RingCentral for NetSuite

Powered by Tenfold

Admin Guide for configuring NetSuite integration

Contents

Introduction

Audience

This document is directed to customers and prospective customers interested in using Tenfold and RingCentral 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/RingCentral integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, contact RingCentral 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.

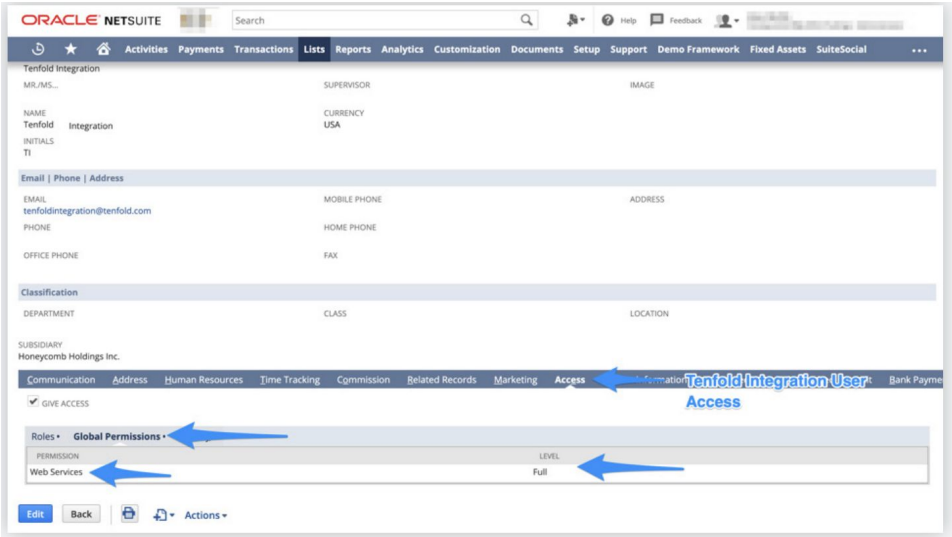
Installation Process

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.

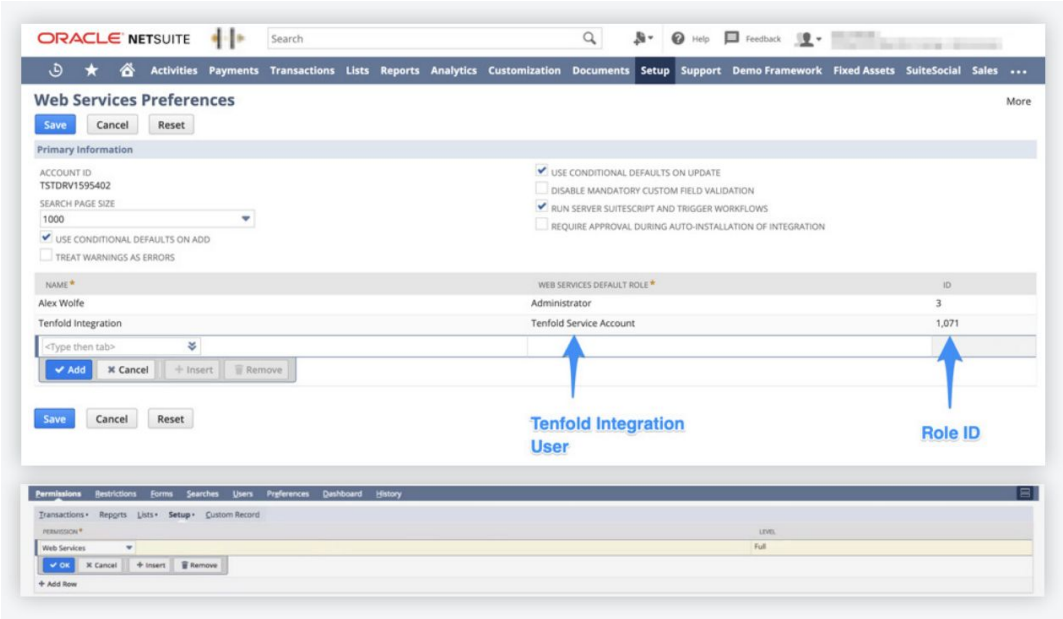
Steps

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**

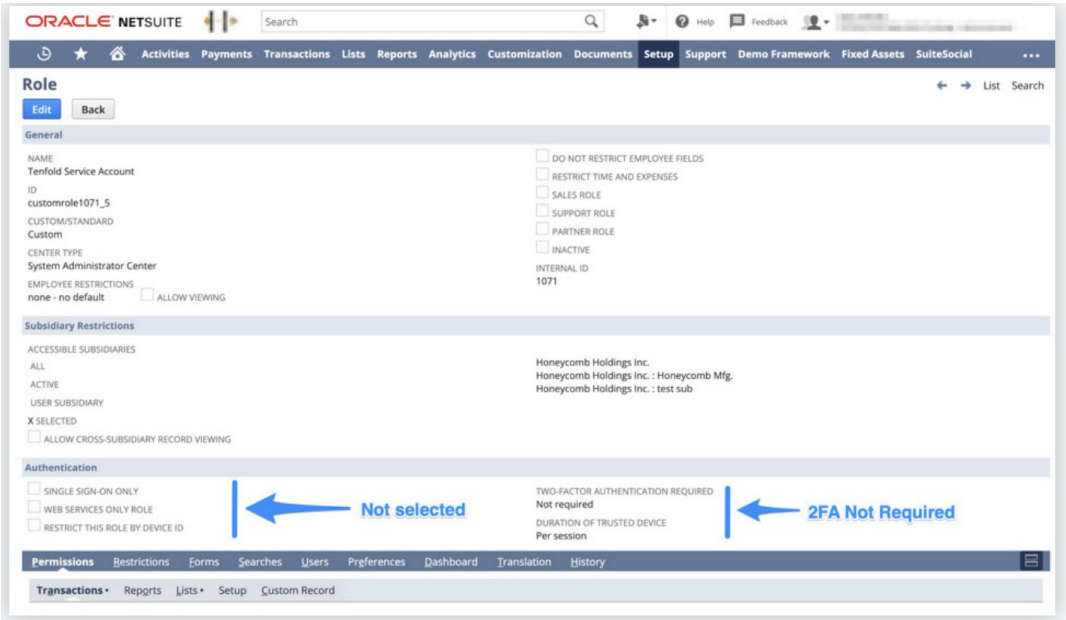


3. In web service setup, navigate to **Setup** > **Integration** > **Web Services Preferences**. Select the user and assign the Web Services Default Role. At this time, this Internal ID will be linked automatically. Select **Add** and **Save**.

