



## Beyond Integration **Unlocking Intelligent Automation**











November 2025

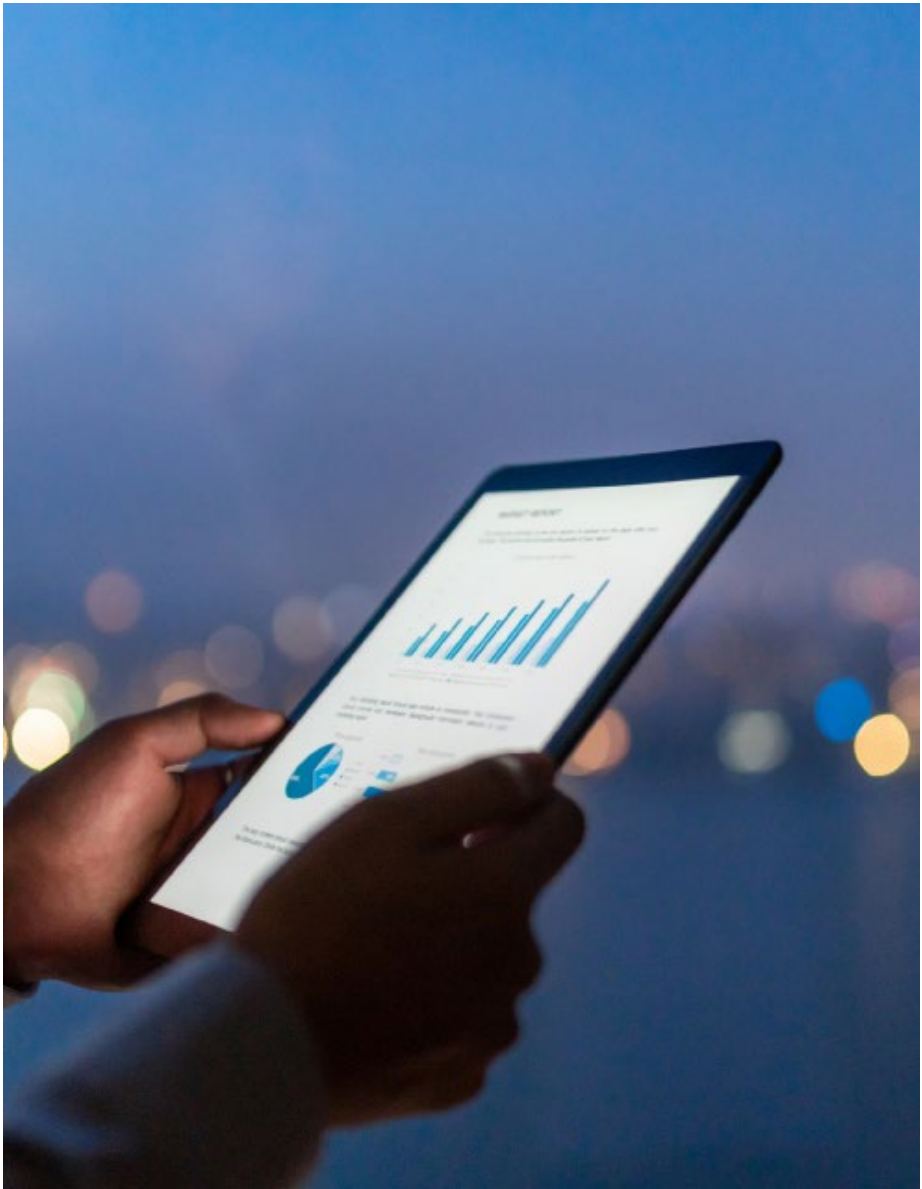
# Business Technology Services

**We solve for business challenges & support innovation through technology solutions.**

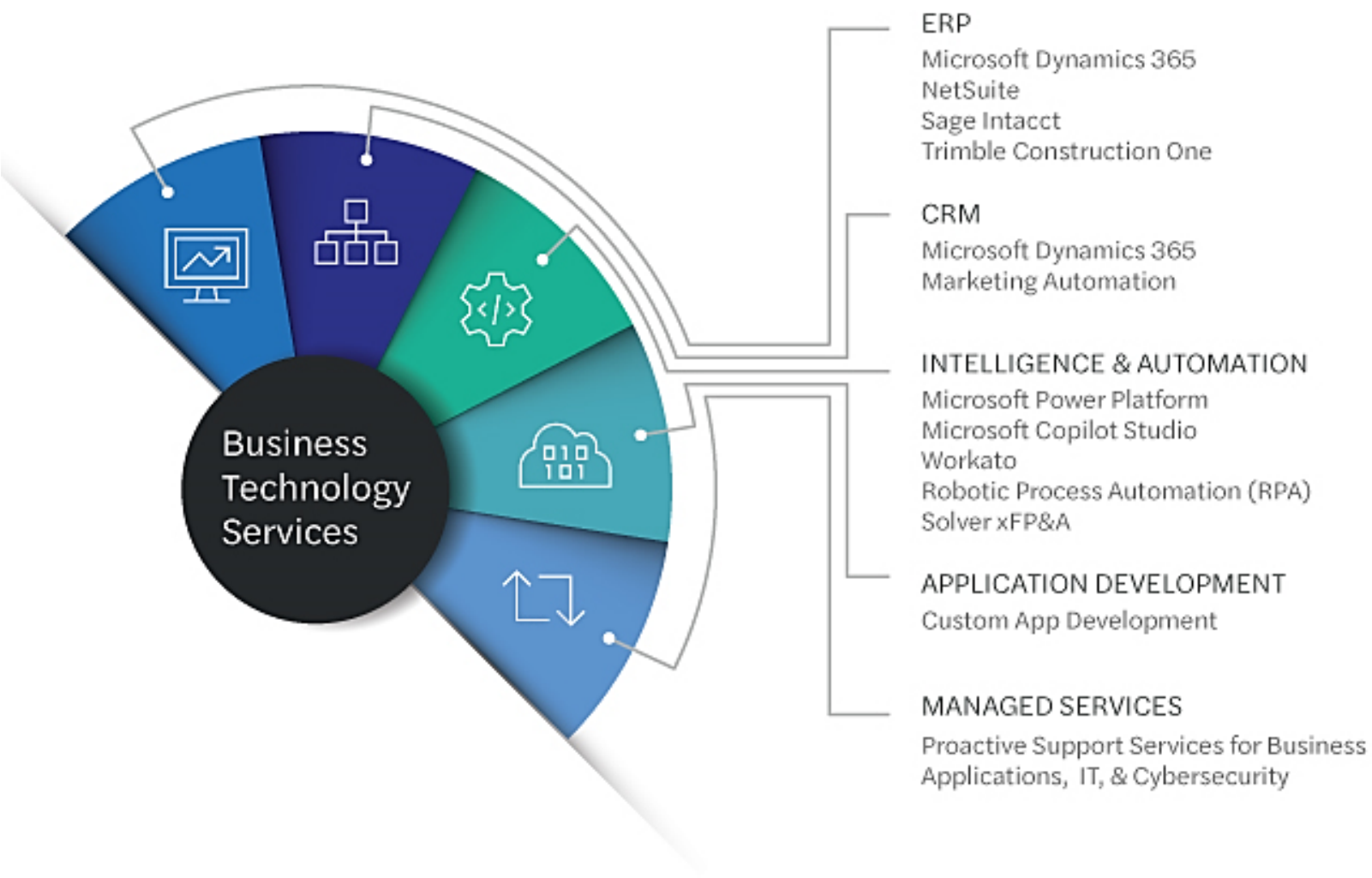
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end technology solutions & managed services help clients achieve their digital transformation goals. Services include:

