



Procure-to-Pay Designed and Scaled for NetSuite Users

Bringing control and compliance
to non-payroll spend.



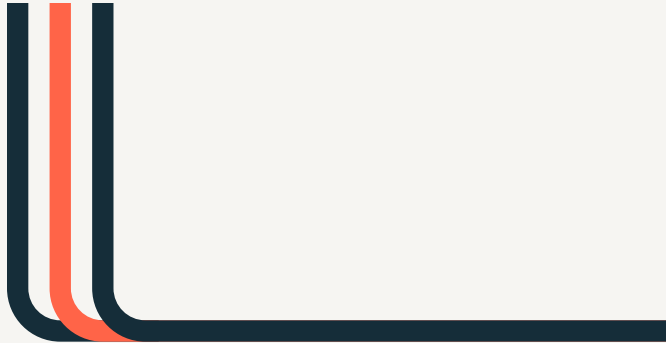
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Introduction.

“Airbase has been a great SuiteApp and an exceptionally easy tool to set up, integrate, and manage compared to any competitive product I have used.”¹



As an essential strategic extension to NetSuite, Airbase orchestrates all workflows across all people, processes, and systems for all of your organization's non-payroll spend. Today, the two systems combine to form the strongest integration partnership in spend management. Airbase has re-engineered traditionally expensive and cumbersome procure-to-pay software as a solution that supports the needs specific to NetSuite ERP users.

Airbase offers the deepest integration available with NetSuite to significantly enhance the value of your ERP investment. Employees get an easy-to-use, consistent way to make compliant purchases while capturing all data and documentation required for approvals and booking. Decision-makers get comprehensive visibility into organization-wide spending, thanks to comprehensive spend analytics functionality. Airbase users love the automatic transfer of clean data from our platform to NetSuite and the access to NetSuite features for use in Airbase. Conversely, in NetSuite, a “view Airbase” dashboard button lets you easily pull up Airbase AP transaction records without leaving your ERP.

Behind the success of this happy partnership is the superior syncing capability that Airbase has worked to perfect.

The amount of time that qualified accountants spend just trying to organize data from different systems, get the coding correct and transfer data, is too much low-value time. Now, with Airbase, our data is just there in NetSuite in real time.”

EOIN HESSION, CONTROLLER AT MEDELY

1. Chapter quotes are all from SuiteApp reviews, where Airbase is the only spend management platform with a five-star rating.



01

Defining a valuable integration.

“*The software and integration easily save us 20+ hours every month as transactions are consistently reconciled, reviewed, synced, and closed on a daily basis*”



What is a native integration and why does it matter?

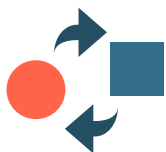
An application programming interface (API) enables two software applications to integrate with one another. When they do this directly, it's known as a native integration. Once integrated, data flows between the applications. This enables more readily available data, and easier reporting and analysis.

Alternatively, a lot of manual input — through CSV imports or spreadsheets — would be required. Many integrations rely on a category of tools called aggregators that offer partial input and field alignment with NetSuite.

Airbase fully integrates with NetSuite functionality across the board without relying on these types of intermediary tools. ERP software integrations eliminate data silos and allow your ERP to continue to serve as the single source of truth, irrespective of the number of systems in your financial tech stack.

What makes this partnership so beneficial?

Employees can access NetSuite's power from inside the lighter, more agile, easy-to-use, and easy-to-modify Airbase platform. The result is Airbase customers save time and money, cut their close in half, and easily shift payments from checks and ACH to cards that earn cash back.



What does a deep integration mean?

NetSuite is much more powerful — and valuable — with Airbase. This is due to the deep, native integration between the two solutions. That means more touchpoints:

- More data calls more frequently.
- More comprehensive insights.
- More overlapping modules and features.
- A high degree of detail flowing to the ERP.
- Ability to interact with more advanced features of the ERP.

What does this integration give you?

