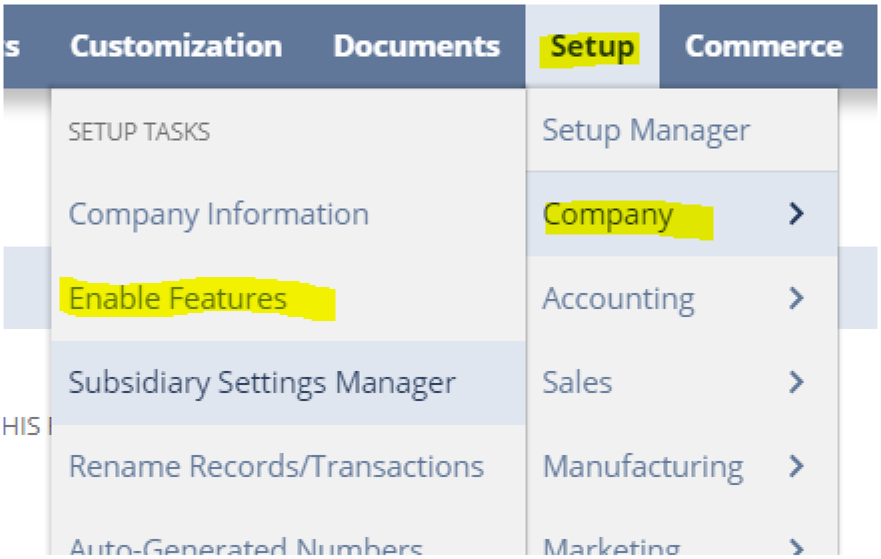
Contents

SalesOutlook / NetSuite Integration Setup Instructions

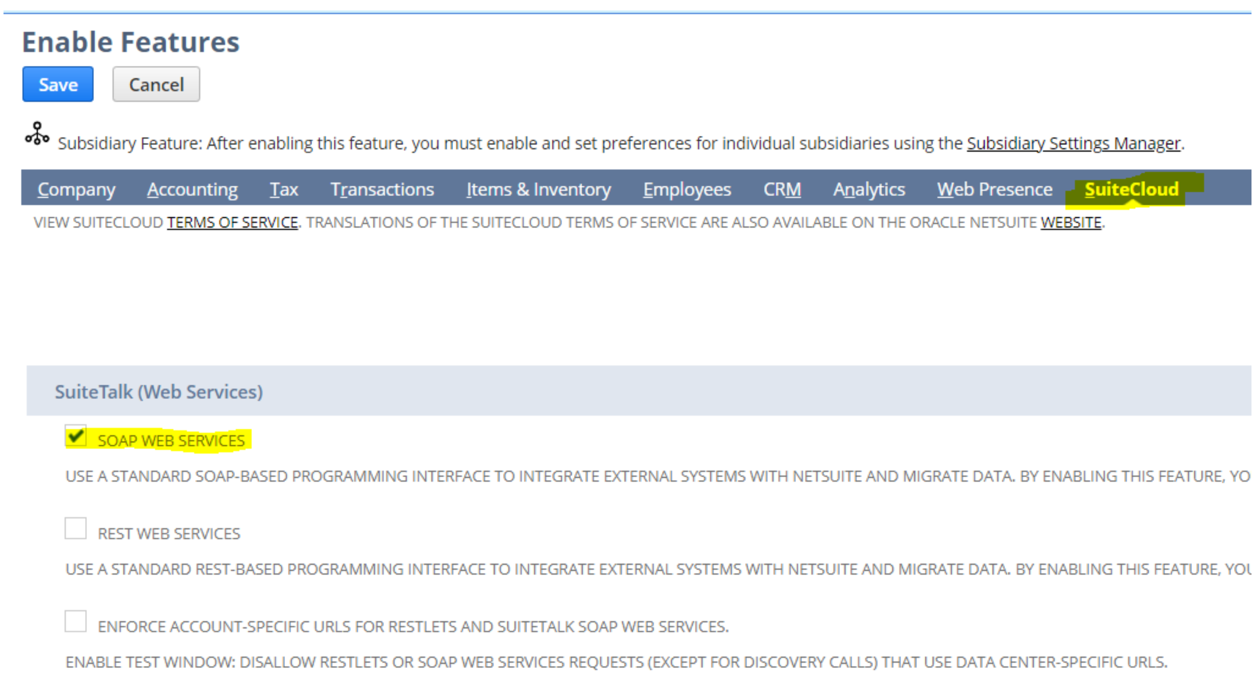
Setting up NetSuite to allow integration with SalesOutlook.

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 enabler Soap Web Services so it may already be checked.



