

Office@Hand for NetSuite

Powered by Tenfold

Admin Guide for configuring NetSuite integration



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Introduction

Audience

This document is directed to customers and prospective customers interested in using Tenfold and Office@Hand in an Oracle NetSuite environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with NetSuite APIs, NetSuite administration, general networking, and Tenfold.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed NetSuite/Tenfold/Office@Hand integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, contact Office@Hand support at support.ringcentral.com or call 1-888-528-7464.

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this NetSuite integration:

- **Application programming interface (API):** A set of clearly defined methods of communication used by Tenfold for reading and writing data.
- **Click-to-dial:** A feature in the Tenfold UI that allows agents to click a phone number to dial a contact.
- **RESTlet:** Server-side scripts that interact with NetSuite data following RESTful principles. RESTlets extend the SuiteScript API to allow custom integrations with NetSuite and improve performance.
- **Tenfold cloud:** A set of web services that receives events from the telephony system and takes further action such as querying and saving to the CRM.
- **Tenfold user interface (TUI):** An agent facing user interface that agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

Customer Responsibilities

You are responsible for supplying the physical and/or IP connection(s) to NetSuite and LAN and for obtaining and loading any licensing required by NetSuite. You are also responsible for configuring NetSuite to support the Tenfold integration. Responsibilities for NetSuite management include but are not limited to maintaining a customized Role within NetSuite with the minimum amount of permissions required for a viable integration and maintaining the RESTlet scripts loaded into the NetSuite scripts folder.

Integration Overview

NetSuite Requirements

Connection Requirements

- Accessible via TCP port 443 (https) to Tenfold Cloud
- Dedicated Service Account (i.e., API User)

Version Requirements

- NetSuite 2017.2
- NetSuite 2018.1

Considerations

If using non-standard forms, please consult with Tenfold to understand supportability.

Permissions Requirements

The NetSuite Role that is provisioned for the integration user will require access to specific Lists in NetSuite to ensure a working solution and that specific actions can be taken via the different series of API calls. The following Lists should be provided FULL access to the provisioned role:

Lists

- Contact
- Companies
- Customers
- Phone Calls
- Tasks
- Employee
- Employee Record

Transactions

- Find transaction
- Opportunity
- Estimate

Installation

Installation Requirements

Entity–Users	Field
Service Account Email	The username for the dedicated Tenfold service account (i.e., API User)
Service Account Password	The password for the dedicated Tenfold service account (i.e., API User)
Account ID	Your NetSuite Account ID*
Role ID	Your NetSuite Role ID*
RESTlet Script Endpoints	The endpoint URLs for the four provisioned RESTlet scripts deployed in NetSuite environment

*More information on obtaining your Account ID and Role ID can be found [here](#).

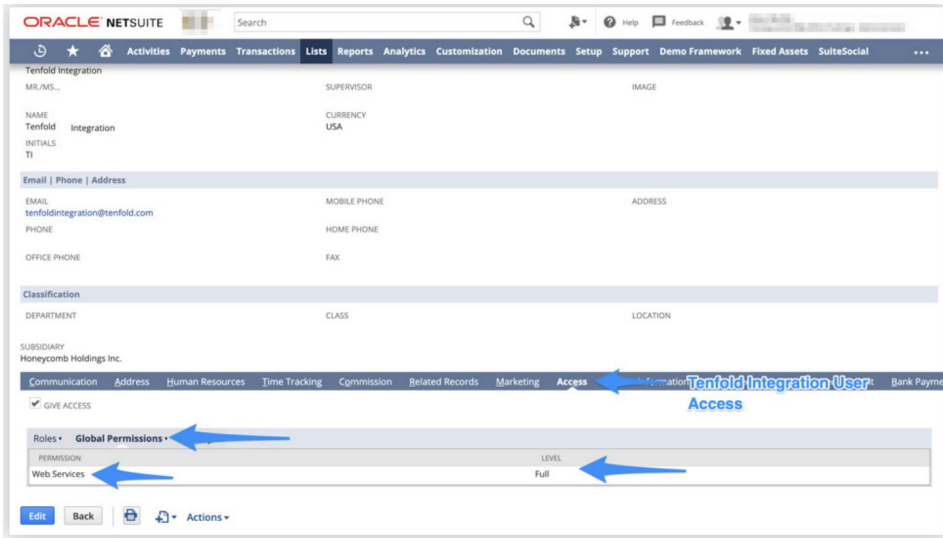
Installation Process

1. Provision Service User in NetSuite for API Connection Purpose:

This section outlines the procedural steps in generating a unique Role and User account in NetSuite for use with the Tenfold API integration. The role-based permission set access allows for greater customization of the integration, as well as maintaining security requirements against full administrative access and enforced two-factor authentication of NetSuite.

Steps

1. Generate a new unique user profile for the Tenfold API connection. Name it “Tenfold Integration,” “Tenfold API user,” or something else that is easy to identify.
2. In the user profile for the API user, add **Global Permissions > Web Services**. Access level should be **FULL**

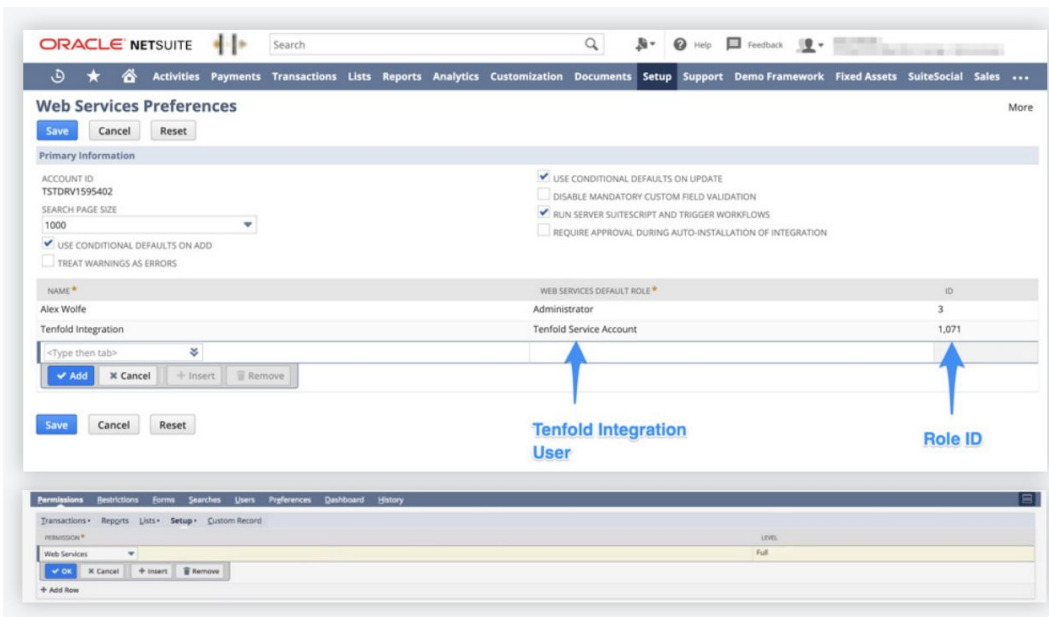


Oracle NetSuite user record for 'Tenfold Integration User'. The record shows personal information (Name: Tenfold Integration, Currency: USA), contact information (Email: tenfoldintegration@tenfold.com), and classification (Department: Moneycomb Holdings Inc.). The 'Access' tab is selected, showing a table of permissions. A blue arrow points to the 'Global Permissions' dropdown, another points to the 'Web Services' permission, and a third points to the 'Full' level.

PERMISSION	LEVEL
Web Services	Full

3. In web service setup, navigate to **Setup > Integration > Web Services Preferences**. Select the user and assign the Web Services Default Role. At this time, this Internal ID will be linked automatically. Select **Add** and **Save**.

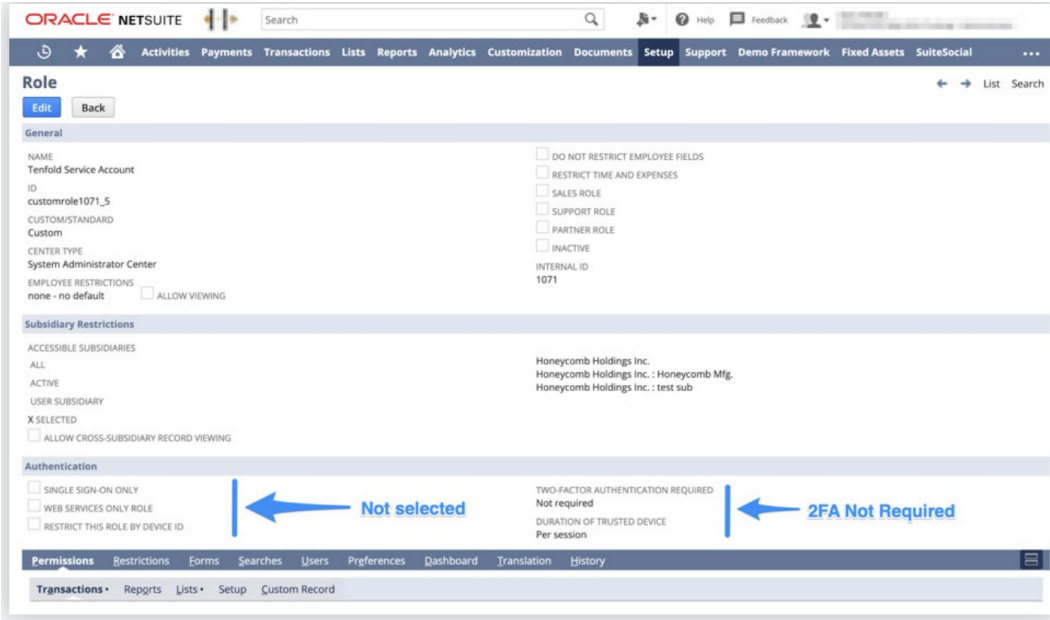
Note: If the Web Service Default Role drop-down menu is blank, the web service may need to be enabled in the role first. Go to **Setup > User/Roles > Manage Roles > New or Search > Select the role > Permissions > Setup**. Click on Add Row and select Web Services from the drop-down menu. Make sure the level is set to **FULL**



Oracle NetSuite 'Web Services Preferences' setup screen. The 'Primary Information' section shows account ID TSDRV1595402 and search page size 1000. The 'WEB SERVICES DEFAULT ROLE' table has two rows: 'Administrator' (ID 3) and 'Tenfold Service Account' (ID 1,071). A blue arrow points to the 'Tenfold Service Account' row with the label 'Tenfold Integration User', and another points to the '1,071' ID with the label 'Role ID'. Below, the 'Permissions' tab shows 'Web Services' with a 'Full' level.

