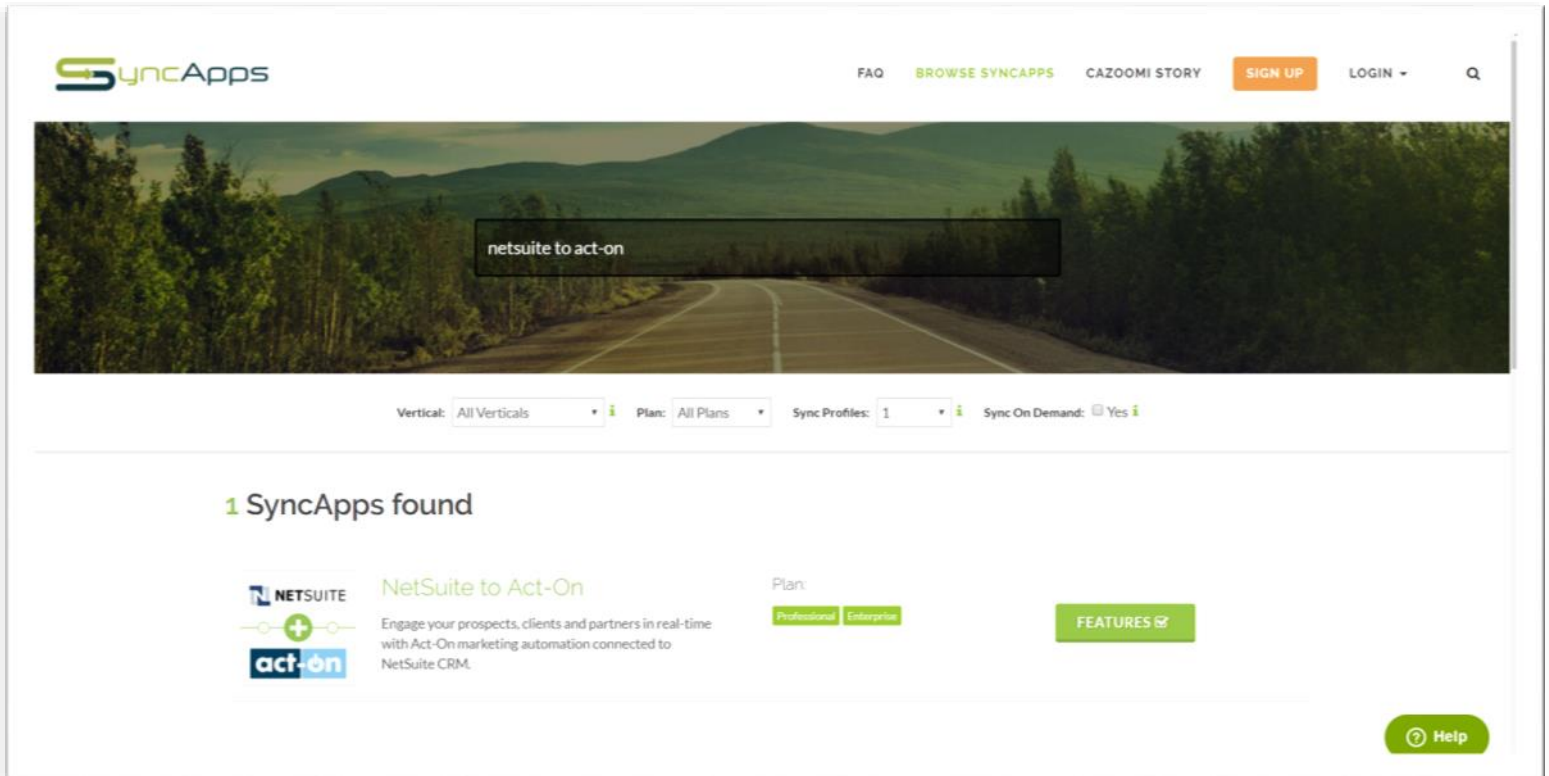


Setup Guide:

NETSUITE ACT-ON

Select your SyncApps

Integrating your Cloud, On-Premise or Plug-in application with your Financials, Marketing, eCommerce, Support, and other mission-critical applications is now a reality.



