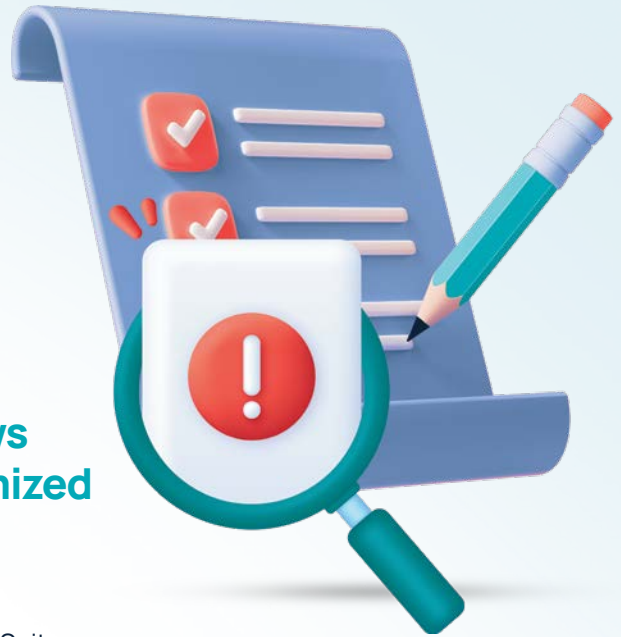


Finance integration in NetSuite: A checklist to assess your ERP setup

Evaluate how well your finance workflows run inside NetSuite – are they fully optimized or creating inefficiencies and risk?



Many finance teams invest in third-party solutions connected to NetSuite expecting them to simplify operations – only to realize that **where** those financial processes happen, is just as important as **how** the systems connect. Integrations don't eliminate complexity. They often shift it elsewhere, creating workarounds, reporting gaps, extra costs and new points of failure.

One of our customers put it bluntly: "**We spent two years and a significant budget on third-party integrations before realizing native NetSuite SuiteApps like Zone's would have kept multiple finance workflows within our existing ERP.**"

This highlights a key distinction: **NetSuite-embedded** vs. **external third-party integrated** finance solutions. NetSuite-embedded solutions run entirely within your ERP, whereas third-party integrations are external platforms connected to NetSuite. The embedded approach keeps finance workflows on one platform, while external integrations require constant data syncs between systems – introducing potential gaps and risks.

These challenges often become clear when companies hit an inflection point. Sometimes it's because their billing system broke when they acquired a new entity. Or when a PE firm pushes for faster close cycles and better revenue visibility, and suddenly their scattered finance tech stack becomes a roadblock.

The real question is: **Is your finance tech stack built for long-term control, or is it creating operational risk through fragmented integrations?**

This checklist will help you assess whether your financial operations are positioned for scalability and efficiency, or if your use of ERP integrations is adding risk that could be eliminated by moving multiple finance workflows inside NetSuite – one platform for total financial control.



Security & compliance risks

- Your finance team manages separate security credentials for each non-NetSuite financial tool.
- Sensitive financial data (e.g., vendor banking details or customer billing info) leaves NetSuite's controlled environment for third-party processing.
- Financial workflows (e.g., approvals, billing, reconciliations, reporting, etc.) happen outside NetSuite's audit trail creating blind spots in transaction history.
- SOX compliance requires tracking and validating actions across multiple disconnected systems.
- Security patches and updates require coordination across separate financial platforms.

If you checked 2 or more: Your financial data isn't fully under your control. Each integration or data export opens a new attack surface that bypasses NetSuite's native security controls. When sensitive data flows through multiple systems, are you prepared to defend every access point? How confident are you that your compliance policies will hold up when auditors ask for proof?

Something to consider: Security risks don't always surface in day-to-day operations. For instance, if your company acquires another entity (that isn't on NetSuite or uses a third-party finance app that integrates with NetSuite), your team is suddenly managing multiple security policies across different platforms. How many access points does this create? How much more manual control is now required to protect sensitive data?



Did you know?

When financial operations stay inside NetSuite's controlled environment (using native SuiteApps), all security controls stay intact directly within your ERP – nothing leaves NetSuite unless you choose to export it.

But if those processes happen within the walls of a third-party app outside NetSuite, security policies are dictated by that external tool and your compliance risks multiply.

The same goes for payroll. When employee data is scattered across multiple systems, security gaps grow – and so does the risk of errors, delays and inconsistent records. A single, secure source of truth in NetSuite not only keeps sensitive payroll data protected and accurate but also gives employees one reliable place to access their information, improving trust and satisfaction.