NAME	WEB SERVICES DEFAULT ROLE	ID
Alex Wolfe	Administrator	3
Tenfold Integration	Tenfold Service Account	1,071

4. . Set up permissions by going to **Setup > User/Roles > Manage Roles > New or Search > Permissions Tab**.



ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial

Role

Edit Back

General

NAME
Tenfold Service Account

ID
customrole1071_5

CUSTOM/STANDARD
Custom

CENTER TYPE
System Administrator Center

EMPLOYEE RESTRICTIONS
none - no default ☐ ALLOW VIEWING

☐ DO NOT RESTRICT EMPLOYEE FIELDS

☐ RESTRICT TIME AND EXPENSES

☐ SALES ROLE

☐ SUPPORT ROLE

☐ PARTNER ROLE

☐ INACTIVE

INTERNAL ID
1071

Subsidiary Restrictions

ACCESSIBLE SUBSIDIARIES
ALL

ACTIVE
USER SUBSIDIARY

X SELECTED
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Honeycomb Holdings Inc.
Honeycomb Holdings Inc. : Honeycomb Mfg.
Honeycomb Holdings Inc. : test sub

Authentication

☐ SINGLE SIGN-ON ONLY

☐ WEB SERVICES ONLY ROLE

☐ RESTRICT THIS ROLE BY DEVICE ID

← **Not selected**

TWO-FACTOR AUTHENTICATION REQUIRED
Not required

DURATION OF TRUSTED DEVICE
Per session

← **2FA Not Required**

Permissions Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions Reports Lists Setup Custom Record

5. . Set the Mandatory Minimum Permissions for Transactions and Lists:

Lists

- Contact: FULL
- Companies: FULL
- Customers: FULL
- Phone Calls: FULL
- Tasks: FULL
- Employee: FULL
- Employee Record: FULL

Transactions

- Find transaction: FULL
- Opportunity: FULL
- Estimate: FULL

Note: Some Tenfold functionality may be operable with **View/Create/Edit** access for various lists, but it is not officially supported. Consult your Tenfold representative with any questions.

ORACLE NETSUITE Search

Activities Payments Transactions Lists Reports Analytics Customization Documents **Setup** Support Demo Framework Fixed Assets SuiteSocial

ACCESSIBLE SUBSIDIARIES
 ALL
 ACTIVE
 USER SUBSIDIARY
 X SELECTED
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Honeycomb Holdings Inc.
 Honeycomb Holdings Inc. : Honeycomb Mfg.
 Honeycomb Holdings Inc. : test sub

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
Cases	Full
Companies	Full
Contacts	Full
Custom Record Entries	Full
Customers	Full
Employee Record	Full
Employees	Full
Phone Calls	Full
Tasks	Full

Full Access

Edit Back

6. Save settings and proceed to the next section.

ORACLE NETSUITE Search

Activities Payments Transactions Lists Reports Analytics Customization Documents **Setup** Support Demo Framework Fixed Assets SuiteSocial

CUSTOM/STANDARD
 Custom

CENTER TYPE
 System Administrator Center

EMPLOYEE RESTRICTIONS
 none - no default ☐ ALLOW VIEWING

☐ SUPPORT ROLE
☐ PARTNER ROLE
☐ INACTIVE
 INTERNAL ID
 1071

Subsidiary Restrictions
 ACCESSIBLE SUBSIDIARIES
 ALL
 ACTIVE
 USER SUBSIDIARY
 X SELECTED
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Honeycomb Holdings Inc.
 Honeycomb Holdings Inc. : Honeycomb Mfg.
 Honeycomb Holdings Inc. : test sub

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
Find Transaction	Full
Opportunity	Full
Estimate	Full

Full

Edit Back

2. RESTlet Setup

Purpose: This section outlines the procedural steps in provisioning and deploying the Tenfold RESTlet scripts within your NetSuite environment. The completion of this process will allow for you to configure the script endpoints within the Tenfold system and greatly improve performance for both read and write operations in NetSuite.

Steps

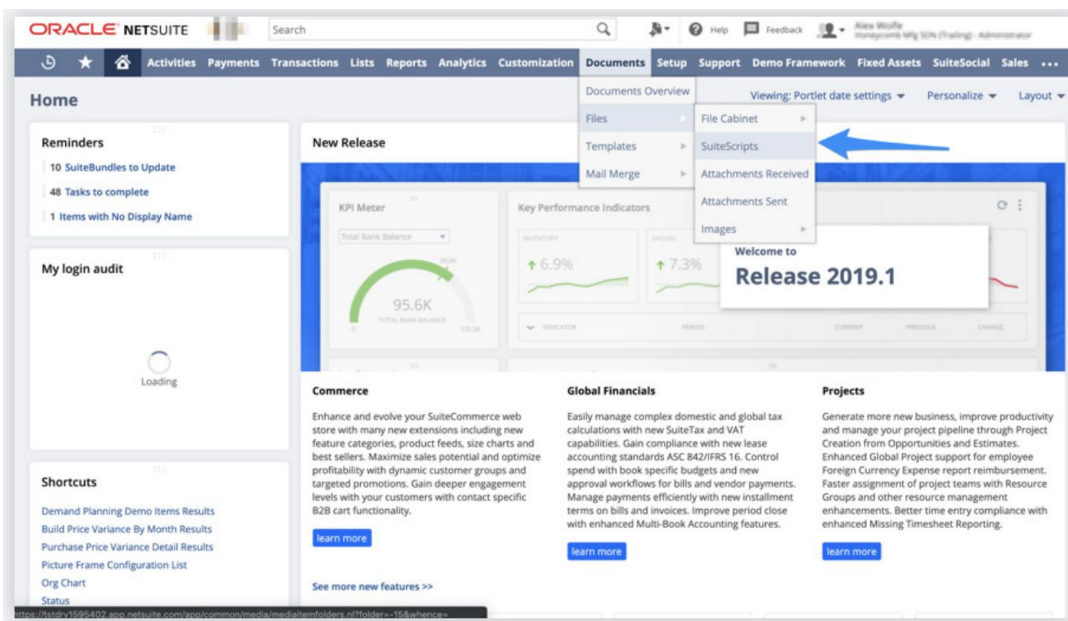
- Add scripts to NetSuite.
- Set up RESTlet endpoints.

Add Scripts to NetSuite:

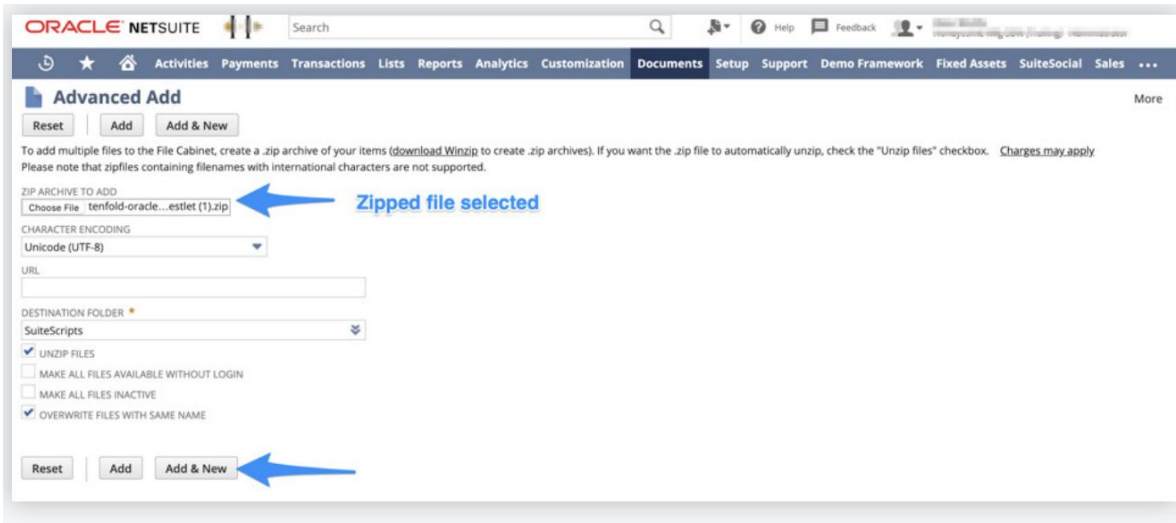
1. Download the NetSuite RESTlet scripts. NetSuite RESTlet scripts can be found in the Tenfold knowledge base here or via the zipped file at the following URL:

<https://storage.googleapis.com/tenfold-NetSuite-restlet/tenfold-oracle-NetSuite-restlet.zip>

2. Once downloaded, go to **Documents > Files > SuiteScripts** in NetSuite.



3. Click on **Advanced Add**. Under **Zip Archive to Add**, click on **Choose File** to select the **tenfold-oracle-NetSuite-restlet.zip** file that was just downloaded.



ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial Sales ...