The screenshot shows the SyncApps search interface. At the top left is the SyncApps logo. To the right are navigation links: FAQ, BROWSE SYNCAPPS, CAZOOMI STORY, SIGN UP, and LOGIN. A search bar is on the far right. Below the navigation is a large banner image of a road through a forest with the text 'netsuite to act-on' overlaid. Underneath the banner are filter controls: Vertical: All Verticals, Plan: All Plans, Sync Profiles: 1, and Sync On Demand: Yes. The main content area shows '1 SyncApps found'. The result is for 'NetSuite to Act-On', featuring the NetSuite and Act-On logos, a description: 'Engage your prospects, clients and partners in real-time with Act-On marketing automation connected to NetSuite CRM.', and plan options: Professional and Enterprise. A 'FEATURES' button is also present. A 'Help' button is in the bottom right corner.



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

Register your Credentials

Signing up for an account is as easy as putting in your Email, Name, Company Name and choosing your password. After you create an account, you and your company will get instant access to all Sync Profiles for 2 weeks, and we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

START YOUR SYNCAPPS FREE TRIAL TODAY

Experience 2 weeks trial with access to all SyncApps, on-demand sync ability and more!

EMAIL ADDRESS

Email address will be used for login.

FIRST NAME

LAST NAME

COMPANY NAME

PASSWORD

6-character's minimum; case sensitive

RE-TYPE PASSWORD

By pressing "Start Free Trial", you agree to Cazoomi's [Terms of Service and Privacy Policy](#).

[START FREE TRIAL](#)

How Your Trial Works

After you create your account, you get instant access to all SyncApps for 2 weeks & we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

If you haven't upgraded yet within the 2 weeks trial, our Cazoomi team will send you an email reminder before your trial ends so you will still have some time to choose one of our three subscription plans.

When you choose the subscription plan that is right for you, your account will be instantly upgraded.

