6 CRITICAL ACTIONS TO TAKE BEFORE INTEGRATING SHOPIFY WITH NETSUITE

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So you're planning to integrate Shopify with NetSuite. Great! In fact, it's probably the best decision you could have made.

Having NetSuite's powerful ERP together with Shopify's flexibility, functionalities and scalability is truly the eCommerce version of having the best of both worlds.

Both platforms are pretty well-known, so you know that you're not in uncharted territory. But just as with any integration or migration, you should proceed with caution.

Because if handed poorly, even the most powerful tools will fail to give results and you'll risk losing customers and revenue to your competitors. You need a plan.

In this guidebook you'll find all the instructions you need to prepare yourself for your next Shopify-NetSuite integration.

Are you ready?

TL;DR: Don't start integration without a detailed plan! You need to know what's coming ahead. Here are the 6 most critical steps to take before integrating Shopify with NetSuite — without compromising revenue!

43% of companies find systems integration as the biggest challenge when expanding an ecommerce business.

Entering a new mindset

Providing customers a seamless shopping experience is everyone's dream in the eCommerce landscape.

To achieve that, businesses depend on several tools that ensure that their products are available and ready to ship in a timely manner, but sometimes streamlining all those processes is not that easy. This is where automation comes in.

Your customers will be happy as long as every step of your process is both efficient and effective.

This is why integrating all your tools, applications and data sources results in better conversion rates, faster order processing and shipping, and real-time viewing of every data you need in order to analyze your sales performance. This allows for strategic planning and seamless decision making.

GET STARTED

The challenges of integration

There are challenges every time you grow. Challenges during integration are particularly risky for businesses, because they mean losing revenue to their competitors.

This is why it's important to establish and check these connections thoroughly to avoid process issues with some upfront work.

84% of business leaders say integration challenges slow business process innovation and 43% of companies find systems integration as the biggest challenge when expanding an ecommerce business.

Remember: changes are inevitable. Most likely your business will need to adapt to them.

Step #1

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Plan your data migration carefully

The first step is to plan and identify which eCommerce processes you need automated. Mapping them out and using ROI as a measure for your decision making is key, as well as listing all related applications and identifying the critical data you'll need to be 100% accurate.

The second step is to choose a Central Data Hub, which will allow for you to unify and manage all the data across the applications.

Following that step, it's important to decide on which direction your data will be flowing from, be it from its origin or bi-directionally, and next, the decision needs to be made on if you're going to be needing real-time updates or just scheduled updates at specific time intervals.

A key step of this process is to define an integration strategy early on in the process. This type of strategy helps standardize all the processes and the tools which help add applications and workflows to larger business processes.

Ask yourself whether accompanying elements to your integration are the right fit for the skills your team harbors, or whether they can be easily implemented with readily available resources.

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Who is responsible for which parts of the process?

Super important: Who will take care of each task? And who will make sure they are executed successfully? Create an ownership team, with clear instructions, responsibilities and expectations.

Stating who is responsible for which parts of the processes is another key step of the process. This way, you will be able to set goals for each stage of the integration processes (be it architecture and tool selection, business processes, project management, implementation and go-live or maintenance) and make sure they are met accordingly.

When picking the tools you will use, it's key to make sure they fit well with your team's knowledge base. Your experts need to know the systems involved, so picking your tools based on your own resources and objectives will ensure a good fit.

Checklist

An integration strategy standardizes the processes and tools needed to efficiently add applications and workflows into larger business processes.

Business

- Who owns each integration (and when)?

  - Centralized vs. distributed

  - Implementation vs. maintenance

  - Internal vs. outsourced

- How will integration projects be prioritized?

- How will different stakeholders communicate?

- How is documentation and training handled?

Technical

- What tools do you have at your disposal?

  - Custom development

  - Native integrations

  - Point to point

  - iPaaS

- When will you batch vs. real-time?

- Where and how should issues be resolved?

