

# Three Common Email & ERP Integration Challenges & How to Solve Them

# Everyday users are bombarded with information.

Emails pile up, calendar invites need to be accepted or created, documents are emailed back and forth, and contacts need to be created or updated. Some, but not all of this data needs to be shared with others in the organization, yet it often is not.

Sharing inboxes is one option, but asking a colleague to search through thousands of emails that aren't their own would not be viable every time someone else needed a piece of information. It would also be an extensive waste of time and productivity. Some organizations still rely heavily on spreadsheets or Google Docs and copy/paste their emails to track this data. While a connected spreadsheet can be very positive, this particular application does not fit that definition, and getting data from your inbox to the spreadsheet would be very manual and time-consuming.



# How do organizations provide 360° visibility of important information to their teams in one central location that is easily accessible?

Most companies today use some type of accounting system and/or Customer Relationship Management (CRM) system that is integrated with their accounting system. QuickBooks is one of the most popular accounting packages in the world today and Salesforce is one of the most popular CRM packages. Companies such as NetSuite offer what is known as Enterprise Resource Planning (ERP), which is a suite of web-based applications that combine accounting, CRM, project management, warehouse management, and more in a single package. The entire organization typically runs off of the ERP and the data in it is the single source of truth. Modern ERP systems can scale with your business, allowing you to add modules and users only when you need them.

This ebook will examine and provide the best practices to help solve the three common issues when integrating emails, files, and calendar invites with an ERP like NetSuite.



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NETSUITE



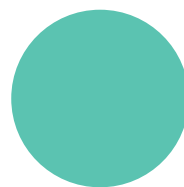
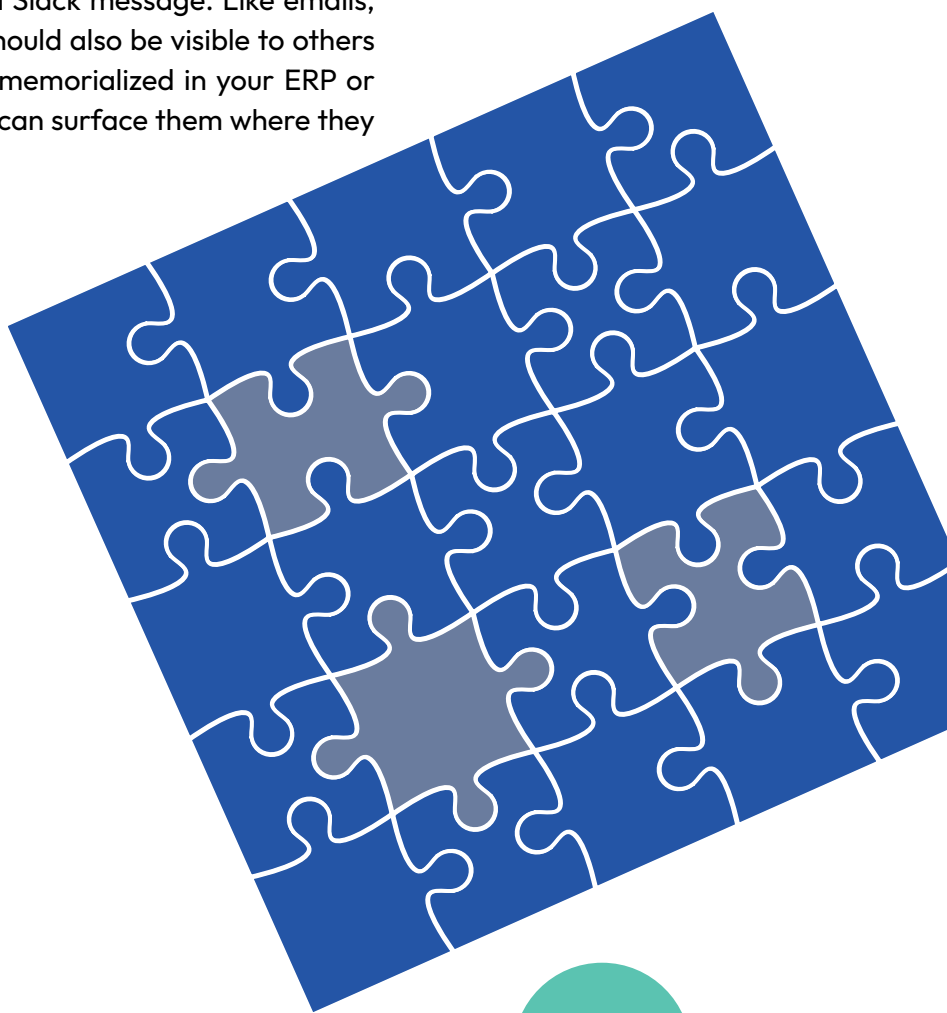
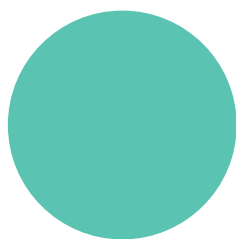
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## Important Information is Missing