Join These Happy SyncApps Customers

Jcurve **UB** **LYTRO**



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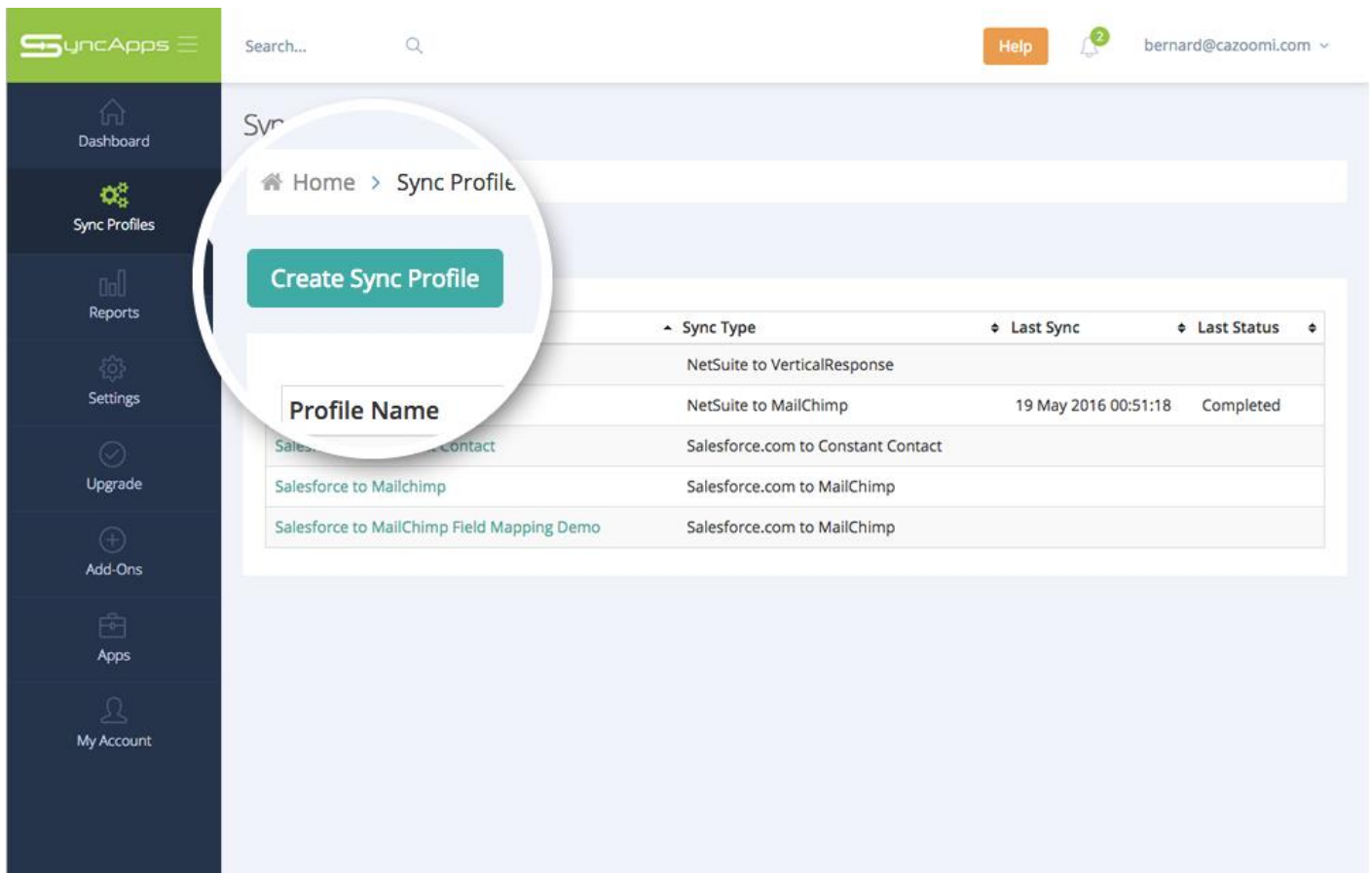
MAJOR FEATURES

- Sync NetSuite Company, Contacts or Leads to an Act-On Master List(s).
- Filter and sync only those records who meet specific criteria from CRM.
- Opt-outs managed automatically in NetSuite from Act-On.
- Custom field mapping between both systems.
- Sync and map hard bounces to CRM custom field.
- Sync Lead Score from Act-On to NetSuite.
- Sync Act-On Campaign Responses to NetSuite custom records. Option to sync specific Campaigns or all Campaigns.
- NetSuite supported Saved Search record types: Contact, Customer, Partner, Transaction. Each saved search will be synced to an Act-On Marketing List(s).
- NetSuite always takes higher precedence over Act-On. Any data changes in NetSuite will always be synced to Act-On.
- Contact and Lead data is synced from Act-On only if the email address doesn't exist in NetSuite at the time of syncing.

1

Create Sync Profile

Select the Apps you use to get started as this will also include any Sync Add-Ons, field mapping or filters.



The screenshot shows the SyncApps dashboard. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area displays a breadcrumb trail 'Home > Sync Profile' and a prominent green 'Create Sync Profile' button. Below this is a table of existing sync profiles.

Profile Name	Sync Type	Last Sync	Last Status
NetSuite to VerticalResponse	NetSuite to VerticalResponse		
NetSuite to MailChimp	NetSuite to MailChimp	19 May 2016 00:51:18	Completed
Salesforce.com to Constant Contact	Salesforce.com to Constant Contact		
Salesforce to MailChimp	Salesforce.com to MailChimp		
Salesforce to MailChimp Field Mapping Demo	Salesforce.com to MailChimp		

i A Sync Profile refers to the setup of 2 available software applications where one application is synced to another application. This includes all the settings for both applications including connection configuration, field mapping, and Sync scheduling.



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Contact Us!

2

Enter Profile Name

The Sync Profile name is just a description for you to remember the Sync Profile that you will create now.