- |  |                                      |   |  |
|--|--------------------------------------|---|--|
|    | Solution Assessment & Selection      |    | Implementation Project Rescues         |
|    | System Implementation & Integration  |    | Business Intelligence (BI) & Analytics |
|    | Process & Technology Design          |    | Robotic Process Automation (RPA)       |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development         |
|  | Training, Monitoring, & Support      |  | IT & Cybersecurity Managed Services    |



# Premier Technology Partnerships



Microsoft Partner



# Today's Presenters



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**Ryan Kauzlick**

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Intelligence & Automation  
Forvis Mazars



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**Walter Hilderman**

Director  
NetSuite  
Forvis Mazars



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**Mark Murray**

Partner Solutions Consultant  
Workato

**ORACLE NETSUITE**  
Solution Provider



# Learning Objectives



<b>01</b>	Discuss how to reduce manual processes & operational bottlenecks
<b>02</b>	Describe ways to enable system-to-system connectivity, even when prebuilt connectors fall short
<b>03</b>	Explain how agentic AI workflows can support orchestration & real-time decision making

# Understanding the Business Context



# Business Challenges & Opportunities

## Hidden Costs Behind Automation Gaps

### Operational Inefficiencies

Manual processes can slow down operations. Some employees average 3–4 hours on daily tasks that could be automated.

### Disconnected Systems

Lack of integrated systems can create bottlenecks & increase errors in business processes.

### Real-World Business Impacts

Issues like delayed reporting & duplicate data entry can lead to missed opportunities.

### Opportunities for Automation

Intelligent automation can help overcome challenges & improve operational efficiency.



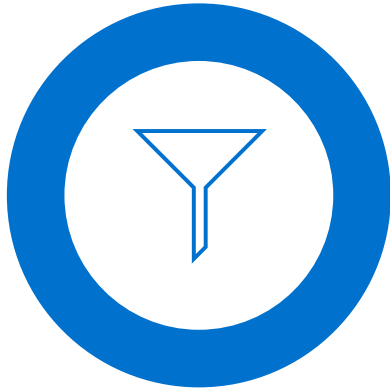
# The Case for Automation

## Turning Challenges Into Opportunities

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**Operational Bottlenecks**

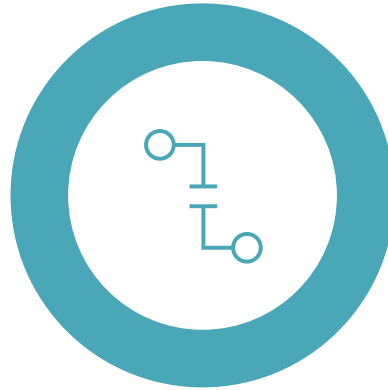
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**Disconnected Systems**

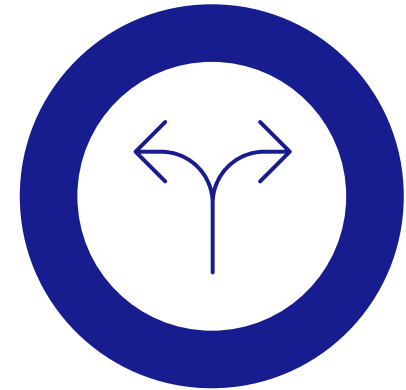
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**Intelligent Decisions**

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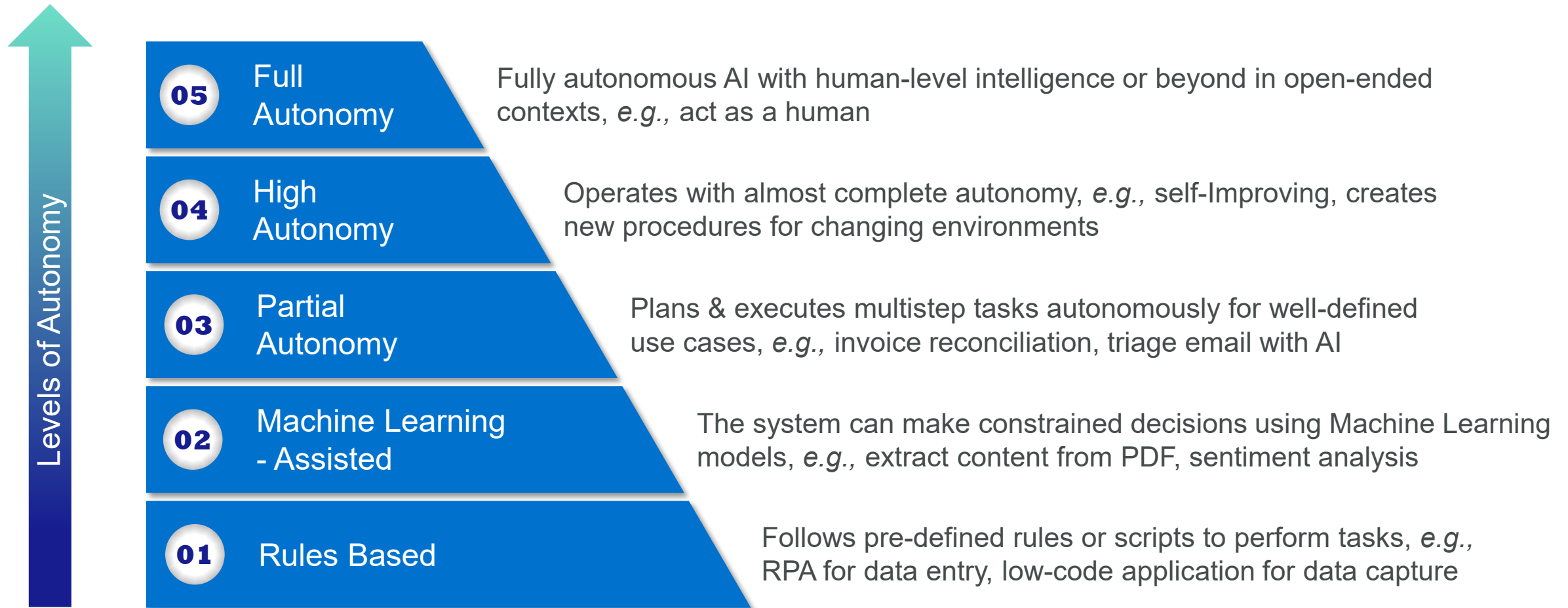