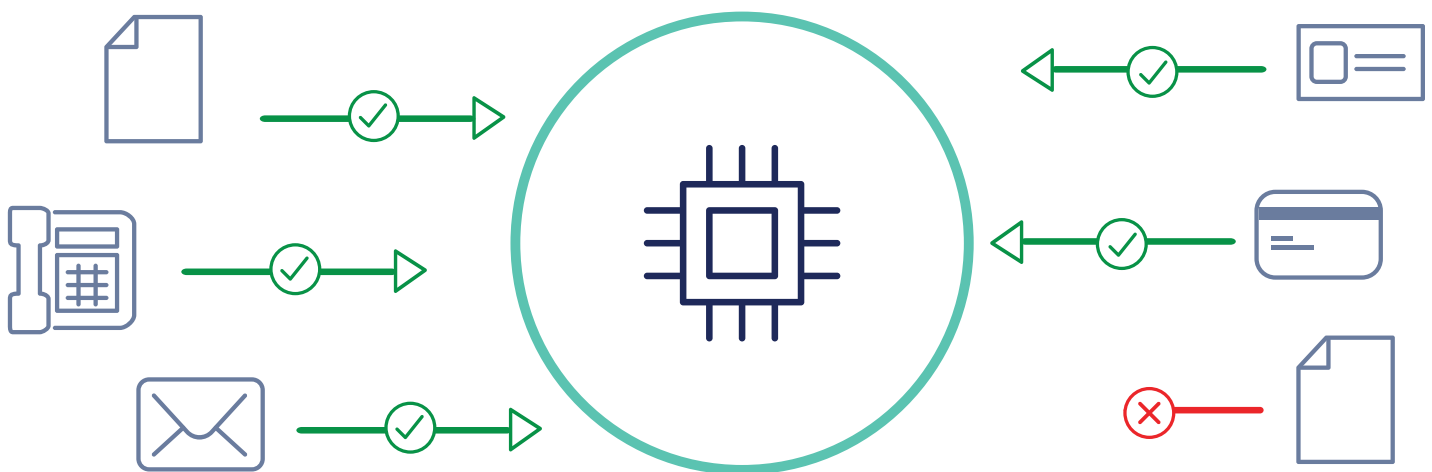
If a company has deployed an ERP like NetSuite, it is typically the single source of truth for the financials first, but other information is often siloed in someone's email inbox and accessing it is a lengthy process. It would potentially involve employees in a company having to send an email requesting information about another email requiring another reply email or a Slack message. Like emails, important meetings (past, present, and future) should also be visible to others in your organization. These meetings should be memorialized in your ERP or CRM so that you and others in your organization can surface them where they are needed most.



Gaining access to all of this disparate data in the ERP, whether it's emails or calendar events that can quickly answer questions, would significantly increase productivity throughout the organization. Far more can get accomplished across teams in less time if data outside the financials is in the ERP. Immediately, everyone in the organization gains instant productivity.

This does not mean that every single piece of data should be added to the ERP. This could result in incorrect or duplicate contacts or data. It could also render certain areas useless because too much information gets added, requiring users to spend time sifting. Quality over the quantity when adding actionable information is important.

