

E Source Increases Invoicing Speed by 300% with Real-Time Data Sync

Customer

E Source

Product

Salesforce – NetSuite SmartConnector

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Celigo is the easiest system I have to manage. We now have a SmartConnector that is reliable and flexible, and doesn't limit us in the information we pass between NetSuite and Salesforce.

— **Alicia Stanworth**

Associate Director of
Accounting at E Source

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About E Source

E Source, founded in 1986, is a privately held research and consulting firm focused exclusively on utilities and their customers. E Source helps electric and gas utilities with critical problems involving energy efficiency, program design, customer experience, marketing and communications, and distributed energy strategy.

Background

Over the past few years, E Source has seen sales volume increase by double digits year over year. As a result, the company quickly outgrew its existing accounting software. It was unable to scale with the company's growth and was experiencing frequent system breakdowns, requiring hours of troubleshooting by the technical support team. In addition, key data – such as quotes, orders, and customer, and product information – had to be manually synced between the accounting and Salesforce systems.

Associate Director of Accounting, Alicia Stanworth helped with the search for a new accounting system. After researching a variety of options, E Source selected NetSuite as the best system for its growing business. However, that move alone didn't solve all of the company's accounting problems.

The Challenge

Before making the move to NetSuite, Alicia needed to find a reliable integration between NetSuite and Salesforce. One that would eliminate the manual work required and speed up orders and customer billings without having to make any changes to the existing sales process.



E Source

Web Site
www.esource.com

To meet her specific business needs, Alicia wanted an integration solution that could provide:

- Automatic real-time data synchronization to replace manual or batch updates
- The ability to map custom data fields between NetSuite and Salesforce
- Flexibility to control the data that is imported into NetSuite from Salesforce
- Reliable integration with the ability to handle large volumes of data without system breakdowns
- A responsive and reliable support team for troubleshooting

After some additional research, Alicia and the E Source team selected the **Celigo Salesforce – NetSuite SmartConnector** as its integration solution.

The Solution

When The Celigo SmartConnector solved E Source’s integration problems by providing real-time data synchronization of key Salesforce objects, including Opportunities, Accounts, Contacts, and Products with NetSuite objects such as Sales Orders, Companies, Contacts, and Items. This led to faster order processing and customer billing, which is of particular value when processing the rush orders that previously required time-consuming manual work.

The prebuilt integration between Salesforce and NetSuite also accommodates several other E Source needs. Because Alicia only wanted customers with valid sales orders to be available in NetSuite, the SmartConnector was configured to only import Customer and Order data into NetSuite when the Opportunity status became “Closed Won.” The SmartConnector also makes it easy to map or add custom fields in NetSuite or Salesforce.

E Source chose to use Celigo’s Customer Success team to implement the Salesforce – NetSuite SmartConnector. The implementation went smoothly, and there has been no interference from the other applications that were already integrated with Salesforce. Alicia remarked, “It was one of the smoothest transitions to a NetSuite implementation that I have ever seen.”

The Bottom Line

With the Celigo SmartConnector in place, E Source now has a reliable, real-time integration between NetSuite and Salesforce that provides the finance and sales teams with accurate, up-to-date information from their own applications, without having to change any of their existing processes.

No more manual or batch updates are required. The real-time data sync means the finance team can process invoices more quickly—typically **within 24 hours** of the Opportunity closing rather than the 48 to 72 hours it took when they had to manually sync the data. This is invaluable when processing rush orders and allows E Source to more quickly close its books each month.

In addition, life is now easier for the E Source sales reps. 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.

Alicia enjoys the reliability and great customer support that Celigo offers. She no longer has to worry about fixing the integration and spending hours troubleshooting with the technical support team. She can spend her time managing NetSuite and analyzing financial data. And if she does need to contact Celigo support, she simply files an online ticket and someone quickly gets back to her. Alicia says that hasn’t had to contact support often.

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Celigo is the easiest system I have to manage. And it’s nice knowing that we have a SmartConnector that’s reliable and flexible, and doesn’t limit us in the information we can pass between NetSuite and Salesforce.”

— **Alicia Stanworth**
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About Celigo

Headquartered in San Mateo, Celigo is pioneering the future of application integration. Celigo’s SmartConnectors™ are prebuilt integrations that connect independent SaaS applications together seamlessly. These connectors are backed by the integrator.io, an easy-to-use integration middleware platform for building custom integrations.

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