## **Enterprise Automation**

Compliment, Connect, & Make Informed Decisions

# Enterprise Automation

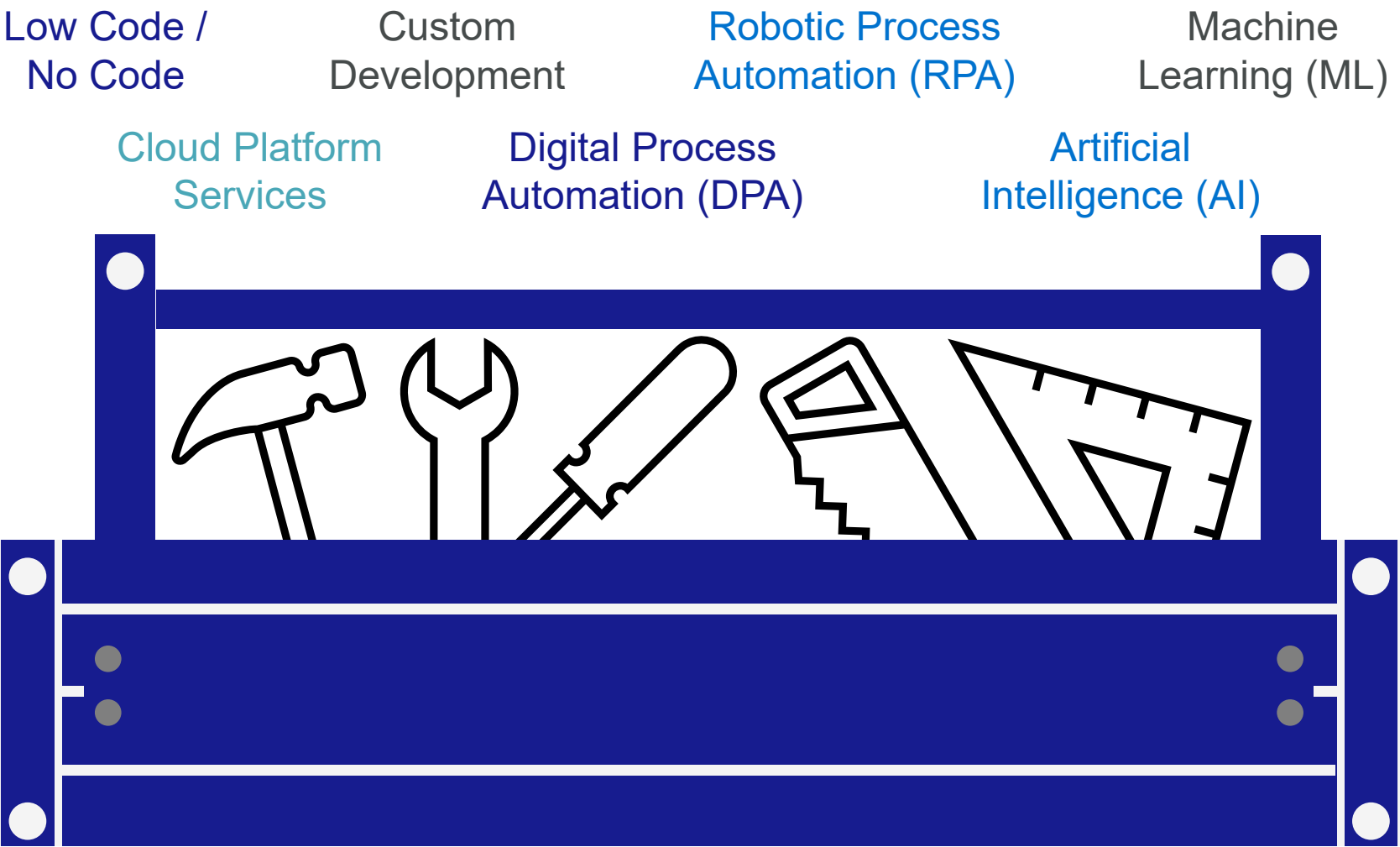
## Levels of Autonomy



**NOTE:** Level 4 & Level 5 are aspirational in today's world but getting closer to reality

# You Have a Toolbox

## Use the Right Tool for the Job



# NetSuite

## A Comprehensive Solution

ORACLE NETSUITE  
Solution Provider

### ACQUIRE & GROW CUSTOMERS



CRM  
CPQ  
e-Commerce  
Point of Sale  
Connectors

Inventory & Order Management  
Procurement  
Warehouse Management  
Supply Chain Management  
Project Management



### HIRE & EMPOWER EMPLOYEES



HR Services  
Performance Management  
Workforce Management  
Payroll

Accounting  
Cash Management  
Analytics & Reporting  
Planning & Budgeting  
Billing & Revenue Management  
Multi-Sub, Currency, Tax, & Language

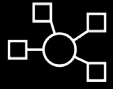


### CREATE & DELIVER PRODUCTS & SERVICES

### IMPROVE CASH & PROFITS

NetSuite

# Intelligent Automation for NetSuite



**Certified Integration:** Connect Workato & NetSuite with a powerful, certified connector for seamless data flow.



**Intuitive Automation:** Build powerful workflows with a drag-&-drop recipe builder, minimal coding required.



**Bidirectional Sync:** Keep NetSuite data in sync with many other business applications across departments.



**Advanced Control:** Use conditional logic & data transformation to tailor automations to your exact business needs.



**Customization Support:** Integrate standard & custom NetSuite fields & objects to fit your unique processes.

# Automate Across the Business

## Workato & NetSuite Key Use Cases

### Finance & Accounting

- **Quote-to-Cash:** Automate sales order & invoice creation from your CRM
- **Procure-to-Pay:** Simplify AP by syncing purchase orders & automating approval workflows
- **Continuous Close:** Reduce manual data entry to close books faster & more accurately

