

Excel SmartClient for NetSuite



One click access to your NetSuite data from within Microsoft Excel. Retrieve, update, add, and delete data through a simple user interface.

Use Microsoft Excel® to Update NetSuite® in Real-Time

The Celigo SmartClient provides a seamless integration between Microsoft Excel and NetSuite, allowing users to access and change NetSuite data directly from within Excel in real-time, and with no programming knowledge whatsoever.

Many NetSuite customers use Microsoft Excel on a daily basis to accomplish a variety of tasks. Adding or editing Expense Reports, updating Item Pricing, Importing Leads, or Classifying Invoices are just a few examples out of hundreds of possibilities.

- Do you want “one click” access to live NetSuite data for reports or charts?
- Are you working with many different record types, even custom records?
- Would you prefer off-line access to NetSuite, and update later when you’re online?
- Have you ever wanted to use mass updates for transaction records?
- Would you prefer to use Excel formulas to calculate price changes for Items?

These are just a few of the many challenges the Celigo SmartClient overcomes.

Works The Way You Do

Using the SmartClient you can take advantage of Excel formulas, formatting, and macros, and virtually eliminate the need to use CSV Imports or Mass Updates in NetSuite. No more time wasted saving & managing CSV files!

This means your business can continue using Excel for complex workflow and established business processes, while taking advantage of constant, real-time connectivity with NetSuite.

Safe & Secure

The Celigo SmartClient uses the NetSuite roles & permissions you already have in place, so there’s no need to worry about unwanted access to sensitive information, or accidental changes to production data.

And because NetSuite roles use default forms for viewing and editing records, the SmartClient maintains your form & field restrictions.

Saves Money & Time

How much is your organization spending on labor costs putting information in NetSuite, or pulling it out for reports? You can double or triple productivity, and reduce costs dramatically with the Celigo SmartClient for NetSuite.

KEY BENEFITS

- > Real-Time NetSuite Access
- > Increased Productivity
- > Off-Line Data Entry
- > Immediate Feedback
- > Use Established Excel Processes

SPECIFICATIONS

- > Excel customization that adds a toolbar to the Office Ribbon
- > Supports Excel 2010, 2007, and 2003 Professional
- > Uses your established NetSuite login ID & password
- > Requires you enable NetSuite SuiteTalk (Web Services)
- > SmartClient workbooks can be shared with co-workers

FREE 14 DAY TRIAL

- > Fully featured trial
- > Installs in minutes
- > Online Video tutorials

“ The SmartClient is a great product, I encourage everyone to have it available for at least some of their users. ”

— Evan Goldberg
NetSuite Chairman & CTO

Key Features

Access Local or NetSuite Saved Search Results Directly in Excel

The SmartClient can access NetSuite Saved Searches you've already built, or use search templates on your local machine that you can build in minutes. Once the results are pulled in to Excel, updating a cell, row, or column of data takes seconds.

Data Validation

The SmartClient uses templates to show only the fields you want to see, and enforces the field type values that NetSuite is using, whether they are drop-down lists, date/time values, or free-form text. Building a template takes just minutes, and they can be reused to show results for different searches.

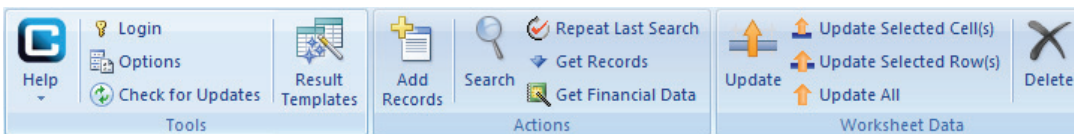
Mass Updates Now Easier Than Ever

Retrieve a specific set of records based on desired criteria; make mass changes to these records using Excel; and update these records in NetSuite with a click of a button. This even applies to transactions such as sales orders. You'll receive immediate, actionable error and warning messages.

Built-In Support for Excel Formulas

Perhaps one of the best features of the SmartClient! It supports standard Excel formulas within template fields. When the SmartClient loads your NetSuite data, Excel formulas automatically adjust field values! Imagine having a few thousand records in a search result load in Excel and have a price update already calculated, or a free-form text field value already present!

Excel Toolbar for Office 2007



“ So far I am SUPER impressed, and I know my supervisors will be as well. I've been jumping through all kinds of hoops trying to get our post inventory adjustments into NetSuite, and this has been 50 times faster than even my best solution. ”

—Garin Oaks
IT Director, LocoX.com

“ Our company processes thousands of vendor bills each month, and we needed a way to get this information into the system easily and effectively. Celigo's Excel SmartClient was exactly what we were looking for. Importing our bills directly into NetSuite using SmartClient saves us hours of manual processing time every single month. ”

— Scott Witmoyer
Vice President of Information Technology,
Nobel Learning

NETSUITE
SuiteCloud
DEVELOPER NETWORK

ABOUT CELIGO

Celigo simplifies the adoption of cloud computing by providing innovative products and services for NetSuite.

Specializing in large and complex business challenges, Celigo provides end-to-end NetSuite integration, customization, and implementation services to customers around the world. We design and implement the extraordinary every day.

Celigo was voted the NetSuite SuiteCloud Developer Network Partner of the Year in 2010 and 2011. We serve over 500 customers, have created thousands of SuiteFlex customizations, and actively manage hundreds of cloud-based integrations.

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