Create Sync Profile

Name *i*

Sync Type

Next

In the next few minutes you will select the Apps you use to get started and name the Sync Profile, which is just a description for you to remember the Sync Profile that you created.

After entering your App credentials in the next few steps if you have questions while on any step in your Sync Profile please hover over any SyncNote tooltip *i* to get detailed information on that specific integration service or related item.

Good luck on the Setup of your new Sync Profile!



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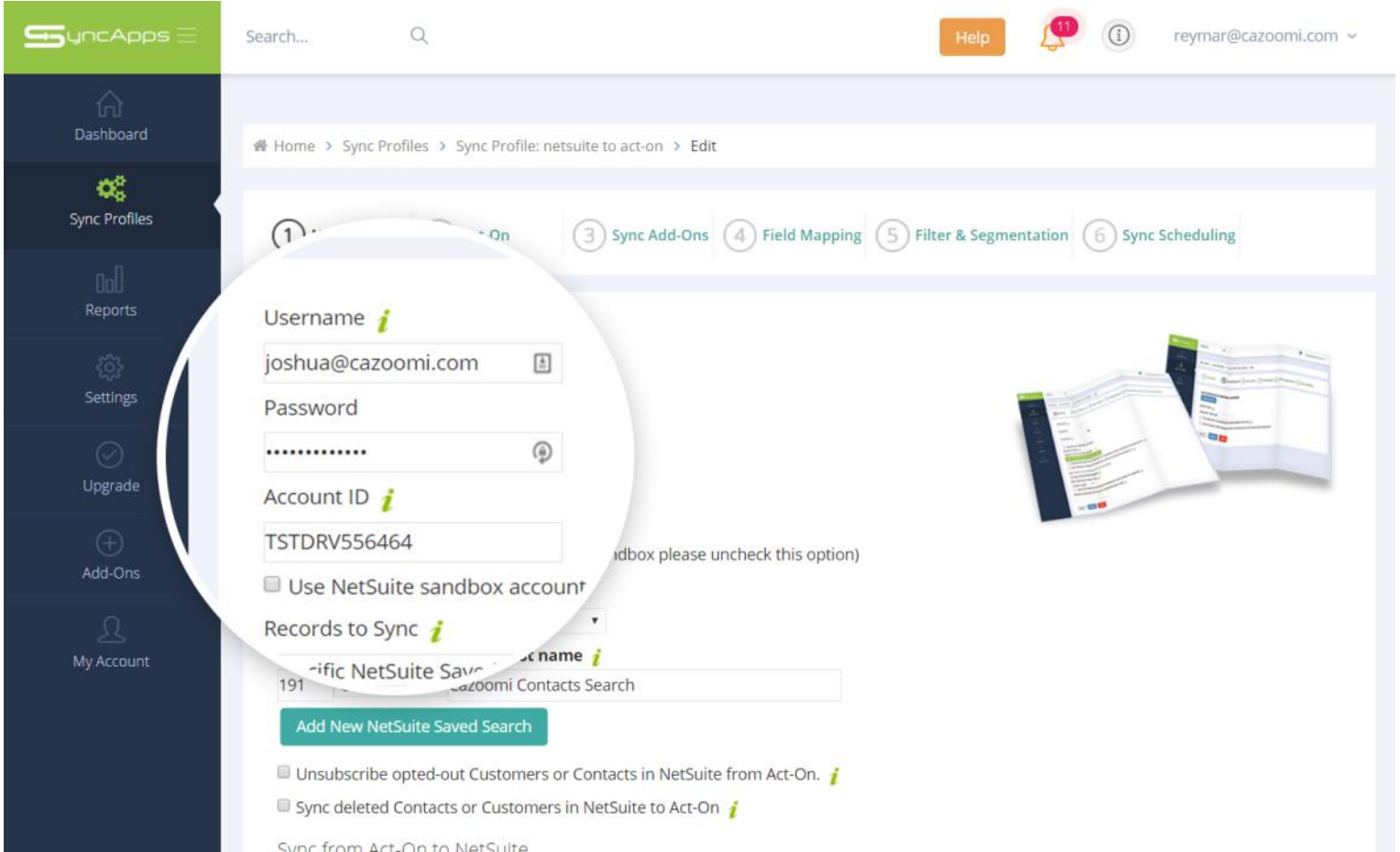
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3

Enter NetSuite Credentials

Grab your NetSuite credentials, and if you have questions, please hover over any SyncNote tooltip to get more information.



