



StarterPak: NetSuite to Salesforce Products and Pricing

1.0

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# NetSuite To Salesforce Products And Pricing StarterPak

StarterPaks provide a base set of Maps and configuration files you can leverage when integrating data between applications. Each StarterPak requires customization to integrate your data properly. Therefore, it is important that you read and understand the entire document before attempting to use the contents of the StarterPak.

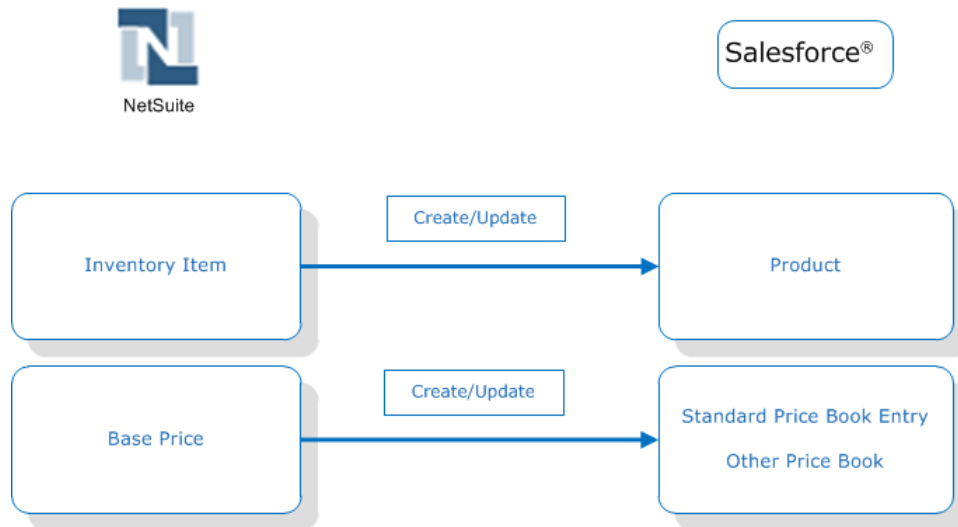
Scribe StarterPaks are meant to be used as a starting point for your own projects, and should not be considered “plug and play”. StarterPaks are available as is, with no guarantee or commitment of support for the associated Maps and configuration files.

Welcome to Scribe’s NetSuite To Salesforce Products And Pricing StarterPak. This StarterPak supports creating Products and Price Book entries in Salesforce from NetSuite Items and Price Levels.

This StarterPak is part of the NetSuite and Salesforce StarterPak series and can be used independently or with other StarterPaks in the series.

## About The StarterPak

This StarterPak uses NetSuite Items to create Salesforce Products, as shown:



**NetSuite To Salesforce Products And Pricing**

This StarterPak is available as a downloadable ZIP file, **ScribeStarterPak-NetSuite-to-Salesforce-Products-and-Pricing\_v1\_0.zip**, from the [Scribe Downloads page](#).

## StarterPak Contents

The StarterPak includes:

- **NS - SF Products & Pricing.xml** – An XML file containing the Scribe Online Map that defines the mappings between NetSuite and Salesforce for products and pricing.
- **SalesforceUnmangedPackageLinkProduct.txt** – A link to an unmanaged package that creates the **ScribeExternalId** field on the Product entity in Salesforce.

## Requirements

In addition to the StarterPak, your site needs:

- A trial or paid subscription to Scribe Online Integration Services (IS).
- Access to a Salesforce Organization
- A Salesforce user with appropriate credentials and permissions to:
  - Import unmanaged packages
  - Edit page layouts
  - Create and update the entities into which the StarterPak migrates
- Access to a NetSuite Organization
- A NetSuite user with appropriate credentials and permissions to query the entities the StarterPak uses
- A Scribe Online Cloud or On-Premise Agent

Although this StarterPak does not use CSV files or Lookup Tables, using them is suggested later in this document.

If you plan to use CSV files you must use an On-Premise Agent.

- A NetSuite configuration with **Multiple Prices** enabled. To configure this setting:
  1. In NetSuite, select **Setup > Company > Enable Features**.
  2. On the **Enable Features** page, click **Transactions**.
  3. Under **Sales**, verify the **Multiple Prices** option is selected.

Item pricing integration is only supported under this configuration.

## Preparing The StarterPak

This section describes the steps required to prepare and customize NetSuite and Salesforce, extract files from the .zip file, and configure Scribe Online Connections.

For information on Scribe Online tasks, such as configuring Connections and using Scribe Online, see the [Scribe Online Help Center](#).