### Sales & Customer Experience

- **CRM Synchronization:** Create a 360-degree customer view by syncing data with Salesforce, HubSpot, & other sales systems
- **E-Commerce Management:** Automatically create orders in NetSuite from platforms like Shopify

### Data & Analytics

- **Secure Data Warehousing:** Transfer NetSuite data to cloud warehouses like Snowflake & Redshift for enhanced reporting & BI



# Technology Solutions by Workato



# Workato at a Glance

## Founded in 2013

By leaders from TIBCO, Oracle, & Splunk to bring integration, automation, & orchestration together

## 12,000+ Customers

Direct & embedded customers across 90 countries globally

## 8,600+ Connectors

Salesforce, Workday, Netsuite, SAP, Jira, Slack, Teams, & more

## Leader in iPaaS MQ

7-year Gartner MQ Leader, ranked furthest in Platform Vision & AI

## #1 Recommended

Only vendor recognized as Customers Choice from Gartner Peer Insights

### FINANCIAL SERVICES



### SOFTWARE



### TELCO / MEDIA



### RETAIL



### MANUFACTURING / HIGH TECH



### HEALTHCARE / PHARMA



# The Fastest Path to Return on AI

## Work With Deep Action™

Bring enterprise search, AI, & action together so employees can discover, automate, & execute in one place.

## Agents With Enterprise Trust

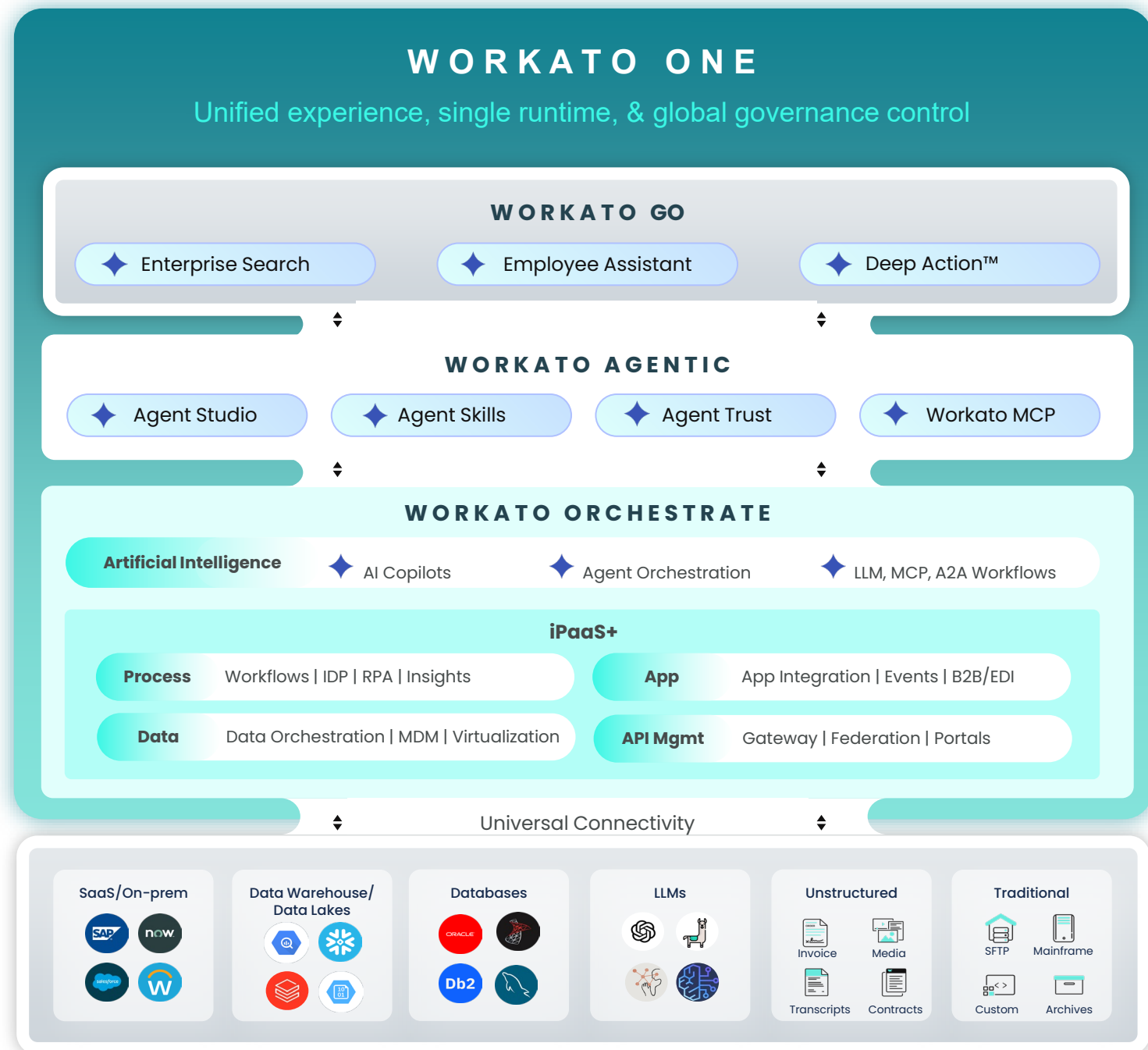
Build & deploy production-ready agents with full context, control, & compliance.

## #1 Orchestration Platform

Unify iPaaS, APIM, Data Orchestration, & more on the #1 platform ranked furthest in Vision & AI Enablement by Gartner.

## No Ecosystem Lock-In

Connect over 10,000 applications & data sources—any format or integration pattern.