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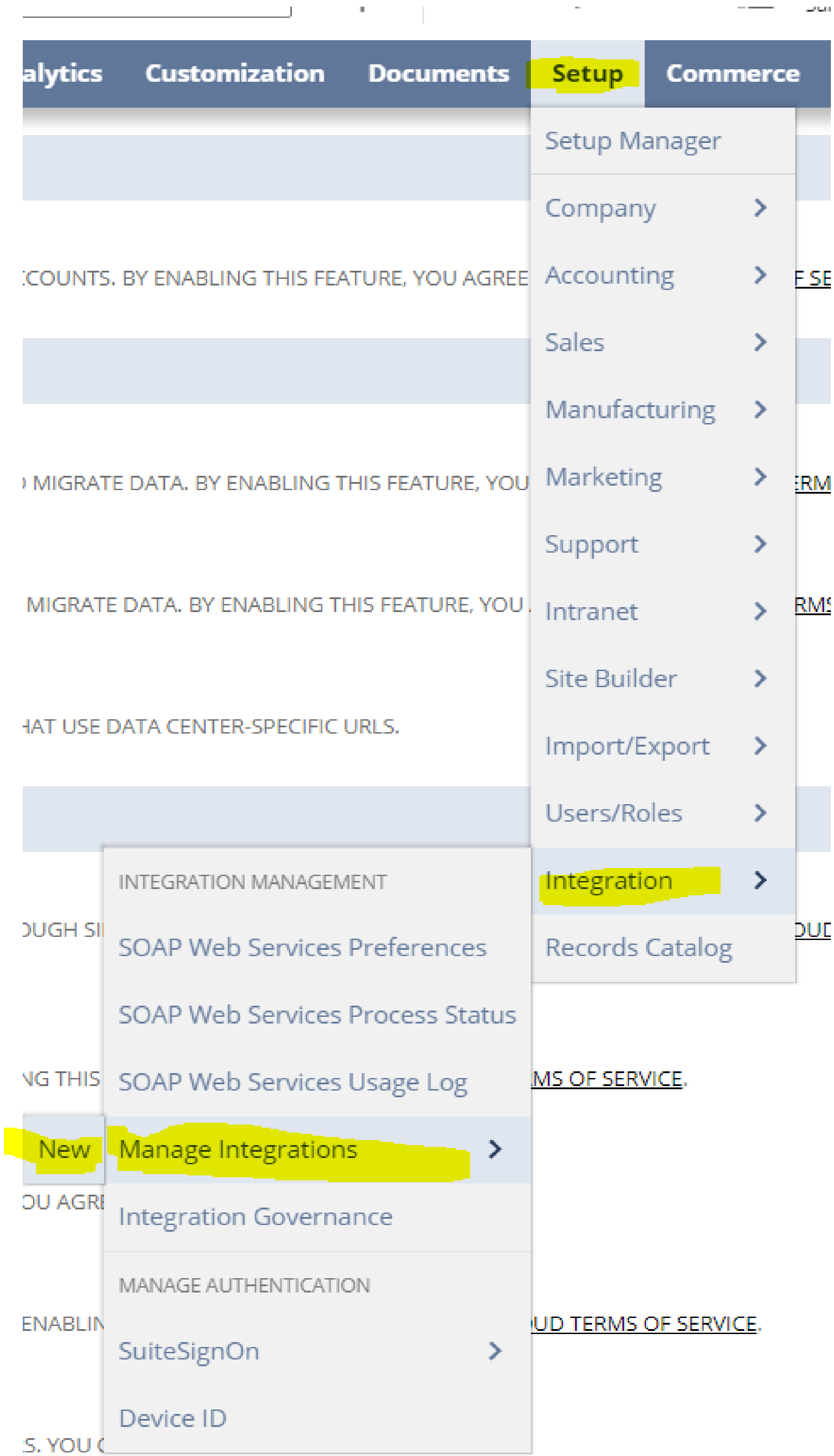
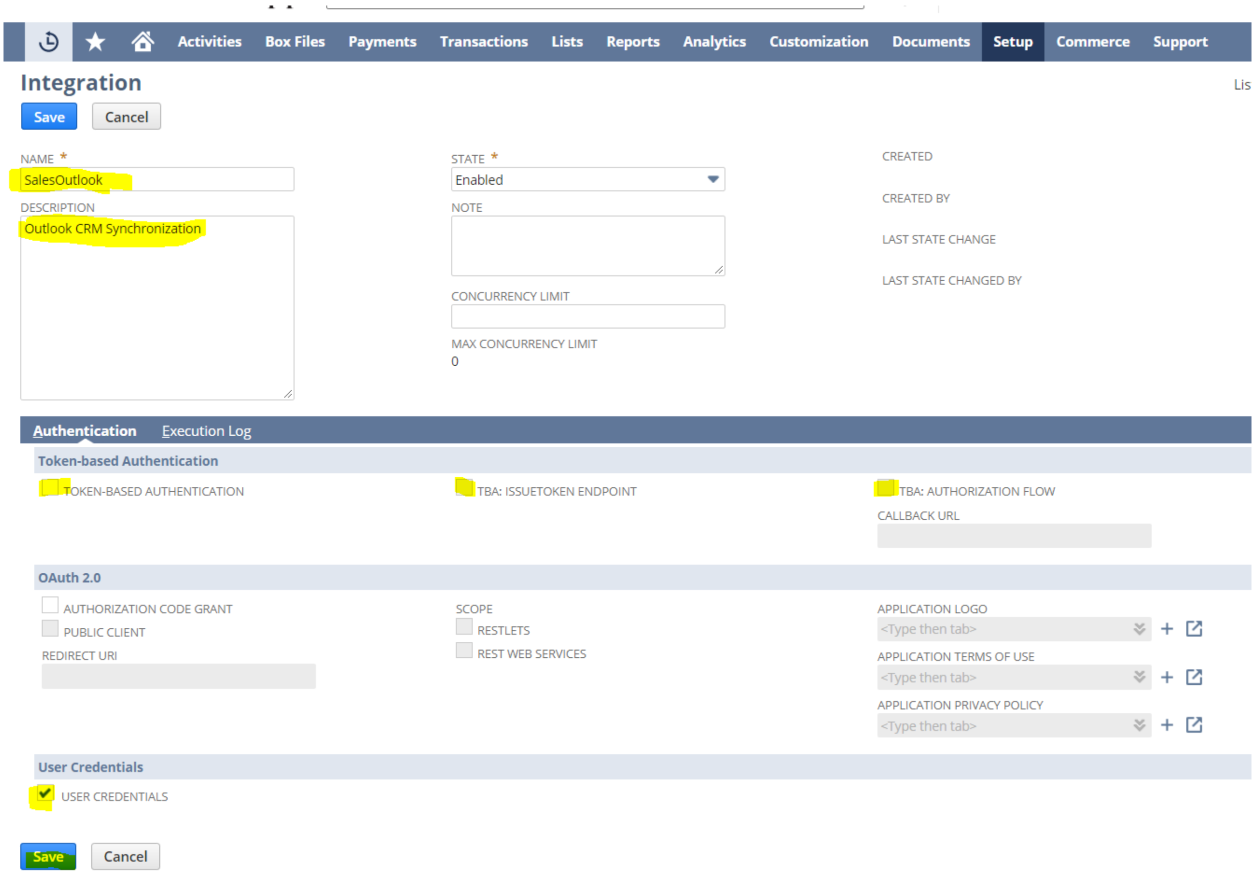
Click on Setup and choose Integration | Manage Integrations |New.