Advanced Add More

Reset Add Add & New

To add multiple files to the File Cabinet, create a .zip archive of your items (download Winzip to create .zip archives). If you want the .zip file to automatically unzip, check the "Unzip files" checkbox. [Charges may apply](#). Please note that zipfiles containing filenames with international characters are not supported.

ZIP ARCHIVE TO ADD
Choose File **tenfold-oracle...estlet (1).zip** **Zipped file selected**

CHARACTER ENCODING
Unicode (UTF-8)

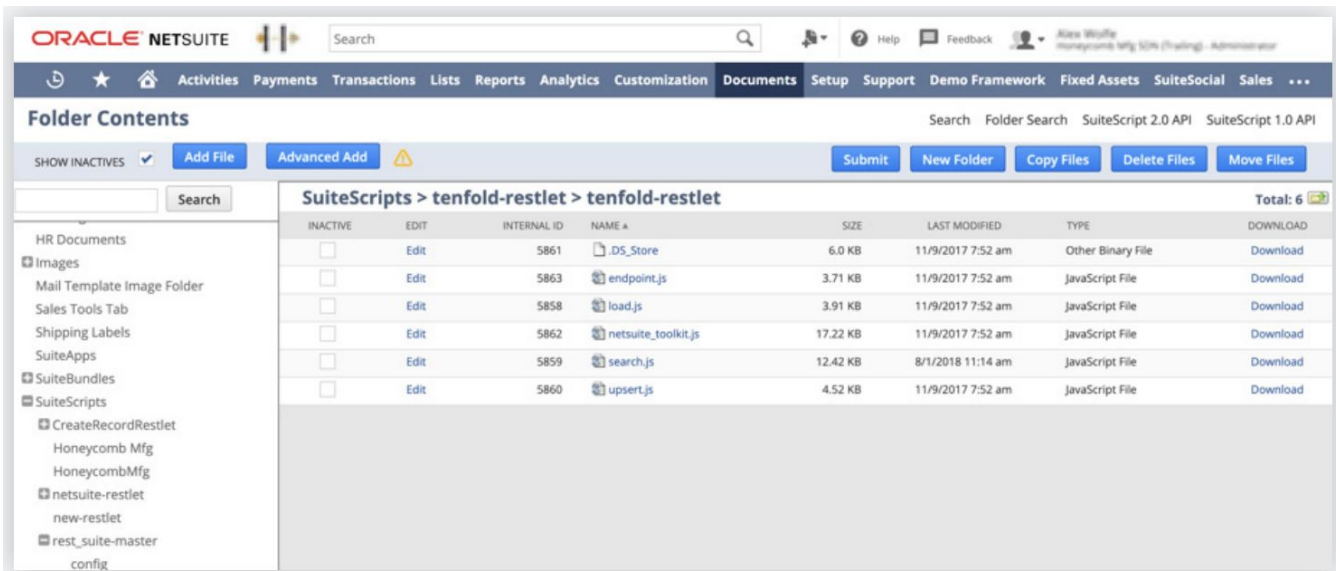
URL

DESTINATION FOLDER
SuiteScripts

☒ UNZIP FILES
☐ MAKE ALL FILES AVAILABLE WITHOUT LOGIN
☐ MAKE ALL FILES INACTIVE
☒ OVERWRITE FILES WITH SAME NAME

Reset Add Add & New

4. Click on the **Add & New** button to create a new folder titled "tenfold-restlet." The upload will take a moment. Navigate back to **Documents > Files > SuiteScripts** to verify the new folder has been created. Make sure that **load.js**, **endpoint.js**, **search.js**, and **upsert.js** are included in the folder



ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial Sales ...

Folder Contents Search Folder Search SuiteScript 2.0 API SuiteScript 1.0 API

SHOW INACTIVES ☒ Add File Advanced Add Submit New Folder Copy Files Delete Files Move Files

Search

SuiteScripts > tenfold-restlet > tenfold-restlet Total: 6

INACTIVE	EDIT	INTERNAL ID	NAME	SIZE	LAST MODIFIED	TYPE	DOWNLOAD
<input type="checkbox"/>	Edit	5861	.DS_Store	6.0 KB	11/9/2017 7:52 am	Other Binary File	Download
<input type="checkbox"/>	Edit	5863	endpoint.js	3.71 KB	11/9/2017 7:52 am	JavaScript File	Download
<input type="checkbox"/>	Edit	5858	load.js	3.91 KB	11/9/2017 7:52 am	JavaScript File	Download
<input type="checkbox"/>	Edit	5862	netsuite_toolkit.js	17.22 KB	11/9/2017 7:52 am	JavaScript File	Download
<input type="checkbox"/>	Edit	5859	search.js	12.42 KB	8/1/2018 11:14 am	JavaScript File	Download
<input type="checkbox"/>	Edit	5860	upsert.js	4.52 KB	11/9/2017 7:52 am	JavaScript File	Download

HR Documents
Images
Mail Template Image Folder
Sales Tools Tab
Shipping Labels
SuiteApps
SuiteBundles
SuiteScripts
CreateRecordRestlet
Honeycomb Mfg
HoneycombMfg
netsuite-restlet
new-restlet
rest_suite-master
config

3. Set Up RESTlet Endpoints

1. You will now be generating four RESTlet endpoints corresponding to each of the following four uploaded files: **load.js**, **search.js**, **upsert.js**, and **endpoint.js**. Navigate to **Customization > Scripting > Scripts**.

Scripts View Deployments

New Script

FILTERS

TYPE: RESTlet API VERSION: - All - SCRIPT FILE: - All - FROM BUNDLE:

☐ SHOW INACTIVES TOTAL: 22

EDIT VIEW	NAME	FROM BUNDLE	ID	API VERSION	DEPLOYMENTS	SCRIPT	LIBRARY SCRIPT	INTERNAL ID
Edit View	Create Record RESTlet		customscript_ife_create_record_rl	1.0	Deployments	recordCRD.js		166
Edit View	MitelCRM Search		customscript554	1.0	Deployments	search.js	netsuite_toolkit.js	554
Edit View	New RESTlet Search		customscript567	1.0	Deployments	search.js	netsuite_toolkit.js	567
View	SuiteSocial News Feed RESTlet	25250	customscript_newsfeed_restlet	1.0	Deployments	newsfeed_ui.js		491
Edit View	Tenfold Create		customscript550	1.0	Deployments	initialize.js	netsuite_toolkit.js	550
Edit View	Tenfold Dispositions		customscript555	1.0	Deployments	disposition.js	netsuite_toolkit.js	555
Edit View	Tenfold Endpoint		customscript559	1.0	Deployments	endpoint.js	netsuite_toolkit.js	559
Edit View	Tenfold Endpoint CR		customscript563	1.0	Deployments	endpoint.js	netsuite_toolkit.js	563
Edit View	Tenfold Initialize Record		customscript553	1.0	Deployments	initialize.js	netsuite_toolkit.js	553
Edit View	Tenfold Load		customscript548	1.0	Deployments	load.js	netsuite_toolkit.js	548
Edit View	Tenfold Load		customscript549	1.0	Deployments	load.js	netsuite_toolkit.js	549
Edit View	Tenfold Load		customscript556	1.0	Deployments	load.js	netsuite_toolkit.js	556

- Click on the **New Script** button at the top of the page. You will be going through the following process four times for each of the four scripts.
- Click on the down arrow in the **Script File drop-down** menu. Click on **List**. Within the -All- drop-down menu, select **SuiteScripts : tenfold-restlet**. Select the script you are setting up (this will be done once per every four files). Click **Create Script Record**. Select RESTlet 1.0 Script Type.

Upload Script File More

Reset Cancel **Create**

SCRIPT FILE: SuiteScripts : tenfold-restlet : tenfold-restlet

Search

endpoint.js
load.js
netsuite_toolkit.js
search.js
upsert.js

SCRIPT FILE: <Type then tab>

- Name the script "Tenfold <script name>" based on the script you are making. That will be Tenfold Endpoint, Tenfold Load, Tenfold Search, and Tenfold Upsert depending on the script you are making. Order does not matter, but all four must be created.

ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial

RESTlet

NAME *
Tenfold Endpoint

ID

API VERSION
1.0

OWNER
Alex Wolfe

☐ INACTIVE

Scripts Parameters Unhandled Errors Deployments

SCRIPT FILE *
endpoint.js

GET FUNCTION

POST FUNCTION
endpointPostHandler

DELETE FUNCTION

PUT FUNCTION

Libraries Custom Plug-In Types

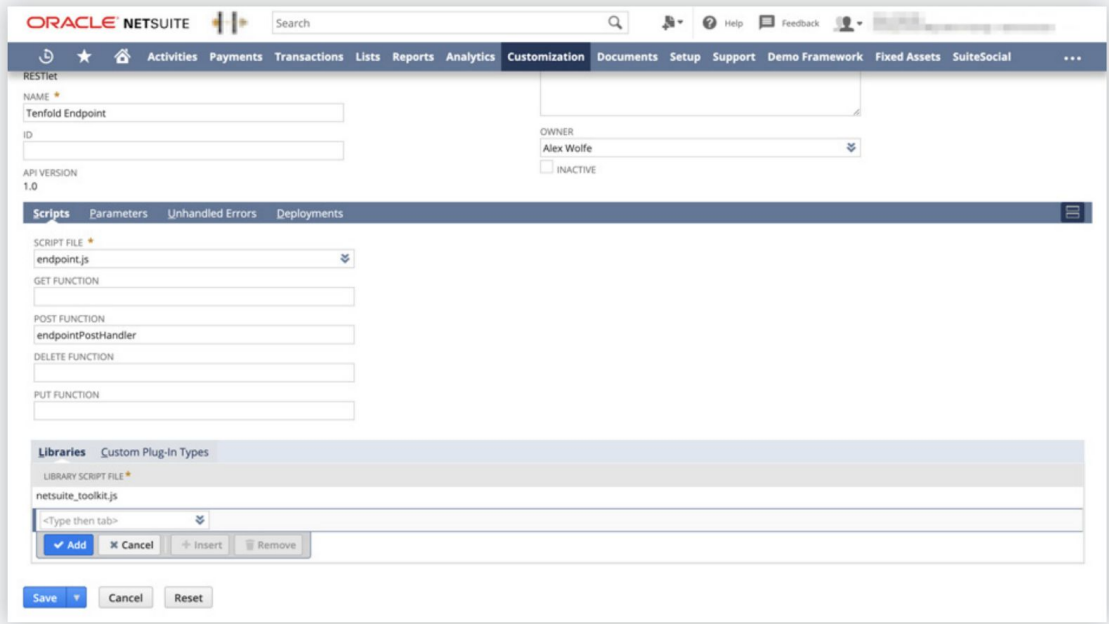
LIBRARY SCRIPT FILE *
netsuite_toolkit.js

