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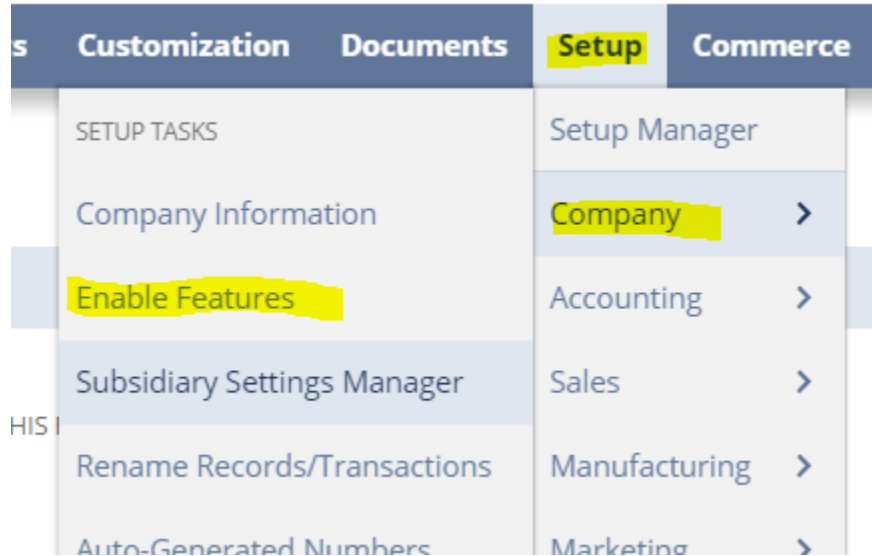
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SalesOutlook / NetSuite Integration Setup Instructions

Setting up NetSuite to allow integration with SalesOutlook.

This Procedure must be done by an administrator in NetSuite. Note: NetSuite must be setup for Subsidiaries and CRM Features which should be the default.

In NetSuite click on Setup | Company | Enable features.



Make sure Soap We Services are checked. They default is to enable Soap Web Services so it may already be checked.

Enable Features

Save

Cancel



Subsidiary Feature: After enabling this feature, you must enable and set preferences for individual subsidiaries using the [Subsidiary Settings Manager](#).

Company Accounting Tax Transactions Items & Inventory Employees CRM Analytics Web Presence SuiteCloud

VIEW SUITECLOUD [TERMS OF SERVICE](#). TRANSLATIONS OF THE SUITECLOUD TERMS OF SERVICE ARE ALSO AVAILABLE ON THE ORACLE NETSUITE [WEBSITE](#).

SuiteTalk (Web Services)

SOAP WEB SERVICES

USE A STANDARD SOAP-BASED PROGRAMMING INTERFACE TO INTEGRATE EXTERNAL SYSTEMS WITH NETSUITE AND MIGRATE DATA. BY ENABLING THIS FEATURE, YO