“Zone's solutions integrate seamlessly within NetSuite and work so well, you would think they were part of core NetSuite.”

– Ryan Maher, Director of Finance at Amigo Mobility





Did you know?

If all your financial operations stay inside NetSuite's single pane of glass, nothing gets lost in translation – billing, payables processing, invoice approvals, reconciliations and close processes flow without system switching. But when multiple finance workflows depend on external systems, inefficiencies stack up and each disconnected step adds more manual oversight (and risk of error).



"We went from 2:30 minutes per invoice down to 45 seconds when processing 8,000 invoices monthly in NetSuite."

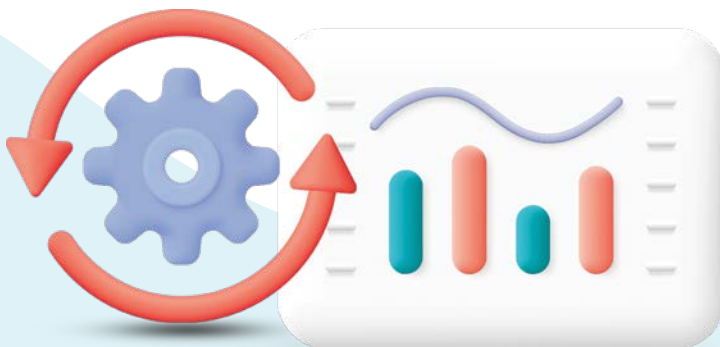
– **Connor Huffman**, VP of Corporate Development at Escalante Golf

Operational efficiency

- Your team has to swivel chair and switch between systems to complete basic financial tasks.
- Month-end close extends beyond five days due to cross-system reconciliation requirements.
- Your team manually re-enters or imports/exports data between NetSuite and external systems.
- A single financial task requires multiple logins and manual validation across different interfaces.
- New finance hires require onboarding and training on multiple finance platforms beyond NetSuite.
- Your team spends significant time validating transactions and fixing discrepancies across NetSuite and other finance tools.

If you checked 2 or more: Your finance team is likely losing 25-30% (or more) of its productive time to manual workarounds. What could your team accomplish if these inefficiencies disappeared?

Think about this: If your team is already losing 10+ hours a week reconciling data across systems, how would they handle a private equity investor suddenly requiring a 5-day close instead of 30? What happens when auditors request deeper insights across multiple subsidiaries? What gets deprioritized? Where do errors creep in?



Data & financial integrity

- Billing, revenue recognition and financial reporting occur in external applications.
- You've encountered inconsistencies between NetSuite data and your other finance systems (e.g., duplicate, missing or out-of-sync transactions and records).
- Your team discovers payment posting errors only during reconciliation periods, not in real time.
- Billing calculations in external systems (e.g., CRM or another third-party billing app) don't match NetSuite revenue recognition.
- Separate audit logs exist across different systems, making forensic accounting and historical analysis difficult.
- Audit preparations require 1+ weeks of compiling and cross-checking reports from multiple tools.
- Financial reports reflect delayed data, due to system sync limitations or batch updates from external sources.
- Sufficient financial reporting requires the consolidation of transactions from separate data sets.

If you checked 2 or more: Your business is at risk of material financial misstatements, revenue booking delays and compliance exposure. If an investor or board member questioned a discrepancy tomorrow, how long would it take to track down the truth?

Think ahead: If your company acquires a business with a different billing model, how long will it take to sync financial data between systems? How do you ensure revenue recognition aligns across subsidiaries without introducing manual errors? Every new system adds friction – how much risk are you willing to absorb?



Did you know?

When multiple financial workflows run natively inside NetSuite (via native SuiteApps), up-to-date data accuracy is intact and guaranteed – no sync delays and no manual reconciliation. But if you need to export data for reporting or perform billing, revenue recognition or forecasting in a third-party system outside NetSuite, discrepancies might not surface for weeks.



"Now we're able to track revenue at a site level [inside NetSuite], which we've never been able to do in the past."

– **Sandro de Ciccio**, VP Controller at Power Factors



System reliability & business continuity

- When your third-party finance tool experiences downtime, you lose access to NetSuite workflows (e.g., invoice approvals, transaction processing).
- Payment processing halts if external systems lose NetSuite connectivity.
- Month-end close deadlines are missed when system syncs fail.
- System updates in one application sometimes break the connection with the other (e.g. a change in the external app disrupts its NetSuite integration).
- NetSuite's own upgrades require all your connected third-party apps to adapt – if integration isn't updated in sync with a new NetSuite release, your critical finance processes suddenly break.
- Your team relies on manual workarounds or redundant backups during system outages.