# Finance Process Inspiration

## High-Impact, Primary Finance Art-of-the-Possible Processes

**B2B Quote-to-Cash**

**Procure-to-Pay**

**Record-to-Report**

**Budget-to-Report**



**ZUORA**

**ORACLE  
NETSUITE**

**coupa**

**Brex**



**#FloQast**

**SAP**

**workday.**

**Anaplan**

**EPICOR.**

**HubSpot**

**sage Intacct**

**ZIP**

**LINKSQUARES**

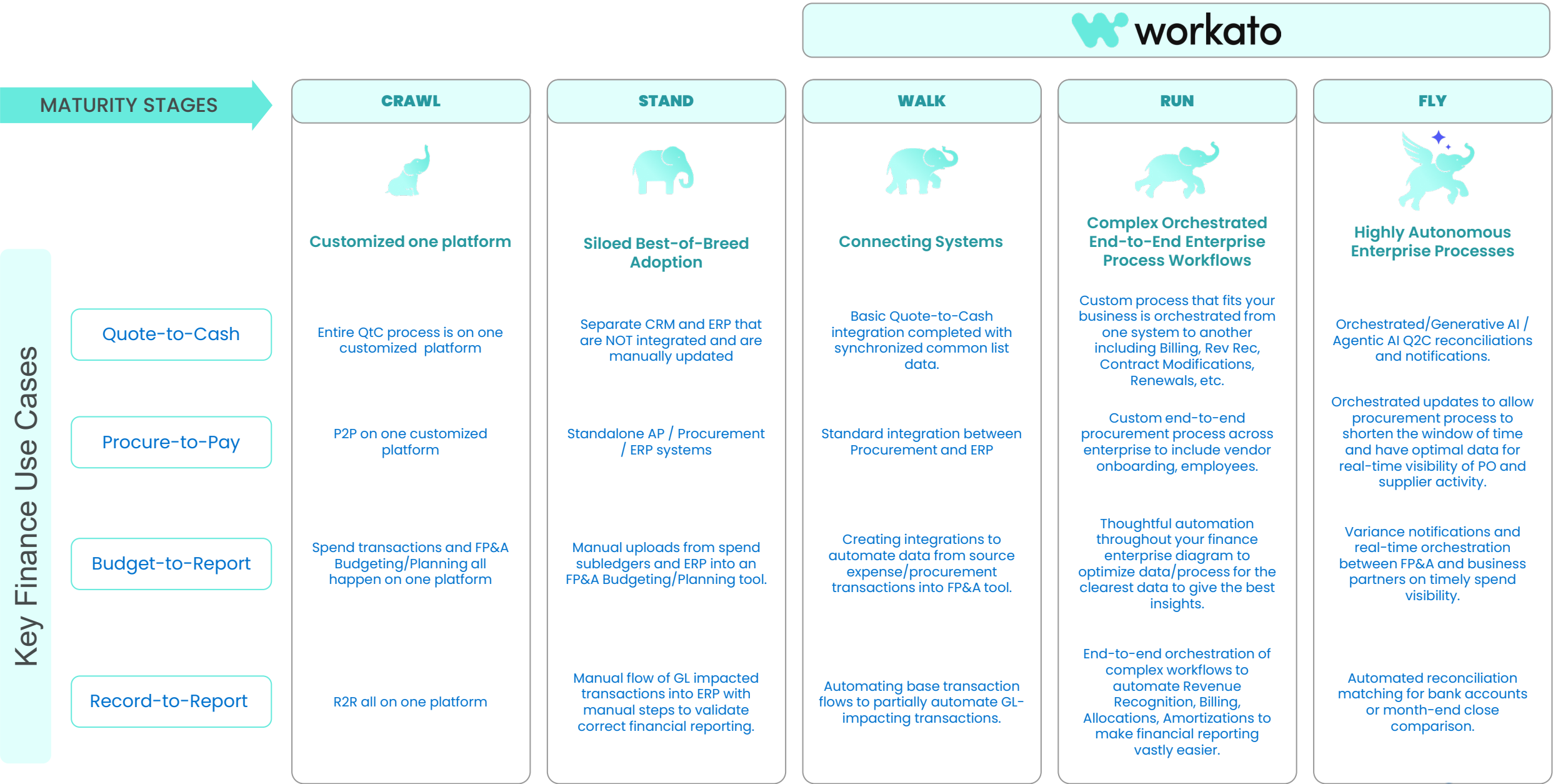
**BLACKLINE**

**infor**

**planful**

**Adaptive  
Insights**

Ideal Enterprise Architecture | Public Company Readiness | Mergers & Acquisitions  
Financials Playbooks | Strategic Long-Range Corporate IT Planning | Enterprise Approval  
Process Sprawl | B2C Order-to-Cash | Continuously Improving Sarbanes-Oxley Plan  
Global Payroll Expansion | Finance AI Use Cases | Efficient Business User Acceptance  
Testing | Global Tax Solutions | Technical Debt Reduction | Transformation Focused on  
Improving Data Quality | Integration Sprawl | Cash Management



