

NetSuite for Outlook

Maintain a 360-Degree View of Your Business Relationships

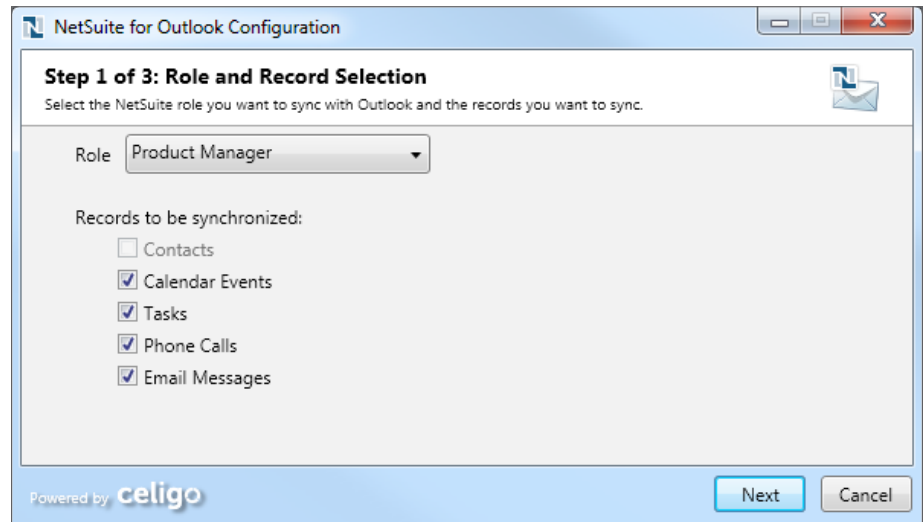


Key Features

- Easy-to-install desktop client.
- Automatic or manual synchronization scheduling.
- Bi-directional sync of contacts, tasks, calendar events and phone calls.
- Uni-directional sync of email messages.
- Saving of email file attachments to NetSuite records.
- Duplicate record handling on events and contacts.
- Administration controls across the organization.
- Supports Outlook 2007, 2010 and 2013 client versions.
- Supports Windows XP, Vista, 7 and 8.

Many businesses rely on Microsoft Outlook to manage their business email communication, contacts, appointments and tasks. But it's also critical to capture that valuable CRM activity in your NetSuite account to maintain a 360-degree view of all your business relationships.

NetSuite for Outlook is a Windows-based application that allows you to synchronize native Outlook records with your NetSuite account in real-time. Outlook records that can be synchronized include events, tasks, phone calls and contacts. The application includes a client component that is easy to install and configure using a step-by-step wizard.



Key Highlights

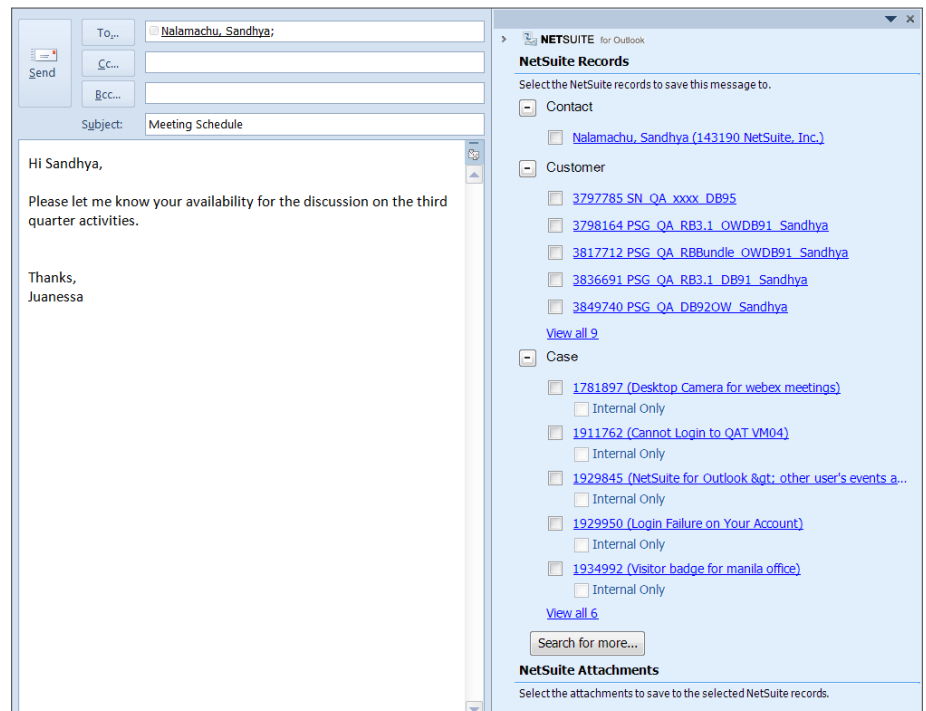
- Seamlessly synchronize contacts, events, tasks, calls and messages between Outlook and NetSuite.
- Ensure data integrity with instant synchronization of the addition, modification and deletion of records in Outlook to NetSuite.
- Set rules to control how users can interact with NetSuite data in Outlook.

Associating Outlook Email with NetSuite Records

To preserve the 360-degree view of your business relationships, NetSuite for Outlook allows you to associate email messages from Outlook to be saved to various NetSuite records. Anytime you write or receive an email in Outlook, you will have the option to choose which NetSuite record you want to attach the email to. As a result, you can preserve the important context underlying your relationships by seeing relevant communication threads from NetSuite.



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Control Which Records Are Synchronized

In order to protect the sensitivity of information in your NetSuite system, NetSuite for Outlook provides administrators with extensive controls that regulate which NetSuite records can be synchronized and how users can interact with NetSuite data from Outlook. An administrator can:

- Choose which record types are available for synchronization.
- Set criteria that determine which records are allowed to be synchronized.
- Define conflict resolution and filter criteria.
- Specify required fields for contacts in Outlook.
- Create default settings provisioned for different roles.