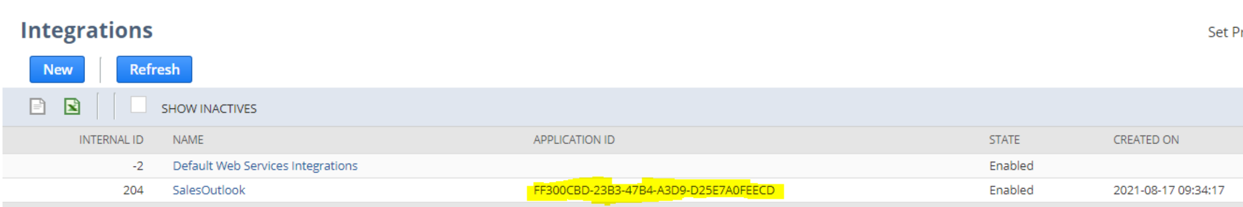


SalesOutlook / NetSuite Integration Setup Instructions

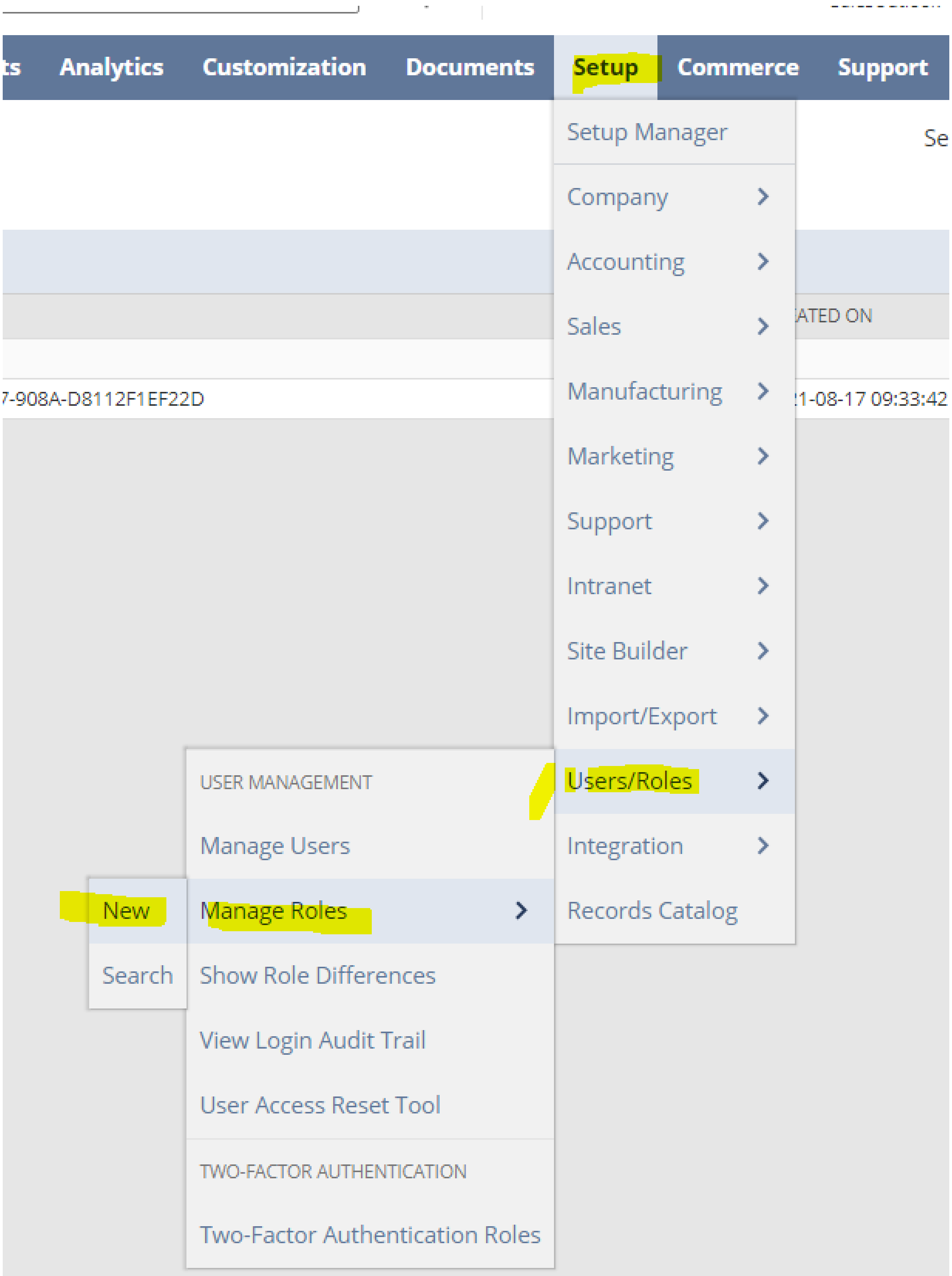
Enter in SalesOutlook as the name and description. Check User Credentials as the integration type. Click Save.



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



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