<Type then tab>

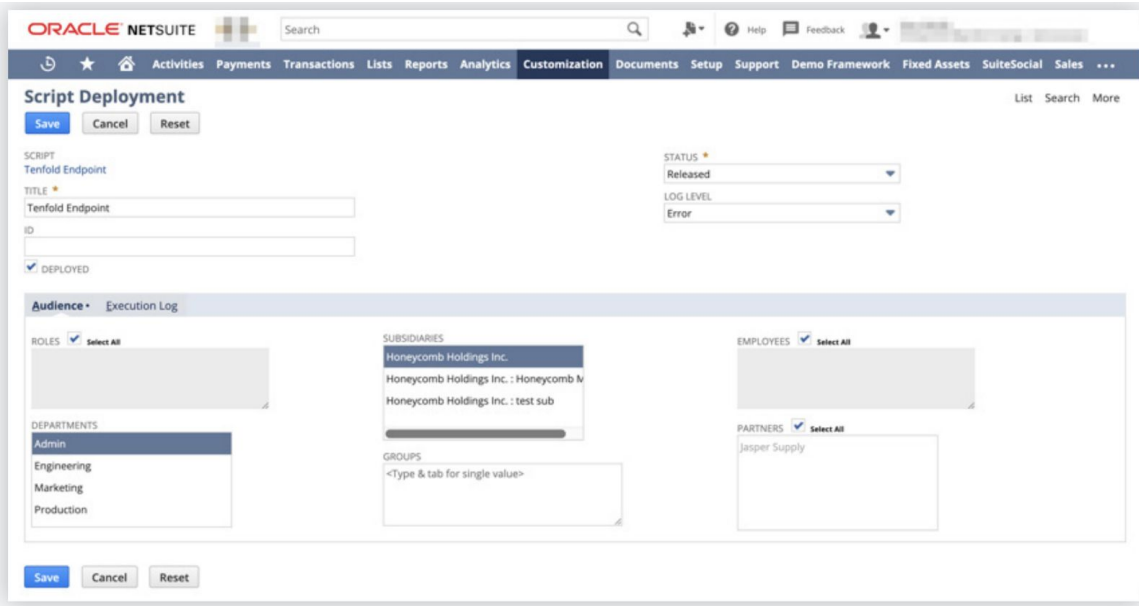
✓ Add ✗ Cancel + Insert - Remove

Save Cancel Reset

- In the POST FUNCTION field, enter “script name>PostHandler.” The corresponding names are shown below. Under **Libraries**, include **NetSuite_toolkit.js** for each of the four scripts.
 load.js -> loadPostHandler
 search.js -> searchPostHandler
 upsert.js -> upsertPostHandler
 endpoint.js -> endpointPostHandler



- Click **Save** and then **Deploy Script**. Set up the deployment in the following page as follows: **Status - Released, Departments - Admin, Employees - All**. Press **Save**



- After deploying, copy the “External URL” for the script. This will be configured in the CRM settings of the Tenfold dashboard. This is also accessible from **Customization > Scripting > Script Deployments**.
- Replicate steps for all four scripts and copy the “External URL” of each script and proceed to the next section.

Script Deployment

[Edit](#)
[Back](#)

Actions ▼

SCRIPT	STATUS
Tenfold Search	Testing
TITLE	LOG LEVEL
Tenfold Search	Debug
ID	URL
customdeploy1	/app/site/hosting/restlet.nl?script=547&deploy=1
<input checked="" type="checkbox"/> DEPLOYED	EXTERNAL URL
	https://rest.na1.netsuite.com/app/site/hosting/restlet.nl?script=547&deploy=1

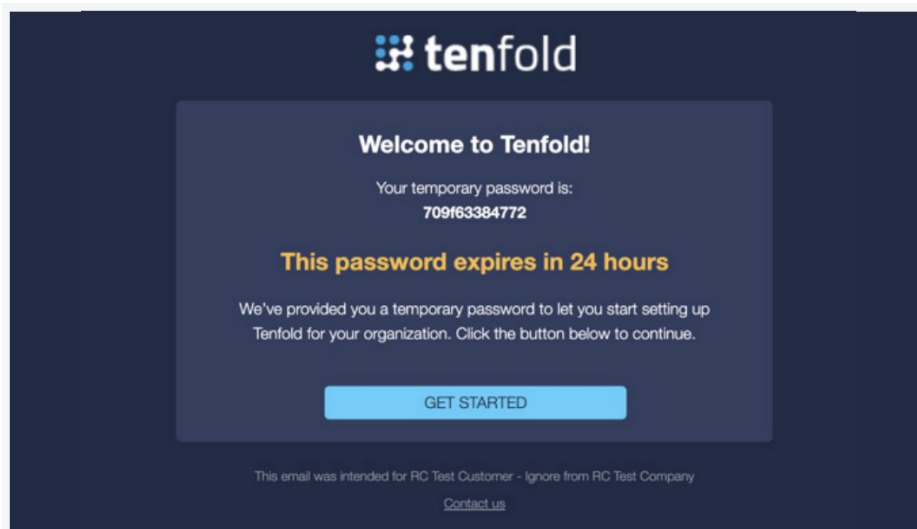
[Audience •](#)
[Execution Log](#)
[History](#)
[System Notes](#)

ROLES	SUBSIDIARIES
-------	--------------

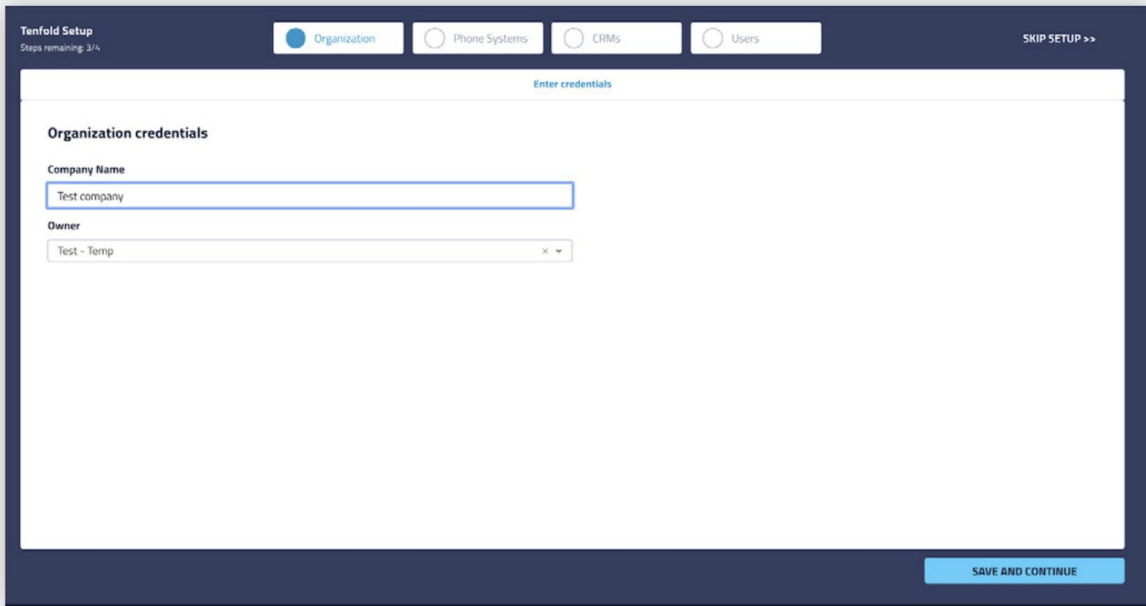
Tenfold Account Creation and Dashboard Setup

New customers of the integration are taken through an onboarding wizard where CRM admins of the company can follow a step-by-step procedure to establish and test the connection with their CRM, Tenfold, and Office@Hand. It only takes a few minutes.

1. After requesting the Tenfold integration in the RingCentral/Office@Hand App Gallery, check your email for instructions on how to create your Tenfold account.



