



StarterPak: Salesforce To NetSuite Customers

1.0

7/21/2017

## **Important Notice**

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, photocopying, recording, or otherwise, without prior written consent of Scribe Software Corporation. No patent liability is assumed with respect to the use of the information contained herein. While every precaution has been taken in the preparation of this book, Scribe Software Corporation assumes no responsibility for errors or omissions. This publication and features described herein are subject to change without notice. Scribe Software Corporation makes no representations or warranties, either expressed or implied, by or with respect to anything in this manual, and shall not be liable for any implied warranties of merchantability or fitness for a particular purpose or for any indirect, special or consequential damages.

## **Disclaimer**

The names of companies, products, people, and/or data used in window illustrations and sample output are fictitious and are in no way intended to represent any real individual, company, product, or event, unless otherwise noted.

## **Trademarks**

Scribe Online is a trademark of Scribe Software Corporation. All other products or services mentioned in this document are identified by the trademarks or service marks of their respective companies or organizations. Scribe Software Corporation disclaims any responsibility for specifying which marks are owned by which companies or organizations.

## **Publishing Information**

Copyright © 1996-2017 Scribe Software Corp. All rights reserved.

# Contents

<b>Salesforce To NetSuite Customers StarterPak</b> .....	1
About The StarterPak .....	1
StarterPak Contents .....	2
Requirements .....	2
<b>Preparing The StarterPak</b> .....	3
Extract The Files From The Zip File .....	3
<b>Configuring The Scribe Online Connections</b> .....	4
Configure The Salesforce Connection .....	4
Configure the NetSuite Connection .....	4
<b>Configuring The Scribe Online Solutions</b> .....	5
Create Solutions .....	5
<b>StarterPak Maps</b> .....	6
Customers And Addresses .....	6
Identifier Keys .....	6
Parent/Child Relationships .....	7
Addresses .....	7
State And Country Values .....	7
Upsert, Update, And Update/Insert In NetSuite .....	8
<b>Additional Notes And Known Issues</b> .....	9
Country Missing From Address .....	9

# Salesforce To NetSuite Customers 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.

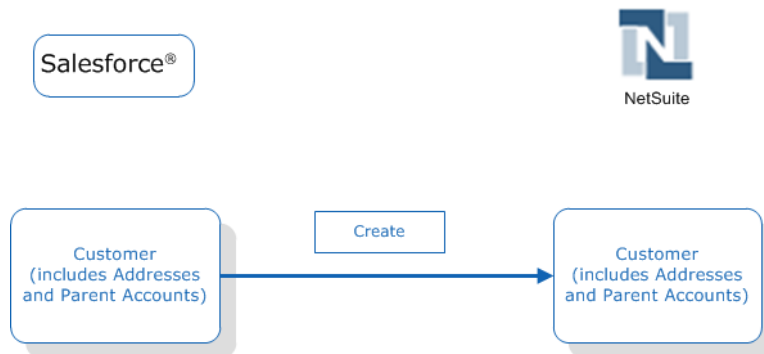
Scribe StarterPaks are meant to be used as a starting point for your own projects, and should not be considered “plug and play”. StarterPaks are available as is, with no guarantee or commitment of support for the associated Maps and configuration files.

Welcome to Scribe’s Salesforce To NetSuite Customers StarterPak. This StarterPak supports creating Customers in NetSuite from Salesforce Accounts, including default Billing Address, default Shipping Address, and Parent Account information. Sample data files are also provided.

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 creates Customers in NetSuite from Accounts in Salesforce, as shown:



### Salesforce To NetSuite Customers

This StarterPak is available as a downloadable zip file, **ScribeStarterPak-Salesforce-to-NetSuite-Customers\_v1\_0.zip**. You can download this file from the [Scribe Downloads page](#).

## StarterPak Contents

The StarterPak includes:

- **SF-NS Customers.xml** – An XML file containing the Scribe Online Maps that define the mappings between Salesforce and NetSuite for Customers:
  - **SF -> NS: Customer Create**
  - **SF -> NS: Update Parent Customer**
- **..\Samples** – A folder containing sample CSV files:
  - **Country.csv**
  - **MX.csv**

## 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 with State and Country Picklists enabled.
- A Salesforce user with appropriate credentials and permissions to query the entities into which the StarterPak integrates.
- Access to a NetSuite Organization
- A NetSuite user with appropriate credentials and permissions to create the entities the StarterPak uses
- A Scribe Online Cloud Agent On-Premise Agent

The StarterPak uses CSV files that require an On-Premise Agent. If you plan to use a Cloud Agent, you must convert the CSV files to Lookup Tables and modify the formulas within the Maps accordingly.

## Preparing The StarterPak

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

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

### Extract The Files From The Zip File

1. Download the **ScribeStarterPak-Salesforce-to-NetSuite-Customers\_v1\_0.zip** file.
2. Extract the files to a location that can be accessed by Scribe Online.
3. Copy the **SF-NS Customers.xml** file to a directory under your Scribe Online installation, such as **..\Scribe Software\Scribe Online Agent\Maps\**.
4. Copy all the files from the **..\Samples** folder, created when the zip file was extracted, to the **Scribe Software\Scribe Online Agent\Data Exchange** folder.

