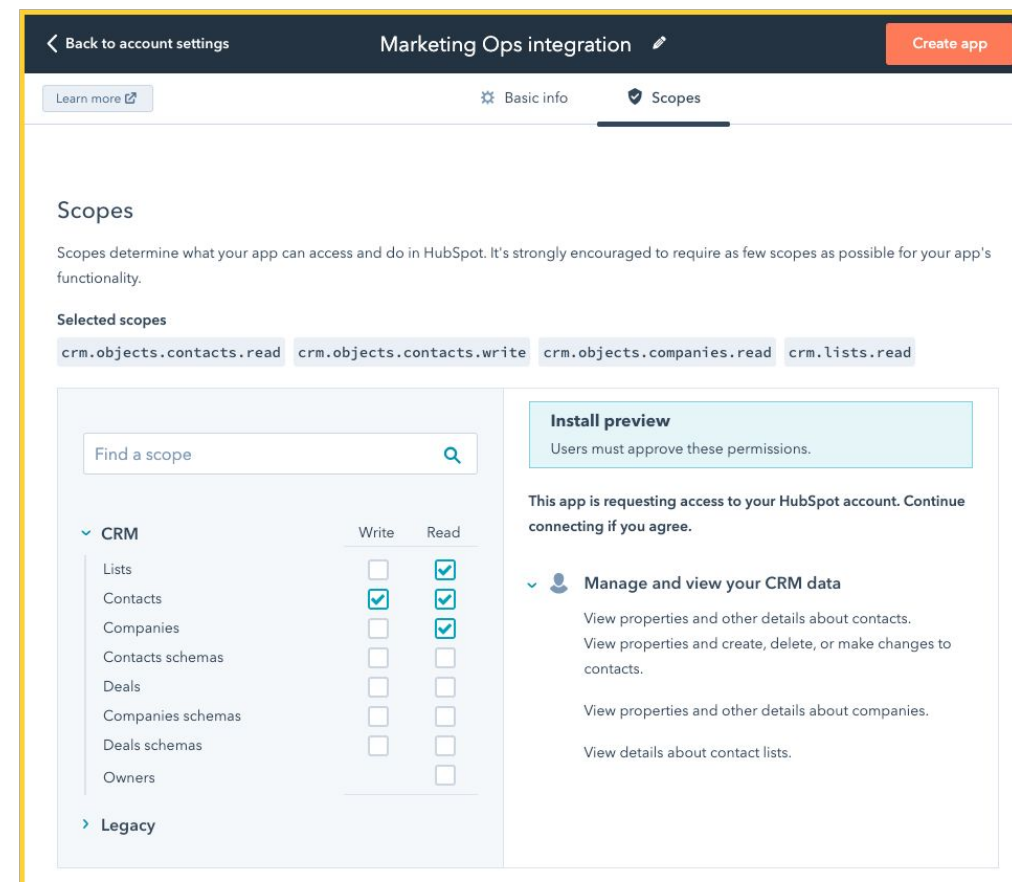
Integration Options

Custom API Integration

Developing a custom integration using NetSuite's SuiteTalk Web Services and HubSpot's APIs. This allows for tailored data synchronization based on specific business requirements.

Pros: Highly customizable, allowing for specific data fields and workflows to be integrated. Can be optimized for performance and specific use cases.

Cons: Requires significant development effort and technical expertise. Ongoing maintenance and updates may be necessary to accommodate changes in APIs.