2. Accept the invite and set your organization details.



Tenfold Setup
Steps remaining: 3/4

Organization Phone Systems CRMs Users

Enter credentials

Organization credentials

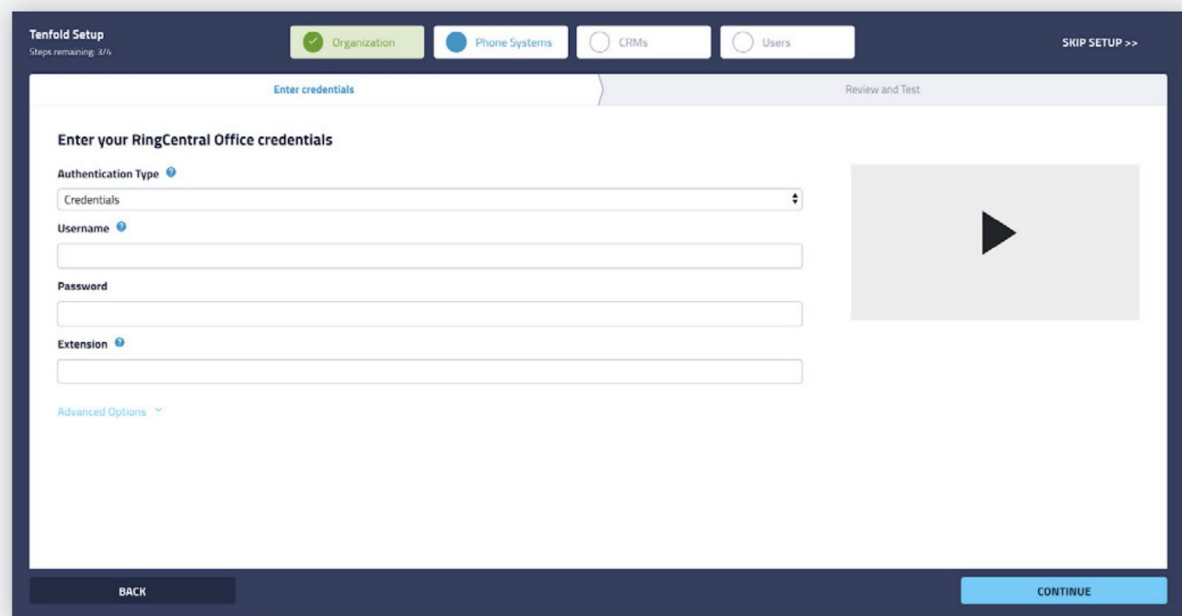
Company Name
Test company

Owner
Test - Temp

SAVE AND CONTINUE

3. Under Authentication Type, select **OAuth**. Then, under **Select Your Environment**, select your company's Office@Hand production or sandbox environment to be connected to Tenfold. This step allows the CRM users who are provisioned to a Tenfold account to have a Office@Hand phone number assigned to them.

Note: You can always reach this page by logging in to the Tenfold dashboard on a browser. Click **Company Settings**, then click **Phone Systems** from the menu.



Tenfold Setup
Steps remaining: 2/4

Organization Phone Systems CRMs Users

Enter credentials Review and Test

Enter your RingCentral Office credentials

Authentication Type
Credentials

Username

Password

Extension

Advanced Options

BACK CONTINUE

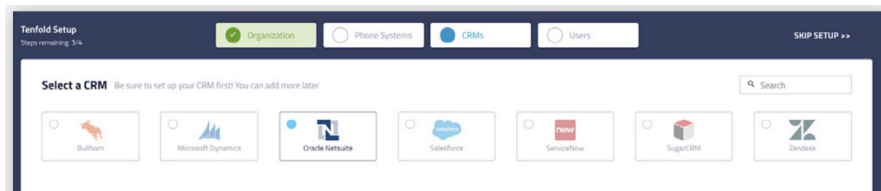
4. Select **Oracle NetSuite** as your CRM and click **Continue**

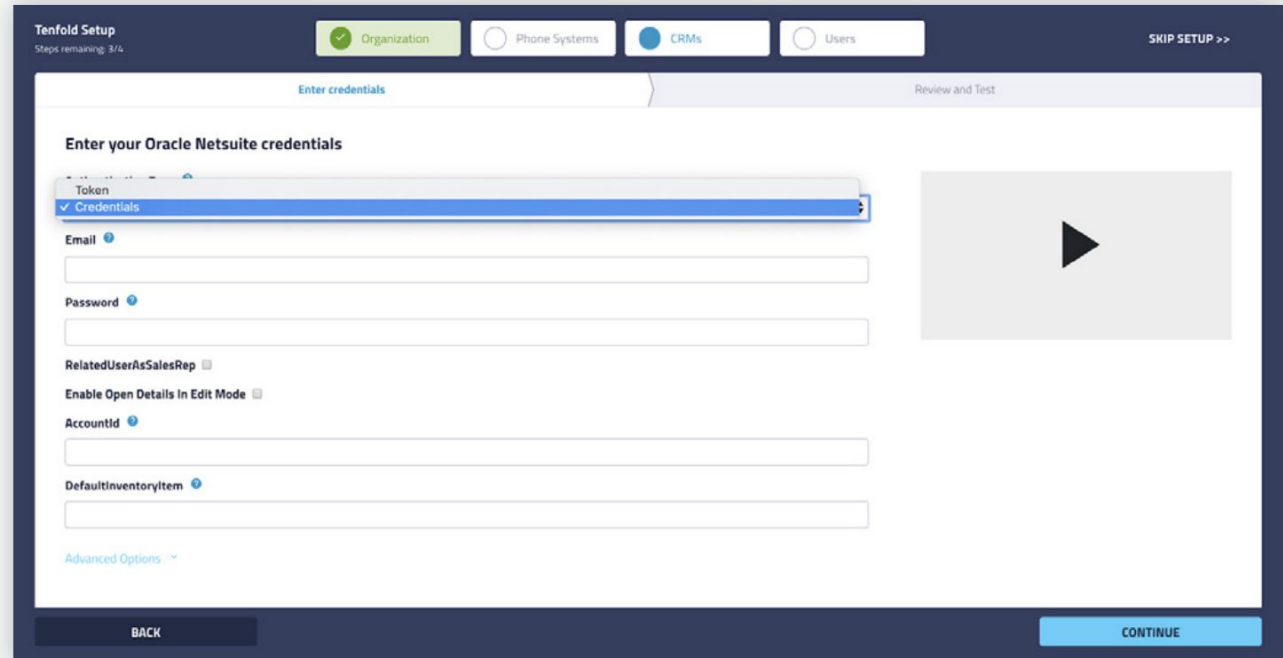
5. Select Authentication type as **Credentials** from the drop-down menu. Next, input the following information into the appropriate fields displayed:
 - Service Account Username
 - Service Account Password
 - Account ID
 - Role ID (Found in section #1)
 - Load Endpoint, Search Endpoint, Upsert Endpoint, and Main Endpoint URLs (on clicking Advanced Options).

Click **Continue**.

This step is required to pull all the users from the CRM account into Tenfold so the users of the CRM and this integration can be provisioned with individual Tenfold accounts each. You can always reach back to this page by logging in to your Tenfold dashboard on a browser, then click Company Settings and click CRM.

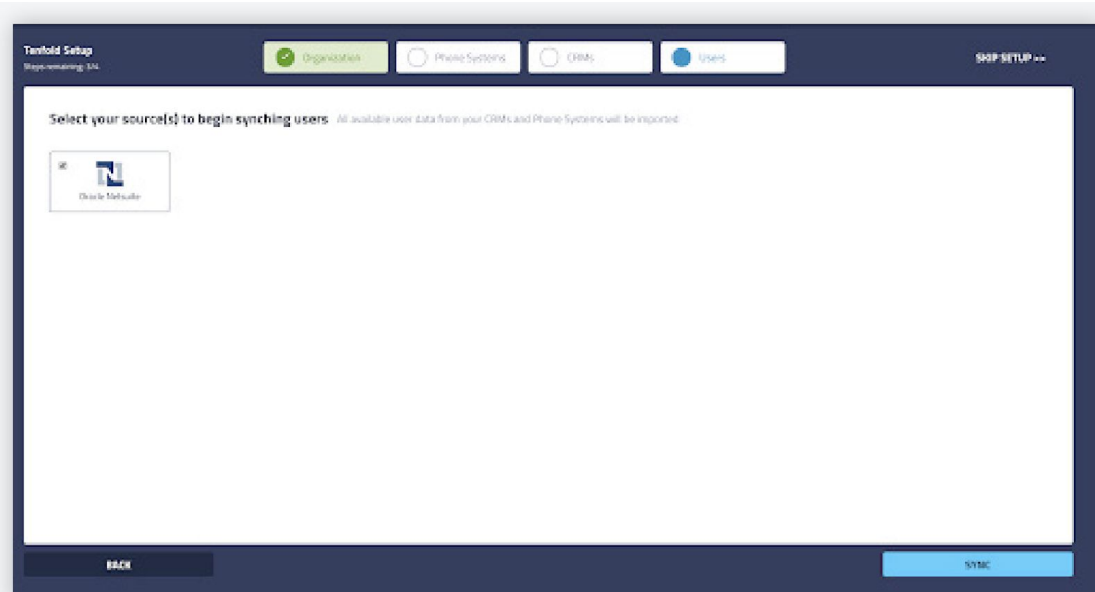
Note: For authenticating via Tokens instead of Credentials, scroll down to the next section for instructions.





- Click on **Sync**. The users list and dashboard will be updated with the CRM users linked to their phone extensions.

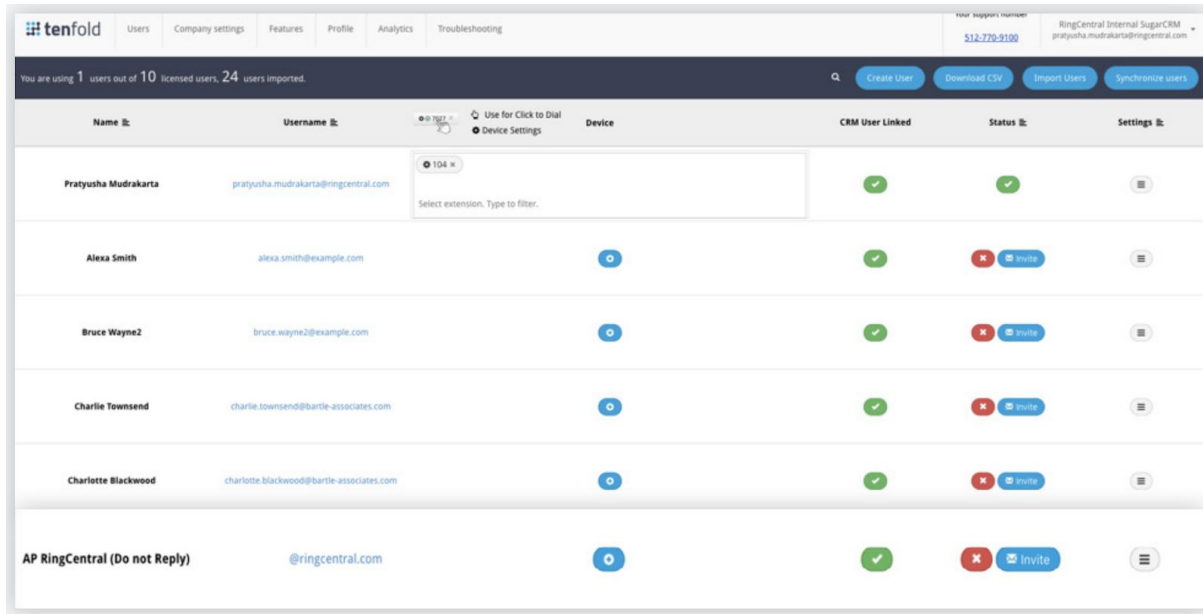
Note: Office@Hand extensions are auto-assigned based on fuzzy match between the users' first and last names in the CRM or Office@Hand.