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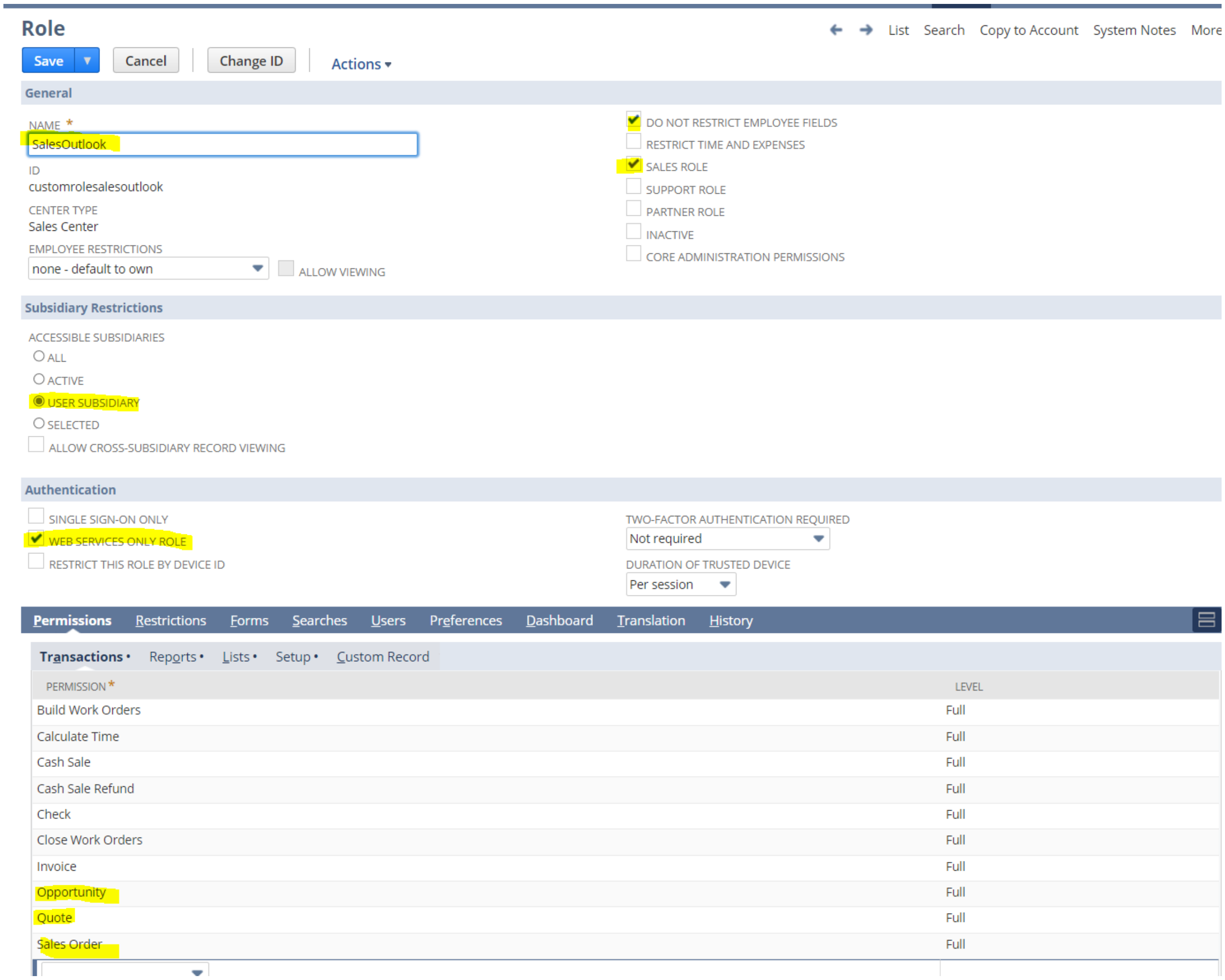
Enter in SalesOutlook as the name and check Do Not Restrict Employee fields and Sales Role. Select User Subsidiary and Web Services Role Only. Click on Permissions and Add the transaction roles you want the users to have.



