



# NetSuite Integration

Mavenlink's NetSuite integration automates project creation and reduces the need for double entry by syncing time, task, project and expense data.

## BENEFITS

- Increase revenue forecasting accuracy with direct insight into your project's progress
- Save time by eliminating redundant data entry
- Improved communication between project delivery teams, accounting, and clients
- Allow delivery teams to see when invoices are paid
- Save time and gain efficiency by creating projects in just one system
- Log time in one place, the place your team members do their work
- Gain real-time visibility into the status of time and expense approvals
- Immediate visibility into % paid on your project budget burn

## ORACLE® NETSUITE

### AVAILABILITY & ACCESS

All of Mavenlink's financial features, including this integration, are available to our Premier & Pro customers.

# GET A COMPLETE VIEW OF YOUR PIPELINE AND PROJECTS

## Functional Capabilities

- Projects are synchronized from Mavenlink to NetSuite or vice versa
- Project updates to project information are synchronized with NetSuite
- Tasks created within the Mavenlink project are pushed to the NetSuite job along with estimated hours and project resources
- Task updates to tasks in Mavenlink are synchronized with NetSuite
- Project Participants in Mavenlink are pushed to NetSuite as Project Resources
- Task Assignees in Mavenlink are pushed to NetSuite as Project Task Assignees
- Approved Timesheets in Mavenlink are pushed to NetSuite as Time Bills including rate and service item
- Approved expenses in Mavenlink are pushed to NetSuite along with line items, if rejected in NetSuite, it will become rejected in Mavenlink
- NetSuite expense categories can be added to Mavenlink, so customers can add their own custom expense categories
- Fully paid invoices for synchronized NetSuite Jobs will have the amount synchronized to Mavenlink for the purposes of tracking paid vs. unpaid budget within the Project Management Workspace
- New users created in NetSuite are automatically created in Mavenlink

### CONFIGURATION OPTIONS

Map Mavenlink users to NetSuite users

Map Mavenlink project statuses to NetSuite statuses

Map custom field in Mavenlink to store Subsidiary

Select the frequency and schedule of the integration sync

Schedule data sync between Mavenlink and NetSuite

# Field Mappings

## Required Project/Job Object Attribute Mappings

| Mavenlink Project                  | Direction | NetSuite Job  |
|------------------------------------|-----------|---------------|
| Title                              | ◀         | Name          |
| Description                        | ◀         | Description   |
| Start Date                         | ◀         | Start Date    |
| Due Date                           | ◀         | End Date      |
| Status                             | ◀         | Entity Status |
| Custom Field: NetSuite Customer ID | ◀         | Customer      |
| Currency                           | ◀         | Currency      |
| Custom Field: Expense Service Item | ◀         | Job Item      |
| Custom Field: NS Job ID            | ◀         | Job ID        |
| Custom Field: Subsidiary           | ◀         | Subsidiary ID |
| Time requires approval             | ◀         | True          |
| Expense requires approval          | ◀         | True          |

## Required User/Employee Object Attribute Mappings

| Mavenlink User | Direction | NetSuite Employee    |
|----------------|-----------|----------------------|
| Full Name      | ◀         | FirstName + LastName |
| Email Address  | ◀         | Email                |

# Field Mappings

## Required Expense Submission/Expense Report Object Attribute Mappings

| Mavenlink Expenses Submission                 | Direction | NetSuite Expense Report |
|---|-----------|-------------------------|
| Approval Status                               | ◄►        | Approval Status         |
| User  | ►         | Employee                |
| Project Custom Field:<br>Expense Service Item | ►         | Class                   |

## Required Project Task Object Attribute Mappings

| Mavenlink Task           | Direction | NetSuite Project Task      |
|--------------------------|-----------|----------------------------|
| Title                    | ►         | Title                      |
| Description              | ►         | Message                    |
| Task Type                | ►         | Is Milestone               |
| Status                   | ►         | Status                     |
| Start Date               | ►         | Start Date                 |
| Due Date                 | ►         | Finished By Date           |
| Billable                 | ►         | Non-Billable Task          |
| Time Estimate in Minutes | ►         | Estimated Work             |
| Percent Complete         | ►         | Percent Time Complete      |
| Assignees                | ►         | Project Task Assignee List |

# Field Mappings

## Required Expense/Expense Object Attribute Mappings

| Mavenlink Expenses | Direction | NetSuite Expense |
|--------------------|-----------|------------------|
| Project            | ▶         | Project          |
| Currency           | ▶         | Currency         |
| Notes              | ▶         | Notes            |
| Fixed: "1"         | ▶         | Fixed: "1"       |
| Amount in Cents    | ▶         | Amount in Cents  |
| Expense Category   | ▶         | Expense Category |
| Date               | ▶         | Date             |
| Billable           | ▶         | Billable         |

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