



NetSuite® Quote Records Integration

NetSuite Solutions for a on Demand CRM Services Provider

Executive Summary

One of our clients, who is an ISV approached us with a tricky task which was to integrate Quote requests that originate from a third party website to be sent to NetSuite quote records database whenever a new quote request is added in the third part website. This case study attempts to detail out the successful implementation of the same by Mindfire.

About our Client

Client An ISV which specializes in CRM applications |

Location WI, USA | **Industry** on Demand CRM Services

Business Situation

Our client, a leading ISV in on-demand CRM customization and implantation, approached us with a proposal to setup integration between a third party website and the NetSuite Quote records database.

The key challenges include:

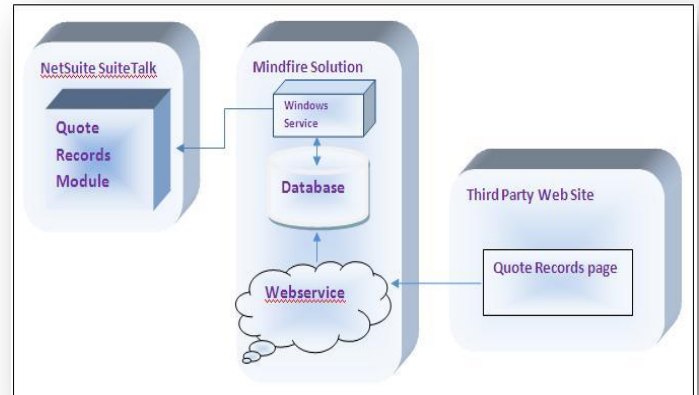
- The website in question was developed using Ruby on Rails and the client did not want any big changes to be done on that website
- The business logic and the application had to reside within our client's environment and not with the third party to enable ease of maintenance
- The Quote record could get into multiple accounts
- The solution should be dynamic enough to serve more than one website
- The previous point leads to the obvious fact that the end web sites could be developed in any platform/technology and we should be able to support the same.
- The continued functioning of the third party website was very critical and the changes are to be kept to a very minimum.
- The time taken to get/send the details from the Quote records page to our solutions should be negligible and end users of the site should not experience any delay in the Quote Submit process.

Solution Details

The Mindfire Solution

Mindfire had to address all the challenges mentioned above with a very limited timeframe. We decided to develop the solution in Microsoft .NET platform and it consisted of many modules.

1. Part A: Third Party Web Site to Client Environment





One of the main challenges is to support any platform/technology used by third parties. So we decided to implement a web service which would be hosted n our client’s server and which would expose web method to accept quote requests from any third party sites.

We created a XSD and sent to the third party and it’s very easy to consume a web service and all they had to do was generate the XML file with the data that is submitted on their Quote request page and hit the web service and submit the XML.

The web service then would validate the XML and store it in a table.

2. Part B: Client Environment to NetSuite

The second part of the solution involved a windows service which would read new records from the database table (on time based polling) and process the same and get the data processed and hits the NetSuite web service using the SuiteTalk platform submits the quote records.

Best practices on error tracking, client notification about error were implemented and if any quote record fail due to invalid data, the client would be immediately notified by way of an email which is auto fired from the system. Also we implemented many fool proof checks in the system so as to prevent any quote insert failures. The solution proved to be extremely scalable.

Technologies

Technologies used: ASP.NET 3.5, C# 3.5, Windows Services, Web Services, SOAP/XML, MySQL 5.1

Final Results

Software System

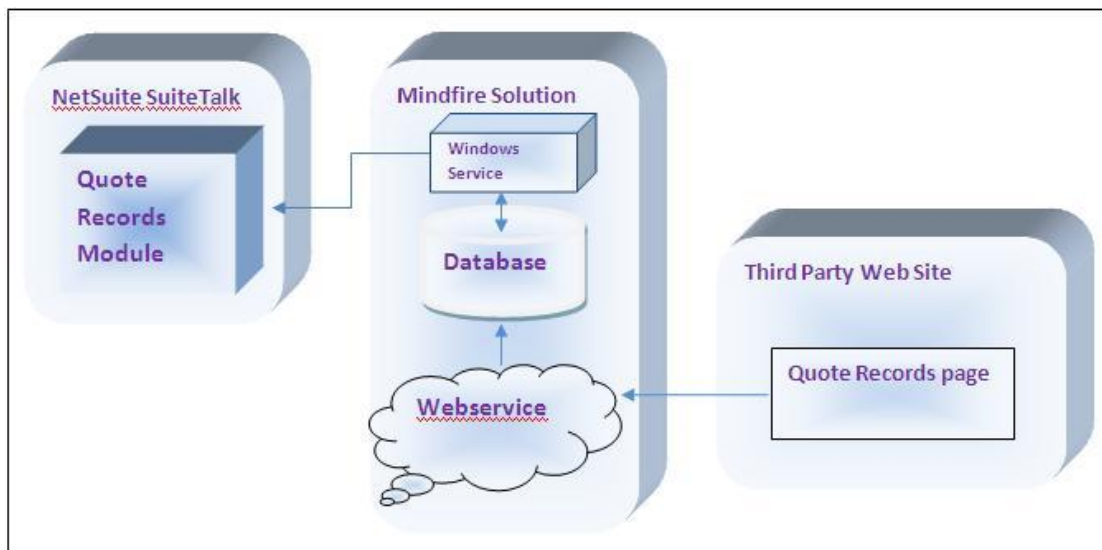


Figure 1 – Diagram Showing Schematic representation of the implementation

The following screen shots show some of the salient results/features of the system.



Achievements

- The full implementation was done in a very short time
- The solution we provided is available 24 * 7
- One Solution that served multiple third parties irrespective of the technology/platform their site is in.
- Seamless integration and a very this client architecture thus providing good user experience
- Full control of the interface with our client/our developers. So easier to maintain.
- The solution has proved its mantle over past several months by handling 1000s of requests from multiple client ends.

Customer Benefits

The client benefited a great deal by this. We equipped them with one solution that could support/serve multiple third parties and the final clients were very happy for the fact that they did not do anything much in terms of infrastructure/coding Etc. This helped our client to increase their sales initiatives with onetime cost.

Future Relationship

Mindfire established a strong relationship with the client firm. Our client continues with us with great success and happiness and we are executing multiple projects for them.