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

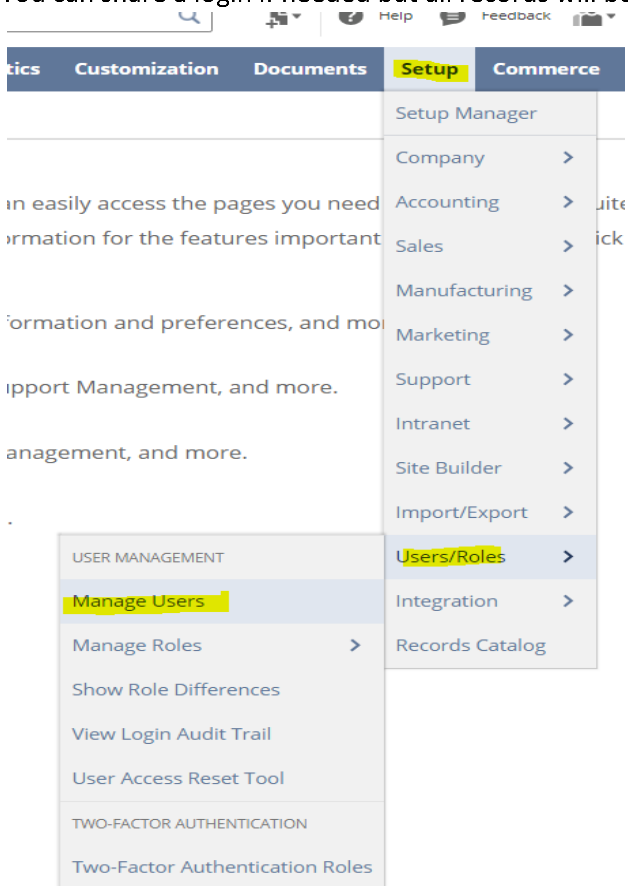
Click on Setup and make sure the following highlighted items are added and the level is set to Full.

Permissions Restrictions Forms Searches Users Preferences Dashboard Translation History

