

# 4 Blockers in your quote-to-cash process with NetSuite & Salesforce - and how to fix them

## 1. Manual Data Entry

If your team is stuck retyping quotes, orders, or customer info from Salesforce to NetSuite (and back again), you're doing double work. Every hand-off is a chance to introduce errors or delays.

By syncing data between your CRM and ERP, you eliminate the copy-paste tax on your team.

- ❑ **Map your duplicated data:** Identify where your team is entering the same data in multiple places. Customer details, product SKUs, pricing – list these pain points first.
- ❑ **Establish a single source of truth:** Decide which system (CRM or ERP) should be the master for each type of data. Clean up inconsistencies so integration is working with reliable information.
- ❑ **Automate the Sync:** Use an integration tool to bi-directionally sync records – when a deal closes in Salesforce, have it auto-create or update the order/invoice in NetSuite without human input.
- ❑ **Kill the spreadsheet handoff:** If you're using Excel or CSV exports to move info between teams, replace that ASAP. Implement a central repository or workflow where sales and finance can access the same updated data, in real time.

## 2. Approval Bottlenecks

You've got a hot proposal, but now it's languishing in someone's inbox waiting for approval. Sound familiar? When quote or discount approvals live in email threads (or, heaven forbid, on paper), deals slow to a crawl. The longer it takes, the staler your deal becomes.

However, with integration-led workflows, approvers can okay a quote faster.

- ❑ **Define your approval rules:** Be explicit about who actually needs to approve what. A clear approval matrix prevents every deal from becoming a committee approval.
- ❑ **Take approvals out of email:** Choose a tool or method to manage approvals centrally. The key is a single queue where approvers get notified and can act immediately (no "lost email" excuses).
- ❑ **Enable one-click or no-login approval:** Ensure approvers can review and approve easily. Fewer hoops = faster responses.

## Do you have further questions?

If you still have questions or want to understand how these ideas apply to your business, [book a discovery call here](#) with our team. We'll help you evaluate your current tech stack and identify practical next steps.

### 3. System Silos

Your sales team lives in Salesforce, your finance team lives in NetSuite – and neither has a full picture of the quote-to-cash pipeline. When CRM and ERP operate in silos, critical revenue data gets delayed, duplicated, or lost in translation.

- **Audit Your Q2C Tech Stack:** List all the systems and tools involved from quote to cash (CRM, CPQ, ERP, billing, e-signature, etc.). Note which ones are not talking to each other. This is where silos are hiding.
- **Leverage Integration Platforms:** Use pre-built connectors and low-code tools to connect your systems easily. For instance, set up workflows so a new Salesforce opportunity automatically creates a NetSuite sales order or invoice with all the correct details. Test it with a small team, then roll out broadly.
- **Create a Shared Dashboard:** As you integrate, build a simple dashboard (maybe in Salesforce or a BI tool) that pulls key metrics from both CRM and ERP – e.g. bookings, billings, cash collected – in one view. This ensures sales and finance are looking at the same numbers and can spot issues together in real time.

### 4. Revenue Delays

You can't celebrate a deal until the cash is in the bank – but too often, "Closed-Won" doesn't translate to "Paid" for weeks or months. Broken quote-to-cash processes are a big culprit here. Maybe the sales team closes an opportunity, but finance doesn't send an invoice promptly (busy work, manual batching, or missing info). Or invoices go out on time but with errors (wrong amounts, missing discounts).

- **Measure Your Quote-to-Cash Timeline:** Start by calculating how long it takes, on average, from a deal being marked Closed-Won to the invoice going out, and then to payment received. This will highlight the biggest delay areas (invoice creation, customer payment lag, etc.).
- **Ensure Accuracy Up Front:** Review your last quarter of invoices for errors or adjustments. Where did those errors come from? Fix your data mappings and business rules in the CRM→ERP integration plus use integration to link your CRM's "Closed-Won" stage with your ERP's invoicing. This will support automated error handling and version control.
- **Integrate Payment and Collections:** Don't stop at invoicing – integrate your accounts receivable info back to the CRM. At minimum, give sales visibility into who has paid and who's overdue. Even better, set up automated reminders or alerts to sales reps when a payment is late, so they can nudge the client (e.g. a Workiro task or a Workato-triggered email to the account owner).

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