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**



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

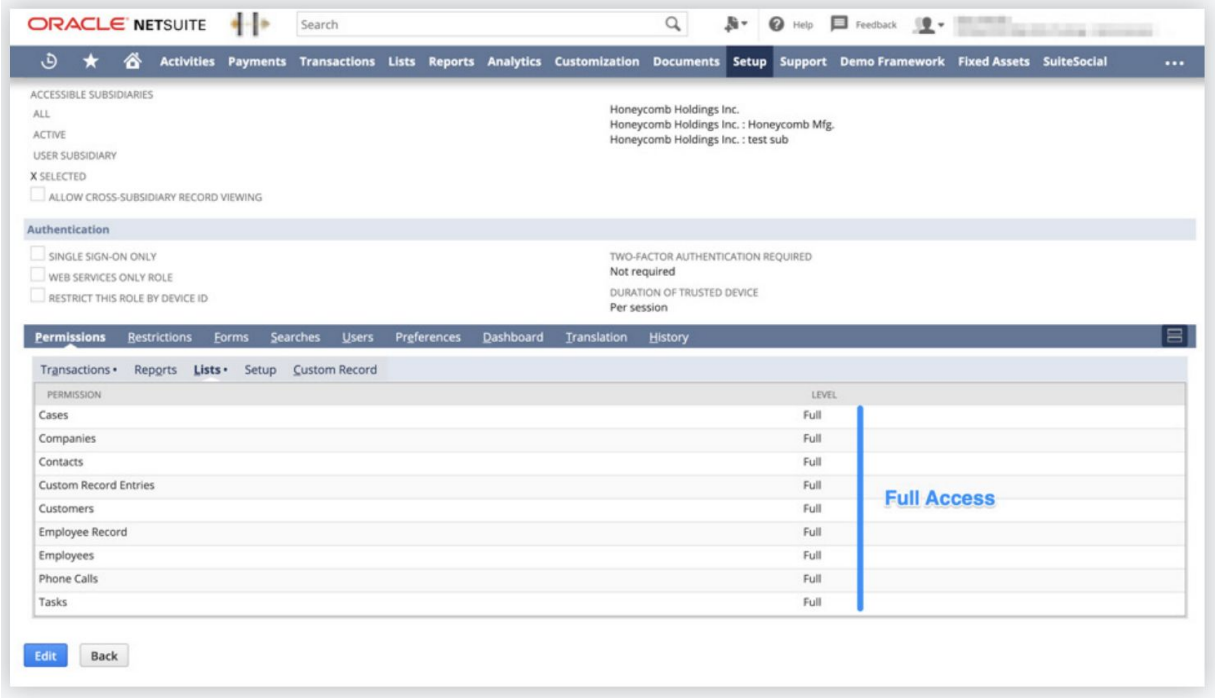


5. . Set the Mandatory Minimum Permissions for Transactions and Lists:

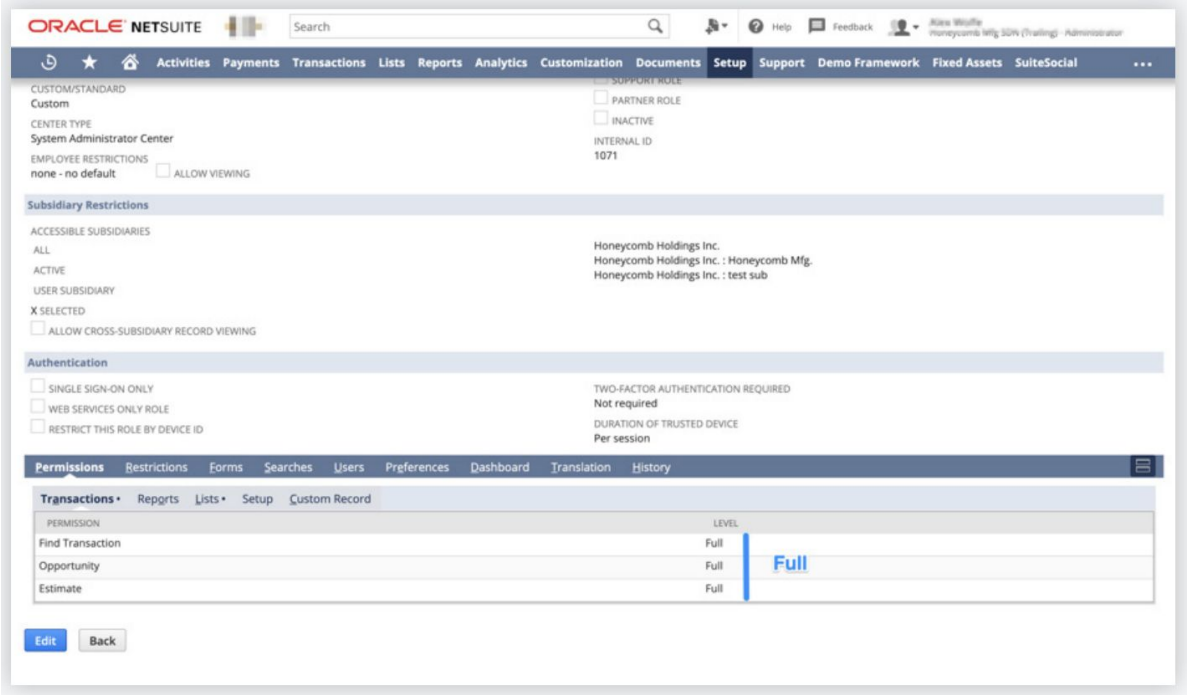
Lists
- Contact: FULL
- Companies: FULL
- Customers: FULL
- Phone Calls: FULL
- Tasks: FULL
- Employee: FULL
- Employee Record: FULL

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.



6. Save settings and proceed to the next section.



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.

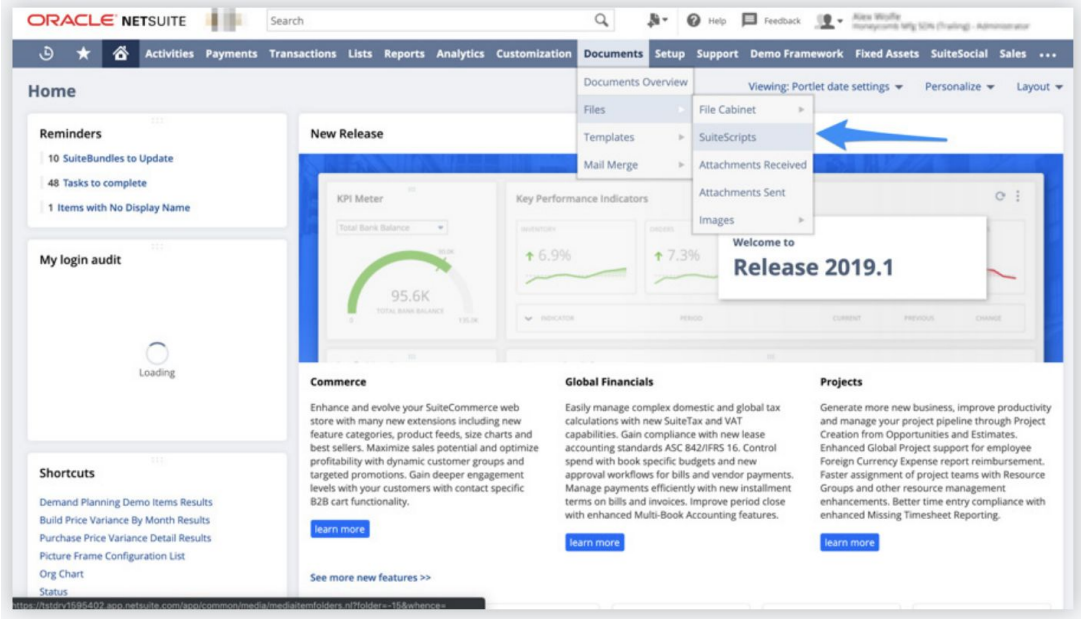
Steps

a) Add scripts to NetSuite.

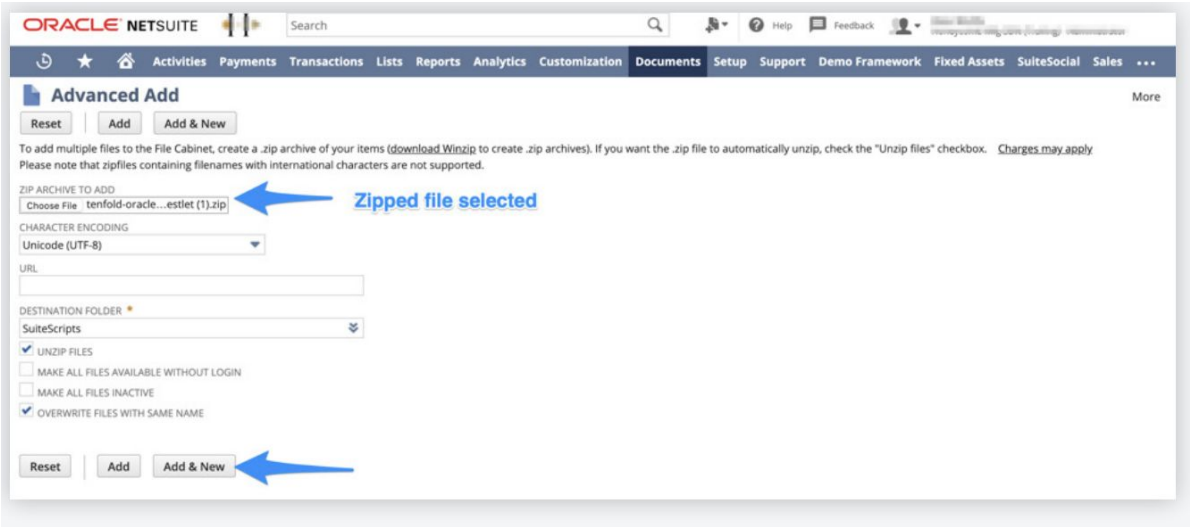
b) Set up RESTlet endpoints.