- Next, click **Invite** under the Status column to invite the users who are going to be using the integration

Note: If the phone extensions are not auto-assigned, click the “+” icon and manually assign the

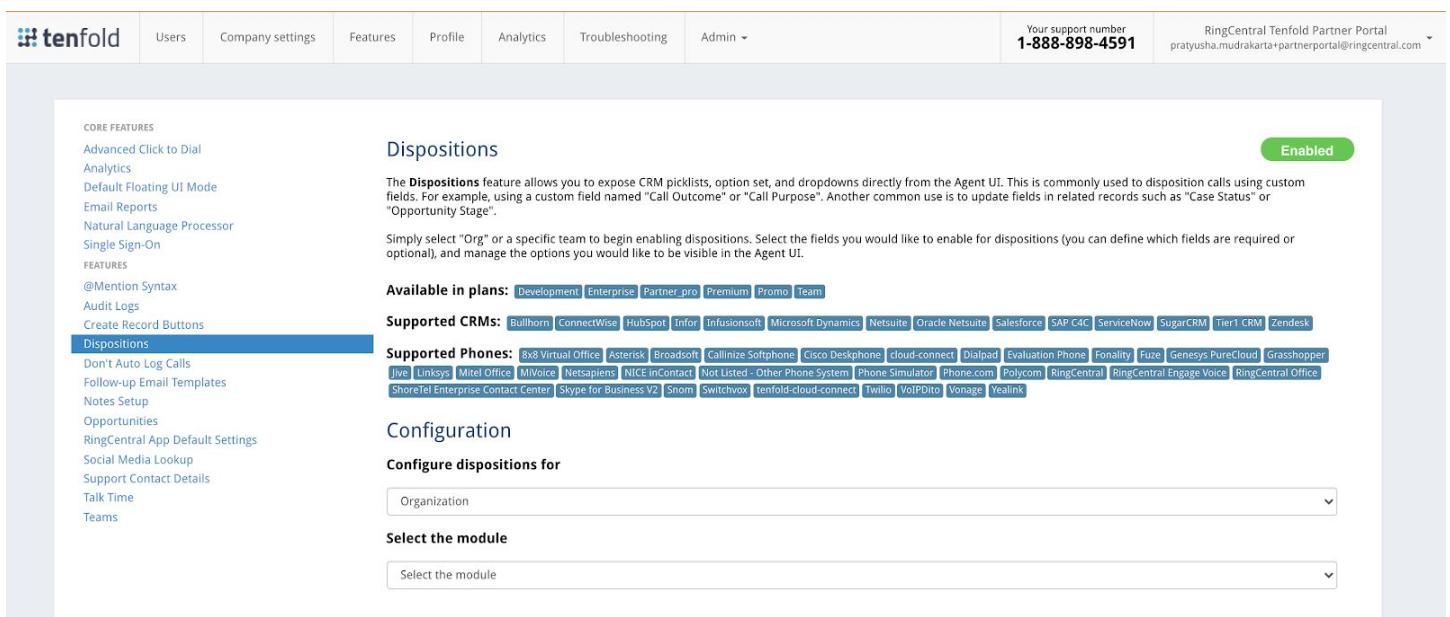
corresponding phone extension to the user.



Name	Username	Device	CRM User Linked	Status	Settings
Pratyusha Mudrakarta	pratyusha.mudrakarta@ringcentral.com	104	✓	✓	
Alexa Smith	alexa.smith@example.com		✓	✗ Invite	
Bruce Wayne2	bruce.wayne2@example.com		✓	✗ Invite	
Charlie Townsend	charlie.townsend@bartle-associates.com		✓	✗ Invite	
Charlotte Blackwood	charlotte.blackwood@bartle-associates.com		✓	✗ Invite	
AP RingCentral (Do not Reply)	@ringcentral.com		✓	✗ Invite	

Feature Setup

1. To enable and update features, log in to your Tenfold dashboard.
 2. In the top left, click on **Features**.
- Here you will be able to adjust the individual user features such as click-to-dial, enable/disable SSO, and more. Setting up features will allow you to better utilize what Tenfold has to offer.



tenfold

[Users](#)
[Company settings](#)
[Features](#)
[Profile](#)
[Analytics](#)
[Troubleshooting](#)
[Admin](#)

Your support number
1-888-898-4591

RingCentral Tenfold Partner Portal
pratyusha.mudrakarta+partnerportal@ringcentral.com

CORE FEATURES

[Advanced Click to Dial](#)
[Analytics](#)
[Default Floating UI Mode](#)
[Email Reports](#)
[Natural Language Processor](#)
[Single Sign-On](#)

FEATURES

[@Mention Syntax](#)
[Audit Logs](#)
[Create Record Buttons](#)
[Dispositions](#)
[Don't Auto Log Calls](#)
[Follow-up Email Templates](#)
[Notes Setup](#)
[Opportunities](#)
[RingCentral App Default Settings](#)
[Social Media Lookup](#)
[Support Contact Details](#)
[Talk Time](#)
[Teams](#)

Dispositions

Enabled

The **Dispositions** feature allows you to expose CRM picklists, option set, and dropdowns directly from the Agent UI. This is commonly used to disposition calls using custom fields. For example, using a custom field named "Call Outcome" or "Call Purpose". Another common use is to update fields in related records such as "Case Status" or "Opportunity Stage".

Simply select "Org" or a specific team to begin enabling dispositions. Select the fields you would like to enable for dispositions (you can define which fields are required or optional), and manage the options you would like to be visible in the Agent UI.

Available in plans: Development Enterprise Partner_pro Premium Promo Team

Supported CRMs: Bullhorn ConnectWise HubSpot Infor Infusionsoft Microsoft Dynamics Netsuite Oracle Netsuite Salesforce SAP C4C ServiceNow SugarCRM Tier1 CRM Zendesk

Supported Phones: 8x8 Virtual Office Asterisk Broadsoft Callinize Softphone Cisco Deskphone cloud-connect Dialpad Evaluation Phone Fonality Fuze Genesys PureCloud Grasshopper Jive Linksys Mitel Office MIvoice Netsapiens NICE inContact Not Listed - Other Phone System Phone Simulator Phone.com Polycrm RingCentral RingCentral Engage Voice RingCentral Office ShoreTel Enterprise Contact Center Skype for Business V2 Snom Switchvox tenfold-cloud-connect Twilio VoIPDito Vonage Yealink

Configuration

Configure dispositions for

Organization

Select the module

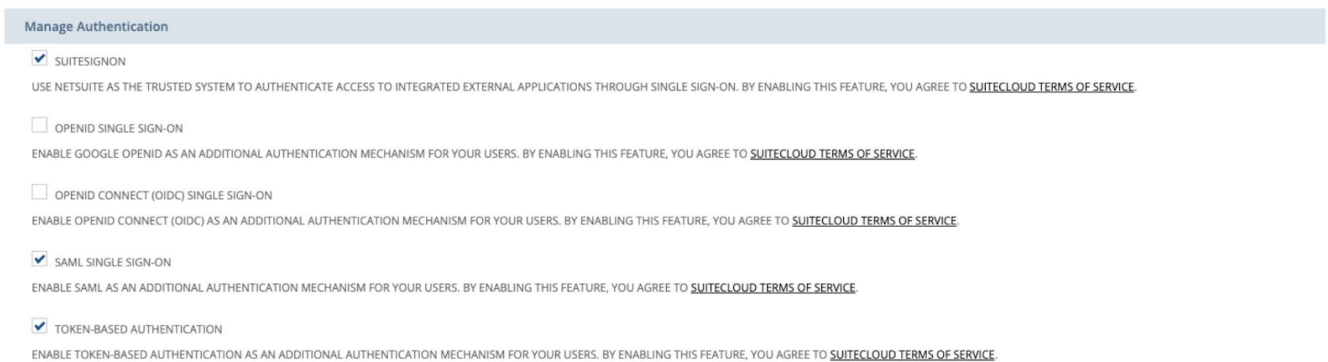
Select the module

Token-Based Authentication Steps (Optional)

Purpose: This section provides a step-by-step guide to getting started with token-based authentication (TBA) in NetSuite. This is an alternate way of authenticating your company's NetSuite account with Tenfold instead of using the Credentials type.

1. Enabling the feature

Token-based authentication must first be enabled in the account. Under **Setup > Company > Enable Features**, navigate to the SuiteCloud subtab. Enable the required features.



