HubSpot CRM + NetSuite Integration

Unify Your Sales, Marketing & Back-Office Operations

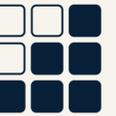By Plus Your Business | HubSpot Elite Partner | plusyourbusiness.com

Introduction

Growing businesses need their front-office CRM and back-office ERP to work as one. When HubSpot and NetSuite operate in silos, teams waste time re-keying data, sales reps lack financial context, and leadership can't see the full picture from lead to revenue.

This guide shows how combining HubSpot CRM with Oracle NetSuite — connected through custom middleware built by Plus Your Business — creates a powerful bidirectional integration that goes far beyond the native connector's limitations.

At Plus Your Business, we specialise in connecting HubSpot with ERP systems like NetSuite. As a HubSpot Elite Partner with ISO 27001, ISO 9001 & ISO 42001 certifications, we bring the expertise needed to implement these integrations securely and effectively.

↔ **Beyond the Native Connector**
Custom Middleware

British Assessment Bureau
UKAS MANAGEMENT SYSTEMS
8289
ISO 27001
INFORMATION SECURITY MANAGEMENT

ISOQAR.COM
ISO/IEC 42001
ISOQAR
REGISTERED
Cert No. 26170

British Assessment Bureau
UKAS MANAGEMENT SYSTEMS
8289
ISO 9001
QUALITY MANAGEMENT

Why Integrate HubSpot & NetSuite?

HubSpot excels at marketing automation, sales pipeline management and customer engagement. NetSuite handles financials, inventory, order management and fulfilment. When disconnected, the gap between these systems creates costly friction.

21%
of sales reps' time is spent researching incomplete data across disconnected systems

Source: Salesforce Research

Native integration limitations:

⚠️ Custom records & fields not supported by native sync

⚠️ Sales order creation fails with timeout errors

⚠️ Address data fragmented across both systems

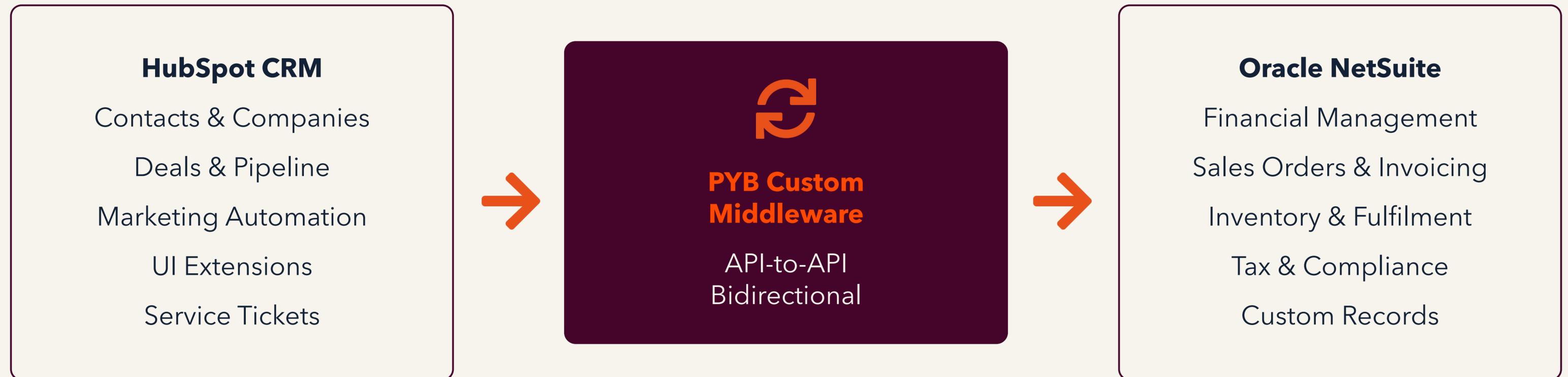⚠️ No visibility of NetSuite financials for sales reps

⚠️ Complex tax rules can't be managed via default tools

The Integration: Bidirectional Data Sync

Our custom middleware provides a robust bidirectional sync between HubSpot and NetSuite that goes far beyond the native connector — supporting custom objects, complex field mapping, address management and automated order creation.

HubSpot CRM

Contacts & Companies

Deals & Pipeline

Marketing Automation

UI Extensions

Service Tickets

PYB Custom Middleware

API-to-API Bidirectional

Oracle NetSuite

Financial Management

Sales Orders & Invoicing

Inventory & Fulfilment

Tax & Compliance

Custom Records

CRM UI Extension: Address Lookup & Management

One of the biggest pain points in any ERP-CRM integration is managing customer addresses. Addresses in NetSuite need to be accurate for shipping, invoicing and tax compliance — but sales teams work in HubSpot, not NetSuite.