1. A faster close and better access to analytics and insights for all of your spending.
2. Controlled spend via pre-approval workflows.
3. Multi-stakeholder review and sign-off from Airbase or inside their own business applications.
4. Reduced manual accounting work via automated processes, including assisted reconciliation to cut time to minutes from hours.
5. NetSuite data for all non-payroll spend kept up to date with regular syncing.
6. NetSuite tools (amortizations, 3-way match, custom segments, etc.) accessed easily from within Airbase.
7. A full audit trail.

2024 SUITEAPP REVIEWS

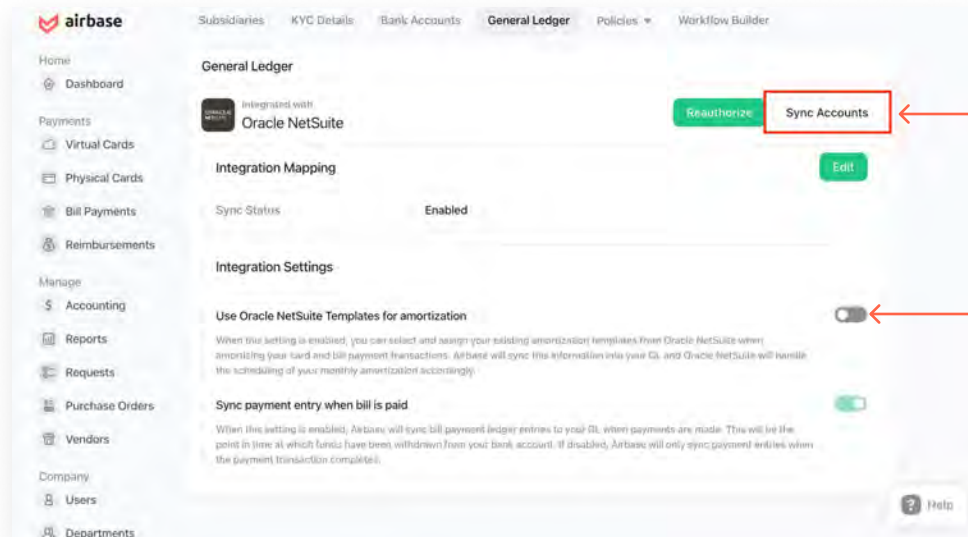


The integration pulls our chart of accounts and segmentation into Airbase where we are able to tag transactions and set up automatic classification rules.



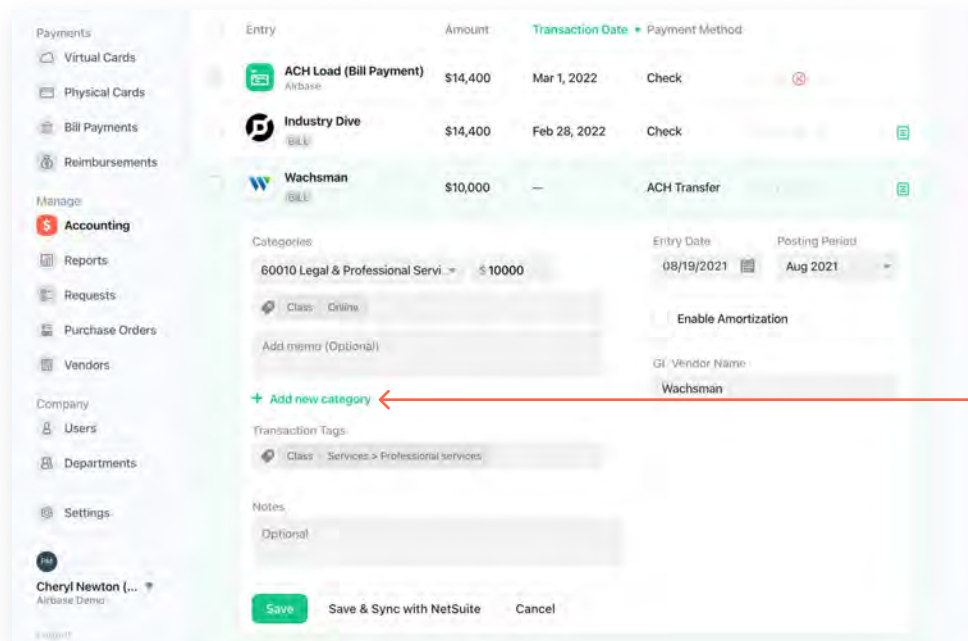
Gone are the days of pulling data from our spend management system, spinning it in Excel, spending hours cleaning and organizing data, and then finally importing it into NetSuite. With Airbase's journal entry features, syncing journal entries is a job that takes a few clicks.