Add Scripts to NetSuite:

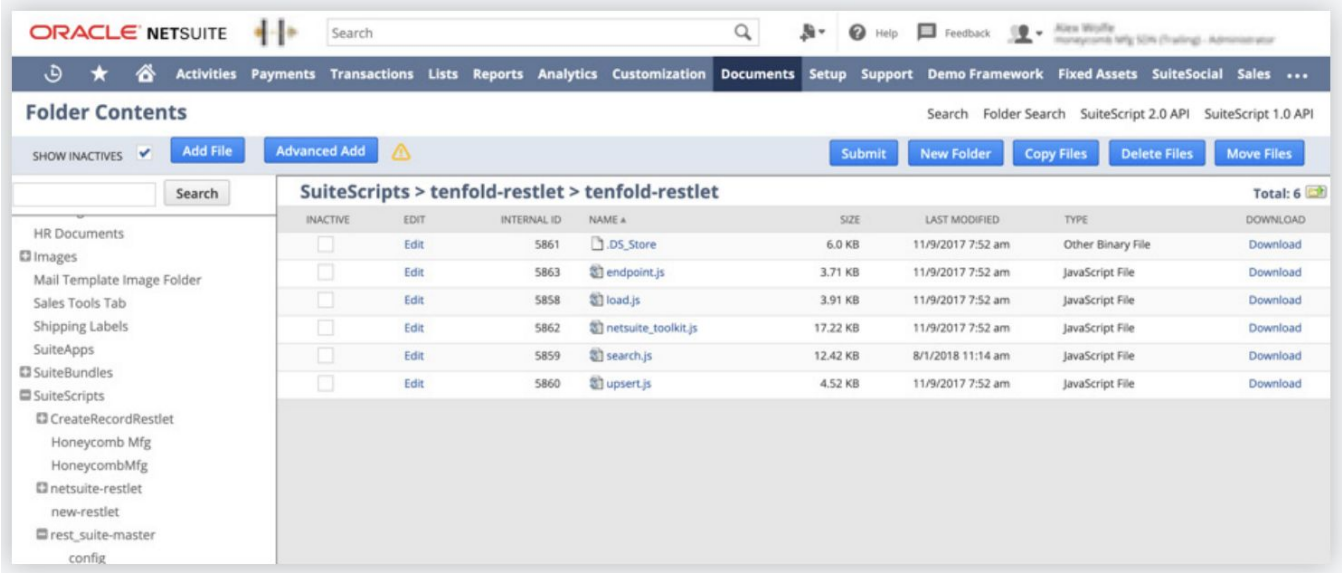
1. Download the NetSuite RESTlet scripts. NetSuite RESTlet scripts can be found in the Tenfold knowledge base here or via the zipped file at the following URL:
https://storage.googleapis.com/tenfold-NetSuite-restlet/tenfold-oracle-NetSuite-restlet.zip
2. Once downloaded, go to **Documents** > **Files** > **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.

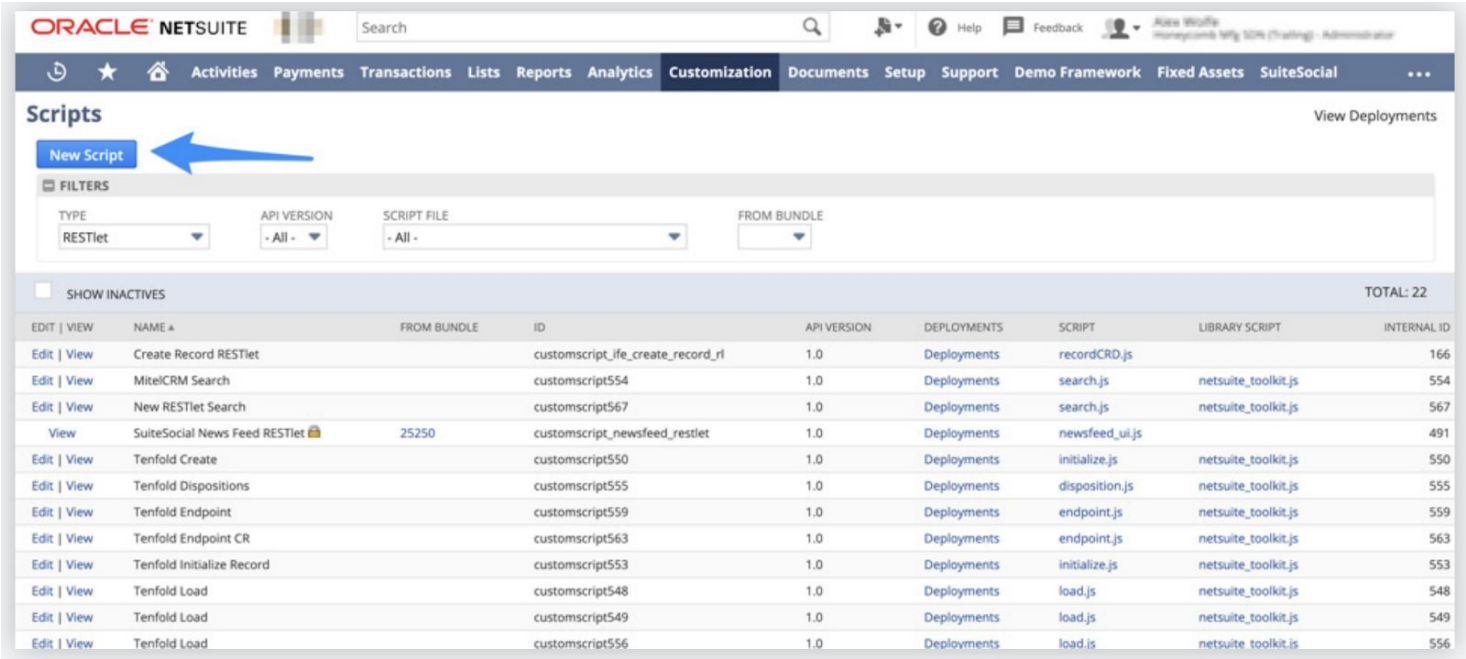


4. Click on the **Add & New** button to create a new folder titled “tenfold-restlet.” The upload will take a moment. Navigate back to **Documents** > **Files** > **SuiteScripts** to verify the new folder has been created. Make sure that **load.js, endpoint.js, search.js, and upsert.js** are included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