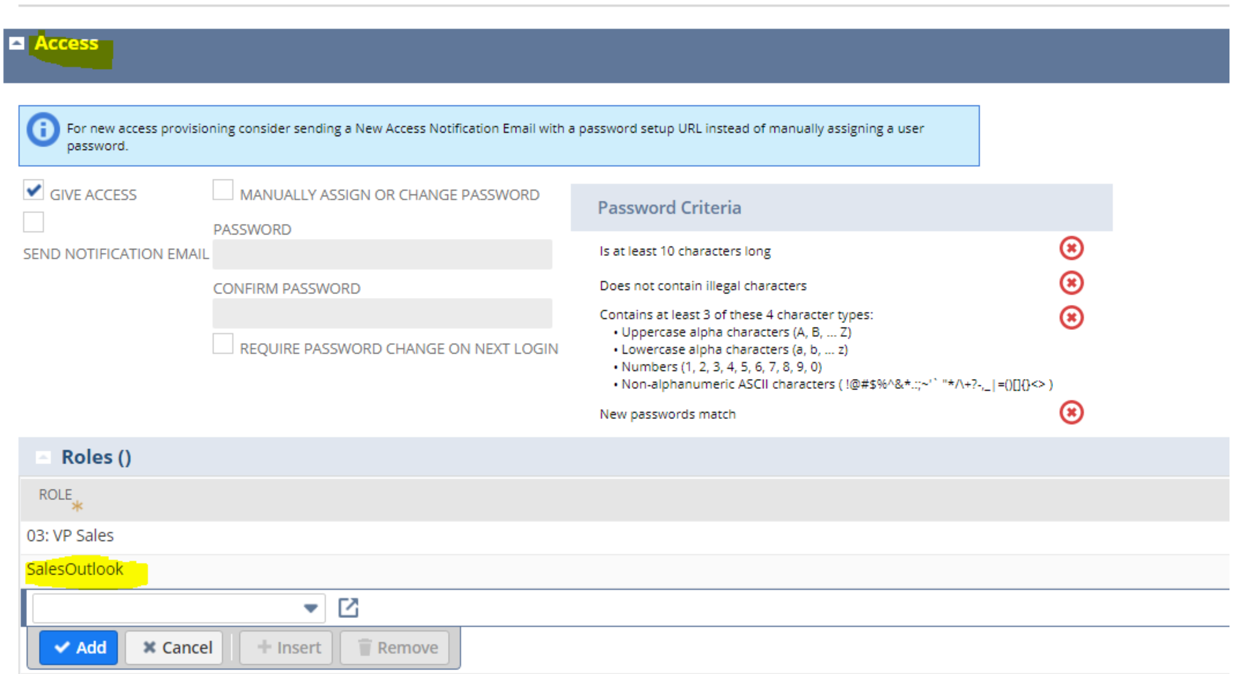
Transactions • Reports • Lists • **Setup •** Custom Record

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

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

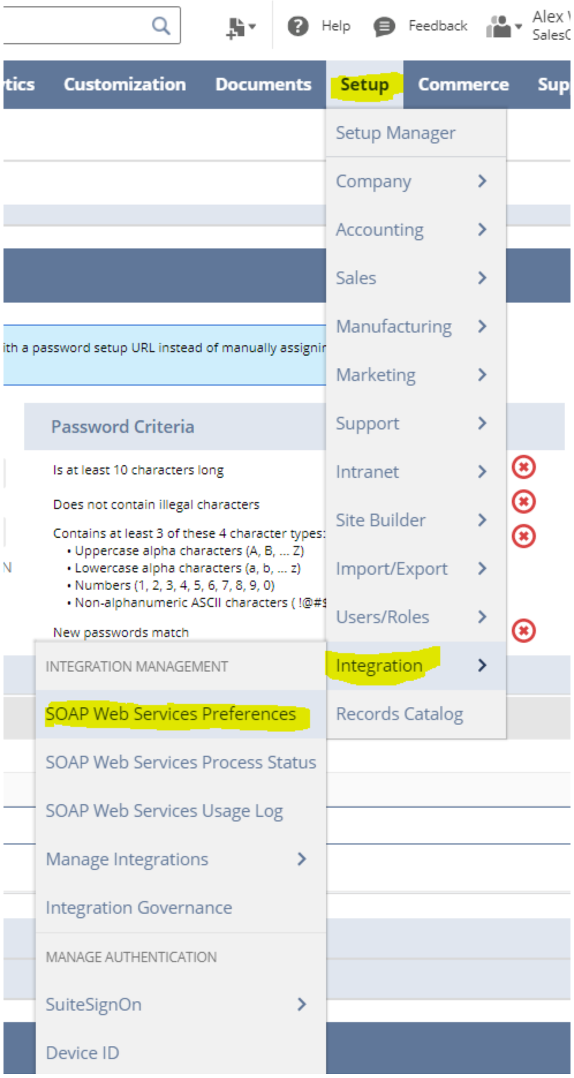


Select and Edit a user, scroll down to the Access section and Add the SalesOutlook role.