Regular, frequent two-way communication and updates keep the two systems aligned.



When enabled, Airbase will automatically find and sync daily with any updates to accounts, tags, vendors, employees, etc. from NetSuite.

Enable to access NetSuite's extensive library of schedules for use in Airbase.



Add a new category, department, or class and it will automatically be added to NetSuite when the transaction data is synced.



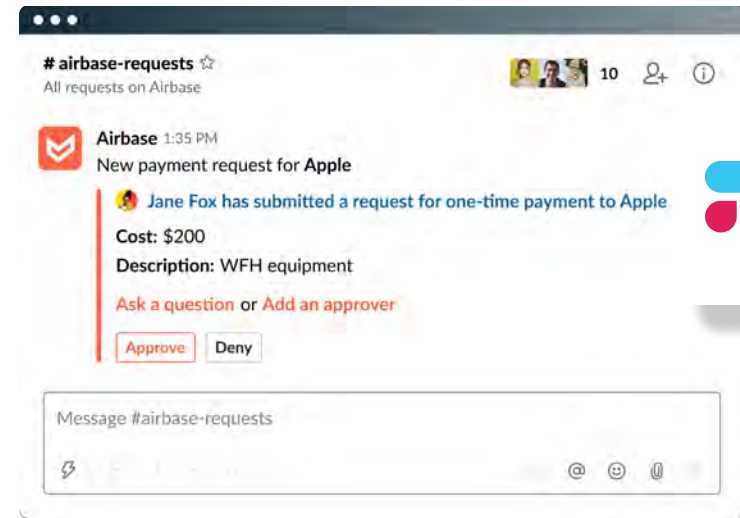
Broader integrations (SSO, HRIS, collaboration tools).

A lot of the numbers that flow into your ERP will lack context once they arrive there. By using Airbase to manage financial data before it flows to NetSuite, you'll always have easy access to the full background of any purchase.

Integrations with HRIS, Slack, and email mean all communications and user information stay attached to every transaction. SSO integrations mean a secure system with robust access settings. It means the steps and data that come before your ERP are clean, contextualized, and secure.

Our HRIS integrations mean employees automatically gain access when they first arrive and lose access as soon as they cease employment with your company.

In addition, by offering integrations into stakeholder systems like Jira for IT or Ironclad for legal, Airbase serves as the hub for data and documentation transfer for all employee spending.

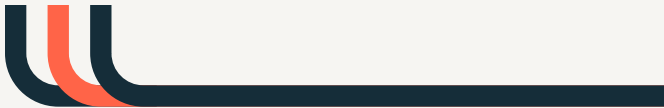




02

Ensure compliance pre-NetSuite booking.

“This integration has significantly strengthened our control and compliance measures.



When bookings are categorized and organized before they reach the ERP, the result is greater efficiency and a more accurate audit trail. Airbase auto-categorizes transactions using machine learning to make the process increasingly accurate over time.

Easily create rules to automatically assign tags and categories to entries. Automate your amortization entries by selecting your NetSuite templates directly within Airbase, including NetSuite's Variable Amortization templates.

Beyond that, transactions are batched in accordance with concurrency limits resulting in the best sync velocity and error margin in the market.

What's a concurrency limit?

NetSuite limits how quickly Airbase (or any third-party integration) can create entries or update NetSuite. This is called a concurrency limit.

To prevent the sync errors caused by the concurrency limit of your NetSuite account, this limit can be configured in Airbase. You can also buy a higher concurrency limit from NetSuite so your Airbase integration can sync even faster.