Manage Authentication

- ☒ **SUITESIGNON**
USE NETSUITE AS THE TRUSTED SYSTEM TO AUTHENTICATE ACCESS TO INTEGRATED EXTERNAL APPLICATIONS THROUGH SINGLE SIGN-ON. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).
- ☐ **OPENID SINGLE SIGN-ON**
ENABLE GOOGLE OPENID AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).
- ☐ **OPENID CONNECT (OIDC) SINGLE SIGN-ON**
ENABLE OPENID CONNECT (OIDC) AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).
- ☒ **SAML SINGLE SIGN-ON**
ENABLE SAML AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).
- ☒ **TOKEN-BASED AUTHENTICATION**
ENABLE TOKEN-BASED AUTHENTICATION AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

2. Integration

Before connecting with a token, an integration record is required for authentication. A new integration should be used and can be created by navigating to **Setup > Integration > Manage Integrations > New**.

- Set the name to "Tenfold Integration". Please make sure to check the **Token-Based Authentication** option
- If you already have an integration record for Tenfold Integration, you can reuse it by editing the integration and checking the **Token-Based Authentication** option.
- Please copy **Consumer Key** and **Consumer Secret** values to be used in the user role configuration.

- **Note:** The Consumer Key and Consumer Secret values are displayed only once, so please make sure you copy them before going to another page



Integration

[Edit](#) [Back](#) [Actions](#)

APPLICATION ID: D01CF748-44EE-40A8-861F-657...CB87AF4

NAME: Tenfold Integration

DESCRIPTION:

STATE: Enabled

NOTE:

CONCURRENCY LIMIT: 4

MAX CONCURRENCY LIMIT: 4

CREATED: 2019-11-27 00:00:00.0

CREATED BY: Alex Wolfe

LAST STATE CHANGE: 2019-11-27 00:00:00.0

LAST STATE CHANGED BY: Alex Wolfe

Authentication **Execution Log** **System Notes**

☒ TOKEN-BASED AUTHENTICATION (TBA)

☐ TBA: ISSUETOKEN ENDPOINT

☐ TBA: AUTHORIZATION FLOW

CALLBACK URL:

☐ USER CREDENTIALS

Consumer key / secret

Warning: For security reasons, this is the only time that the Consumer Key and Consumer Secret values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values.

Treat the values for Consumer Key and Consumer Secret as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

CONSUMER KEY: 55cbd24ba657983633e393a40a03f44f5d47221adf27dfa093dd09b2f9091a76ee

CONSUMER SECRET: ad6eed06c409bdb5448e4df36104162fdxzc951c3c5ece97a7ac298427c265972

[Edit](#) [Back](#) [Actions](#)

3. Role

Token-based authentication is a per-user authentication and requires certain permissions in NetSuite. An existing role can be used (recommended) or a new role can be created.

Access Token Management: Users with this permission can create, assign, and manage tokens for any user in the company. They cannot use token-based authentication to log in to the NetSuite UI.

Log in using Access Tokens: Users with this permission can manage their own tokens using the Manage Access Tokens link in the Settings portlet, and they can log in using a token.

User Access Tokens

- Users with only this permission can log in using a token, that is, they can use tokens to call a RESTlet.
- Users with only this permission cannot manage tokens or access pages where tokens are managed

General

NAME *

ID

CENTER TYPE

EMPLOYEE RESTRICTIONS

☐ ALLOW VIEWING

☐ DO NOT RESTRICT EMPLOYEE FIELDS
☐ RESTRICT TIME AND EXPENSES
☐ SALES ROLE
☐ SUPPORT ROLE
☐ PARTNER ROLE
☐ INACTIVE

Subsidiary Restrictions

ACCESSIBLE SUBSIDIARIES
☐ ALL
☐ ACTIVE
☒ USER SUBSIDIARY
☐ SELECTED
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Authentication

☐ SINGLE SIGN-ON ONLY
☐ WEB SERVICES ONLY ROLE
☐ RESTRICT THIS ROLE BY DEVICE ID

TWO-FACTOR AUTHENTICATION REQUIRED

DURATION OF TRUSTED DEVICE

1. Go to **Setup > Users/Roles > Manage Roles > New**.

2. Create a role and assign necessary permission for the Tenfold integration. Please tap here for the list of permissions required for the Tenfold integration.

3. The role must have **User Access Tokens** permission for integration using **Token-Based Authentication**.

Assign the Role to the desired user that will be used for integration. Go to **Lists > Employees> edit user > Access tab > Roles subtab**

Permissions Restrictions Forms Searches Preferences Dashboard Translation

Transactions Reports Lists Setup

PERMISSION *
Web Services
User Access Tokens

LEVEL
Full
Full

Permissions Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions Reports Lists Setup

PERMISSION *
Cases
Companies
Contacts
Customers
Employee Record
Employees
Phone Calls
Tasks

LEVEL
Full
Full
Full
Full
Full
Full
Full

Permissions		Restrictions	Forms	Searches	Users	Preferences	Dashboard	Translation	History
Transactions •		Reports	Lists •	Setup •					
PERMISSION		LEVEL							
Find Transaction		Full							
Opportunity		Full							
Estimate		Full							

4. Creating an Access Token for the Integration Record, User, and Role

With the integration record created and proper role assigned, a token can be created for authentication. To create a token, have the user with the token authentication role log in. Click the **Manage Access Tokens** link available on the home dashboard under settings or go to **Setup > Users/Roles > Access Token > New**. Next step is to connect your NetSuite account with your account.

Access Token

Edit
Back
Actions

Primary Information

APPLICATION NAME
Tenfold Integration

USER
Tenfold API

ROLE
Tenfold Integration Role

TOKEN NAME
Tenfold Integration - Tenfold API, Tenfold Integration Role

☐ INACTIVE

Token id / secret

Warning: For security reasons, this is the only time that the Token ID and Token Secret values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values. Treat the values for Token ID and Token Secret as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

TOKEN ID
e6c855aad17f60b2d5b333e0affd95d67934b764be653e6469c2eee27debba771

TOKEN SECRET
21f8ee33205d38db42dfd51d390c5f5de285af0123b843805dccc1cfa25f745

5. Setting Up Token-Based Authentication in Tenfold Dashboard

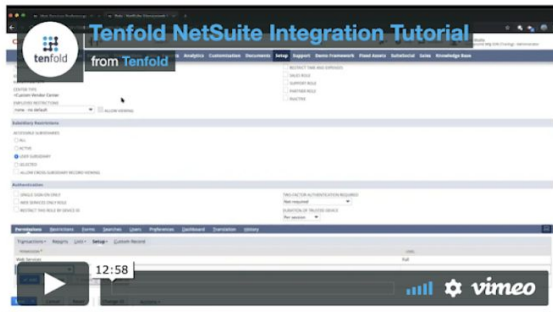
- Start by navigating to your Tenfold dashboard at <https://dashboard.tenfold.com/>
- Select the **Company Settings** link in the top navigation
- In the sub-navigation, select **CRM**
- Select **Oracle NetSuite** as your CRM
- Select Authentication type as **Token** from the dropdown
- Enter the following information into the form:
 - a. Consumer Key
 - b. Consumer Secret
 - c. Token ID
 - d. Token Secret
 - e. Account ID
 - f. Role ID (Found in section #1)
 - g. Load Endpoint, Search Endpoint, Upsert Endpoint, and Main Endpoint URLs (Under Change Advanced Options)

Click **Save**

Upon clicking Save, if the information provided is correct, Tenfold will test the connection and present a

success message.

Help Video



Instructions

After authenticating with NetSuite, follow the instructions in the article below to install the Tenfold RESTlet.

<https://www.tenfold.com/support-center/netsuite-restlet>

Additional options

Related user as sales rep option is used by "Create Record" function. When new record is created current user is assigned to this record as Sales Representative. Avoid of this option usage if current user cannot be assigned as Sales Rep.

Date Format and **Time Format** should have the same value as corresponding user, whom AccountID specified. You can inspect current Netsuite's "DATE FORMAT" value in user's preferences



Oracle Netsuite

Authentication type

Token

Consumer Key

Consumer Secret

Token ID

Token Secret

Related user as sales rep

☐

Enable Open Details in Edit Mode

☐

Advanced Options

Related User as Sales is used by the "Create Record" function. When a new record is created, the current user is assigned to this record as a Sales Representative.

Date Format and Time Format should have the same value as the corresponding user whose Account ID is specified. You can inspect the current NetSuite's "DATE FORMAT" value in the user's preferences

<https://system.Netsuite.com/app/center/userprefs.nl>.

System Region is used when there is a need of working with a specific NetSuite Data Center.

Appendix A) NetSuite Fields

The tables below outline the out-of-the-box entities and respective fields that will be interacted with for the core Tenfold integration. Read and/or write permissions for additional fields, both standard and custom, may be required for your Tenfold deployment

User

Entity—Employee	Field	Required Permissions
Employee	email	Read
Employee	entityid	Read
Employee	firstname	Read
Employee	lastname	Read
Employee	phone	Read

Customer, Lead, Prospect

Entity—Customer, Lead, Prospect	Field	Required Permissions
Customer, Lead, Prospect	comments	Read
Customer, Lead, Prospect	companyname	Read/Write
Customer, Lead, Prospect	datecreated	Read
Customer, Lead, Prospect	email	Read/Write
Customer, Lead, Prospect	entityid	Read
Customer, Lead, Prospect	entitystatus	Read
Customer, Lead, Prospect	firstname	Read/Write
Customer, Lead, Prospect	homePhone	Read/Write
Customer, Lead, Prospect	isinactive	Read
Customer, Lead, Prospect	isperson	Read/Write
Customer, Lead, Prospect	lastname	Read/Write
Customer, Lead, Prospect	mobilePhone	Read/Write
Customer, Lead, Prospect	phone	Read/Write
Customer, Lead, Prospect	salesrep	Read/Write
Customer, Lead, Prospect	subsidiary	Read/Write
Customer, Lead, Prospect	userid	Read/Write