Sync process will connect to NetSuite system using web service. To set a specific role for a web service user, please follow the instructions on [this link](#).

If web service role is not set, web UI default role might be used instead.



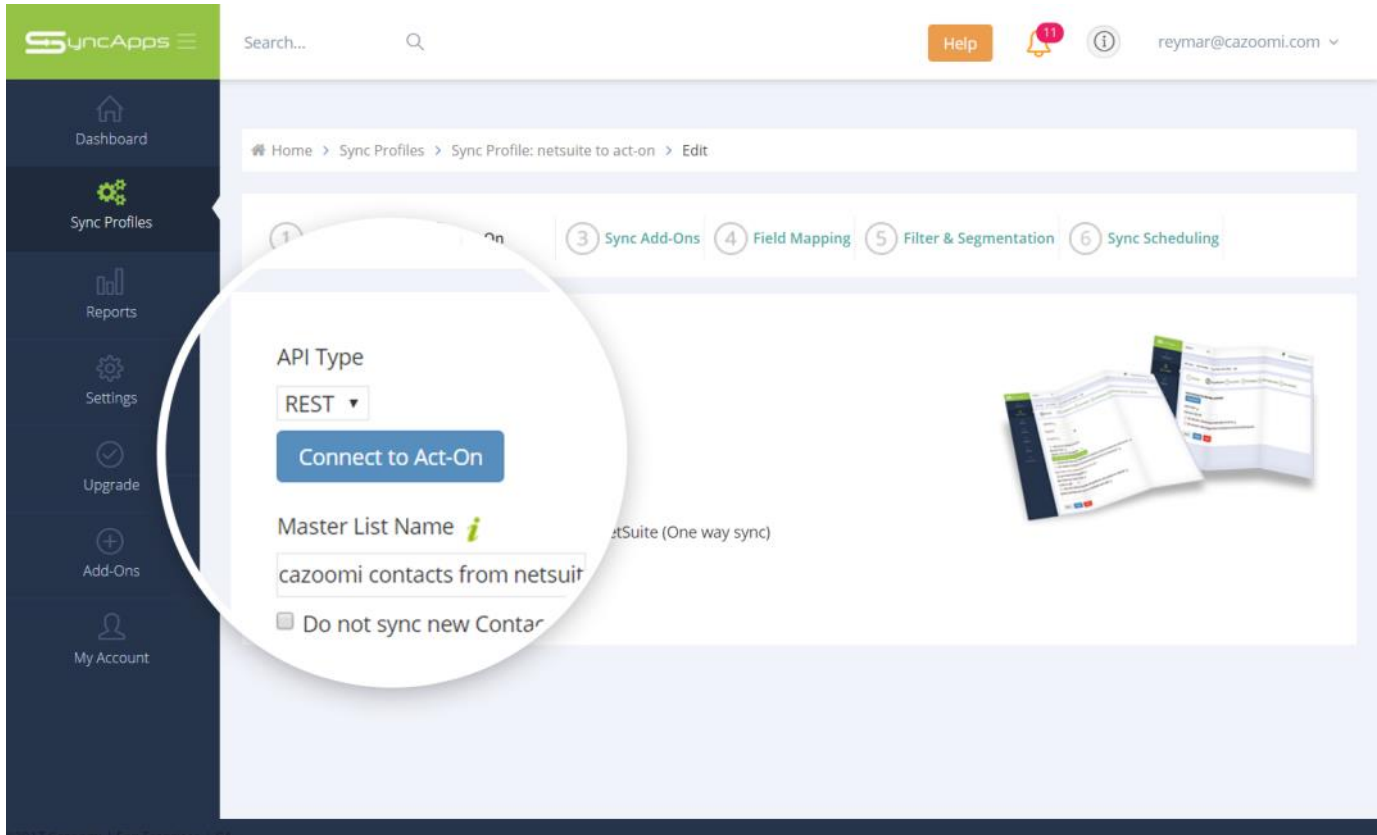
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4 Insert your Act-On Credentials

Connecting to Act-On is super simple. Press the button to log into your account to validate the Sync Profile.



