# StarterPak: Dynamics CRM Opportunity To NetSuite Sales Order

Version 1.0

7/20/2015

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# Contents


**Dynamics CRM Opportunity To NetSuite Sales Order StarterPak** ..... **1**

About The StarterPak ..... 1

StarterPak Contents ..... 1

Requirements ..... 2

Supported Dynamics CRM Versions ..... 2

**Preparing The StarterPak** ..... **3**

Extract The Files From The Zip File ..... 3

**Configuring The Scribe Online Connections** ..... **4**

Configure The Dynamics CRM Connection ..... 4

Configure The NetSuite Connection ..... 4

**Configuring The Scribe Online Solution** ..... **5**

Create Solution ..... 5

**StarterPak Map** ..... **6**

Customers And Addresses ..... 6

Identifier Keys ..... 6

Billing And Shipping Addresses ..... 6

Sales Order ..... 7

State And Country Values ..... 7

Sales Order Lines ..... 7

Upsert, Update, And Update/Insert In NetSuite ..... 8

Sales Tax ..... 9

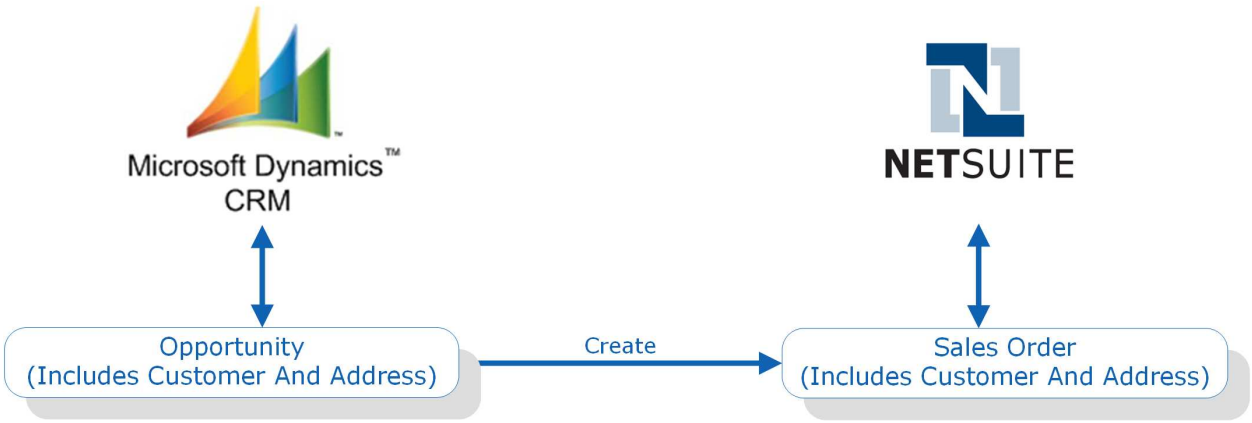
# Dynamics CRM Opportunity To NetSuite Sales Order StarterPak

Welcome to Scribe's Dynamics CRM Opportunity To NetSuite Sales Order StarterPak, which supports creating a Sales Order in NetSuite from a Won Opportunity from Dynamics CRM.

This StarterPak is part of the NetSuite and Dynamics CRM 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 Won Opportunities in Dynamics CRM:




**Dynamics CRM Opportunity To NetSuite Sales Order**

This StarterPak is available as a downloadable zip file, **ScribeStarterPak-DynamicsCRM-to-NetSuite-Opportunity-to-SalesOrder_v1_0.zip**. You can download this file from the Scribe Downloads page.

## StarterPak Contents

The StarterPak includes:

- **CRM-NS Opportunity to Sales Order.xml** — An XML file containing the Scribe Online map that defines the mappings between Dynamics CRM and NetSuite for Sales Orders.
- **..\Samples** — A folder containing a sample csv file:
  - NS_CRM_Country.csv

# Requirements

In addition to the StarterPak, your site needs:

- A trial or paid subscription to Scribe Online Integration Services (IS).
- Access to a Dynamics CRM Organization.
- A Dynamics CRM 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 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 Lookup Tables and modify the formulas within the maps accordingly.

## Supported Dynamics CRM Versions

The following versions of Dynamics CRM are supported:

- Dynamics CRM Online
- Dynamics CRM 2015 On Premise
- Dynamics CRM 2013 On Premise
- Dynamics CRM 2011 On Premise

# Preparing The StarterPak

This section describes the steps required to prepare NetSuite and Dynamics CRM, 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-DynamicsCRM-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 **CRM - NS Opportunity to Sales Order.xml** file to a directory under your Scribe Online installation, such as **..\Scribe Software\Scribe Online Agent\Maps** .
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 Dynamics CRM Connection

- Configure the Dynamics CRM Connection, as described in Scribe Online Connector For Microsoft Dynamics CRM.
- Verify that you have the credentials and permissions to query Accounts and Opportunities.