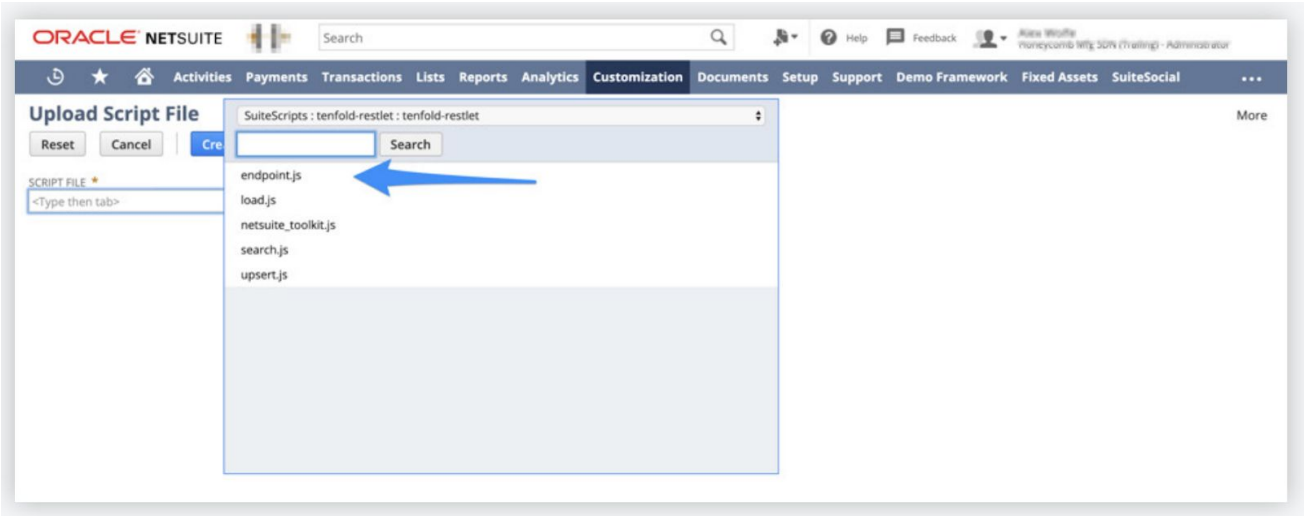
3. Set Up RESTlet Endpoints

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.**

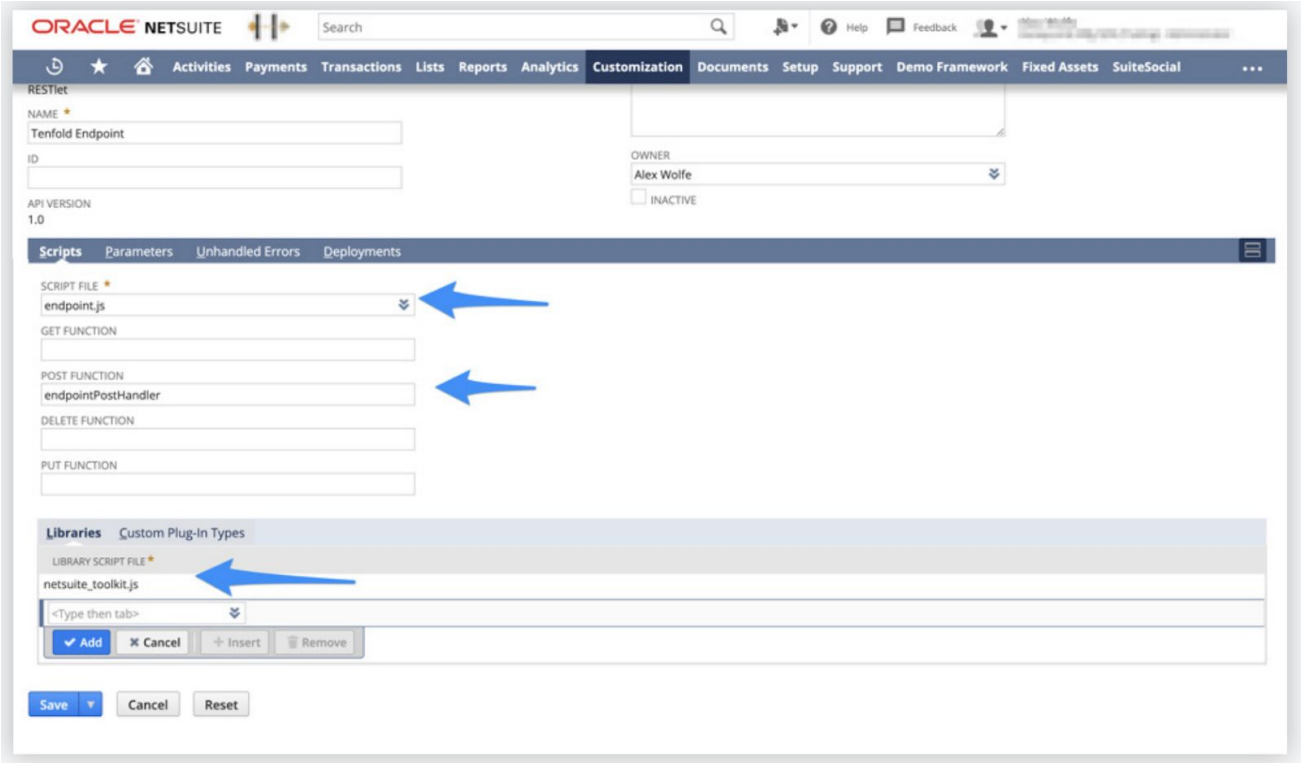


2. Click on the **New Script** button at the top of the page. You will be going through the following process four times for each of the four scripts.

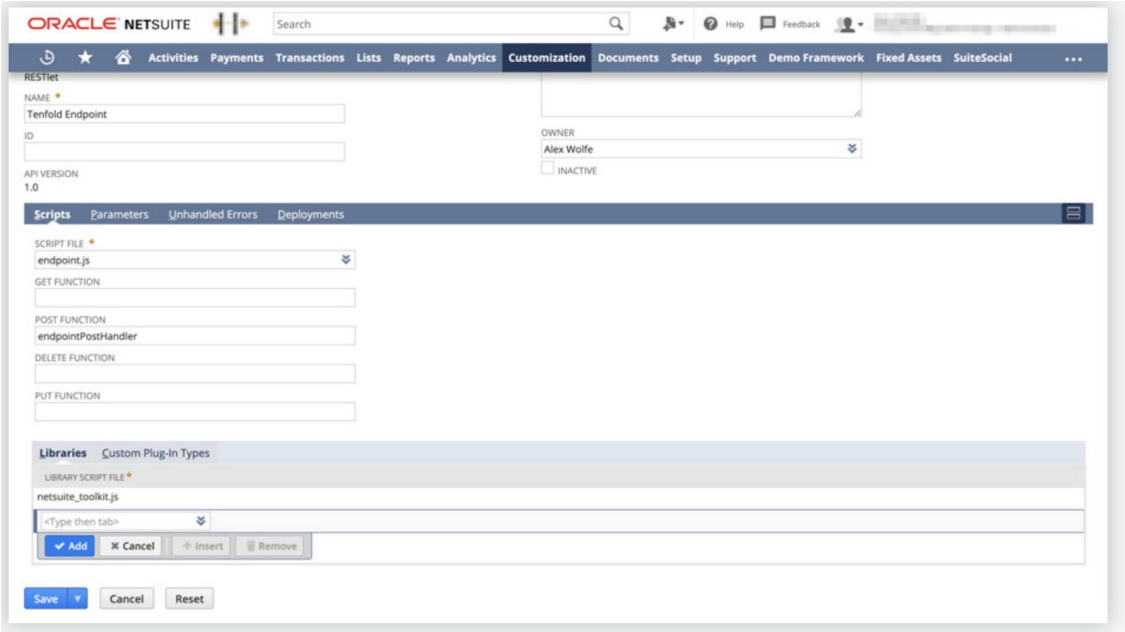
3. Click on the down arrow in the **Script File drop-down** menu. Click on **List**. Within the -All- drop-down menu, select **SuiteScripts : tenfold-restlet**. Select the script you are setting up (this will be done once per every four files). Click **Create Script Record.** Select RESTlet 1.0 Script Type.