Contact

Entity—Contact	Field	Required Permissions
Contact	comments	Read
Contact	datecreated	Read
Contact	email	Read
Contact	entityid	Read
Contact	firstname	Read/Write
Contact	homePhone	Read/Write
Contact	isinactive	Read
Contact	lastname	Read/Write
Contact	mobilePhone	Read/Write
Contact	phone	Read/Write
Contact	salesrep	Read/Write
Contact	subsidiary	Read/Write
Contact	userid	Read/Write

Phone Call

Entity—PhoneCall	Field	Required Permissions
PhoneCall	assigned	Read/Write
PhoneCall	company	Read/Write
PhoneCall	company	Read/Write
PhoneCall	completeddate	Read/Write
PhoneCall	contact	Read/Write
PhoneCall	endtime	Read/Write
PhoneCall	id	Read
PhoneCall	message	Read/Write
PhoneCall	phone	Read/Write
PhoneCall	starttime	Read/Write
PhoneCall	status	Read/Write
PhoneCall	supportcase	Read/Write
PhoneCall	timedevent	Read/Write
PhoneCall	title	Read/Write
PhoneCall	transaction	Read/Write

Task

Entity—Task	Field	Required Permissions
Task	assigned	Read/Write
Task	company	Read/Write
Task	contact	Read/Write
Task	duedate	Read/Write
Task	id	Read
Task	message	Read/Write
Task	title	Read/Write

Opportunity

Entity—Opportunity	Field	Required Permissions
Opportunity	entitystatus	Read
Opportunity	expectedclosedate	Read
Opportunity	probability	Read
Opportunity	projectedtotal	Read
Opportunity	status	Read
Opportunity	title	Read
Opportunity	trandate	Read
Opportunity	tranid	Read

SupportCase

Entity—SupportCase	Field	Required Permissions
SupportCase	assigned	Read
SupportCase	casenumber	Read
SupportCase	company	Read
SupportCase	contact	Read
SupportCase	createddate	Read
SupportCase	id	Read
SupportCase	priority	Read
SupportCase	status	Read
SupportCase	title	Read

Estimate

Entity—Estimate	Field	Required Permissions
Estimate	duedate	Read
Estimate	entitystatus	Read
Estimate	expectedclosedate	Read
Estimate	probability	Read
Estimate	salesrep	Read
Estimate	status	Read
Estimate	total	Read
Estimate	totalcostestimate	Read
Estimate	trandate	Read
Estimate	tranid	Read

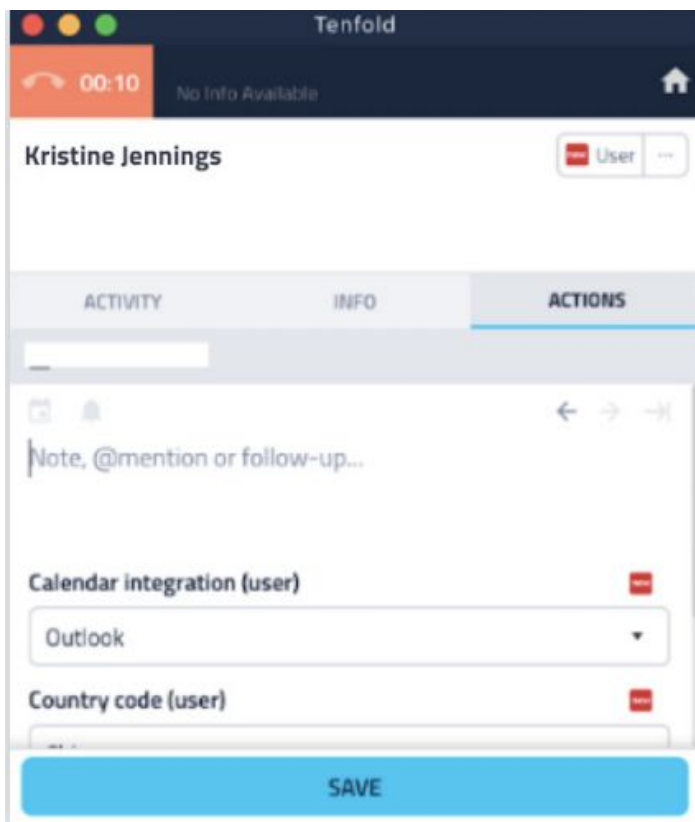
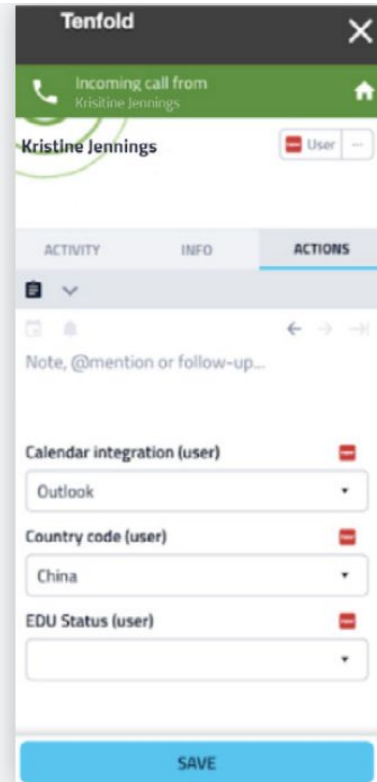
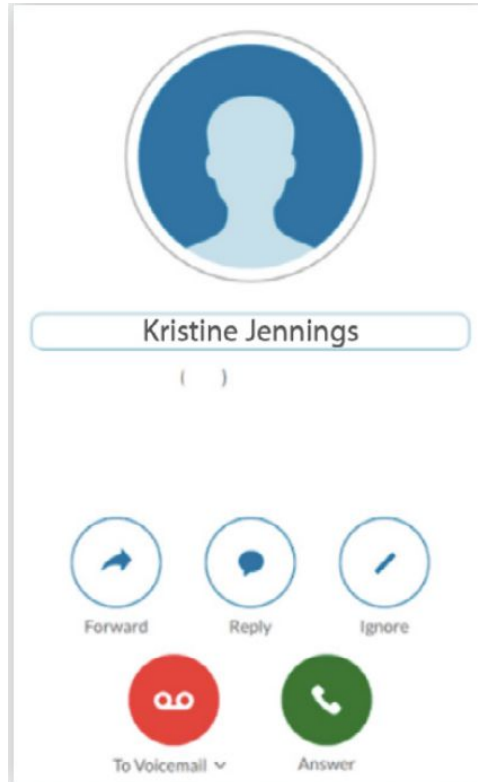
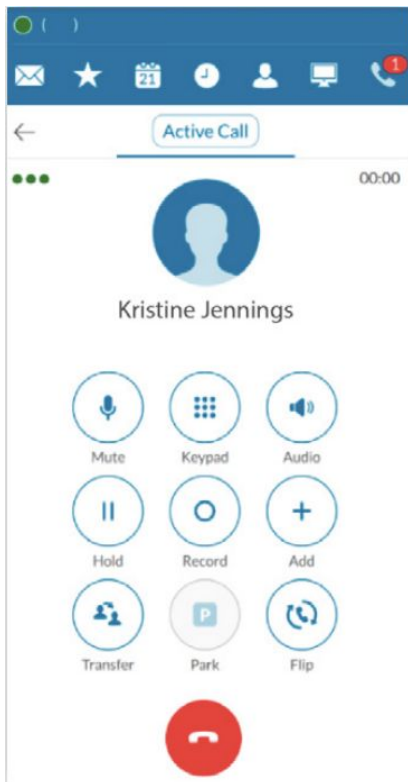
Using Tenfold with Office@Hand

Note: For the following calling features, users need to install the [AT&T Office@Hand softphone app](#). For call logging and notes, users need to install the [Tenfold Chrome extension](#)

Call Controls give users the option of managing their calls directly from within the Office@Hand SoftPhone™ desktop app. Control options include the Mute, Keypad, Hold, Record, Transfer and more.

Inbound Calling automatically captures inbound calls in CRM whether or not a user interacts with the Tenfold UI or the Office@Hand SoftPhone desktop app.

Outbound Calling allows users to place a call through the Office@Hand SoftPhone desktop app. The appropriate record is then matched in the Tenfold UI. All calls will reflect in call history, both in the Tenfold and Office@Hand apps.



Office@Hand for NetSuite FAQs

What do I need to download to use this integration?

Download the [Tenfold Chrome extension](#). This combination offers the best user experience and access to all features. Alternative is the Tenfold Desktop app: [For PC](#), [For Mac](#). Also download the [Office@Hand softphone](#)

Do I need the RingCentral for Google Chrome extensions to use this integration?

No. If you have the Tenfold Chrome extension installed, you should be able to do a successful click-to-dial.

What do I do when click-to-dial is not working?

Click-to-dial could be failing due to one or more of the following reasons:

1. You do not have the Chrome extension installed, or there are too many other Chrome extensions installed in your browser. Please try creating a different browser profile.
2. You are logged out of your Office@Hand account. Please try reconnecting the phone system in your Tenfold dashboard or contact your company admin if you are unable to access it.
3. You did not include a click-to-dial number as part of your Tenfold profile. Navigate to the Tenfold dashboard portal and select Profile. Click the gear icon next to the extension and input your CTD number as your Office@Hand phone number.

What do I do when Tenfold does not detect my inbound or outbound calls but my Office@Hand Phone app is ringing?

Verify if you installed the Chrome extension and try reconnecting the phone system within your Tenfold dashboard again as you might be logged out of your Office@Hand account. Or contact your company admin for the reconnection.

How do I customize dispositions?

If you are provisioned “user access” to the integration, please contact your company admin to configure the dispositions you would like reflected in the Tenfold Desktop App.

What do I do when I am facing permission issues like searching through contacts or email notifications for incoming calls?

Office@Hand for NetSuite needs a role to be assigned to users using this integration. The issue could be due to the permissions related to that role. Please contact your company’s NetSuite admin for more details regarding this.

Support: For more help, visit support.ringcentral.com or call 1 (888) 528-7464.