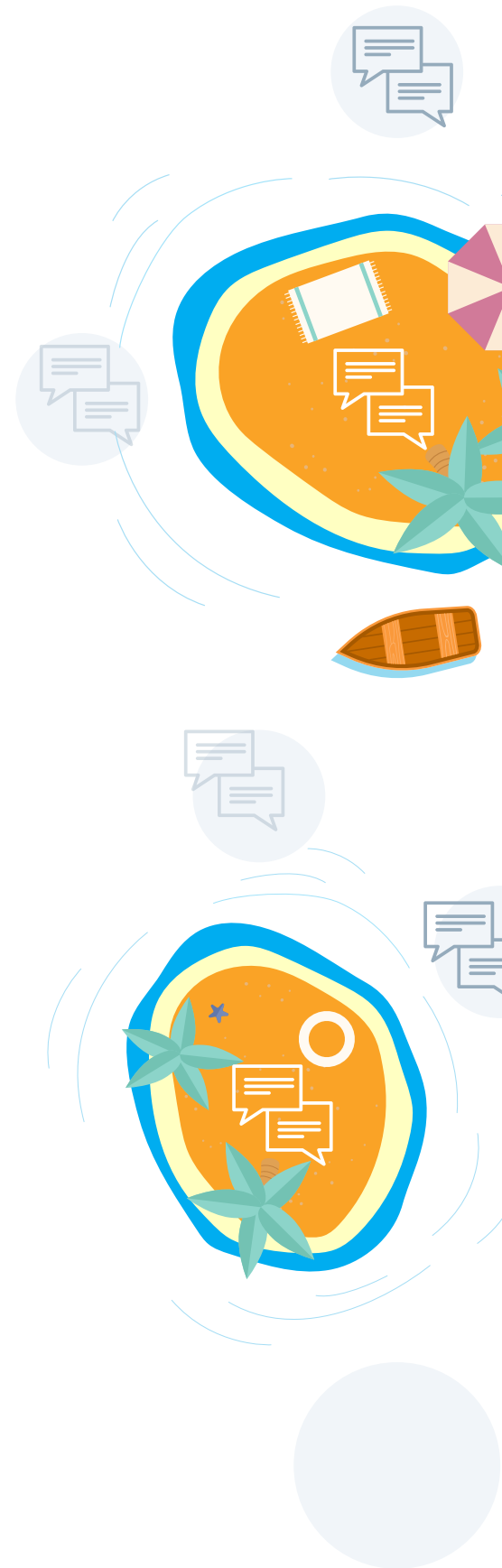
The first step organizations should take is making it a priority to add relevant data to the ERP. Working together as an organization to outline exactly what information should be in ERP is an important second step. Users should standardize on where they want to track these conversations. Options might include the customer record, the contact record, or the opportunity record. Decide upfront so your users will always know where to go. Create a system with checks and balances to make sure that all information related to contacts, such as phone number and job title, is added. In addition, consider what is important to incorporate at the opportunity, support, and other relevant levels. If this best practice is followed, the ERP really can become the single source of truth for all areas beyond the financials, saving users time having to search for missing information. This system works even better if organizations can provide users with a fast and intuitive method to get that information there.



## Communication Silos are Created

Without a central place to store important data, it is common for communication silos to occur. ERPs are very powerful applications that many organizations use every day with the intention of them being the central place for information such as financial history, customer records, support cases, user notes, and custom records. But often, users may not add information to the right place for access outside their team, they may not think it was relevant, or worse yet, may not save it anywhere at all because it takes extra steps and time. It requires logging into the ERP, which is especially difficult if traveling, or it results in a manual, inconsistent process that is a barrier to transparent communication within the organization. When that happens, cross-functional teams within companies are forced to attempt to make decisions without all of the relevant data points.

A problem can also be created when ERP users are all in a silo with customers, contacts and transactional data, custom records, and anything else that has been added to the platform and other users who are working within an email client, such as Outlook or Google Workspace, are in another silo with customer communications, calendar events, general email, signed contracts, and more. To further compound that issue, email users are siloed from each other, because you do not want to share every single email with every user in the organization.