# One Skill Set, IDE: The Workato Recipe

## Event Based

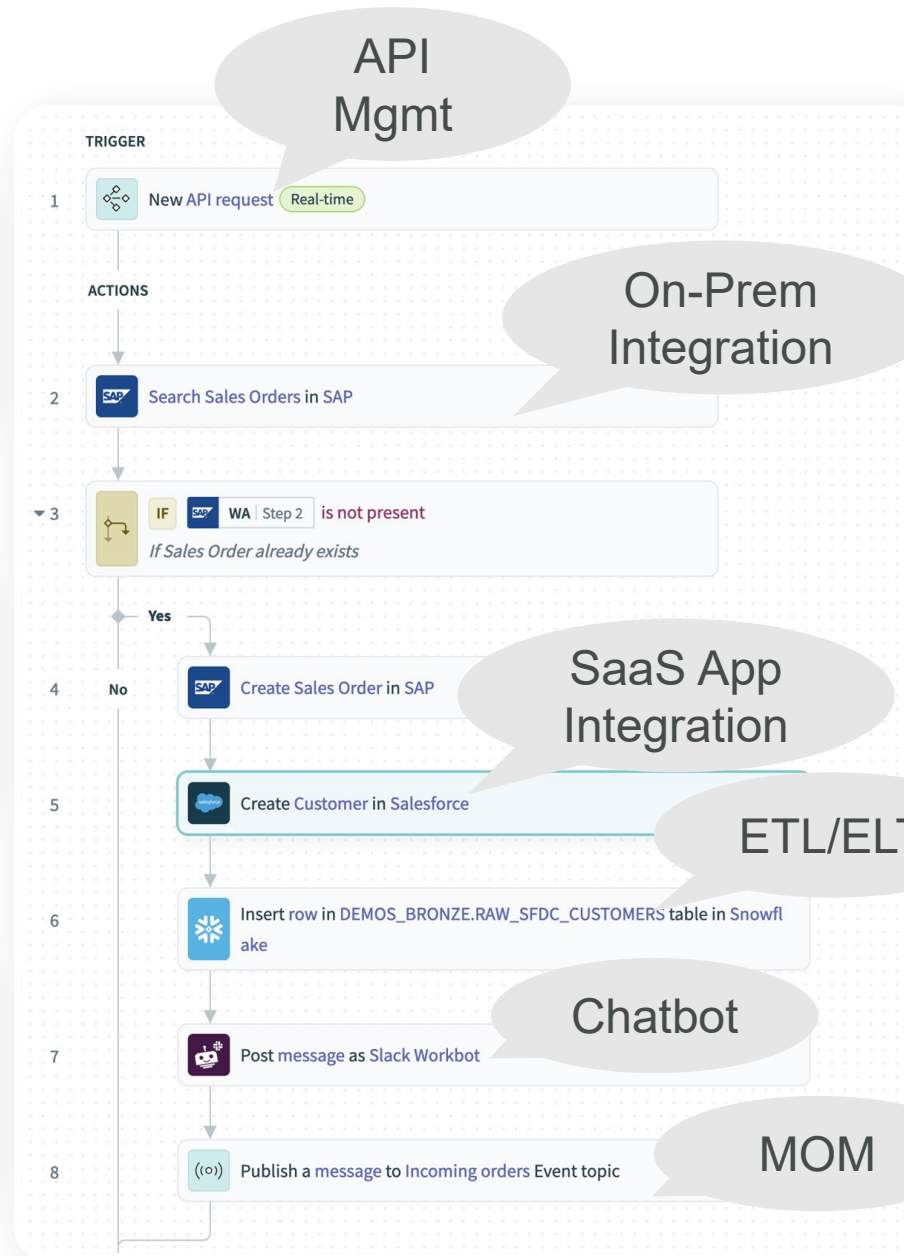
Real-time |  
Scheduled | Batch

## Low Code

Conversational  
interface for any user  
in the business

## Powerful Logic

Linear | Branching |  
Looping | Try/Catch |  
Call Other Recipes



## Composable Orchestration

Mix & match  
integrations

## Connect to Anything

APIs | UI | Data | Files  
| Unstructured | Docs |  
Event Streams

## Community Powered

750K+ public  
community recipes

# Educational Insights



# AI Buzzword Bingo

<b>AI</b> (Artificial Intelligence) Simulates human intelligence & decision making	<b>Agent</b> Autonomous system that acts toward goals	<b>Co-Pilot</b> AI assistant helping humans complete tasks
<b>LLM</b> (Large Language Model) Deep learning model for natural language processing	<b>RAG</b> (Retrieval-Augmented Generation) Retrieves data to improve AI responses	<b>Vector DB</b> Stores & searches high-dimensional vector data
<b>AI Tool Call</b> AI invokes an external tool to complete a task	<b>MCP</b> (Model Context Protocol) Protocol for secure communication between LLMs & tools	<b>AGI / SGI</b> Advanced general or super-intelligent AI concepts

# Demonstrations

## CRM Integration Use Case

Showcasing integration from NetSuite to Salesforce for effective quote-to-cash processes.

## Intelligent Document Processing

Demonstrating invoice extraction & automatic NetSuite updates through smart document processing.

## AI Infusion in Workflows

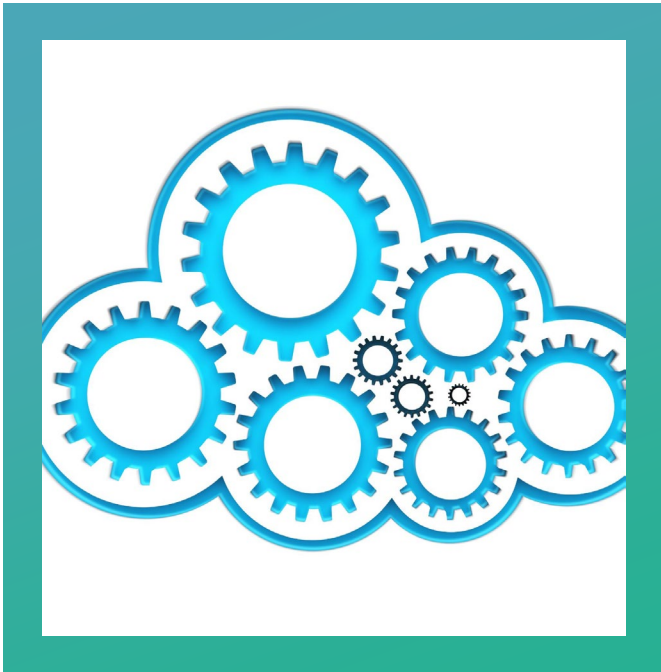
Applying agentic AI workflows for real-time decision making & enhanced automation.

## Technical Setup Overview

Providing a technical flow overview to map out the demonstration structure & setup.

# Demo Use

## Case 1: CRM Integration



### **CRM System Integration**

Integrating CRM platforms like NetSuite & Salesforce can streamline business workflows effectively.

### **Accelerated Sales Cycle**

Automation reduces manual entry, speeding up the quote-to-cash sales process.