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5

Sync Add-Ons

The SyncApps Add-Ons screen allows you to select those you want and more for each App you connect.



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6

Field Mapping

Field mapping from your chosen App 1 & App 2 allows you to update existing or new records with ease.

The screenshot shows the SyncApps web interface. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, and My Account. The main content area is titled 'Home > Sync Profiles > Sync Profile: netsuite to act-on > Edit'. A progress bar at the top indicates the current step is '4 Field Mapping', with other steps being '3 Sync Add-Ons', '5 Filter & Segmentation', and '6 Sync Scheduling'. A circular callout highlights the 'Enable Additional Field Mappings' checkbox, which is checked. Below it are three dropdown menus: 'NetSuite Field', 'Act-On Field', and 'Mapping Direction'. The 'Mapping Direction' dropdown is set to 'NetSuite to Act-On'. A video player on the right shows a person performing a yoga pose with the text 'Do Integration Yourself-DIY with field mappin... KFIT'. Below the video, there is a note: 'Fields with (*) are read only fields, can... available in the field selection list please press the above "Refresh Fields" button to retrieve latest fields data from...'. At the bottom, a 'Current Mapping' table shows a mapping from 'NetSuite' to 'Act-On'.



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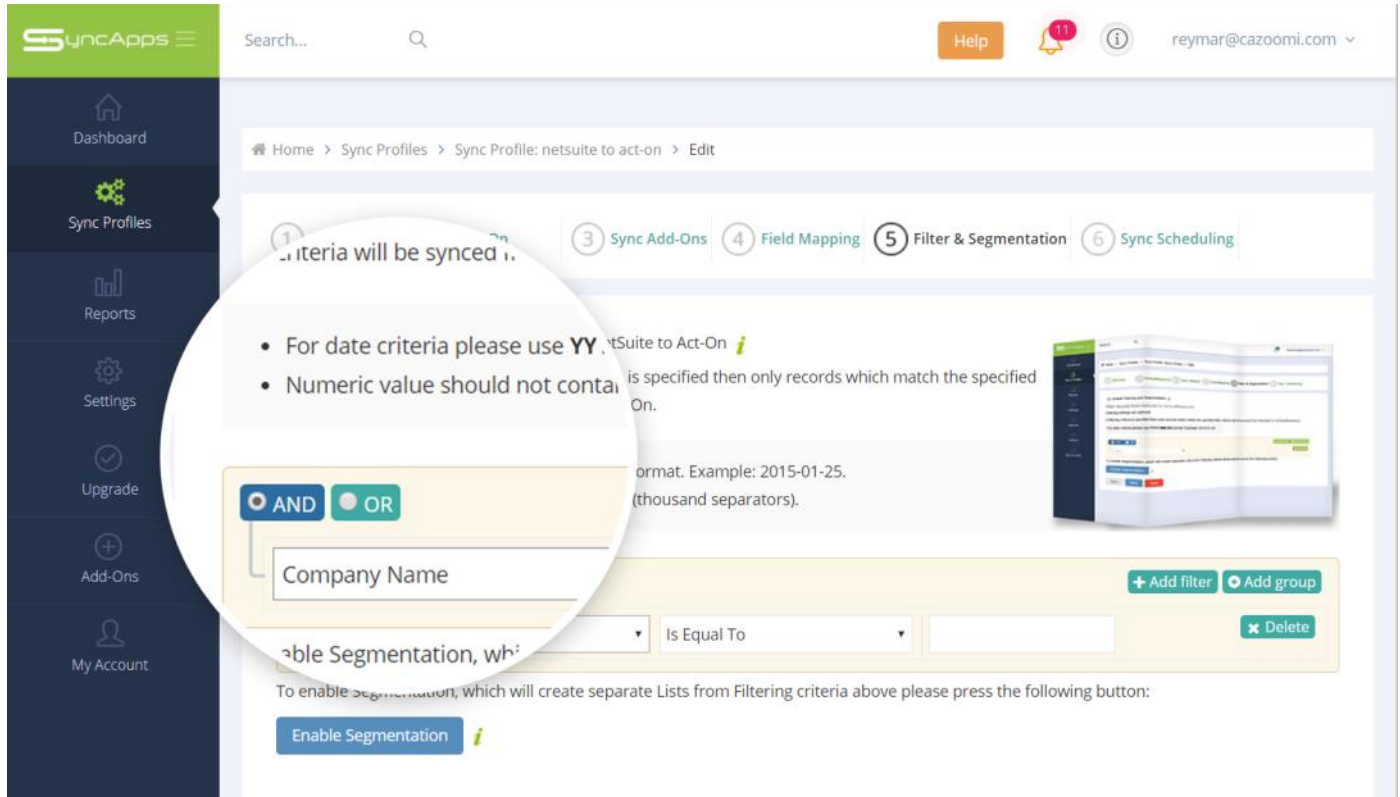
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[Contact Us!](#)