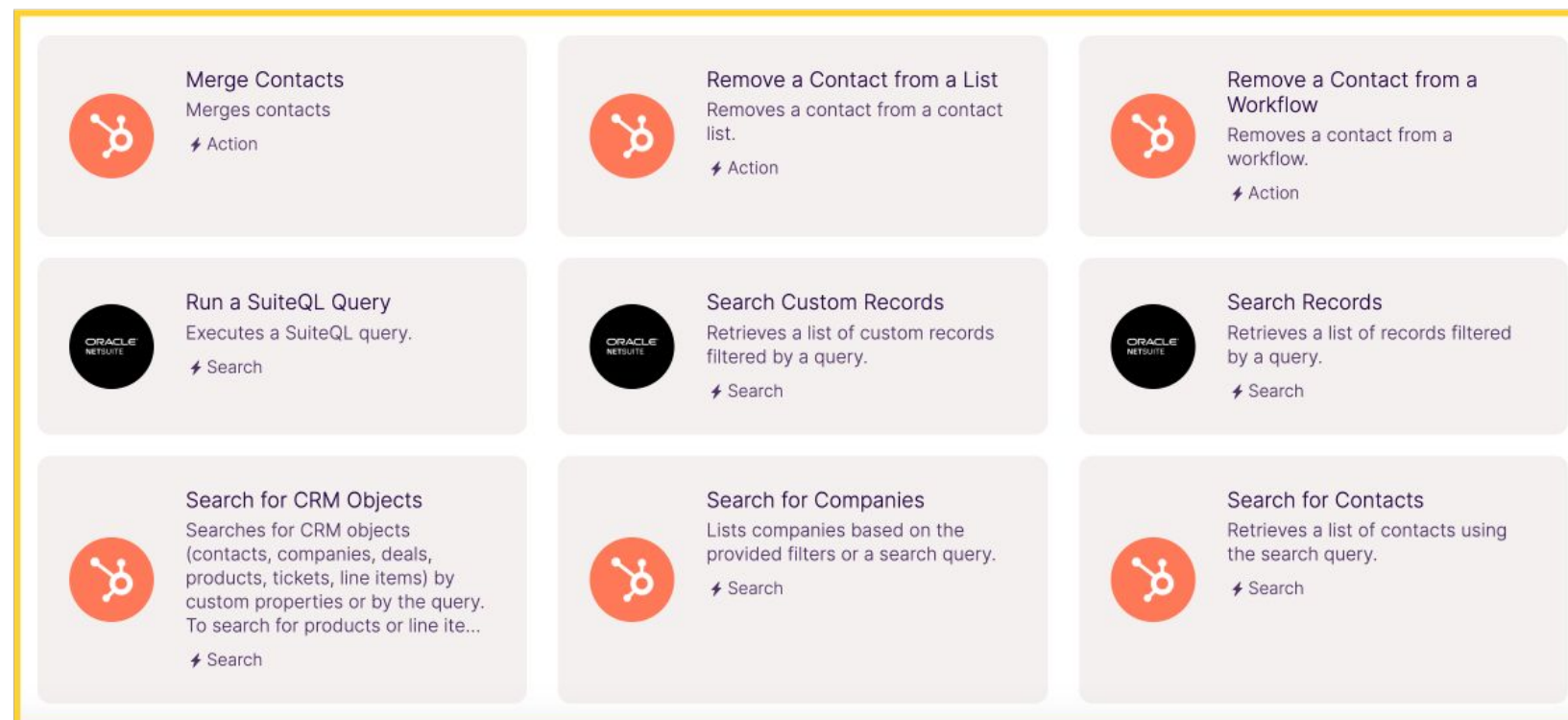
Integration Options

Third-Party Integration Platforms

Third-Party integration platforms (or iPaaS) like Celigo, Make, Boomi, and Workato offer pre-built connectors and integration apps for NetSuite and HubSpot, simplifying the integration process.

Pros: Easier to set up and manage than custom integrations. Often come with a user-friendly interface and pre-built templates. No deep technical expertise is required for setup.

Cons: Can be less flexible than custom integrations. Costs can vary based on the volume of data and the complexity of workflows.





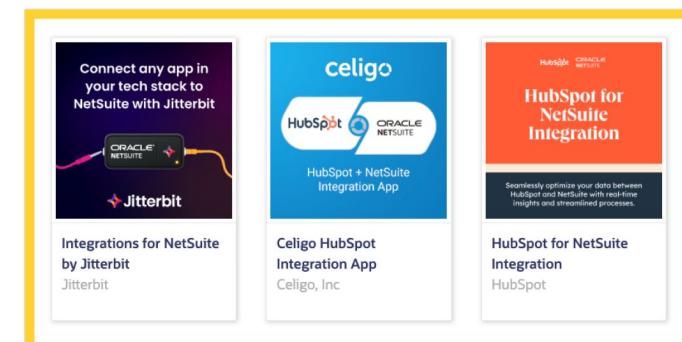
Integration Options

NetSuite SuiteApps

SuiteApps are third-party applications available through NetSuite's SuiteApp marketplace, designed to integrate NetSuite with various platforms, including HubSpot. A good example is the HubSpot Connector for NetSuite.