REST WEB SERVICES

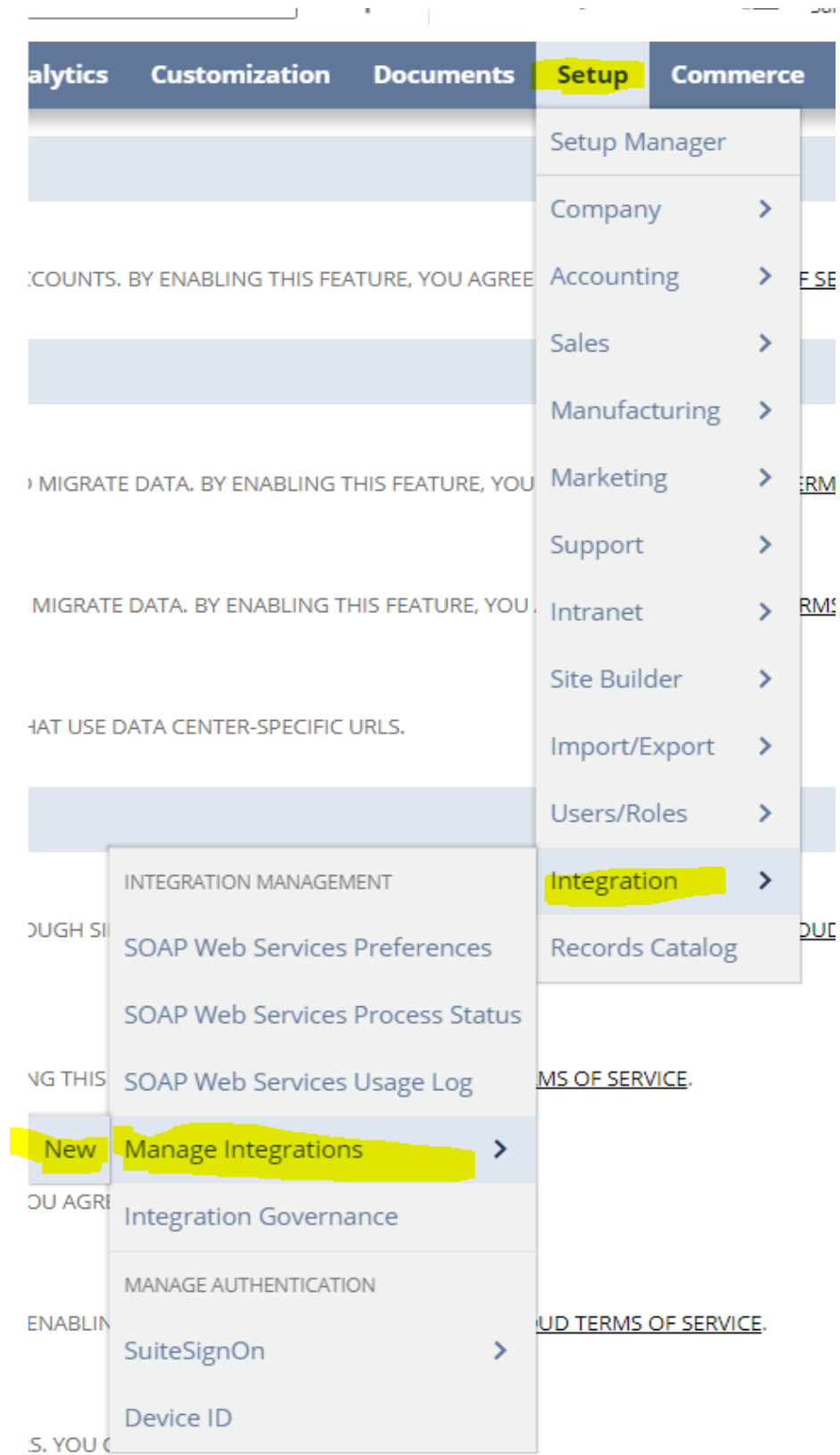
USE A STANDARD REST-BASED PROGRAMMING INTERFACE TO INTEGRATE EXTERNAL SYSTEMS WITH NETSUITE AND MIGRATE DATA. BY ENABLING THIS FEATURE, YO

ENFORCE ACCOUNT-SPECIFIC URLS FOR RESTLETS AND SUITETALK SOAP WEB SERVICES.

ENABLE TEST WINDOW: DISALLOW RESTLETS OR SOAP WEB SERVICES REQUESTS (EXCEPT FOR DISCOVERY CALLS) THAT USE DATA CENTER-SPECIFIC URLS.