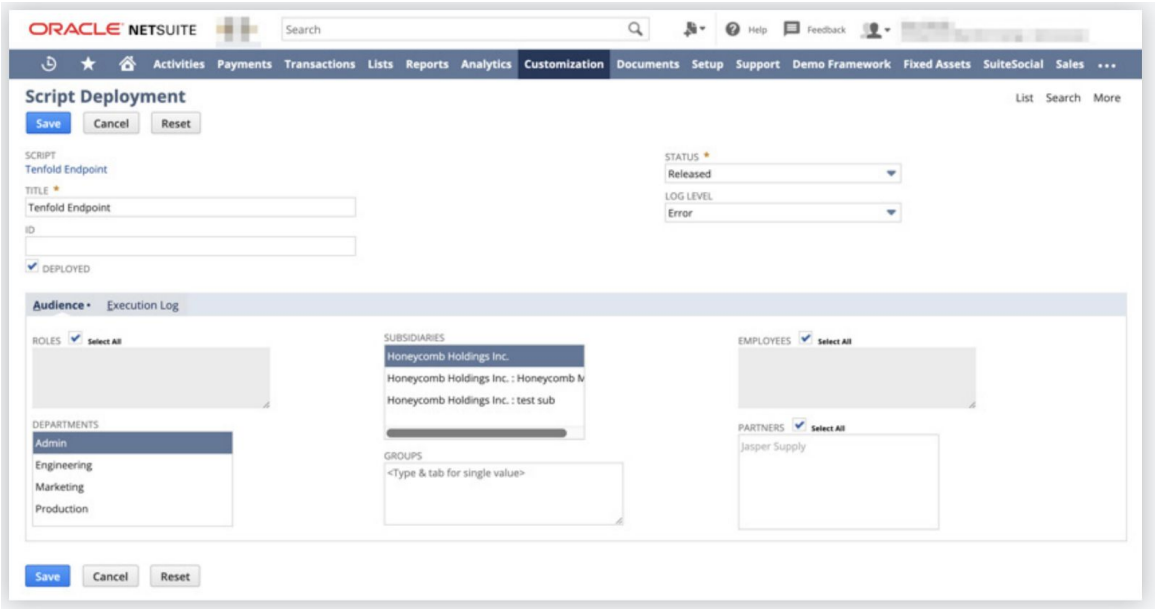
4. Name the script “Tenfold <script name>” based on the script you are making. That will be Tenfold Endpoint, Tenfold Load, Tenfold Search, and Tenfold Upsert depending on the script you are making. Order does not matter, but all four must be created.



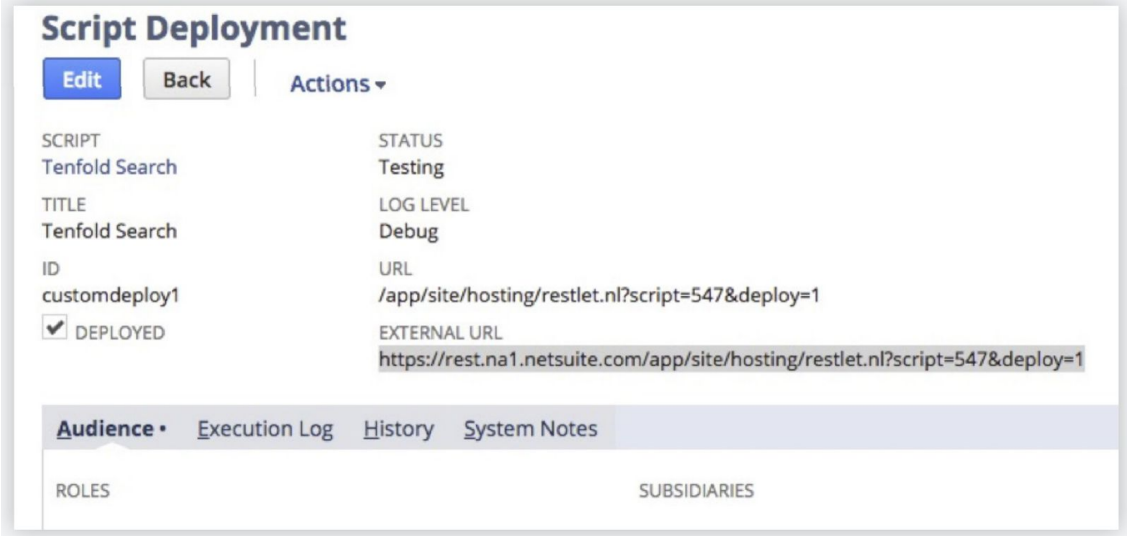
5. In the POST FUNCTION field, enter “script name>PostHandler.” The corresponding names are shown below. Under **Libraries**, include **NetSuite_toolkit.js** for each of the four scripts.
   load.js -> loadPostHandler
   search.js -> searchPostHandler
   upsert.js -> upsertPostHandler
   endpoint.js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



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



7. 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**.
8. Replicate steps for all four scripts and copy the “External URL” of each script and proceed to the next section.

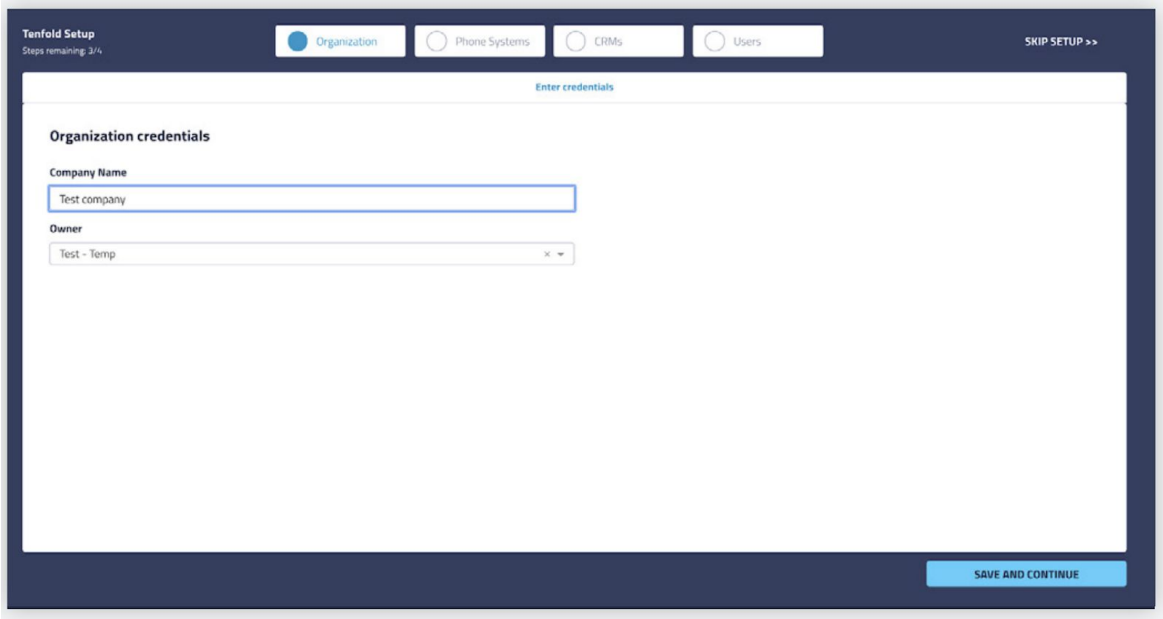


Tenfold Account Creation and Dashboard Setup

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 RingCentral. It only takes a few minutes.

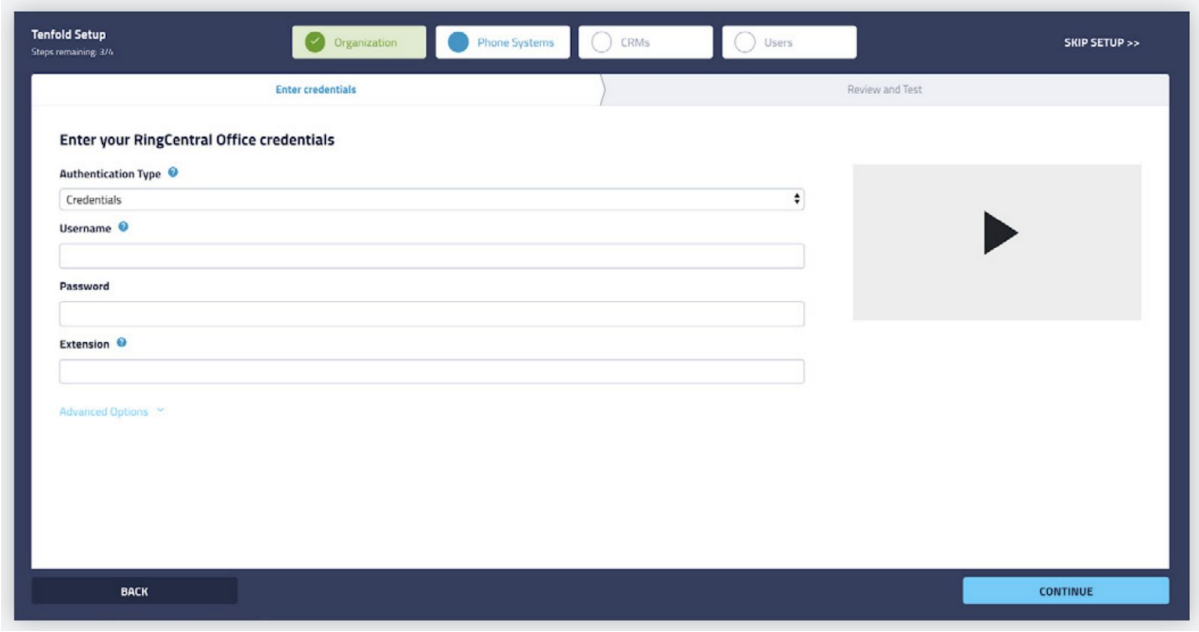
1. After requesting the Tenfold integration in the RingCentral App Gallery, check your email for instructions on how to create your Tenfold account.

