![Grazitti Interactive® — Marketing for Digital Natives]

# Automate File Syncing Between NetSuite and Salesforce Lightning with Boomi

## HIGHLIGHTS

Re-enabled File synchronization

Completed implementation in 4 days

Synchronized through a secure framework (REST)

## THE CUSTOMER

The Customer is an IT company headquartered in California. It offers instructors the tools to make the writing process engaging for students, provide highly personalized feedback, and assess progress. As of 2018, the Customer's product is used by more than 30 million students at thousands of institutions in 150 countries.

## THE CONTEXT

The Customer relied on Celigo for seamless communication between its sales team and the employees engaged in back-office and finance work. But when it migrated to Salesforce Lightning, Celigo's Salesforce-NetSuite File synchronization ceased to function.

## THE OBJECTIVES

Restart the auto-synchronization of Files between Salesforce and NetSuite using Boomi while retaining Celigo to keep other data in sync. The implementation should be able to accommodate further development, should the Customer plan to phase out Celigo and replace it entirely with Boomi.

## THE SOLUTION

- The Customer needed a synchronization tool that would actually be able to fetch Invoice Files from Salesforce and sync them with NetSuite. The Attachment objects were not supported in Salesforce Lightning and had been replaced by Files, which were essentially an enhanced version of the Attachment object.

- Although the Customer had some experience using Boomi, the question of whether the latter was a suitable replacement had not been settled. We performed a gap analysis and concluded that Boomi could be used.

- Celigo supported the syncing of Attachment object but Salesforce Lightning dropped support for Attachments. Boomi was up for the job because it supported Attachments as well as the File object.

- NetSuite functions differently from Salesforce. We defined the processes to map Files and Sales Orders between the two platforms.

- After Celigo ceased to function on Attachments, the Customer's employees had to manually synchronize Files between NetSuite and Salesforce. It was time-consuming. We implemented Boomi in four days to save their time.

- Boomi's features constitute of a super-set of Celigo's capabilities. We implemented Boomi in such a way that the Customer could phase out of Celigo in an orderly fashion when it wanted.

- A detailed quality analysis was performed to ensure the implementation was suitable for use in a business context.

## THE OUTCOME

Restarted the automated synchronization of Files between Salesforce and NetSuite, saving the Customer hundreds of hours in manual syncing. Implemented Boomi Process in such a way that the Customer could build on the current implementation to phase out Celigo without causing chaos.