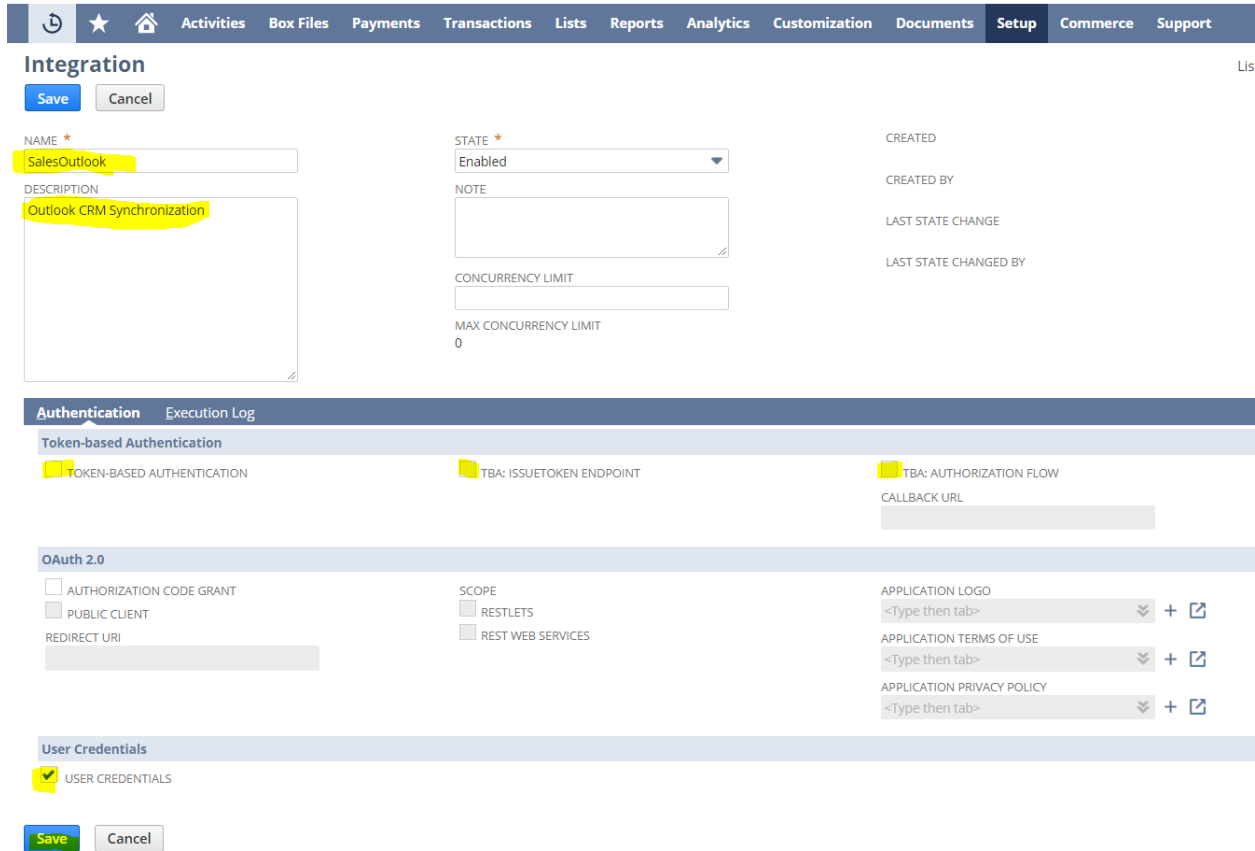
SalesOutlook / NetSuite Integration Setup Instructions

Click on Setup and choose Integration | Manage Integrations | New.



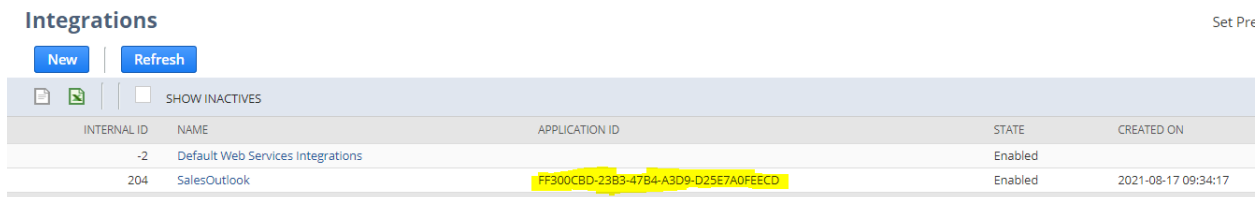
SalesOutlook / NetSuite Integration Setup Instructions

Enter in SalesOutlook as the name and description. Check User Credentials as the integration type. Click Save.