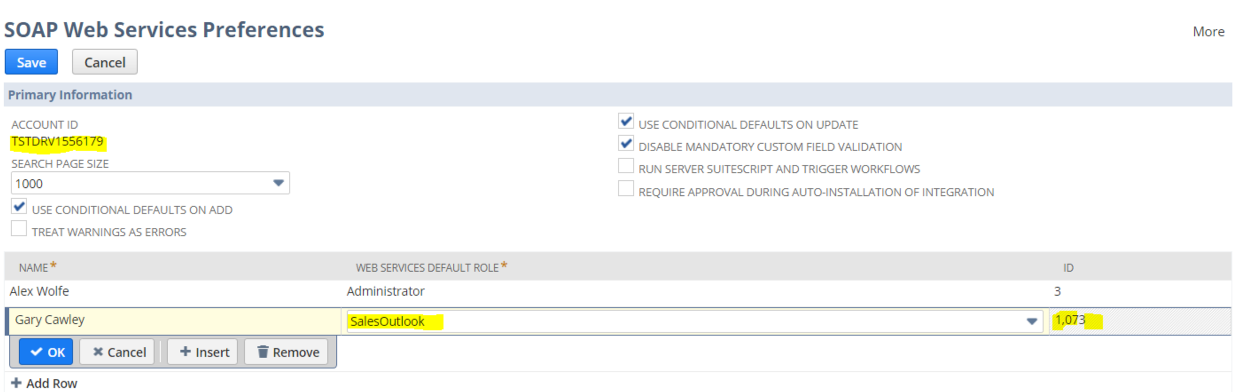


SalesOutlook / NetSuite Integration Setup Instructions

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.



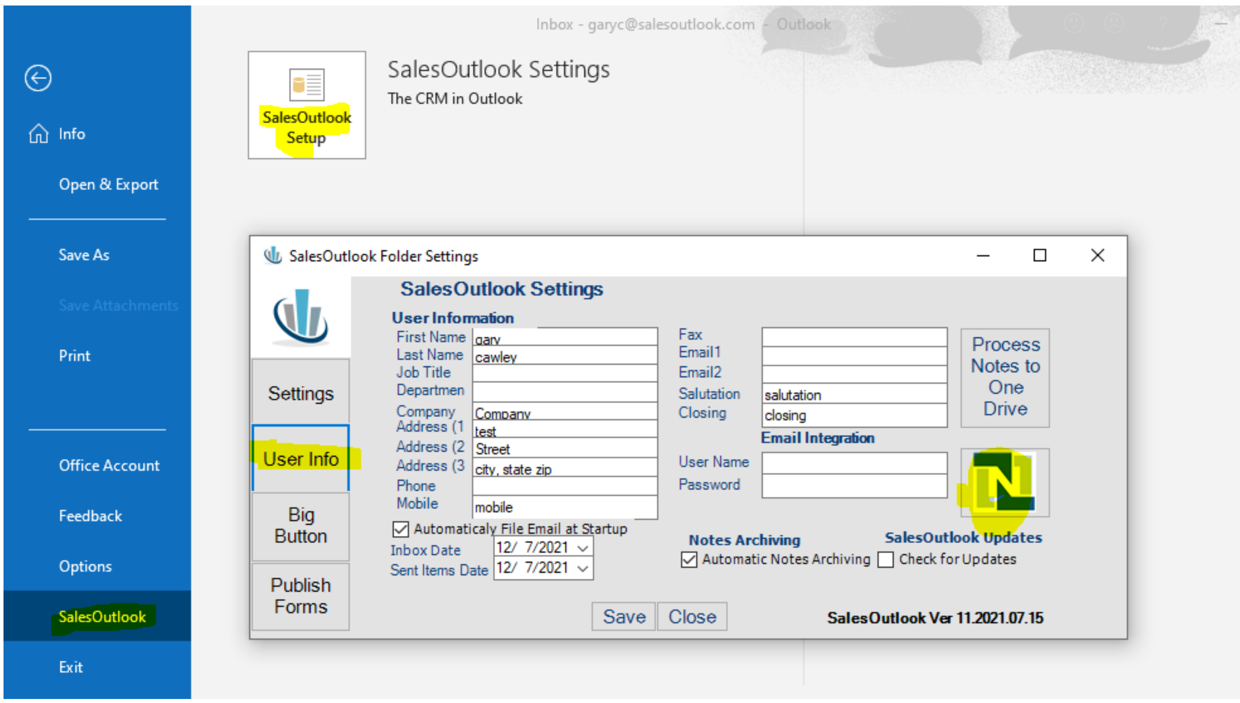
Setting up users to synchronize SalesOutlook with NetSuite.

Install SalesOutlook (See the SalesOutlook Install Guide)

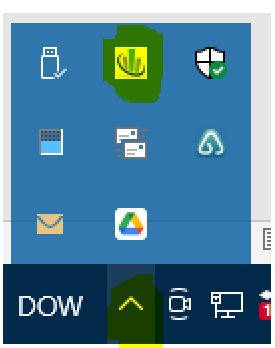
The user will need the following from the NetSuite Integration steps above.

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.