7

Filter and Segmentation

Filtering takes CRM record, filters based on the specified criteria and syncs records into your target application. Segmentation syncs record from each defined segment into separate lists.



Criteria will be synced i.

- For date criteria please use YY-MM-DD format. Example: 2015-01-25.
- Numeric value should not contain thousand separators.

AND OR

Company Name

+ Add filter + Add group

Is Equal To

Delete

Enable Segmentation



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8

Sync Scheduling

Sync scheduling can be set up on paid plans. Sync On-Demand is available in all trials to allow quick testing of your Apps integration.

The screenshot shows the SyncApps web interface. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, and My Account. The main content area displays the configuration for a sync profile named 'netsuite to act-on'. The 'Sync Scheduling' step is highlighted in the progress bar. The configuration options are:

- Sync Interval:** Fixed Interval (selected), Every Hours.
- Sync on specific days (Once a day):** S M T W T F S.
- Sync Time:** Between 12 AM to 03 AM, CST.

A 'Finish' button is visible at the bottom of the configuration panel.



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Press the "Sync Now" button from your Sync Profile screen to sync your data immediately.

The screenshot shows the SyncApps interface. On the left is a dark blue sidebar with navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, and My Account. The main content area is titled "Sync Profile: netsuite to act-on". At the top right, there are links for "Help", a notification bell with "12", and the user email "reymar@cazoomi.com". A yellow banner at the top of the profile page states: "Sync profile has been successfully configured. Please click 'Sync Now' button below to start sync process." Below this is a breadcrumb trail: "Home > Sync Profiles > netsuite to act-on". The profile details are listed under a "Summary" section:

- Plan Type:** Enterprise (Tier-4)
- Profile ID:** 917875087
- Status:** Enabled
- Created:** 19 Sep 2017 13:08:57 CST
- Sync Type:** NetSuite to Act-On
- Object Type:** Contact
- Scheduling:** Disabled