The screenshot shows the NetSuite Integration Setup form. The top navigation bar includes: Home, Activities, Box Files, Payments, Transactions, Lists, Reports, Analytics, Customization, Documents, Setup, Commerce, Support. The form is titled "Integration" and has "Save" and "Cancel" buttons. The "NAME" field contains "SalesOutlook" and the "DESCRIPTION" field contains "Outlook CRM Synchronization". The "STATE" dropdown is set to "Enabled". The "CONCURRENCY LIMIT" is 0. The "Authentication" section is expanded, showing "Token-based Authentication" (checked), "OAuth 2.0" (unchecked), and "User Credentials" (checked). The "Application ID" field is highlighted in yellow.

Note the Application ID as this will be needed for each SalesOutlook user that will synchronize with NetSuite.



The screenshot shows the NetSuite Integrations list. The table has columns: INTERNAL ID, NAME, APPLICATION ID, STATE, and CREATED ON. The "SalesOutlook" integration is highlighted in yellow.

| INTERNAL ID | NAME | APPLICATION ID | STATE | CREATED ON |
|-------------|-----------------------------------|--------------------------------------|---------|---------------------|
| -2 | Default Web Services Integrations | | Enabled | |
| 204 | SalesOutlook | FF300CBD-23B3-47B4-A3D9-D25E7A0FEEDC | Enabled | 2021-08-17 09:34:17 |

SalesOutlook / NetSuite Integration Setup Instructions

Click on Setup Users/Roles | Manage Roles | New.

The screenshot displays the NetSuite navigation menu with the following structure:

- Setup (highlighted in yellow)
- Users/Roles (highlighted in yellow)
- Manage Roles (highlighted in yellow)
- New (highlighted in yellow)

The background shows a list of records with columns for ID (e.g., 7-908A-D8112F1EF22D) and Date/Time (e.g., 11-08-17 09:33:42).

SalesOutlook / NetSuite Integration Setup Instructions

Enter in SalesOutlook as the name and check Do Not Restrict Employee fields and Sales Role. Select User Subsidiary and Web Services Role Only. Click on Permissions and Add the transaction roles you want the users to have.

Role

← → List Search Copy to Account System Notes More

Save Cancel Change ID Actions

General

NAME *
SalesOutlook

ID
customrolesalesoutlook

CENTER TYPE
Sales Center

EMPLOYEE RESTRICTIONS
none - default to own ALLOW VIEWING

DO NOT RESTRICT EMPLOYEE FIELDS
 RESTRICT TIME AND EXPENSES
 SALES ROLE
 SUPPORT ROLE
 PARTNER ROLE
 INACTIVE
 CORE ADMINISTRATION PERMISSIONS

Subsidiary Restrictions

ACCESSIBLE SUBSIDIARIES

ALL
 ACTIVE
 USER SUBSIDIARY
 SELECTED

ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Authentication

SINGLE SIGN-ON ONLY
 WEB SERVICES ONLY ROLE
 RESTRICT THIS ROLE BY DEVICE ID

TWO-FACTOR AUTHENTICATION REQUIRED
Not required

DURATION OF TRUSTED DEVICE
Per session

Permissions

Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions • Reports • Lists • Setup • Custom Record

| PERMISSION * | LEVEL |
|-------------------|-------|
| Build Work Orders | Full |
| Calculate Time | Full |
| Cash Sale | Full |
| Cash Sale Refund | Full |
| Check | Full |
| Close Work Orders | Full |
| Invoice | Full |
| Opportunity | Full |
| Quote | Full |
| Sales Order | Full |

SalesOutlook / NetSuite Integration Setup Instructions

Click on Lists and add the list you want the users to have and set level to Full. (see recommended lists below).

Authentication

SINGLE SIGN-ON ONLY

WEB SERVICES ONLY ROLE

RESTRICT THIS ROLE BY DEVICE ID

TWO-FACTOR AUTHENTICATION REQUIRED
Not required

DURATION OF TRUSTED DEVICE
Per session

Permissions Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions • Reports • **Lists** • Setup • Custom Record

| PERMISSION | LEVEL |
|---------------------|-------|
| Accounts | Full |
| CRM Groups | Full |
| Calendar | Full |
| Companies | Full |
| Contacts | Full |
| Customer Profile | Full |
| Customers | Full |
| Documents and Files | Full |
| Employee Record | Full |
| Employees | Full |
| Events | Full |
| Items | Full |
| Notes Tab | Full |
| Other Names | Full |
| Related Items | Full |
| Subsidiaries | Full |
| Tasks | Full |
| Track Messages | Full |
| Work Calendar | Full |

Click on Setup and make sure the following highlighted items are added and the level is set to Full.