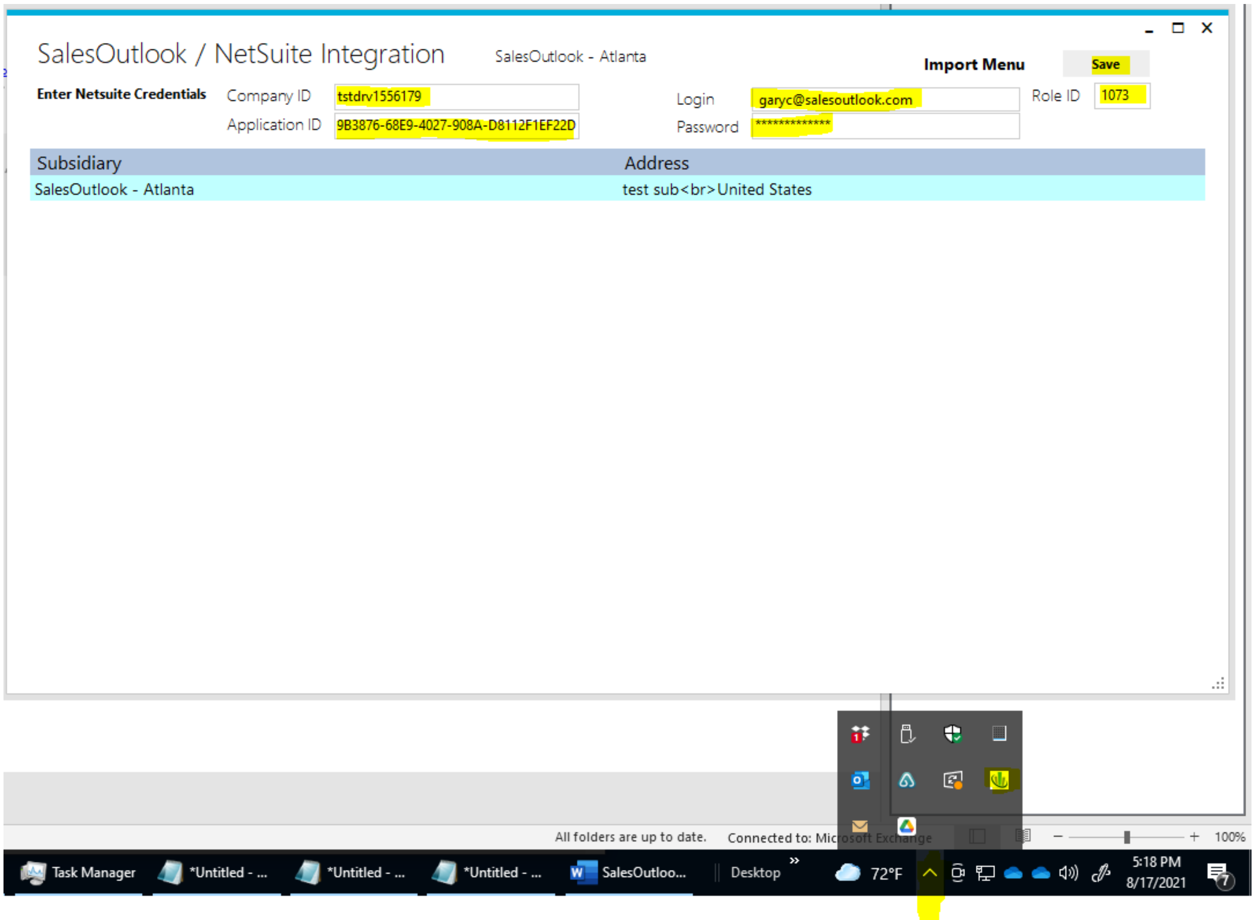


In the bottom right notification area in Windows, double click on the SalesOutlook icon.



SalesOutlook / NetSuite Integration Setup Instructions

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

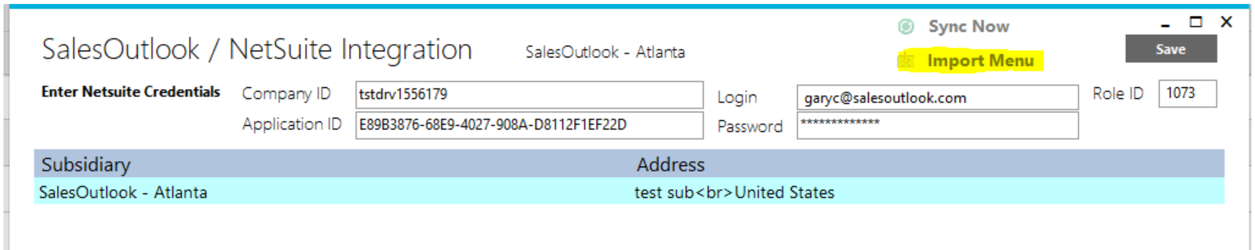


So in this sample the user would need the following:

Company ID(Account ID)= TSTDRV1556179
Application ID=FF300CBD-23B3-47B4-A3D9-D25E7A0FEECD
NetSuite login ID and password
Role ID =1073

Importing NetSuite Records.

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



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