Determine who will own and contribute to the stages of the process:

- Architecture and tool selection

- Business process

- Project management

- Implementation

- Testing and go-live

- Maintenance

Bonus pro tip: Establish ownership teams

- Pair up technical and business owners

- Always have back-up owners identified and trained

- Communicate!

- Changes you make to "your" integration can affect other departments

GET STARTED WITH YOUR SHOPIFY-NETSUITE INTEGRATION

Step #2

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Be vigilant of the integrity of your data

It's also important to avoid dealing with unknowns. Before starting, assess your risks and face the hardest things first to have time to spare in case things don't go as planned. Test everything out early on in the process so that you can have a pillow to fall back on as early as possible if the need arises.

Have the right expectations — become familiar with what you can and can't do on NetSuite, and use the system in the way it's intended to. A great tool to take into account is NetSuite's SAFE Guide, which provides plenty of tips on platform integration.

Often, integration challenges arise in the form of errors. Upon investigation, the root cause is often a miss on the business process side, not the technical side. Some of those errors are to be expected, so think about your processes and map them out before you begin.

It's also helpful to consider your use cases. The vast majority of things that we do with integration are manual activities that we're now automating. During your business process mapping and design, use real data from your eCommerce account or other applications. Manually bring that over into NetSuite based on how you're expecting your integration to work, and it will help to flush out implementation issues.

Checklist

Many small details with NetSuite can have a big impact on your integration

- Have the right expectations!

  - Don't use the system in a way it wasn't intended, such as bringing in large quantities of data

  - Transactional line limits can have big consequences even as corner cases

- Use ExternalID or Custom Field to track external primary keys

- Carefully select your data types

  - Text field vs. custom list values

  - Compliance should be a consideration

- Consider governance

  - You can run into problems to solve if you don't consider governance

  - These issues are challenging to debug

- Processing order of scripts should be considered

    - A workflow or small script can create unintended results

- Use the SAFE Guide - SuiteApp Architectural Fundamentals & Examples

Set clear expectations around data between all parties

- Document

    - Use cases the integration should cover

    - Source format of the data

    - Transformations that occurs during processing

    - Destination format of the data

    - Make all of this consumable by a business user

    - Flowcharts and diagrams

• Confirm

- Can the sender comply?

- If your sending system is reliant on manually entered data or information coming from other systems, can you guarantee it meets the contract?

- Plan for expected failures

- Many things that go wrong can be anticipated

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Step #3

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Focus on the processes first, the rest will follow

You also need to remember that integration challenges are process issues and not technical problems. This means you will need to clearly map out your processes before you begin, in order to flush out implementation issues.

It's advised to define your use cases, using real data from your eCommerce account, and manually bringing that over into NetSuite based on how your integration is expected to work. Details come second.

And when you do find an error, it's important to move data validation upstream to prevent it, and not respond to it: your main concern should always be to get to the root of the problem, getting as close to the data issue source as possible. Track it, and if it's a pattern, look for a way to fix it.

Working in integration means you need to establish 'data contracts', that is, cltear documentation on everything your integration entails - source format, use cases, transformations during processing, destination format of the data, ensuring compliance, contingencies, etc. — to sign off on it with all parties involved, to set clear expectations around data.

A seamless integration is one that can be auditable and traceable from the very beginning, as you need to walk through records from end to end. Records must be clear and linking must always exist. NetSuite's flexibility is a great advantage in this respect, as its tracking is as accurate as you can get.

And a final friendly reminder: if you want everything running smoothly, then you need to work for it. Integrations are high maintenance, they change and evolve over time, and if you don't keep up with it, errors will start to pop up all over the place.

Plan for these modifications - look to allocate both time and resources towards resolving these issues and avoiding integration debt at all costs. This way, your integration will be a highly optimized, efficient tool.

Checklist

Integration challenges are process issues and not technical problems.