2. Accept the invite and set your organization details.



3. Under Authentication Type, select **OAuth**. Then, under **Select Your Environment**, select your company's RingCentral 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 RingCentral 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.



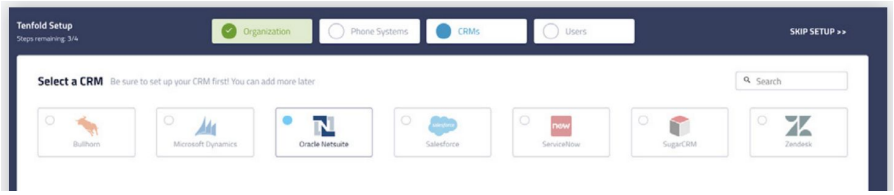
4. Select **Oracle NetSuite** as your CRM and click **Continue**
5. Select Authentication type as **Credentials** from the drop-down menu. Next, input the following information into the appropriate fields displayed:

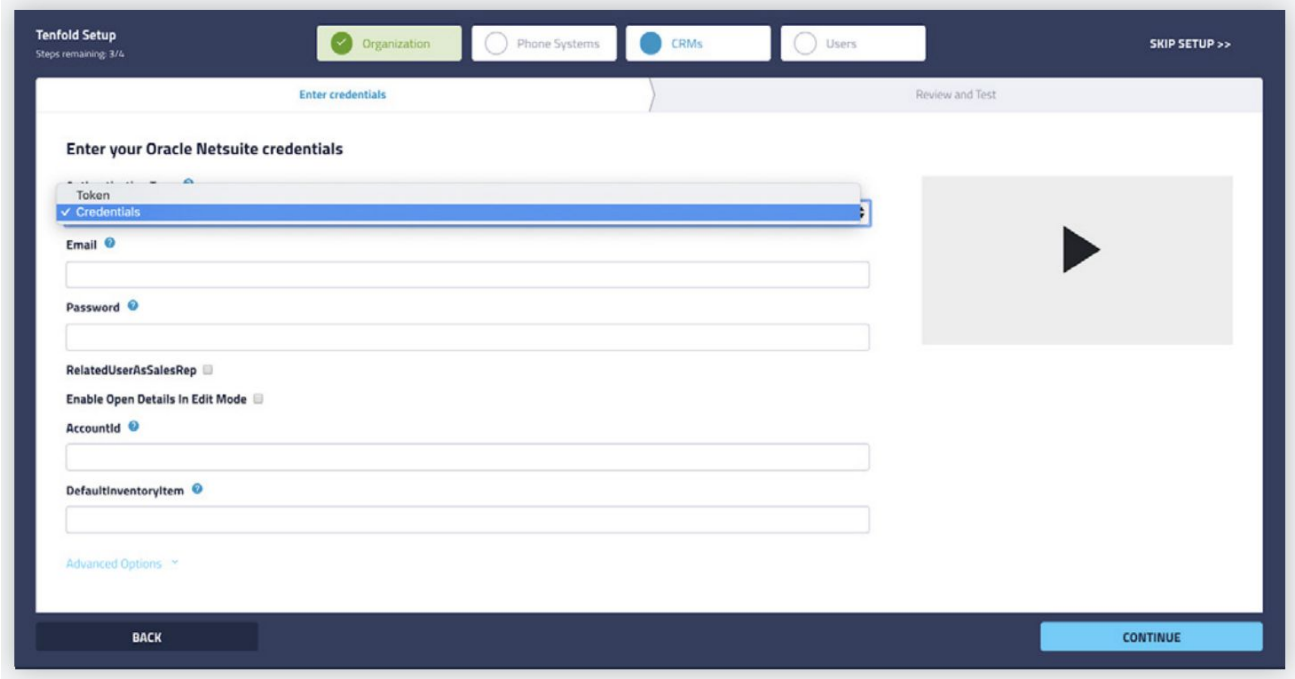
• Service Account Username
• Service Account Password
• Account ID
• Role ID (Found in section #1)
• Load Endpoint, Search Endpoint, Upsert Endpoint, and Main Endpoint URLs (on clicking Advanced Options).

Click **Continue.**

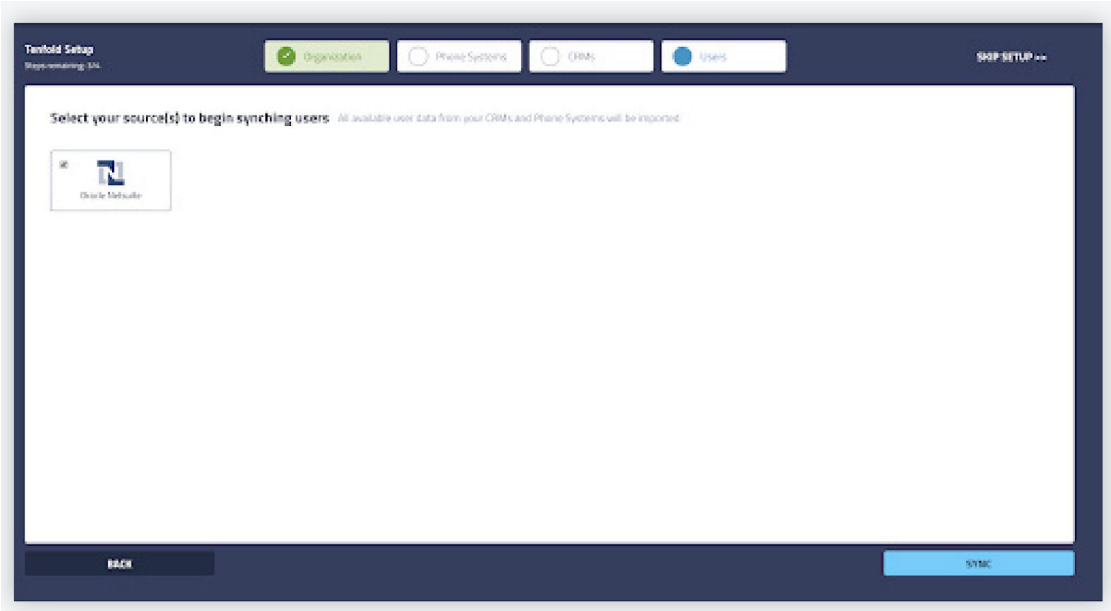
This step is required to pull all the users from the CRM account into Tenfold so the users of the CRM and this integration can be provisioned with individual Tenfold accounts each. You can always reach back to this page by logging in to your Tenfold dashboard on a browser, then click Company Settings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