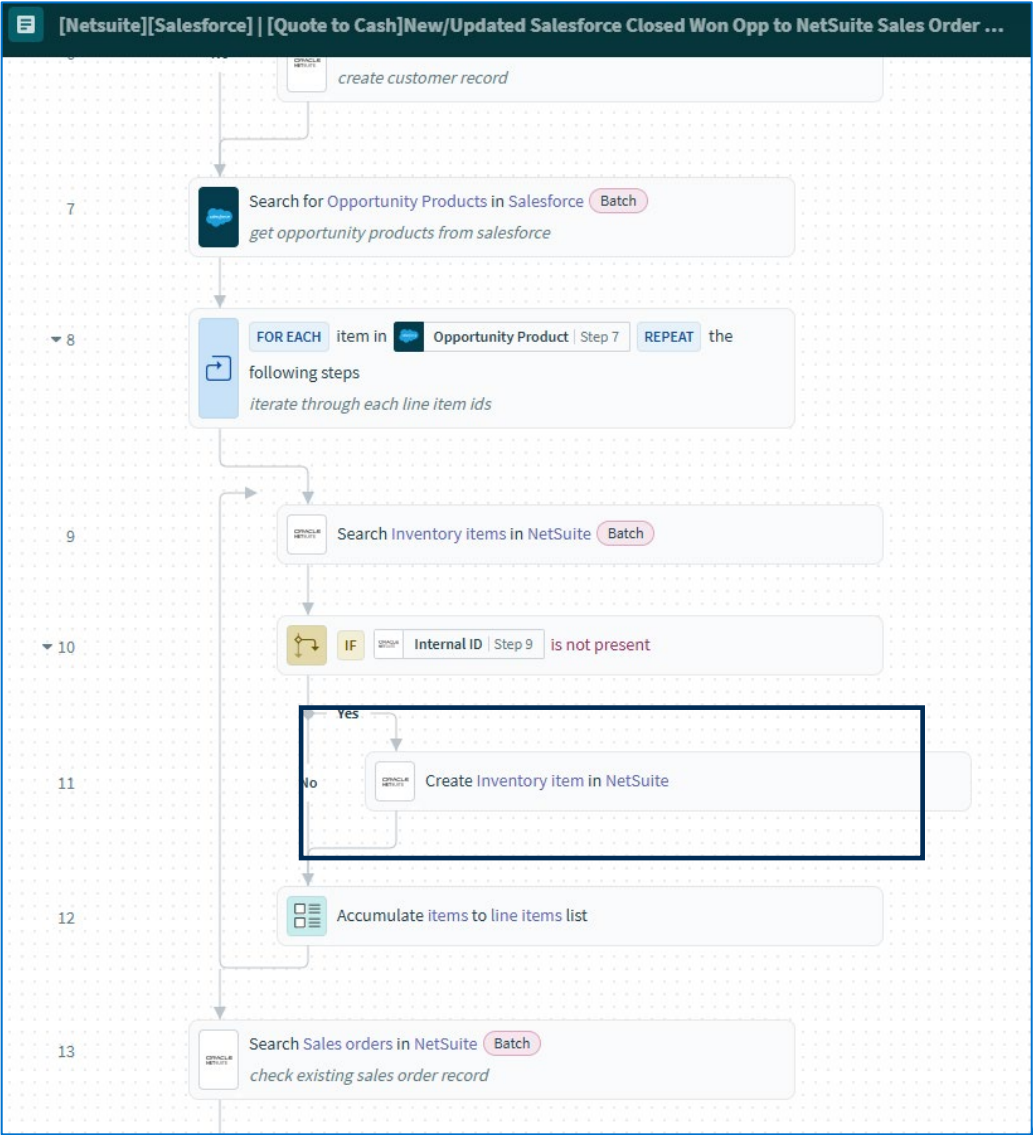
### **Improved Data Accuracy**

Automated data transfer helps improve accuracy & consistency in sales data management.

### **Reduced Administrative Overhead**

Automation reduces manual tasks, lowering administrative burden for sales teams.

# Salesforce → NetSuite: Closed-Won Opps to Sales Orders With Line Items



# Demo Use Case 2: Intelligent Document Processing (IDP)

## AI Extracts Invoice (& Other Document Formats) Data

- AI automatically extracts invoice details from emails, streamlining data capture

## Error Reduction & Time Savings

- Automation reduces errors & saves time by reducing manual entry & validation

## Efficiency in Financial Operations

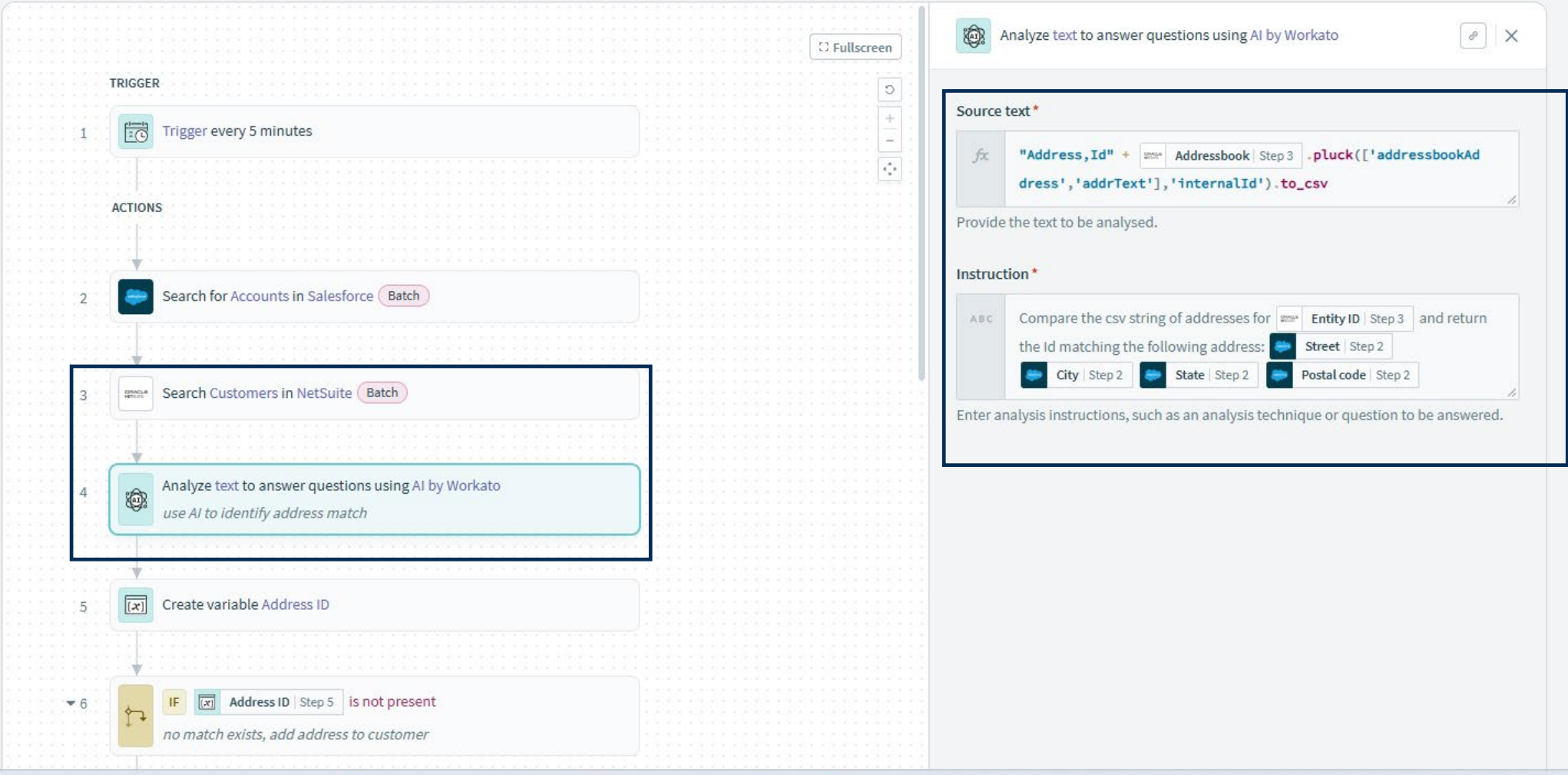
- Intelligent automation helps improve accuracy & efficiency in financial workflows