### Extract The Files From The Zip File

1. Download the **ScribeStarterPak-NetSuite-to-Salesforce-Products-and-Pricing\_v1\_0.zip** file.
2. Extract the files to a location that can be accessed by Scribe Online.
3. Install the Salesforce package by doing one of the following:
  - Select [Install Salesforce Package](#) to start the Salesforce Package Installation.
  - Open the **SalesforceUnmanagedPackageLinkProduct.txt** file that you just extracted.
  - Copy the link from the text file to your browser.
4. Follow the prompts to install the package.
5. Copy the following XML file to a directory under your Scribe Online installation, such as **..\Scribe Software\Scribe Online Agent\Maps\**:
  - **NS - SF Products & Pricing.xml**

## Configuring The Scribe Online Connections

Connections are used in multiple Maps, therefore, Scribe recommends creating Connections from the Connections page and adding them to the Maps as needed. For information, see [Adding Connections](#).

### Configure The Salesforce Connection

Configure the Salesforce Connection as described in [Scribe Online Connector For Salesforce](#).

Verify that you have the credentials and permissions to:

- Create and update products
- Create price book entries
- Query price books entries

If you are using an existing Salesforce Connection, refresh the metadata as described in [Resetting Metadata](#).

### Configure the NetSuite Connection

Configure the NetSuite Connection as described in [Scribe Online Connector For NetSuite](#).

Verify that you have the credentials and permissions to:

- Query items
- Query item price lists


If you are using an existing NetSuite Connection, refresh the metadata as described in [Resetting Metadata](#).



## Configuring The Scribe Online Solution

After you create Scribe Online Connections, configure the Solution.

### Configure The Solution

1. Configure a new Solution. See [Adding Or Editing An Integration Solution](#).
2. In the Maps section of the Solution, select **Import** from the Menu .
3. Browse to the **NS - SF Products & Pricing.xml** file, and import that file. See [Exporting And Importing Maps](#).

The imported Maps show as Incomplete.

4. Open each Map and configure the Connections. See [Defining An Integration Map](#).

You must modify the Map for your NetSuite and Salesforce Organizations, and your business requirements. More information is provided in the [StarterPak Map](#).

## StarterPak Map

This section provides details about the Map included in this StarterPak. For more information on the specific field mappings, review the Map in Scribe Online.

- **NS-> SF: Inventory Item Upsert** – Retrieves all active items of type Inventory Item from NetSuite. By default, the Map processes all records created or updated since the last run/date time, which is based on the NetSuite **lastModifiedDate** field. It also retrieves all related Inventory Item Price Lists or Price Levels, and creates or updates Products and Price Books in Salesforce from NetSuite Inventory Item and Price Level information.

This Map contains hard-coded values that must be replaced with the values from your Organizations or with an appropriate formula. More information is provided below.

## General Information

This section provides additional information about the Product and Pricing information in the Map in this StarterPak.

### Product

The **internalID** of the Item from NetSuite is written to the **ScribeExternalId** field on the Product in Salesforce. If an existing Product in Salesforce has a matching **internalID/ScribeExternalId**, it is updated. Otherwise, a new Product is created.

NetSuite has many types of items. Each supported type is exposed as its own entity. To integrate a type other than Inventory Item, duplicate the provided Map and modify as needed. See the [Scribe Online Connector For NetSuite](#) topic for more information on the supported types.

### Pricing

Although NetSuite supports quantity-based pricing and multiple price levels, this StarterPak only supports a single price level, which is the Base Price, and quantity 0 pricing.

## Price Books

The Base Price from NetSuite is used to create an entry in the Price Book that is designated as the **Standard Price Book** and in an additional Price Book. If the Price Book Entry for the Product/Price Book combination already exists, it is updated. Otherwise, a new Price Book Entry is created.

Salesforce requires each Product to have an entry in the Price Book that is designated as the **Standard Price Book** before you can add a product to any other Price Book.

To designate a Price Book as the **Standard Price Book**, in Salesforce, select the **Is Standard Price Book** option.

## Required Map Edits

You must change the following in the Lookup Criteria of both **Lookup SF Price Book Entry** Blocks:

- **First Lookup Block** – Change the value for the **Pricebook2Id** field to represent the ID of the Price Book designated as the **Standard Price Book** on your system.
- **Second Lookup Block** – Change the value for the **Pricebook2Id** field to represent the ID of an additional Price Book on your system.
- **Both Create SF Price Book Entry Create Blocks** – Change the following in the Field mappings:
  - **First Create Block** – Change the Formula for the **Pricebook2Id** field to represent the ID of the Price Book designated as the **Standard Price Book**, on your system.
  - **Second Create Block** – Change the Formula for the **Pricebook2Id** field to represent the ID of an additional Price Book on your system.

You can create a simple Map in Scribe Online to query the Salesforce **Pricebook2** entity to determine the ID value of a Price Book.

To integrate additional Price Levels, manually create the corresponding Price Book(s) in Salesforce. For each Price Level/Price Book you want to integrate, modify the Map and add a nested **If/Else** Block in the **For Each NS Inventory Item Price List** Block. With a CSV file or Lookup Table, replace the hard-coded Salesforce IDs in the **Lookup Salesforce Price Book Entry** Blocks with the appropriate formula, using:

- The Price Level Name, as it appears in NetSuite
- The corresponding Salesforce ID of the corresponding Price Book