If you checked 2 or more: Your critical finance operations depend on multiple points of failure outside your control. Every external integration adds uptime risk, meaning your finance team may lose hours (or days) of productivity whenever one system goes down.

Consider this: What happens if your key employee (e.g., NetSuite admin or billing specialist) leaves tomorrow? If your finance workflows depend on a patchwork of third-party apps and manual workarounds, will your team be able to maintain business continuity – or will critical processes break the moment a key person is gone?



Did you know?

When finance operations stay inside NetSuite, uptime is dictated by a single system with no dependency on external infrastructure. If your processes rely on workarounds between multiple disconnected tools and are controlled by an external third-party app, business continuity is at risk when your NetSuite admin or billing specialist leaves. One failed sync can easily shut down your critical processes and create bottlenecks.





Did you know?

When finance stays inside NetSuite, overhead is predictable. Every third-party tool requires ongoing IT maintenance, troubleshooting and system updates – time and costs finance teams don't always account for upfront.



"The leap from our previous system to now has been night and day for prorated calculations. We've bridged the gap between Salesforce and our billing system in NetSuite thanks to ZoneBilling."

– Lakshman Manoharan, Head of Business Systems at Lattice

Administrative overhead

- Apart from NetSuite, you maintain 2+ separate vendor contracts for financial operations.
- Your team manages multiple support tickets across 2+ different vendors.
- IT resources are required for maintaining system connections.
- License costs accumulate across disconnected financial applications.

If you checked 2 or more: Every additional vendor, tool and contract adds cost and complexity. You may be overpaying by 40-60% compared to processing your financial ops inside the walls of NetSuite.

Ask yourself: If your standalone billing tool is up for renewal and your company is evaluating ERP changes, are you about to lock yourself into another disconnected system? How much will that decision cost in the long run?



Your finance integration risk level: You checked boxes

3-6 items checked: Your finance tech stack creates unnecessary complexity that could be streamlined. You're managing inefficiencies now – but for how long?

7-10 items checked: Your finance operations are creating barriers to efficiency, accuracy and compliance. These issues will only compound as your business grows.

10+ items checked: Your finance processes are running on borrowed time. Errors, delays and security risks aren't just possible – they're probably already happening. The question isn't **if** this will impact financial integrity, but **when**.





Did you know?

With finance automation inside the walls of NetSuite, our customers typically see the ROI in 6-9 months through:

- **90% increase in billing efficiency** with real-time data sync between NetSuite and Salesforce
- **75% faster bill turnaround**
- **100% bank reconciliation accuracy** and faster month-end close
- **Three months of payroll admin cut** each year
- **Zero system sync delays**

Calculate how much you could save with AP or billing management automation, directly inside NetSuite. →

If it happens outside NetSuite, it's out of your control: Your ERP should be your financial home.

Every financial process that happens outside NetSuite's walls creates an additional point of potential failure. At Zone, we understand this challenge directly – our founders were finance executives who experienced firsthand how disconnected systems fragment data, complicate compliance and drain productivity.

For more than a decade, we've worked with finance teams who've spent years battling billing and reconciliation errors, security concerns and disconnected reporting – only to realize their ERP should have been their finance home all along.

That's why our finance automation solutions for multiple workflows live inside NetSuite – not bolted onto it.

When finance uses native NetSuite additions:

- Security controls remain unified – no external attack surface and no fragmented access policies.
- Financial data is always accurate and audit-ready – no sync delays, no duplicate entries.
- Month-end close is faster – no redundant reconciliation across tools.
- Cost is predictable – no third-party licensing overhead.

Finance leaders who moved their operations inside NetSuite gained over 700 hours annually for strategic work, eliminated system sync delays and discrepancies and sped up month- and year-end close. **If your finance stack isn't as seamless as it should be, let's talk.** We'll show you what's possible when everything stays inside NetSuite.



Streamline your accounting, finance and payroll workflows in NetSuite

All your finance and payroll operations. Just one login.

- ✓ Cloud-native apps, built for NetSuite
- ✓ Trusted by thousands of leading organizations
- ✓ Billing, reporting, AP automation, payroll & more