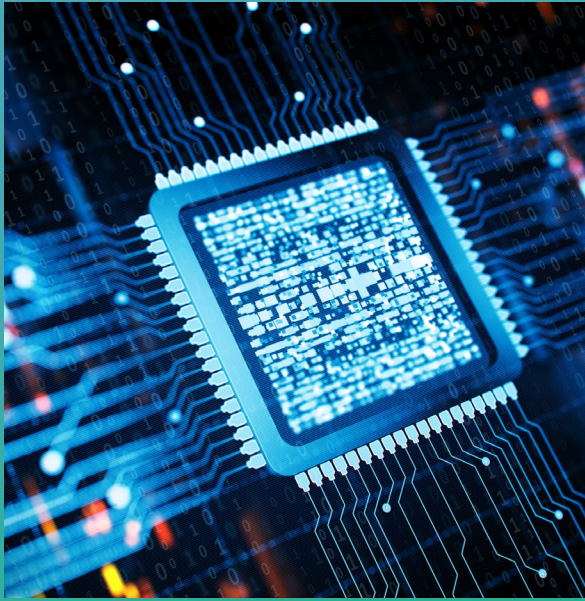
# NetSuite Address Book Matching Using AI

Community library : Recipes > Netsuite Addressbook matching using AI

## Netsuite Addressbook matching using AI



# Demo Use Case 3: AI Infusion



## **Agentic Workflow Orchestration**

AI infusion can help manage complex processes with intelligent agentic workflows for seamless operation.

## **MCP Connector & AI Genies**

MCP connector & AI genies can drive real-time decisions within dynamic workflows.


## **Automated Approvals & Escalations**


Automated approvals & escalations demonstrate AI's role in smart process management.

## **Transformative AI Potential**

This use case highlights AI's power to transform & automate complex workflows intelligently.

# AI Agent – Fin QTC Collections & Cash App



Projects >  -/MH LOB Test/Qtc/Collections > Fin QTC Collections and Cash App

Fin QTC Collections and Cash App

Overview

Conversations

End user settings

Active

POWERED BY

Claude Sonnet 3.7

CHAT INTERFACE

Workato GO

Job description

Skills

Knowledge bases

App events

KPIs

Position Title:

Billing & Collections Agent (Agentic AI Solution)

Department:

Finance – Accounts Receivable

Reports To:

Accounts Receivable Manager / Controller

Purpose:

The Billing & Collections Agentic AI is an autonomous digital team member responsible for automating, optimizing, and intelligently managing the company’s monthly billing and collections operations. It ensures invoices are generated accurately, delivered on time, and payments are collected efficiently — while maintaining an excellent customer experience and supporting accurate revenue recognition.

Key Objectives:

Ensure all customer invoices are issued timely and accurately based on subscription contracts.

Accelerate cash collection and minimize Days Sales

Period: Last 30 days

TOTAL CONVERSATIONS

14

▲ Up from 0 in previous 30 days

UNIQUE USERS

3

▲ Up from 0 in previous 30 days

CONVERSATION VOLUME

12

10

8

6

4


2

0

Total conversations

Oct 6Oct 8Oct 10

Genie details



Fin QTC Collections and Cash App

Add to Action Board

Try asking...

Show me the current A/R aging open invoices report

Generate and send this month's customer invoices

List overdue accounts prioritized by risk score

what are the top 5 open invoices by amount due?

Skills

Get A/R Aging Open Invoices from Netsuite

Add a Promise to Pay

Acton

1. Define the AI Agent (Genie)

2. Chat with the AI Agent

3. Interactive results from your AI Agent chat

What can you do?

1 step >

As a Billing & Collections Agent, I can help you with the following tasks:

AR Aging and Invoice Management

- Retrieve open invoices and AR aging reports from NetSuite
- Identify the top overdue invoices by amount or days overdue
- Provide detailed information about specific customer invoices

Collections Management

- Record promises to pay from customers with specific dates
- Track and update payment commitments in the system
- Help prioritize collection efforts based on aging categories

Information and Documentation

- Access and explain collections procedures from the company's SOP
- Provide information about billing cycles, payment terms, and collection protocols
- Answer questions about the collections process according to company policy

Reporting

- Help analyze collection effectiveness and AR metrics
- Provide insights on Days Sales Outstanding (DSO) and other KPIs
- Support cash flow forecasting through payment tracking

forv/s  
mazars

# Key Takeaways



# Platform Focus & Relevance

## NetSuite & Workato



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 **workato**

- ERP & NetSuite Suitability
- Scalability & Adaptability
- Governance for Responsible AI
- Cross-Functional Team Relevance

# Discover

## Determine Automation Viability

Automating process should provide a positive return on investment (ROI). Here are key questions to consider.

**01**

### Calculating Value

Have you identified how this automation provides value to the business?

**02**

### Champion Exist

Have you identified a Champion of this automation to see it through completion?

**03**

### Reoccurring

Are additional reoccurring costs associated with the automation?

**04**

### Level of Effort

What is the estimated LOE to take from concept to deployment?

**05**

### Timeline

Is the timeline realistic to achieve the goals of the automation?

**06**

### Reuse

Will this automation be for a one-time use or repeatable?

# Unlocking the Value of Automation

## How do you measure value?

Quantifying the Impact of Automation

**01**



Cost Savings

**02**



Hours Saved

**03**



Employee  
Engagement

**04**



Adoption

# Key Takeaways



## **Reduce Manual Processes**

Reducing manual tasks decreases bottlenecks & increases efficiency in workflows.



## **Connect Systems Seamlessly**

Integrating diverse systems enables smooth data flow & operational continuity.



## **Scale Automation With AI**

Using low-code & AI tools like Workato can enable scalable, intelligent automation to support business growth.



# Call to Action

- Embrace the power of automation
- Your journey begins now, & it's never too late
- Focus on your unique business processes & dare to break away from the crowd

# Q&A



Business  
Technology  
Services

## Questions?

# Contact

## Forvis Mazars



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