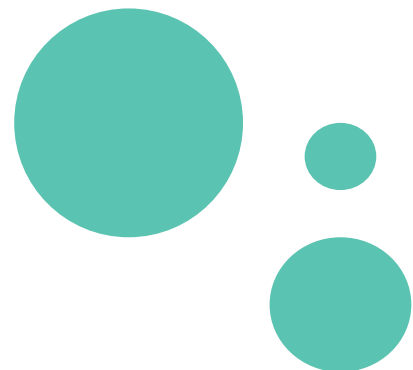
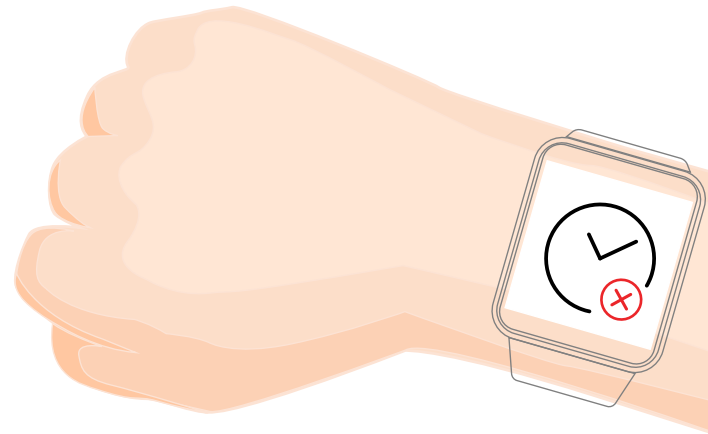
A project manager may have a series of customer-facing meetings for a project. Storing these events on the project record would surface them in the right place for others to see. A sales rep may be working on an opportunity and storing events on the opportunity would provide important visibility. An Account Manager may want to store events at the contact or customer level. Allowing everyone to see what was going on really helps with the synergy between teams, because regardless of what communication took place, as long as it is added to NetSuite, all teams within the organization can feel confident in their decisions and action items.

If businesses make it a priority to integrate information in email clients with the ERP across teams, transparency increases exponentially because the ability to quickly see what is critical is gained. Inter-departmental synergy and confidence are significantly increased because it creates universal knowledge of what was going on instead of just hoping to know. Users no longer have to call or email someone else to get an emailed response. They are empowered to access the information they need from the single source of truth, the ERP.