Pros: Designed specifically for NetSuite, ensuring compatibility and often offering deep integration. Installation and setup can be more straightforward, with support available.

Cons: May not cover all custom requirements. Dependent on the third-party provider for updates and support.



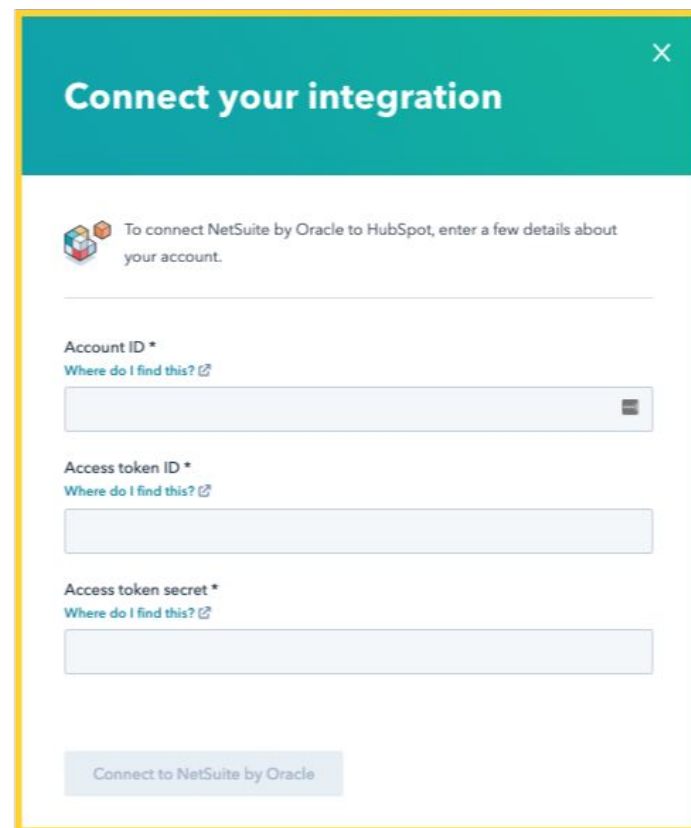
Integration Options

HubSpot's Data Sync

HubSpot's native data sync app for NetSuite is available on HubSpot Marketplace and offers a two-way sync of certain types of data between HubSpot and NetSuite.

Pros: Easy to install and configure, offering out-of-the-box integration capabilities. Supported by HubSpot for frequent updates.

Cons: May not offer the depth of customization a business requires.



The screenshot shows a modal window titled "Connect your integration" with a close button (X) in the top right corner. Below the title bar, there is a small icon of a cube and the text: "To connect NetSuite by Oracle to HubSpot, enter a few details about your account." Below this, there are three input fields, each with a label and a "Where do I find this?" link with an external link icon:

- Account ID *
Where do I find this? [🔗](#)
- Access token ID *
Where do I find this? [🔗](#)
- Access token secret *
Where do I find this? [🔗](#)

At the bottom of the form is a button labeled "Connect to NetSuite by Oracle".

Integration Options

Considerations for Choosing an Integration Option

Selecting the right integration approach depends on your specific business requirements, technical capabilities, and budgetary constraints. It may be helpful to consult with integration specialists or the vendors themselves to determine the best fit for your organization.



Complexity of Needs:

The more complex your integration needs, the more likely a custom integration or a robust iPaaS solution will be necessary.



Resource Availability:

Consider your available technical resources and expertise. A custom API integration will require skilled developers, while iPaaS solutions are more accessible to non-technical users.

Considerations for Choosing an Integration Option



Budget:

Custom integrations can be costly both in development and maintenance, while third-party platforms and connectors may have recurring subscription fees.



Scalability:

Ensure the chosen solution can scale with your business needs, handling increased data volume and additional integration points over time.



Data Sync Requirements:

Consider the frequency and volume of data sync needed. Real-time data sync may be crucial for some businesses, while others may suffice with periodic updates.



Use Cases

Marketing

Customer Segmentation Based on Purchase History:

Utilize NetSuite's detailed purchase history records to segment customers in HubSpot.

This segmentation can inform targeted marketing campaigns, personalized content, and special offers based on past purchasing behaviors, increasing engagement and conversion rates.