“I love how Airbase categorizes and pushes transactions directly into NetSuite with departments and classes automatically. The sync is rock-solid and makes my team much more efficient.”

DAVID COFFMAN, VP FINANCE AT DOXIMITY



Custom Segments that flow directly to NetSuite.

With NetSuite's Custom Segments feature, you can create custom classification fields — in addition to the out-of-the-box Department, Class, and Location segments — to categorize data and customize reporting according to their unique needs.

Airbase can pull in these NetSuite Custom Segments for additional transaction tagging before entries hit the GL — eliminating manual work and leading to a faster month-end close.

POs and 3-way match automatically integrate with NetSuite.

If you're using the NetSuite PO module, Airbase POs can be synced with NetSuite's 3-way match to help keep your ERP and POs aligned.

Our PO module also offers extensive functionality and integrates directly with NetSuite PO modules.

For more details on our PO functionality and how it all operates in complete harmony with NetSuite, check out [this ebook](#).

Amortizations via NetSuite.

Airbase integrates with the native NetSuite amortization feature, so you can leverage a broad range of amortization schedules and structures from their library. When you have more complex schedules to support, select the NetSuite template that meets your needs and let Airbase take it from there.





03

Spend analytics for real-time reporting and insights.

“It saves us a ton of time as transactions are consistently reconciled, reviewed, synced, and closed on a daily basis.”



The metrics you need — right in Airbase.

Airbase spend analytics gives easy access to important reports for data-backed decisions and process optimization, without having to go to NetSuite. Right within Airbase, stakeholders can:

- Monitor rogue vs. approved spend.
- Identify bottlenecks in the purchasing process to optimize cycle times.
- Analyze spend by department, vendor, and category.
- Gain visibility into spending across bills, cards, and expense reports, including request, approval, and payment for each transaction.

Automated documentation and data capture — anywhere.

Without Airbase, one wrong receipt or missing email can drag an accounting manager out of NetSuite and on a tiring hunt for the correct details across several different systems. With Airbase, W-9s, email chains, contracts, receipts, and all other supporting documentation are automatically organized, uploaded, and scanned for all details.

The mobile app allows you to view activity, upload receipts, and capture transactions on the go, making life easier for those making purchases or trying to see the reports.



Airbase streamlines NetSuite's reporting.

When you rely on NetSuite as your source of truth, it can delay reporting until after the month-end close. With Airbase's anytime syncing, NetSuite can be kept as up to date as desired. NetSuite reporting will show an accurate picture of all global spend — any day of the month.

Airbase syncing can be done on an automatic, batched, or manual basis to keep the ERP as up to date as is required for reporting purposes. Having Airbase as an additional layer before data hits NetSuite means erroneous accounting almost disappears — your data is massaged, cleansed, and never hits your ERP without being polished. This leads to better, more reliable reporting and much easier reconciliation.

Without Airbase, one wrong receipt or missing email can drag an accounting manager out of NetSuite and on a tiring hunt for the correct details across several different systems. With Airbase, W-9s, email chains, contracts, receipts, and all other supporting documentation are automatically organized, uploaded, and scanned for all details. The mobile app allows you to view activity, upload receipts, and capture transactions on the go, making life easier for those making purchases or trying to see the reports.

It's impractical and expensive to give every employee in the company access to NetSuite — this integration enables all relevant employees to see details in reporting and spend that they wouldn't usually be able to see without Airbase — and at a much lower cost.





04

Vendor management and multi-subsidary support.

“We reviewed almost every main competitor on the market and Airbase has the best multi-currency and multi-subsidary feature that works great with NetSuite’s OneWorld.



With NetSuite, the “vendor master” forms the basis for all vendor management. Full records for recurring vendors mean it’s easy to maintain supplier relationships. All vendor information is located within a central record, so purchasing managers can easily access transaction progress. Airbase integrates directly into this vendor master.