## Information is Incorrect or Out of Date

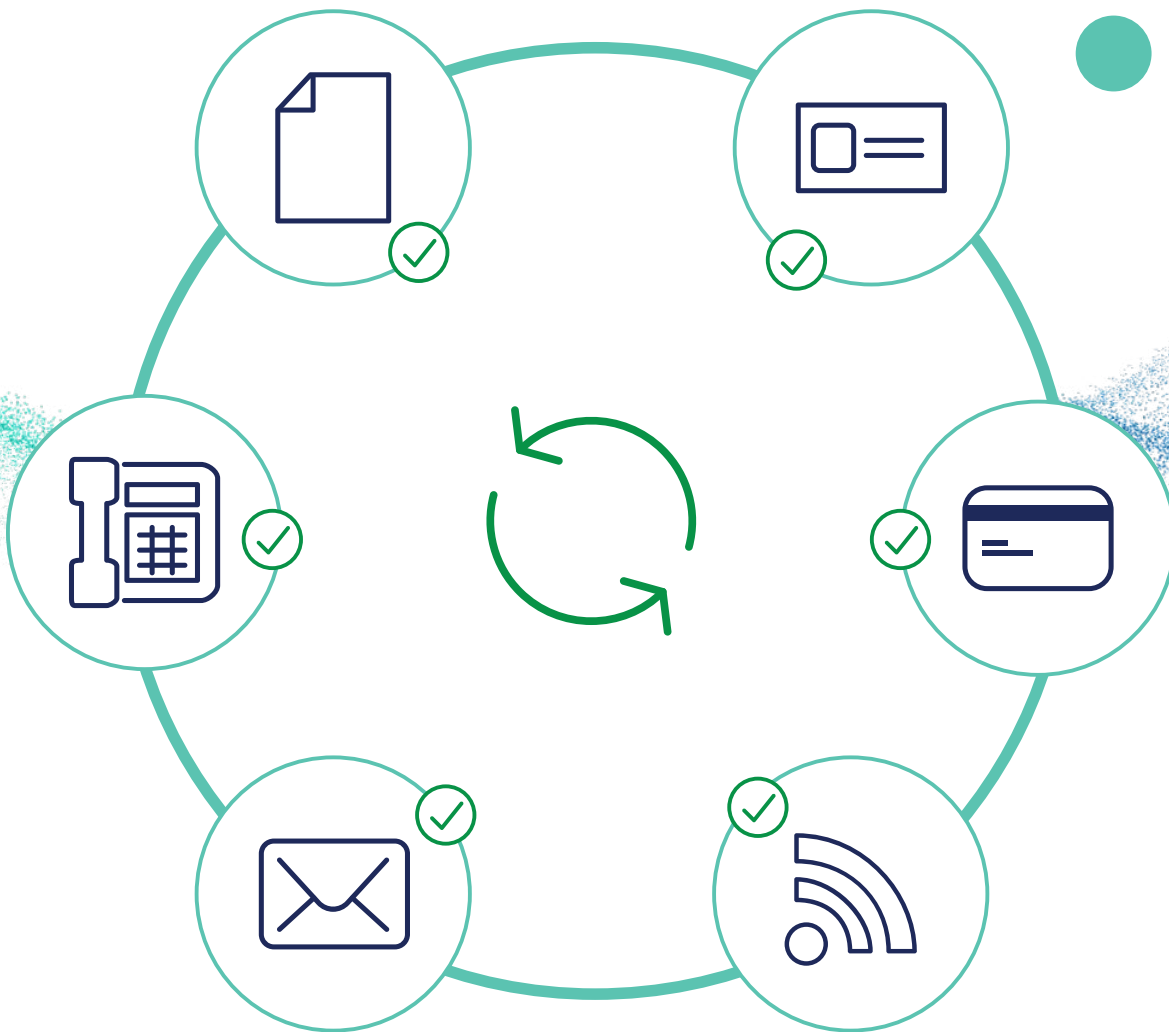
It is critical to keep information in the ERP up to date, but in many cases, it takes a lot of time to go in and make a small change. It requires a user to leave one system, log in to another, and find the record that they want to correct or update. Whether it's phone numbers, titles, email addresses, or other pertinent contact information, it is important to have it incorporated on contact, vendor and customer records. Often, despite the best intentions, it does not happen. A typical example is sales reps who have to work very quickly throughout much of the day and may not go into NetSuite to update a contact record with a phone number change because it takes an extra minute or two.





Offering a method for users to update information in the ERP more quickly would significantly increase the validity of the data. Users could save time throughout the day and important records would stay up to date. Many times, the adoption of these practices is not high within organizations because they have not found an effective way to offer to their team to make it easier for this to happen.

If a company's email client was integrated with the ERP system, users could keep working in one system that they are already familiar with to update ERP records in seconds. Attachments, such as contracts or other important documents, could also be incorporated.