Back to lists

Programmable Logic Controller Customer

Active list Size: 13 companies Last company added: April 11, 2024 3:05 PM

Filters Performance Settings Activity

Filters [Test company](#) [Edit filters](#) Search in list

<input type="checkbox"/>	NAME	ADDED TO LIST DATE	COMPANY OWNER
<input type="checkbox"/>	Infinite Media Partners	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Infinite Technologies ...	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Pioneer Biotech Inc.	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Nebula Biotech Group	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Zenith Finance LLC	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Galactic Finance LLC	Apr 11, 2024 3:05 PM	Ryan Gunn (rgunn@ap
<input type="checkbox"/>	Galactic Manufacturi...	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Quantum Biotech Gro...	Apr 11, 2024 3:05 PM	Unassigned
<input type="checkbox"/>	Pioneer Biotech PLC	Apr 11, 2024 3:05 PM	Unassigned

Group 1

Company is associated to:
Any A8 Product

And associated A8 Product has all of:
Product Name is equal to any of Programmable Logic Controller

Prev 1 Next 25 per page

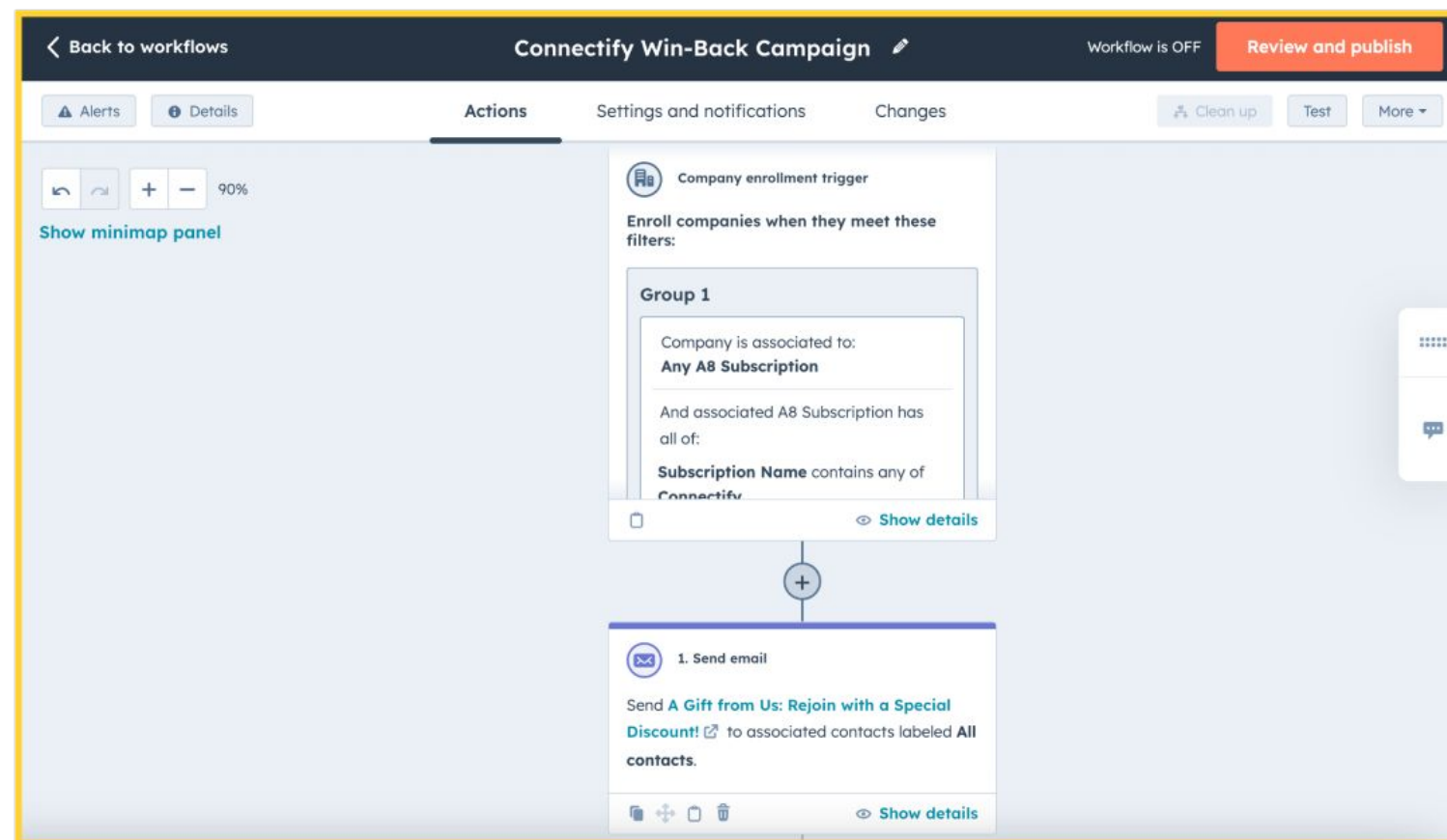
Use Cases

Marketing

Customer Win-Back Campaigns:

Leverage subscription and cancellation data from NetSuite to trigger win-back campaigns in HubSpot.

These campaigns can be tailored with personalized messages and offers designed to address the reasons for cancellation and encourage customers to reconsider their decision.