- Integration builds on everything before and below it

- Clearly map your processes out at the beginning

  - If they don't work on a napkin, they won't work in a system

- Define your use cases clearly

  - Almost always you are automating what would otherwise could be a manual activity. Make sure walk through it in detail

  - Think about your testing when you start

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Step #4

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Data consistency between platforms

Next you need to check that all the settings and every setup you planned will store the information where you want it, and where you need it.

More than checking that the information on both sides will be compatible, what you need to look for is instances where you'll risk having data scattered over the two platforms.

And think of a system to set in place for new properties, fields, or data that might come in the future so there is a clear plan of action and your information doesn't end up all over the place. And data management will always be a work in progress.

Your integration project isn't going to keep humming along on its own. Integrations with very minimal maintenance are the exceptions to the rule now. In the mid-market, the business landscape is very dynamic, and hence, you can expect that your integrations will change.

Checklist

- Most businesses aren't static.

  - Change will require modification to the integration. Plan for it!

- Your integration will need to keep up, it should evolve!

  - Small changes over time will result in a transformation of the solution into a highly optimized and efficient tool.

- Allocate time and resources to resolve issues and make changes.

  - This is one of the most common mistakes that results in problems.

- **Don't end up in integration debt and derail!**

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Step #5

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Choose the right partner

When it comes to Shopify-NetSuite, Celigo offers the most complete integration.

As a matter of fact, NetSuite was the first Smart Connector Celigo ever built, so they know a thing or two about it. Here are a few perks and benefits of integrating your Shopify store with Celigo:

Never Miss A Single Order

- If Shopify orders do not get synchronized in NetSuite, the orders are stored in Celigo until they are created in NetSuite

- Easy access to one-click retry whenever errors occur (e.g., system downtime, incorrect SKU #)

- Manually override Shopify orders that contact invalid data to be sent to NetSuite

Self-Customization

- Map data fields from a Shopify record type to a NetSuite record type through an intuitive user interface

- Easily create complex business rules inside the mapping interface

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Self-Service Dashboard

- Gain full visibility into integrations and error details for easy troubleshooting

- Easily manage and update integration settings and data mappings

- Enable alert messages to be sent to team members based on error types

Connect Multiple Stores

- Connect additional Shopify stores to the same NetSuite account using a simple two-step process

- Automatically enable default integration settings and mappings from the original store to additional Shopify stores

Checklist

The right technology, people, and time go a long way to be successful. Don't get caught dealing with unknowns when you have the least amount of time.

- Make sure you have experts that know the systems involved

  - Limited access to knowledgeable help can provide a big return

- Pick your tools based on your resources and goals

- Make sure your integration tools are a good fit

  - Don't choose a batch tool for a real-time job

- What have you not done before?

  - New to integration, new to services type, new to system?

- Which areas will require the most resources?

  - In terms of time and skillset

- Is anything newly built or custom?

  - Custom APIs or new applications increase the risk of problems.

- Get a proof of concept for your team soonest

  - This can be a big win for a team and builds confidence

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Step #6

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Choose the right connector

Its **Shopify-NetSuite Integration App** (SmartConnector) is a full-featured, prebuilt integration application with advanced capabilities.

The main advantage of Celigo's solution is that systems can be configured, deployed, and maintained with fewer technical resources. Also, it supports Shopify, Shopify Plus, and Shopify POS, and uses the intuitive interface to quickly configure the integration so that you can set it and forget it.

Key Benefits

- Optimize the buying experience with timely fulfillment, accurate product availability, and real-time statuses

- Scale operations efficiently by automating eCommerce processes

- Achieve fast time-to-value with prebuilt, out-of-the-box integration

- Minimize ongoing costs with automatic product updates and upgrades

Key Features

- Sync sales orders and customers from Shopify to NetSuite in real-time

- Sync fulfillments/invoices from NetSuite to Shopify

- Sync products from NetSuite to Shopify

- Manage end to end order workflow by syncing order cancellations/refunds from NetSuite to Shopify

- Advanced functionality to flag high risk/fraud orders, identify order duplicates, perform variance reporting

- Advanced functionality to sync matrix items/variations

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