## 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 query Accounts.

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 create Customer and Customer Address.

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

## Configuring The Scribe Online Solutions

After you create Scribe Online Connections, configure the Solution.

### Create Solutions

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 **SF - NS Customers.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 Maps for your NetSuite Organization, your Salesforce Organization, and your business requirements. For more information, see [StarterPak Maps on the next page](#).



## StarterPak Maps

This section provides details about the Customer and Parent Accounts Maps included in this StarterPak.

The StarterPak provides the following Customer Account Maps:

- **SF -> NS: Customer Create** – Retrieves all active, non-deleted Accounts from Salesforce, and creates new Customers in NetSuite including Billing Addresses and Shipping Addresses. By default, the Map processes all records created or updated since the last run/date time, which is based on the Salesforce **LastModifiedDate** field.
- **SF -> NS: Update Parent Account** – Retrieves all active, non-deleted Accounts from Salesforce that have a related Parent Account, and updates the corresponding Customer in NetSuite with its Parent Customer. By default the Map processes all records created or updated since the last run/date time, which is based on the Salesforce **LastModifiedDate** field.

If your Organization does not use parent Accounts in Salesforce, you do not need to implement the **SF -> NS: Update Parent Account** Map.

## Customers And Addresses

When working with Customer and Address information, consider the following.

### Identifier Keys

When you define your integration approach and best practices, you can choose whether or not to store the unique identifiers, or keys. You can do one of:

- Store keys from the source system in the target system
- Store keys from the target system back into the source system
- Do not store keys

The Map provided in the StarterPak stores the key from the source system in the target. The **Account.ID** field on the Account in Salesforce is written to the **ExternalId** of the Customer from NetSuite.

## Parent/Child Relationships

If your Organization uses Parent/Child relationships for Accounts, after all Customers have been integrated, you can use the **SF -> NS: Update Parent Account Map** to update the NetSuite Parent Customer from the Parent Account in Salesforce.

To prevent making assumptions about key sharing, the **Lookup NS Account (Parent)** Map is configured to use the Company Name as the Lookup Criteria. Scribe recommends modifying the match criteria and basing it on the key fields.

## Addresses

The Billing Address and Shipping Address for the Salesforce Account are used to populate the default Billing Address and default Shipping Address in NetSuite.

## State And Country Values

The State and Country values differ between NetSuite and Salesforce. The StarterPak contains two sample CSV files that transform these values between NetSuite and Salesforce, and that formulas in the Maps reference. Because these CSV files do not cover all country and state scenarios, you must review the CSV files and formulas, and update them to suit your business needs. Your implementation may require other CSV files in addition to the samples provided.

- **Country values** – NetSuite Country values differ from Salesforce Country Codes. For example, the NetSuite Country value is `_unitedStates`, while the Salesforce Country Code is `US`. The `Country.csv` file provides a list of NetSuite country values and corresponding Salesforce Country Codes.
- **State values** – The State values in NetSuite and Salesforce may differ and require transformation. For example, by default, the States for United States, Australia, and Canada match and require no transformation. However, the values for Mexico differ and do require transformation. Use the `MX.csv` file, which provides NetSuite State values and corresponding Salesforce values, as an example for other countries that require transformations.

## Upsert, Update, And Update/Insert In NetSuite

You can extend the Maps to support **Upsert** or **Update** for the Customer by changing the Block operation type of the **Create NS Customer** Block:

You can extend the Maps to support **Upsert** or **Update** for the Customer by replacing the **Create NS Customer** Block:

- **Upsert** – Uses the externalId for record matching. The externalId is already linked.
- **Update** – Use either the externalId or internalId for record matching.

The Map can also be extended to support **Updates** for Customer Addresses by changing the Block operation type of the **Create Address** Blocks in the Map:

The Map can also be extended to support **Updates** for Customer Addresses by replacing the **Create Address** Blocks in the Map:

- Use the parentInternalId and the addressInternalId for record matching.
  - **parentInternalId** – The internalId of the Customer associated with the address.
  - **addressInternalId** – The internalId for the specific address.

See [Changing Block Operation Type](#) for additional information.

The Address Entity does not support **Upsert**.

## Additional Notes And Known Issues

When you modify the Maps in this StarterPak, keep the following information in mind.

### Country Missing From Address

If a Salesforce Customer has either a Billing or Shipping Address without a Country, the following error occurs:

```
Error description: Operation failed. Label: Create default Billing Address, Name: CustomerAddressCreate_5, Message: An unexpected error occurred.
```

If the error occurs, the Salesforce Customer integrates to NetSuite, but addresses with no assigned country do not integrate. To resolve this, do one of the following:

- Manually enter the missing addresses in NetSuite.
- Delete the customer from NetSuite, correct the address in Salesforce, and reprocess the record.