Use Cases

Marketing

Inventory Levels to Create Promotions for Items with High Inventory:

Use NetSuite's real-time inventory data to identify products with excess stock.

This information can be used to create targeted promotions and marketing campaigns in HubSpot, helping to move inventory more efficiently and capitalize on opportunities for upselling and cross-selling.

The screenshot displays the HubSpot CRM interface for a product record. The product is 'Programmable Logic Controller' (SKU: PLC-3450) with an 'Amount in Inventory' of 316. A 'Data highlights' section is visible, and an 'Edit property' dialog box is open, showing the formula for 'Inventory Difference' as $\text{Max Inventory Amount} - \text{Amount In Inventory}$. The dialog also shows the field type as 'Calculation' and the number format as 'Formatted number'. The background shows a list of associated companies, including Quantum Technologies Group, Nova Consulting LLC, Vertex Biotech PLC, Nebula Manufacturing Partners, and Pioneer Biotech PLC.



Use Cases

Sales

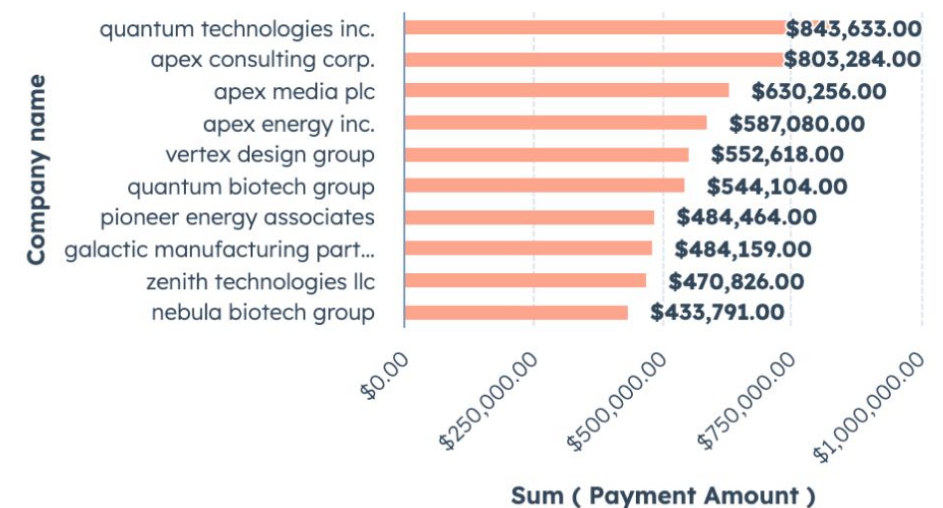
Reporting & Commissions:

Report on realized revenue instead of won-deal amount. Implement reporting in HubSpot that focuses on realized revenue from NetSuite, allowing sales teams to track commissions based on actual revenue rather than just won-deal amounts.

This provides a more accurate reflection of sales performance and earnings.