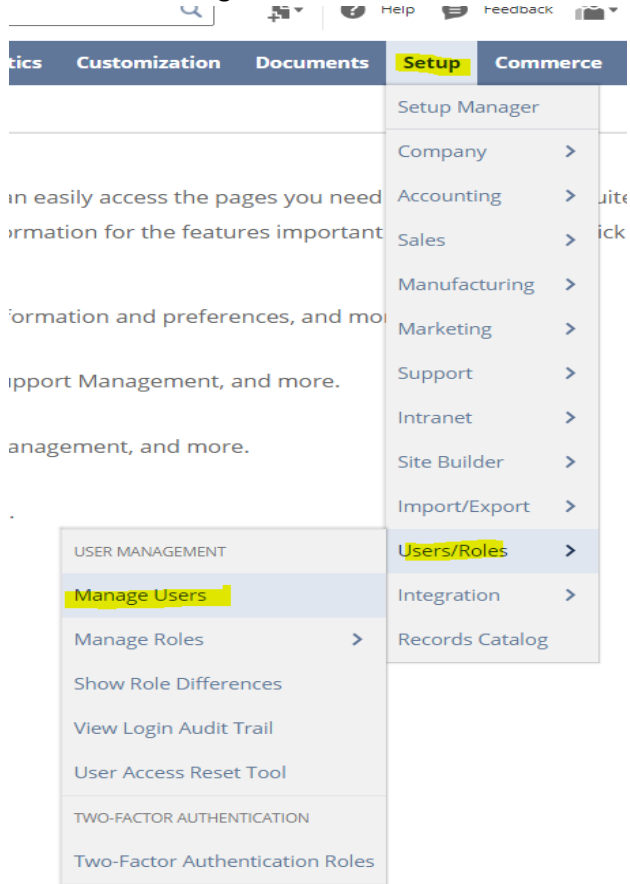
Permissions Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions • Reports • Lists • **Setup** • Custom Record

| PERMISSION * | LEVEL |
|---|-------|
| Accounting Lists | Full |
| Advanced PDF/HTML Templates | Full |
| Allow JS / HTML Uploads | Full |
| CRM Lists | Full |
| Control SuiteScript and Workflow Triggers in Web Services Request | Full |
| Control SuiteScript and Workflow Triggers per CSV Import | Full |
| Custom Lists | View |
| Custom Sublist | View |
| Customer Status | Full |
| Integration Application | Full |
| Manage Accounting Periods | Full |
| Manage Users | Full |
| Mobile Device Access | Full |
| Other Lists | View |
| SOAP Web Services | Full |
| Sales Force Automation Setup | Full |
| Sales Territory | View |
| Subsidiary Hierarchy Modification | Full |
| Subsidiary Settings Manager | View |
| SuiteSignOn | Full |
| Two-Factor Authentication base | Full |

SalesOutlook / NetSuite Integration Setup Instructions

Click Setup, Users/Roles | Manage Users. Add the new role to each user that will be using SalesOutlook. You can share a login if needed but all records will be created by this user



SalesOutlook / NetSuite Integration Setup Instructions

Select and Edit a user, scroll down to the Access section and Add the SalesOutlook role.

Access

For new access provisioning consider sending a New Access Notification Email with a password setup URL instead of manually assigning a user password.