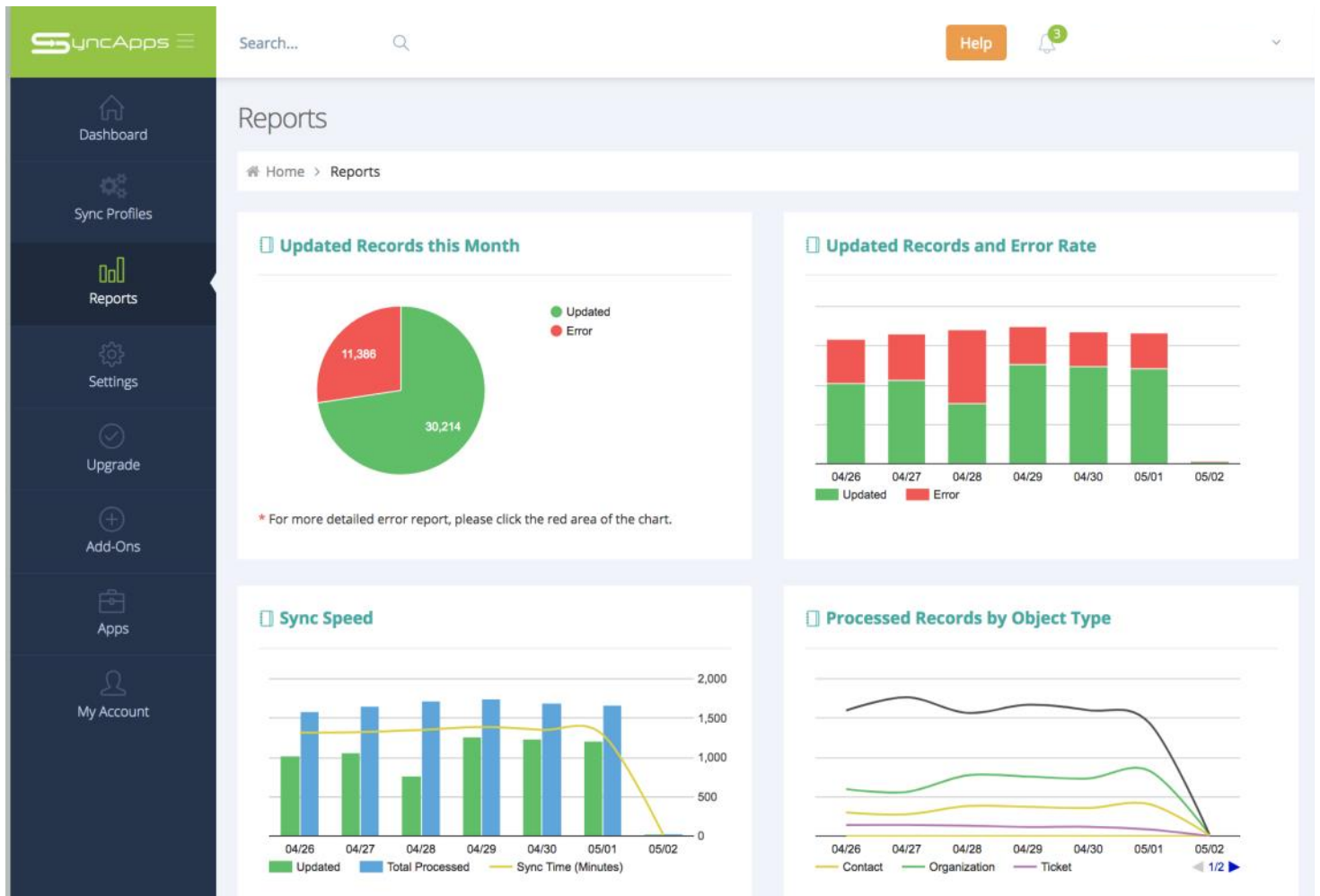
At the bottom of the profile details are four buttons: "Edit", "Disable", "Delete", and "Copy". A circular callout on the right side of the profile details highlights two buttons: a dark blue "Sync Now" button and a teal "Reset Sync Process" button. The text within the callout reads: "following button to sync your Sync Profile immediately." and "below button to Reset your Sync Profile. Please be aware that this will reset your previous settings in your Sync Profile."



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Cazoomi Story

SyncApps® by Cazoomi offers an integration framework available to unite your company's data.

Deploying Software-as-a-Service for Financials, CRM & Marketing, eCommerce or Support?

SyncApps® by Cazoomi is the easiest way to synchronize your applications without breaking the bank. Once available to only Fortune 1000 companies, Cazoomi introduces a way for your business applications to talk to each other for less than the price of a Netflix subscription.

See other small businesses, education and nonprofits to even large enterprises who started on a Free Trial.



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