Payment by Target Account ⓘ

● Sum (Payment Amount)



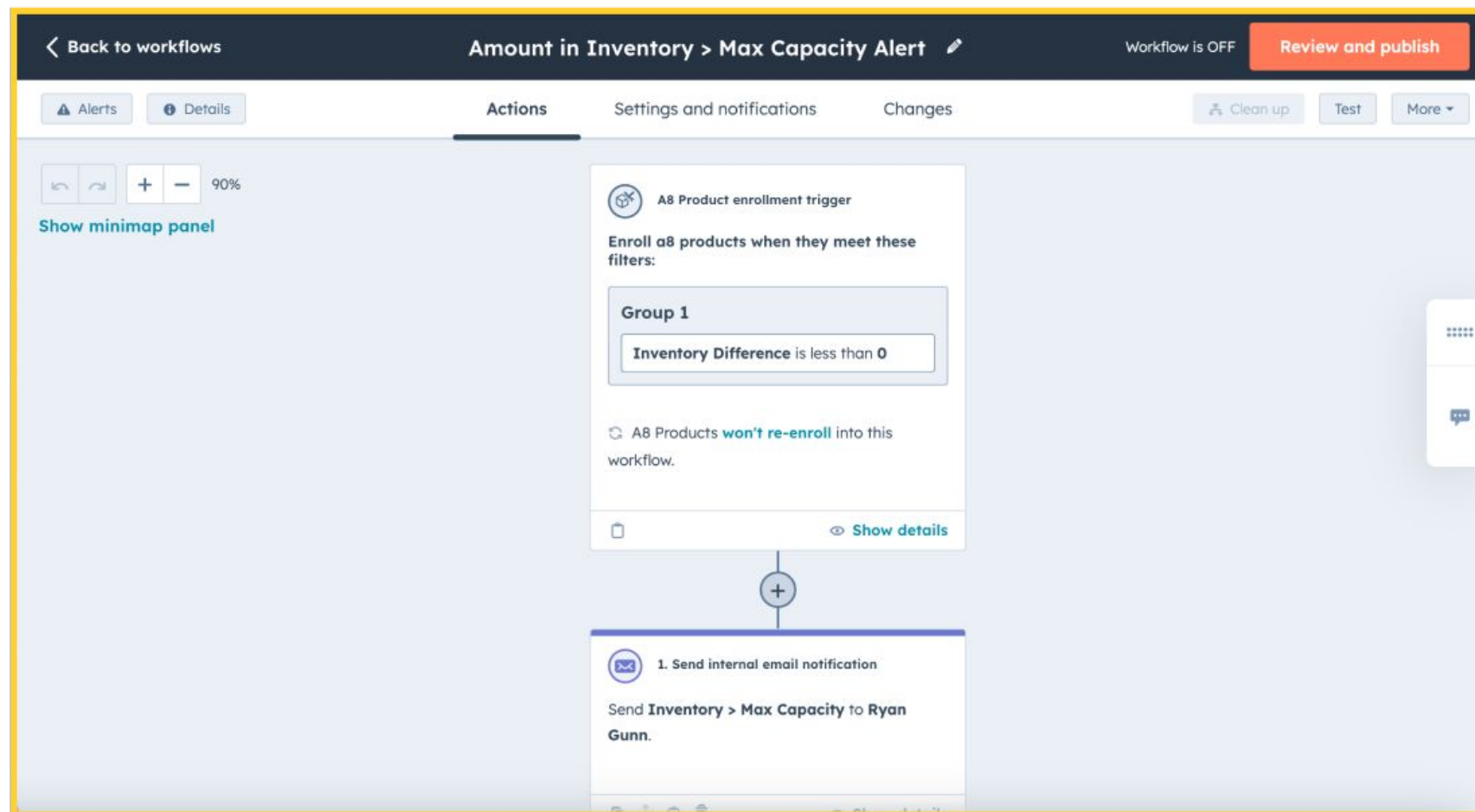
Use Cases

Sales

Real-Time Inventory Levels and Pricing Data:

Integrate NetSuite's inventory and pricing data into HubSpot to provide sales teams with real-time access to product availability and current pricing.

This enables sales representatives to provide accurate and timely information to prospects and customers, improving the sales process' efficiency and effectiveness.



Use Cases

Sales

CPQ (Configure, Price, Quote):

Utilize NetSuite's CPQ capabilities within HubSpot to streamline the quote generation process.

This allows sales teams to quickly create accurate and customized quotes based on real-time pricing, discounts, and inventory data, reducing the sales cycle and improving customer satisfaction.

