



StarterPak: Salesforce To NetSuite Opportunity To Sales Order

1.0

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# Salesforce To NetSuite Opportunity To Sales Order 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.

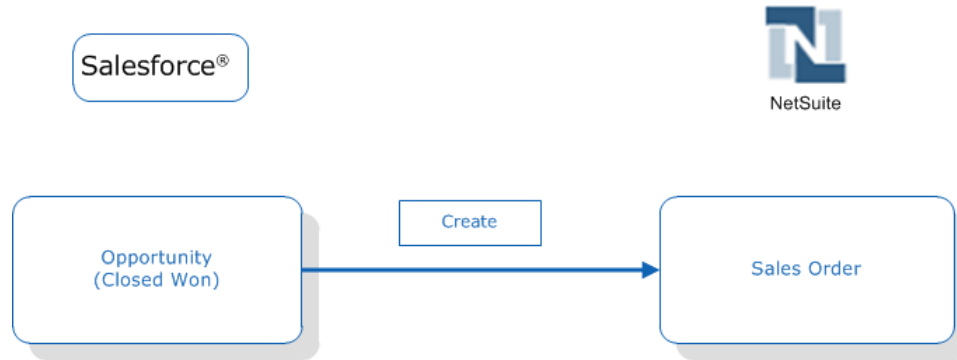
Scribe StarterPaks are meant to be used as a starting point for your own projects, and should not be considered “plug and play”. StarterPaks are available as is, with no guarantee or commitment of support for the associated Maps and configuration files.

Welcome to Scribe’s Salesforce To NetSuite Opportunity To Sales Order StarterPak, which supports creating a Sales Order in NetSuite from a Closed/Won Opportunity and the synced Quote from Salesforce. Designed for a single Price Book/Price Level, it also supports Custom pricing.

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 supports creating Sales Orders in NetSuite from Closed/Won Opportunities in Salesforce:



### Salesforce To NetSuite Opportunity To Sales Order

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

## StarterPak Contents

The StarterPak includes:

- **SF-NS Opportunity to Sales Order.xml** – An XML file containing the Scribe Online Map that defines the mappings between Salesforce and NetSuite for Sales Orders.
- **..\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
  - Quote functionality 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 or 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 Look Up 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 Scribe Insight 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-Opportuntiy-to-SalesOrder\_v1\_0.zip** file
2. Extract the files to a location that can be accessed by Scribe Online.
3. Copy the following XML file to a directory under your Scribe Online installation, such as **..\Scribe Software\Scribe Online Agent\Maps\**:
  - **SF - NS Opportunity to Sales Order.xml**
4. Copy all 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, Opportunities and Quotes.

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
- Customer Address
- Sales Order
- Sales Order Lines


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.

### Create 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 **SF - NS Opportunity to Sales Order.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](#).

The Map requires modifications specific to your NetSuite and Salesforce Organizations and your business requirements. For more information, see [StarterPak Map on the facing page](#).

## 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.

The StarterPak includes the following Map:

- **SF-> NS: Create Sales Order from Closed/Won Opportunity** – Retrieves all Closed Won Opportunities, related Accounts, synced Quotes, and line items from Salesforce, and creates Sales Orders in NetSuite. The Map processes all records created since the last run/date time, which is based on the Salesforce **CreateDate** field. If the related Customer does not exist in NetSuite, the Customer, default Billing Address, and default Shipping Address are created in NetSuite.

This Map creates the Sales Order in NetSuite from a Salesforce Opportunity that has a synced Quote.

If you do not use Salesforce Quotes, modify the **Create NS Sales Order** Block to create a Sales Order in NetSuite from a stand-alone Opportunity in Salesforce:

If you do not use Salesforce Quotes, modify the **Create NS Sales Order** Block to create a Sales Order in NetSuite from a stand-alone Opportunity in Salesforce:

- **externalId** – Change this link to use the Salesforce Opportunity Id, instead of the Salesforce Quote Id.
- **shippingCost** – Do one of the following:
  - If you have Shipping and Handling charges, change this link to use the Salesforce field where your Organization stores Shipping and Handling charges.
  - If you do not have Shipping and Handling charges, set this field to TODOUBLE ("0"), which results in a \$0.00 shipping cost in NetSuite.

## Customers And Addresses

When working with Contact 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 StarterPak stores the key from the source system in the target. The ID on the Account in Salesforce is written to the **externalId** field of the Customer NetSuite.

**Lookup NS Customer** uses the Company Name as the Lookup Criteria, to prevent making assumptions about key sharing. Scribe recommends modifying the match criteria and basing it on the key fields.

### Billing And Shipping Addresses

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

### Sales Order

By default, the Sales Order is created using the default Billing Address and the default Shipping Address from the Customer and the default State in NetSuite. The **Create NS Sales Order** Block contains a hard-coded **internalId** value for the Inventory Location.

You must replace the **InternalID** value for the Inventory Location with the appropriate value for your NetSuite Organization.

### State And Country Values

The State and Country values differ between NetSuite and Salesforce. The StarterPak contains two sample CSV files to transform these values from NetSuite to Salesforce 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.

## Sales Order Lines

When creating transaction lines in NetSuite, you must provide the `internalId` for the Item as well as the Price Level.

The **Lookup NS Inventory Item** Block is configured to use the `ItemId/Product Code` as the Lookup Criteria, so as to not make any assumptions about key sharing. Scribe recommends modifying the match criteria and basing it on the key field.

The **Fetch NS Inventory Item Price List** retrieves and loops through all NetSuite Price Levels associated with the Product. The Map assumes the Base Price in NetSuite and the Standard Price in Salesforce are the same, and is the only Price Level/Price Book in use.

The **If SF Unit Price matches NS Base Price** Block determines if the Salesforce price matches the NetSuite price for the Base Price Level. The Base Price `internalId` is hard-coded in the first **Create NS Sales Order Items** Block. If you either use a Price Level other than the Base Price, or the Salesforce price differs from the value on the NetSuite Price Level, you may need to modify the line to use a Price Level of Custom. The `internalId` for this is hard-coded in the second **Create NS Sales Order Items** Block, and should not have to be changed for any reason.

## 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**.

## Sales Tax

The StarterPak was designed against a NetSuite Organization without Advanced Taxes enabled and with the following Sales Tax configuration:

### Set Up Taxes

For more information, click [Here](#), or click Help at the top of the page.

- ENABLE TAX LOOKUP ON SALES TRANSACTIONS
- CUSTOMERS DEFAULT TO TAXABLE
- ITEMS DEFAULT TO TAXABLE
- CHARGE OUT OF DISTRICT SALES TAXES

- PER-LINE TAXES ON TRANSACTIONS

CHARGE SALES TAX ON STORE ORDERS

Always ▼

DEFAULT TAX CODE \*

-Not Taxable- ▼

TAX CODE LISTS INCLUDE

Tax Groups Only ▼

If the Customer and Item are taxable and you use this configuration with the State Tax tables provided by NetSuite, the Sales Tax is calculated on the postal code of the Shipping Address on the Sales Order. The postal code is contained within a Tax Group.