# Tying It All Together

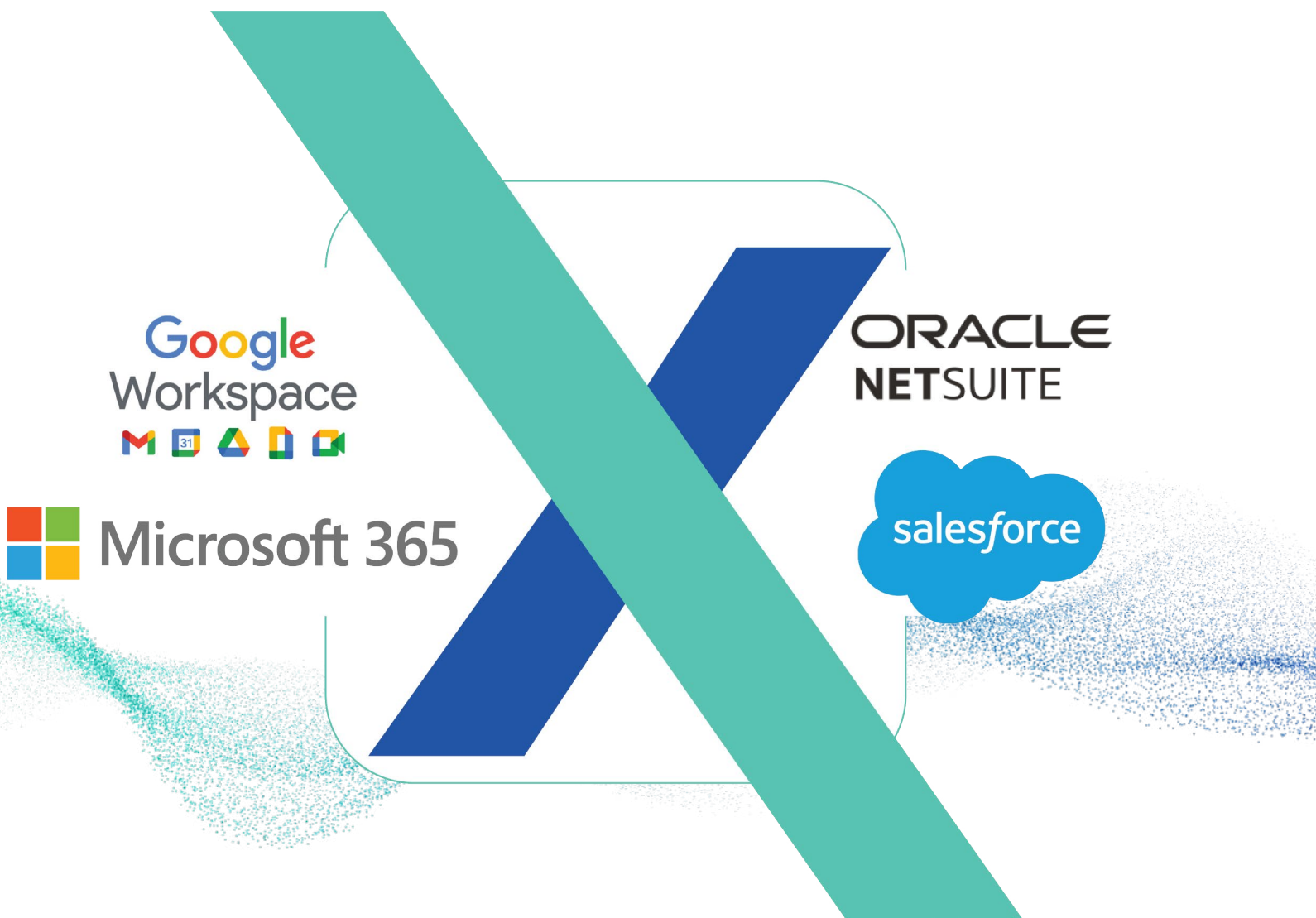
With ExtendSync for use with Microsoft Outlook or Google Workspace, users can work quickly without leaving their inbox. ExtendSync helps by making it easy to add or edit various details in NetSuite via Outlook or Gmail in just a few seconds. From adding contact details to missing information, or updating opportunities, ExtendSync allows this to happen with a click of a mouse, so efficiency and productivity get a boost because copying and pasting (or hoping teams copy and paste) is no longer required. It just takes a couple of clicks to attach emails to not only the contact record, but also specific transactions.

In addition, emails can easily be added and will live in one central place in NetSuite, the communications tab. It provides users with an effective way to save time and be more productive throughout the day and while keeping important records up to date in NetSuite.



# Beyond Email

ExtendSync also integrates with Google Drive or with Microsoft 365, including SharePoint and OneDrive for Business, or even the native NetSuite file cabinet. Signed contracts and other documents can be stored in seconds, making them just a click away and adding them to a relevant record inside of NetSuite. Important emails, files, and calendar events can be attached to NetSuite through an intuitive interface that lives in the inbox. There's no longer a reason for not having up-to-date information in the CRM, regardless of whether the source is Office 365 or Google Workspace.



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