The screenshot displays the HubSpot CRM interface for a deal record titled "RevOps - Ops Hub". The deal amount is \$30,000, the close date is 09/12/2023, and the stage is "Closed won". The pipeline is "New Sales". The deal owner is Jordan Mülhus. The deal type is "New Business" with a "Medium" priority. The start date is blank. The interface includes a "Product Search" section with a table of products and their details.

PRODUCT NAME	PRICE	DESCRIPTION	AMOUNT	ADD TO DEAL
OptiHub	\$49.99	Streamline workflows with AI algorithms.	20	2
RevOpsMaster	\$299.99	Analyze, optimize, repeat. Total revops.	15	1
CodeGenius	\$79.99	Auto-code actions in HubSpot, no sweat.	50	0
DataPulse	\$99.99	Real-time metrics for informed decisions.	30	0
SmartFormPro	\$59.99	Custom HubSpot forms. Zero hassle.	100	1
HubSync	\$59.99	Seamless integrations between platforms.	40	0
IntelliAudit	\$129.99	HubSpot compliance, simplified.	25	0
OmniLeads	\$199.99	Lead scoring that actually works.	10	0



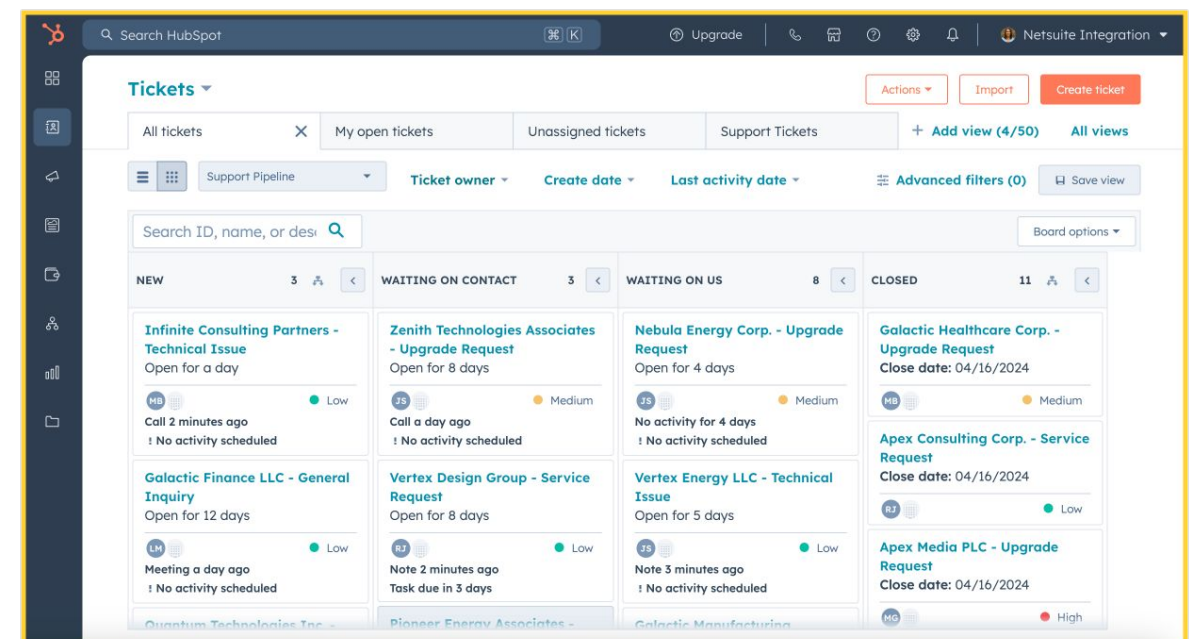
Use Cases

Customer Success

Service Histories:

Import service history data from NetSuite into HubSpot to provide Customer Success teams with a comprehensive view of each customer's interaction history.

This enables personalized and informed support, improving resolution times and customer satisfaction.