Airbase’s newly enhanced vendor profile contains:

- Essential information associated with each vendor such as the default payment method, payment terms, currency, and compliance status.
- A vendor’s history through a unified view that consolidates all associated POs, bills, and virtual cards.
- Vendor contracts, tax forms, and other essential documents.
- Customizable details like Default Spend Owner and GL Categories. Airbase automatically applies these settings to bills and POs created for the vendor.

Airbase also provides a user-friendly, convenient, and secure vendor portal to collaborate, communicate, and stay connected with vendors.

Vendors can easily access the portal to adjust their details, provide documentation, and view payment status. This saves accounting teams lots of time chasing down details and responding to vendor inquiries. Airbase also validates all tax IDs for domestic vendors against IRS records and international vendors’ tax IDs against government records to ensure compliance. Airbase then pushes essential vendor information to NetSuite so the two systems are in sync.

Multi-subsidary support starts with Airbase, and ends with NetSuite.

Airbase multi-subsidary and multi-currency support is unmatched across the spend management market. Our multi-subsidary support forms one of the strongest parts of the NetSuite and Airbase integration.



“In terms of multi-subsidary and multi-currency functionality, Airbase can almost mirror NetSuite. It makes multi-entity accounting so much easier.”

BOBBY COFFIN, SCS CLOUD

- Airbase offers total value transparency on the multi-subsidary functionality. For NetSuite users with multiple entities, this compounds value from both solutions and simplifies bookings and entity management.

For multi-subsidaries, you don't need to switch systems to log those bookings. It's just a simple drop-down, which makes for far less toggle time between systems. Amendments can be made easily between the two systems if necessary.

“The value in this integration comes from letting the two solutions focus on what they're good at — together, they tick every box.”

BOBBY COFFIN, SCS CLOUD

■ Usability leads to adoption which ensures compliance.

Spend management tools — whether it's AP automation, expense management, or corporate cards — are used by almost everyone in a company and therefore rely on simple, intuitive usability. Adoption is essential to realizing the value of a spend management system.

Contrastingly, NetSuite has been built to meet the needs of accounting and finance professionals with heavyweight features and workflows that make it difficult for an employee with an everyday purchase request. Where Airbase becomes super helpful is its usability for non-finance and finance people alike.

Save hours with assisted reconciliation.

Airbase's assisted reconciliation feature simplifies the tedious and time-consuming month-end task of finding reconciling items.

Assisted reconciliation fetches real-time GL data, matches transactions, and spots discrepancies in minutes. AP teams just review the reconciliation report to identify items such as timing differences, transaction amount discrepancies, sync errors, missing entries, or manually created GL entries.

The team at SeekOut tells us this is one of their favorite features, since it reduced their reconciliation time from five to six hours to under a minute.

Guided Procurement ensures full compliance.

“The authorization of expenses is easier than ever, as the system automatically notifies the appropriate users.”



There is a lot that needs to happen before a purchase by an employee even hits the GL. It begins with the initial intent by an employee, who may or may not be aware of company policies and requirements for all types of spend. This is where Airbase steps in. Airbase’s Guided Procurement module directs any employee who wants to make a purchase on all necessary approvals, information, and documentation (e.g., SOC reports, W-9s, contracts) that they will need to collect and input.

Airbase then routes purchase details to appropriate stakeholders and secures the required transaction approvals. This routing can be done directly in Airbase or via stakeholder business applications like Jira, Asana, DocuSign, or Ironclad. Looping in all stakeholders from the start controls for risk and saves everyone time.

This unique front-end control gives you no-code workflows to build company policies directly into the procurement process and thereby automate compliance.

“Guided Procurement incorporates everything I need — risk review, privacy review, info security review, and approval review with automatic routing for all relevant purchases. It was really easy to work with the team to design the rules and workflows to reflect our policies.”

**CHRISTINA HOWLETT PEREZ, ASSOCIATE VICE PRESIDENT,
PROCUREMENT AT DEFINITIVE HEALTHCARE**



06

Payments and approvals.

“Airbase has a straightforward, easy-to-setup, and easy-to-use integration with NetSuite. The approval flows are very easy to set up and customize.