If you are using an existing Dynamics CRM Connection, refresh the metadata as described in Managing Connections.

## 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, be sure to refresh the metadata as described in Managing Connections.

# Configuring The Scribe Online Solution

After you create Scribe Online Connections, configure the Solution.

## Create Solution

1. Configure **Step 1** and **Step 2** of the Solution. See Managing Solutions.
2. On **Step 3**, Defining a Map, click **Import**, browse to the **CRM - NS Opportunity to Sales Order.xml** file, and import that file.

   The maps show as Incomplete.

3. Open each map and configure the source and target connections.

You must modify the map for your NetSuite Organization, your Dynamics CRM Organization, and your business requirements. For more information, see the StarterPak Map section.

# 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 provides the following map:

**CRM-> NS: Create Sales Order from Won Opportunity** — Retrieves all Won Opportunities, related Accounts, and line items from Dynamics CRM, and creates Sales Orders in NetSuite. The map processes all records created since the last run/date time, which is based on the Dynamics CRM **createdon** field. If the related Customer does not exist in NetSuite, the Customer, default Billing Address, and default Shipping Address are created in NetSuite.

## 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.accountid** field on the Account in Dynamics CRM is written to the **ExternalId** of the Customer from 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 address1 and address2 set of fields for the Account in Dynamics CRM 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

NetSuite requires specific values for country whereas Dynamics CRM country values are free form text by default. For example, the NetSuite country value for United States is _unitedStates, while the Dynamics CRM country value could be United States, US, U.S., etc. The StarterPak is designed with the expectation that the country values in Dynamics CRM are the two character ISO standard values such as US, CA, and AU. The **NS_CRM_Country.csv** file provides a list of the NetSuite country values and the corresponding two character ISO Country standard value. This file is used to transform the country from Dynamics CRM to NetSuite. You may need to modify this file to meet your specific requirements.

NetSuite also requires specific values for state. The StarterPak is designed with the expectation that the state values in Dynamics CRM are the same as the expected state values in NetSuite. Review your data in both NetSuite and Dynamics CRM. If the state values differ, you can generate a csv file similar to the **NS_CRM_Country.csv** file to perform the necessary 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/productidname as the Lookup Criteria, to prevent making 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** block retrieves and loops through all NetSuite Price Levels associated with the Product. The map assumes the Base Price in NetSuite and the default Price Level base price in Dynamics CRM are the same, and is the only Price Level/Price List in use.

The **If CRM Unit Price matches NS Base Price** block determines if the Dynamics CRM 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 Dynamics CRM 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:

- **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:

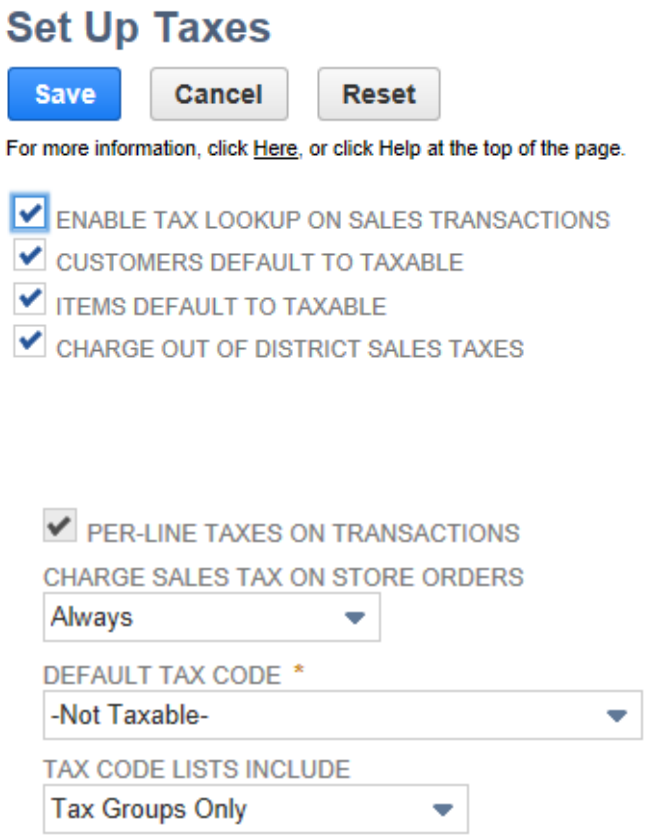
- Use the parentInternalId and the addressInternalId for record matching.
  - **parentInternalId** — The internalId of the Customer associated with the address.
  - **addressInternalId** — The internalId for the specific address.

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:




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.