GIVE ACCESS MANUALLY ASSIGN OR CHANGE PASSWORD

SEND NOTIFICATION EMAIL REQUIRE PASSWORD CHANGE ON NEXT LOGIN

PASSWORD

CONFIRM PASSWORD

Password Criteria

- Is at least 10 characters long ✖
- Does not contain illegal characters ✖
- Contains at least 3 of these 4 character types: ✖
 - Uppercase alpha characters (A, B, ... Z)
 - Lowercase alpha characters (a, b, ... z)
 - Numbers (1, 2, 3, 4, 5, 6, 7, 8, 9, 0)
 - Non-alphanumeric ASCII characters (!@#\$%^&*.;:~'"/+?-_|=|{}[]<>)
- New passwords match ✖

Roles ()

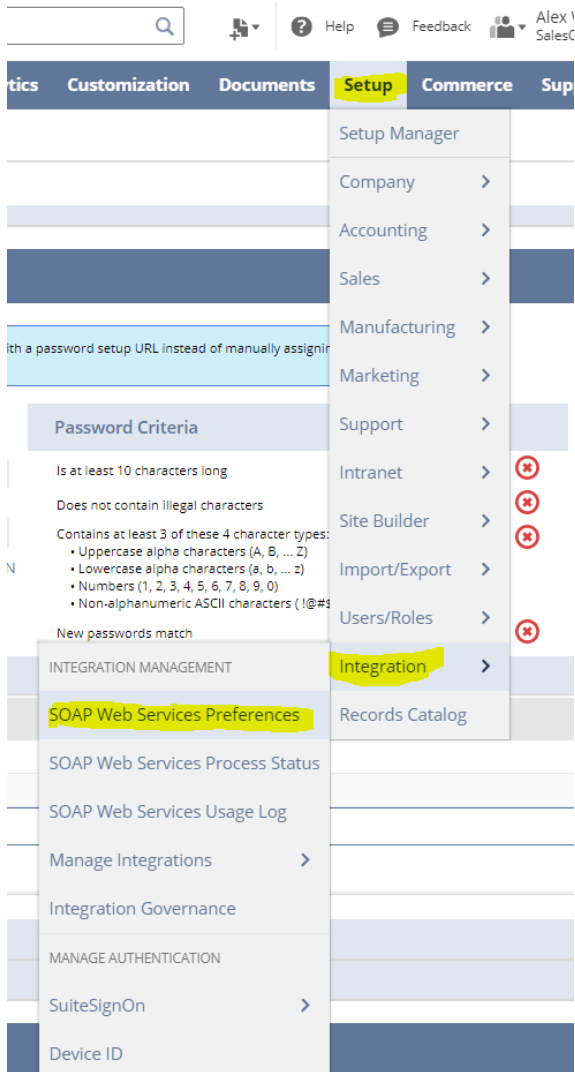
ROLE *

03: VP Sales

SalesOutlook

SalesOutlook / NetSuite Integration Setup Instructions

Click on Setup | Integration | Soap Web Services Preferences.



Make a note of the Account ID, Role ID and Application ID (from instructions above). Each user will need this information. The integrations steps are now complete.

SOAP Web Services Preferences

More

Primary Information

ACCOUNT ID
TSTD0V1556179

SEARCH PAGE SIZE
1000

USE CONDITIONAL DEFAULTS ON ADD
 TREAT WARNINGS AS ERRORS

USE CONDITIONAL DEFAULTS ON UPDATE
 DISABLE MANDATORY CUSTOM FIELD VALIDATION
 RUN SERVER SUITESCRIPT AND TRIGGER WORKFLOWS
 REQUIRE APPROVAL DURING AUTO-INSTALLATION OF INTEGRATION

| NAME* | WEB SERVICES DEFAULT ROLE* | ID |
|-------------|----------------------------|-------|
| Alex Wolfe | Administrator | 3 |
| Gary Cawley | SalesOutlook | 1,073 |

+ Add Row

SalesOutlook / NetSuite Integration Setup Instructions

Setting up users to synchronize SalesOutlook with NetSuite.

Install SalesOutlook ([See the SalesOutlook Install Guide](#))

The user will need the following from the NetSuite Integration steps above.