Airbase adds comprehensive approvals you've been missing in NetSuite.

Airbase allows users to build flexible approval workflows, looping in the right approvers and observers, and ensuring all documentation is attached, so that all data is sure to be compliant and accurate as it flows into NetSuite.

That means less receipt chasing, less transaction sleuthing, and more compliance. Plus, approvals are easily configurable and editable within Airbase to reflect up-to-the-minute policy amendments or additions.

Convenient, safe payments in Airbase. Accurate bookings in NetSuite.

Airbase facilitates secure company spending with a choice of payment methods. While our software-enabled corporate cards boast the advantage of cash back, check, ACH, and vendor credits are also supported. Airbase can make payments to your vendors in 150 currencies and to 200 countries. Best of all? All of these payments will be automatically booked and flow directly to NetSuite after auto-reconciling your bank to Airbase.



07

An integration that's secure.

“Airbase curated the integration to adhere to NetSuite’s complex requirements.”



The consolidation Airbase offers significantly tightens the security of your payments data.

When you pair NetSuite with Airbase, it can eliminate a lot of other point solutions, which means fewer systems and reduced user access. That in itself narrows down the opportunity for data manipulation or fraudulent interception.

Attentive controls and security features mean your financial data and spend processes are protected. Airbase offers customizability and flexibility around controls and approval settings that can be difficult and cumbersome to configure and adjust in NetSuite. With Airbase, amendments are easier to make to reflect changes in the organization and spend controls, and approval workflows. That means added security, as well as a clear history around the data that is flowing to your ERP.

When you pair this first-touch security with the security NetSuite offers, your whole purchasing process becomes airtight. It's control on control, with both solutions offering in-depth, customizable controls.

“Thanks to SSO and 2FA, NetSuite can trust the data from Airbase. That's of huge value when it comes to data security.”

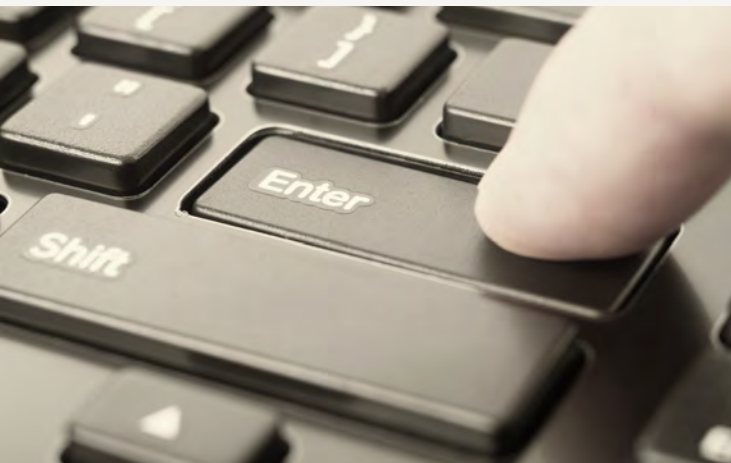
BOBBY COFFIN, SCS CLOUD



08

Conclusion.

“*The UI is extremely user friendly, which has allowed us to have seamless, company-wide integration.*”



Both Airbase and NetSuite have unique superpowers one serves as the hub for all employees to use in a decentralized spending process, the other to serve as the single source of truth for financial operations. Together, they're an unbeatable procure-pay-close system. Airbase offers an easy-to-use, intuitive user experience and brings a level of customization for employee spending that is not available in NetSuite. Airbase specializes in making all types of employee purchasing controlled and compliant, while offering advanced payment options. All transaction information and documentation are captured and organized to flow seamlessly into NetSuite. Airbase is particularly valuable to NetSuite users because it doesn't require an expert, and all appropriate people are looped in. The resulting consistency and efficiency come with the fact people want to use Airbase.

While NetSuite can be your single source of truth for all financial operations, Airbase can serve as a single source of truth for all non-payroll spend. It covers the spend cycle from intake to insights and syncs all that data to NetSuite. A winning combination.