

SalesLoft Streamlines Orders with the Celigo Salesforce – NetSuite Integration

Customer
SalesLoft

Product
Salesforce - NetSuite Integration App

About SalesLoft

SalesLoft is the #1 sales engagement platform, helping sales organizations deliver a better sales experience for their customers. More than 2,000 customers use the company's category-leading sales engagement platform to engage in more relevant, authentic, and sincere ways. SalesLoft is designed for sales teams to intelligently speak to prospects personally, instead of sending prospects passive-automated emails.

Background

Michael Ramos, Sr. Solutions Architect of Business Operations, joined SalesLoft in April of 2018 with being part of the mission to automate their processes. SalesLoft helps sales organizations deliver a better experience, by doing so, they use Salesforce as their CRM and NetSuite for financials internally.

Ramos shares, "We started implementing NetSuite because we wanted to move our ERP to something bigger and more robust. Salesforce is used pretty heavily, so getting our revenue and sales information into NetSuite was a priority. We found bringing Celigo into this process was essential."

With the decision to modernize their core technology, the team needed to face the challenges of the manual workload they were experiencing. Having NetSuite and Celigo being apart of the new strategy assisted with their process of having a self sustaining solution.

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— **Michael Ramos**
Sr. Solutions Architect,
Business Operations,
SalesLoft



The Challenge

Before bringing Celigo into the picture, the team was conducting manual work with QuickBooks. Ramos realized they needed a strategy in place to have Salesforce, Quickbooks, and NetSuite work seamlessly together. “Quickbooks was a manual process. We would export the information and import it into QuickBooks, but we didn’t have a Salesforce to QuickBooks sync,” says Ramos.

Ramos continues to add, “As a company, we bring in 200 orders a week. If we were to still operate QuickBooks manually with our current order amount, it would be very labor and resource-intensive.” SalesLoft uses QuickBooks for more of a billing platform rather than for their actual revenue reporting, so automating billing information into NetSuite was a priority.

The Solution

While the team was adopting a new strategy with Celigo, Ramos mentions, “We had to do a lot of testing and we had to restructure the way we did our data, but it was a quick process with Celigo. Outside of our slowdowns, the process was straightforward and quick.”

The SalesLoft team played an active role during the implementation, including mapping fields between business objects, using the integration apps easy-to-use interface. The Business Operations team now takes care of errors and syncing. The team has also taught the finance team how to sync and fix errors as well.

The Bottom Line

SalesLoft has noticed a lot of improvement with having the Salesforce to NetSuite integration with Celigo. They now have access to up-to-date customer financials—such as invoices, days outstanding, and customer payments—directly from Salesforce, enabling them to have more-informed conversations with customers without having to rely on the finance team for data.

The Salesloft team has realized the benefits of streamlining their applications and the reduction of IT costs. Ramos has realized how the Salesforce to NetSuite integration app is self-sustaining for the entire team. They are realizing the benefits of automation and are able to maintain business operations with less resources.

Moving forward, the team plans on continuing to improve its automation processes—they have big plans to integrate Workday with NetSuite.

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About Celigo

Celigo’s integration solutions enable applications to work together as one. Celigo integrator.io is a powerful and intuitive iPaaS platform that enables both technical and non-technical users to synchronize data, automate processes, and streamline operations by integrating any applications and data sources.

Contact Us

1820 Gateway Drive, Suite 260,
San Mateo, CA 94404, USA
Email: sales@celigo.com
www.celigo.com

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