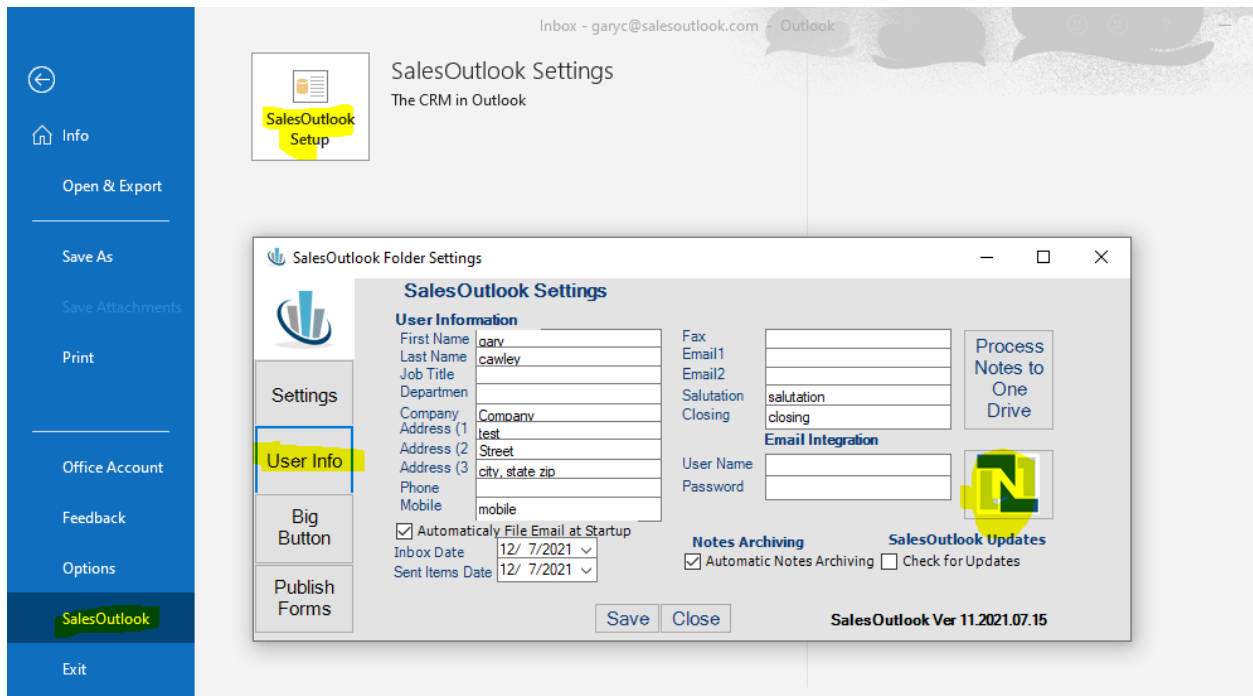
NetSuite User login and Password

NetSuite Account ID

NetSuite Application ID

NetSuite Role ID

In Outlook Choose File | SalesOutlook | SalesOutlook Setup | User Info Tab | Click on the NetSuite button. The SalesOutlook Integration will load in the show hidden icons area of Microsoft Windows.



In the bottom right notification area in Windows, double click on the SalesOutlook icon.



SalesOutlook / NetSuite Integration Setup Instructions

The SalesOutlook NetSuite Integration screen will pop up. Enter the information and click Save.

SalesOutlook / NetSuite Integration SalesOutlook - Atlanta Import Menu Save

Enter Netsuite Credentials

Company ID:

Application ID:

Login:

Password:

Role ID:

| Subsidiary | Address |
|------------------------|---------------------------|
| SalesOutlook - Atlanta | test sub United States |

Task Manager *Untitled - ... *Untitled - ... *Untitled - ... W SalesOutloo... Desktop 72°F 5:18 PM 8/17/2021

So in this sample the user would need the following:

Company ID(Account ID)= TSTDRAV1556179

Application ID=FF300CBD-23B3-47B4-A3D9-D25E7A0FEECD

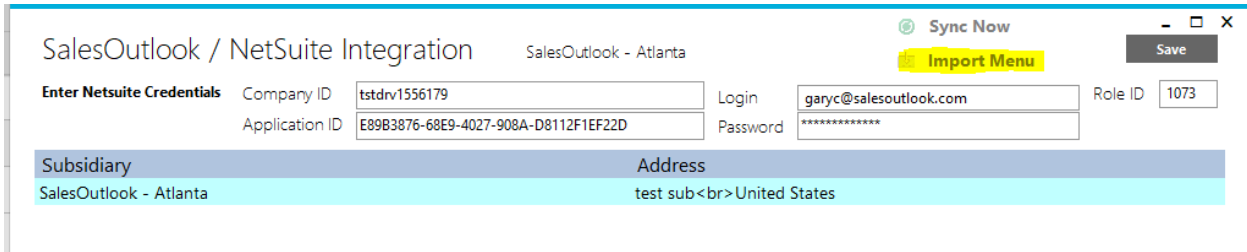
NetSuite login ID and password

Role ID =1073

SalesOutlook / NetSuite Integration Setup Instructions

Importing NetSuite Records.

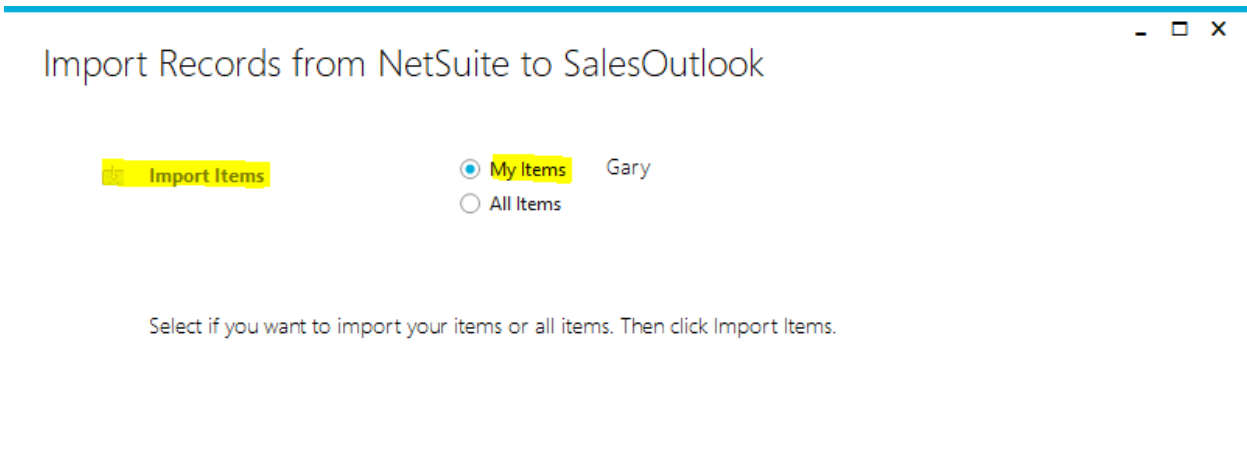
Double click on the SalesOutlook icon in the hidden icon section and click on Import Menu.



The screenshot shows a web application window titled "SalesOutlook / NetSuite Integration" with a subtitle "SalesOutlook - Atlanta". In the top right corner, there are buttons for "Sync Now" (with a refresh icon), "Import Menu" (highlighted in yellow), and "Save". Below the title, there is a section for "Enter Netsuite Credentials" with the following fields: "Company ID" (tstdrv1556179), "Application ID" (E89B3876-68E9-4027-908A-D8112F1EF22D), "Login" (garyc@salesoutlook.com), "Password" (masked with asterisks), and "Role ID" (1073). At the bottom, there is a table with two columns: "Subsidiary" and "Address". The table contains one row with the values "SalesOutlook - Atlanta" and "test sub
United States".

| Subsidiary | Address |
|------------------------|---------------------------|
| SalesOutlook - Atlanta | test sub United States |

Select the users records or if you are setting up all users, click on All items and then click on Import Items.



The screenshot shows a dialog box titled "Import Records from NetSuite to SalesOutlook". It features a yellow "Import Items" button on the left. To the right of the button are two radio button options: "My Items" (which is selected) and "All Items". The name "Gary" is displayed next to the "My Items" option. Below the radio buttons, there is a line of instructional text: "Select if you want to import your items or all items. Then click Import Items."