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

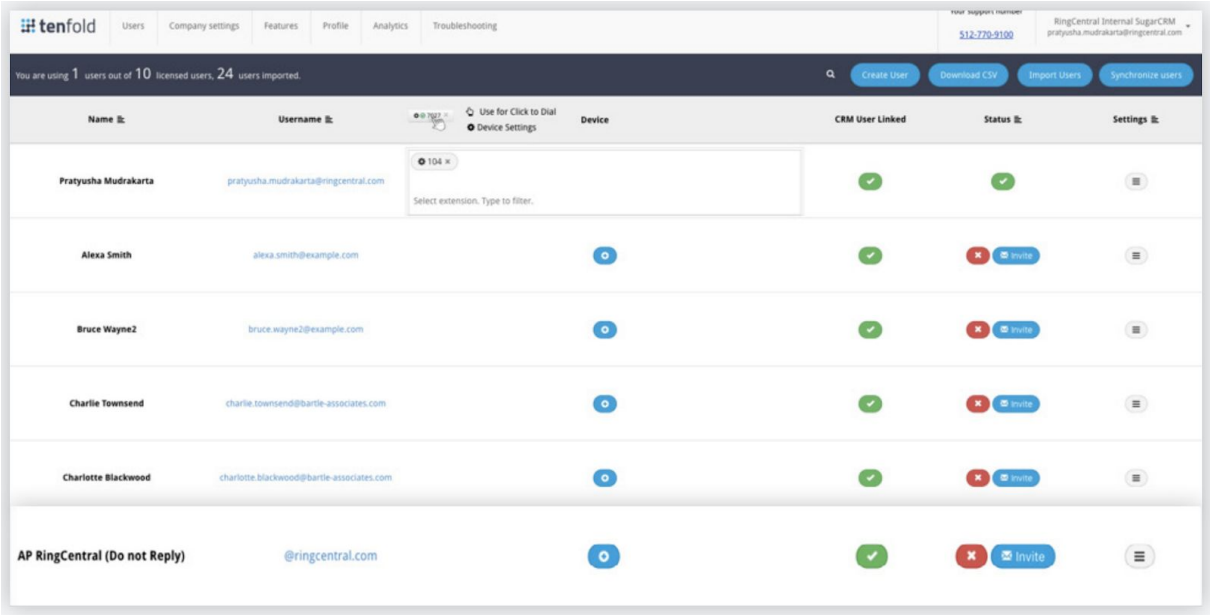




6. Click on **Sync.** The users list and dashboard will be updated with the CRM users linked to their phone extensions.
   Note: RingCentral extensions are auto-assigned based on fuzzy match between the users' first and last names in the CRM or RingCentral.



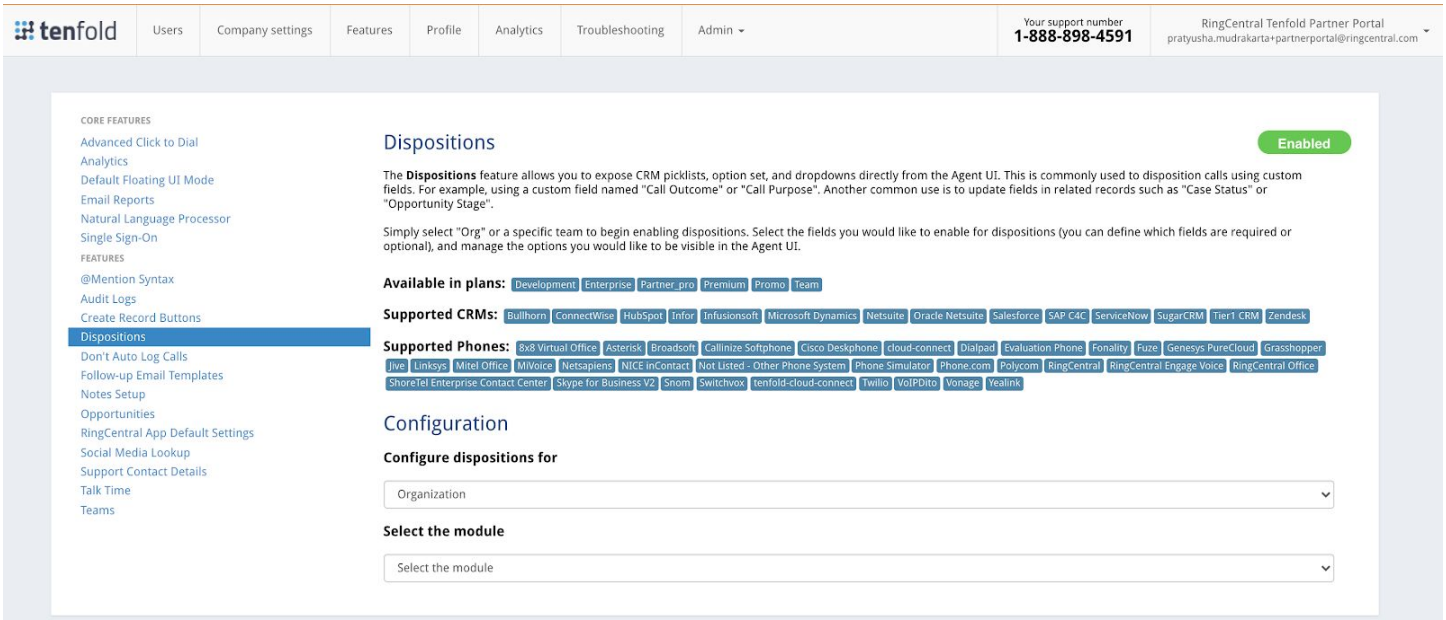
7. Next, click **Invite** under the Status column to invite the users who are going to be using the integration
   Note: If the phone extensions are not auto-assigned, click the "+" icon and manually assign the corresponding phone extension to the user.



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.

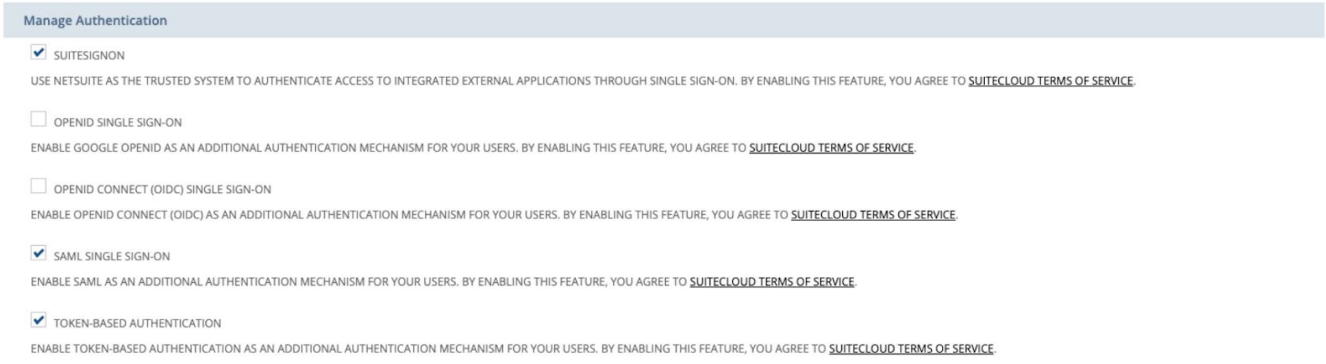


Token-Based Authentication Steps (Optional)

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

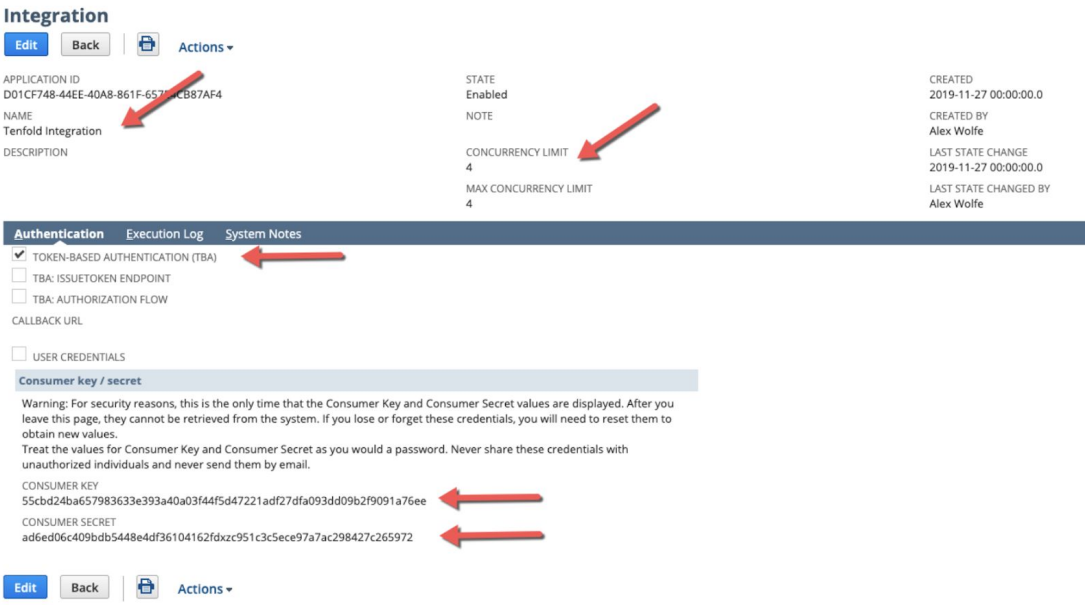
Token-based authentication must first be enabled in the account. Under **Setup** > **Company** > **Enable Features**, navigate to the SuiteCloud subtab. Enable the required features.