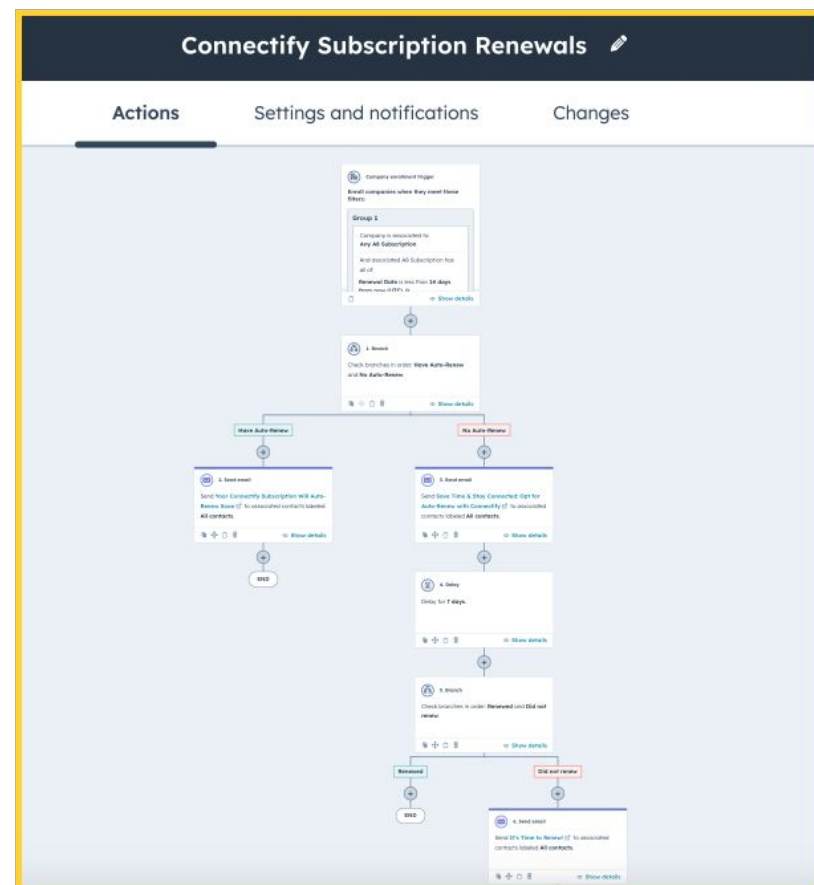
Use Cases

Customer Success

Subscription Renewal Automation:

Use NetSuite's subscription data to automate renewal notifications and processes in HubSpot.

This ensures timely communication with customers about upcoming renewals, increases renewal rates, and provides opportunities for upselling or cross-selling during the renewal process.



Use Cases

Customer Success

Account Health Alerts for Late Payments:

Monitor customer account health by setting up alerts in HubSpot based on NetSuite's financial data, such as late payments.

These alerts can trigger proactive engagement from Customer Success teams to address potential issues, maintain healthy customer relationships, and reduce churn.

The screenshot displays the HubSpot CRM interface for a company named Zenith Manufacturing LLC. The account health is highlighted in red, indicating a critical issue. The interface shows various data points and activities related to the company.

Account Health: Red

Data highlights:

- CREATE DATE: 04/11/2024 12:53 PM EDT
- LIFECYCLE STAGE: Lead
- LAST ACTIVITY DATE: 04/15/2024 3:03 PM EDT

Recent activities:

- Jordan ... logged a meeting wit... Apr 15, 2024 at 3:03 PM EDT

Account Details:

- Company name: Zenith Manufacturing LLC
- Phone: +1-789-497-7069
- Street address: 4147 Main St, Sunnyvale, NY 17874
- Company owner: Ryan Gunn
- Industry: Electrical/Electronic Manufacturing
- Number of employees: 55,000

Financial Data (A8 Payments):

- Payment Amount: \$53,031
- Payment Status: Missed
- Payment Due Date: 04/14/2024

Inventory Data (A8 Products):

- High-Capacity Storage Unit (SKU: HCSU-3800): Amount in Inventory: 129, Price: \$3,800
- Smart Conveyor Belt (SKU: SCB-4100): Amount in Inventory: 145, Price: \$4,100



NetSuite & HubSpot

Conclusion

Integrating NetSuite with HubSpot offers a variety of benefits that can significantly enhance the efficiency and effectiveness of your go-to-market efforts. By enabling a seamless flow of critical data between your ERP and CRM systems, you can achieve a more unified view of your customers, streamline your operations, and drive more personalized and impactful engagement strategies.

With the right integration in place, your organization can unlock the full potential of both NetSuite and HubSpot, paving the way for greater innovation, improved customer satisfaction, and accelerated growth.

To watch the full NetSuite & HubSpot Guide video, please visit aptitude8.com/netsuite.