Our Solution: A Custom HubSpot UI Extension

✓ Look up and validate addresses with real-time search

✓ Add, edit or remove shipping and billing addresses

✓ All changes sync bidirectionally to NetSuite instantly

✓ No need for sales teams to ever log into NetSuite

✓ Ensures address accuracy for tax and shipping compliance

✓ Supports multiple addresses per customer record

Address Validation & Control

We built a CRM user interface extension that gives your team full control over all customer addresses directly from within HubSpot. Look up, validate, create and manage shipping, billing and delivery addresses — all synced bidirectionally with NetSuite in real time.

Order Fulfilment: HubSpot to NetSuite

Our integration enables complete order fulfilment directly from HubSpot into NetSuite – with full bidirectional sync. This is where the integration delivers its biggest operational impact.

Ideal for multi-year contracts, multi-site deliveries, and businesses where one quote generates many fulfilment orders.

How It Works

1

Quote in HubSpot

A deal serves as a quote – capturing all line items, pricing and customer details within CRM

2

Split into Sales Orders

One quote can generate tens or hundreds of sales orders – split by shipping address, delivery date or contract year

3

Orders Created in NetSuite

Each sales order is automatically created in NetSuite with correct address, tax and line item details

4

Status Syncs Back

Order status, fulfilment updates and invoice data sync bidirectionally back to the HubSpot deal record

NetSuite Integration Capabilities

Our custom middleware leverages NetSuite's SuiteTalk REST/SOAP APIs and HubSpot's API to deliver functionality the native connector cannot:

Customer & Contact Sync
Bidirectional sync of contacts, companies, lifecycle stages and custom fields

Sales Order Creation
Automated order creation from deals with full line item, pricing and tax detail

Address Management
Full address CRUD via CRM UI extension – validated and synced in real time

Invoicing & Payments
Invoice status, payment tracking and credit data surfaced in HubSpot

Inventory Visibility
Real-time stock levels from NetSuite available to sales reps in HubSpot

Complex Tax Setup
We can configure complex tax rules and jurisdictions to ensure compliance

Problems This Integration Solves

These are the most common pain points businesses face when HubSpot and NetSuite are disconnected — and how our integration solves each one:

✓ **Native connector too limited**

Custom middleware handles custom records, complex field mapping and advanced logic the native sync can't support.

✓ **Orders re-keyed manually into NetSuite**

Closed deals in HubSpot automatically generate sales orders in NetSuite — with full line items, addresses and tax.

✓ **Address data is fragmented**

Our UI extension lets sales manage all customer addresses in HubSpot, synced bidirectionally with NetSuite.

✓ **Sales can't see financial context**

Invoice status, payment history and credit terms from NetSuite surface in HubSpot — no ERP login needed.

✓ **One quote, many orders — handled manually**

A single HubSpot deal can split into tens or hundreds of NetSuite sales orders by address, date or contract year.

✓ **Duplicate records across systems**

Intelligent matching and deduplication ensure contacts and companies stay in sync without creating duplicates.

Reporting & Analytics

With all data flowing between HubSpot and NetSuite — from initial marketing touchpoint through invoicing and payment — you gain end-to-end visibility across your entire operation.

Complete Customer Journey Tracking

Marketing Attribution – track every lead source through to collected revenue

Sales Metrics – deals, tasks, time-to-close and activity by rep

Operational Data – invoice status, revenue, margins from NetSuite

Customer Lifetime Value – total revenue segmented by source

Revenue Attribution & ROI

Connect marketing spend directly to revenue outcomes. Track from initial click through to invoiced and paid revenue confirmed by NetSuite.

Commission & Performance Tracking

Track sales performance against targets, calculate commissions on confirmed NetSuite revenue, and structure bonus programmes — all in one system.

Key Benefits

Businesses that integrate HubSpot CRM and NetSuite ERP gain a unified platform that eliminates data silos, automates workflows and provides end-to-end visibility across the customer lifecycle.

Faster Sales Cycles
Automated order creation and real-time data eliminate bottlenecks in the sales process

Operational Efficiency
Bidirectional sync eliminates duplicate data entry, manual re-keying and system switching

Address Accuracy
CRM UI extension ensures correct shipping and billing addresses for every order

Better Customer Experience
Sales teams have complete financial and order context without leaving HubSpot

Data-Driven Decisions
Full attribution from first marketing touch through to invoiced and paid revenue

Scalable Architecture
Custom middleware grows with your business and adapts to complex requirements

Get in Touch

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