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

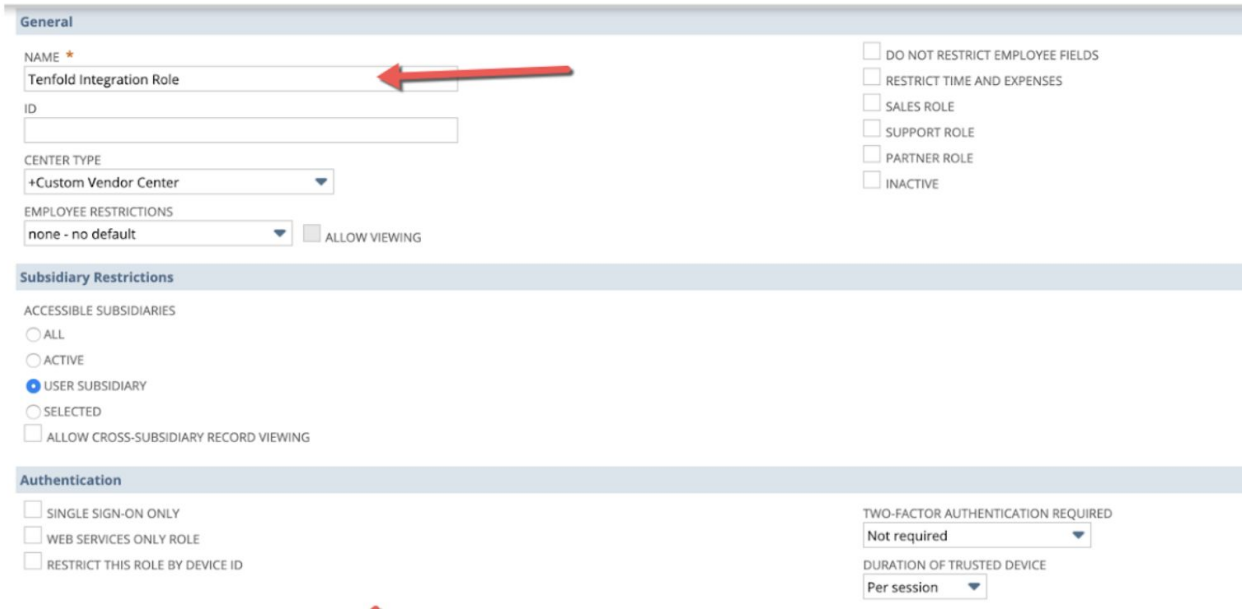


3. Role

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.

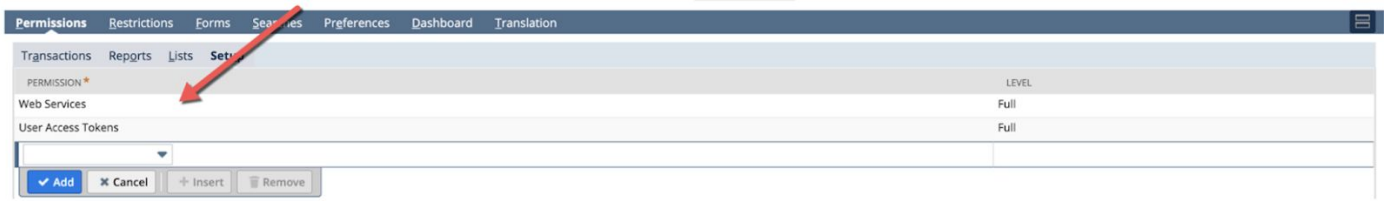
User Access Tokens

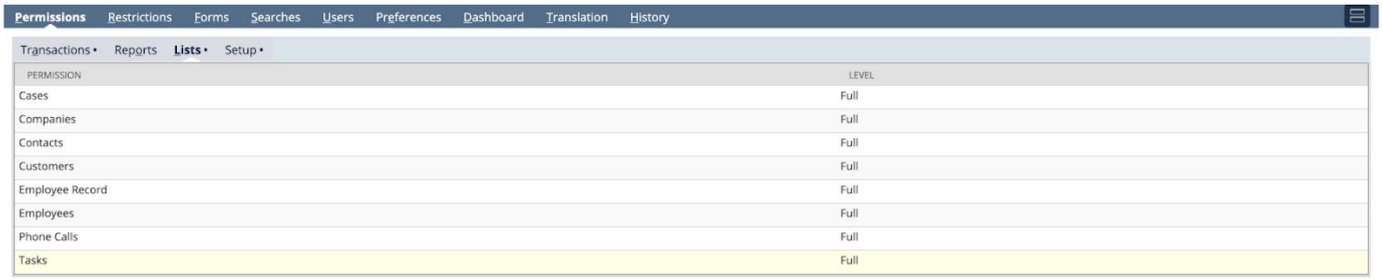
- Users with only this permission can log in using a token, that is, they can use tokens to call a RESTlet.
- Users with only this permission cannot manage tokens or access pages where tokens are managed



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**.

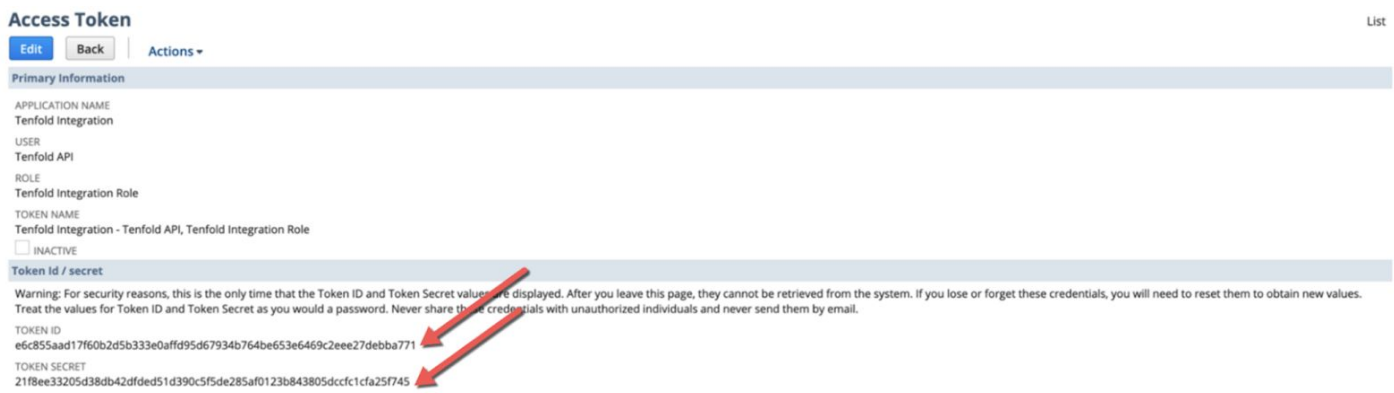
Assign the Role to the desired user that will be used for integration. Go to **Lists** > **Employees**> **edit user** > **Access tab** > **Roles subtab**





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.



5. Setting Up Token-Based Authentication in Tenfold Dashboard

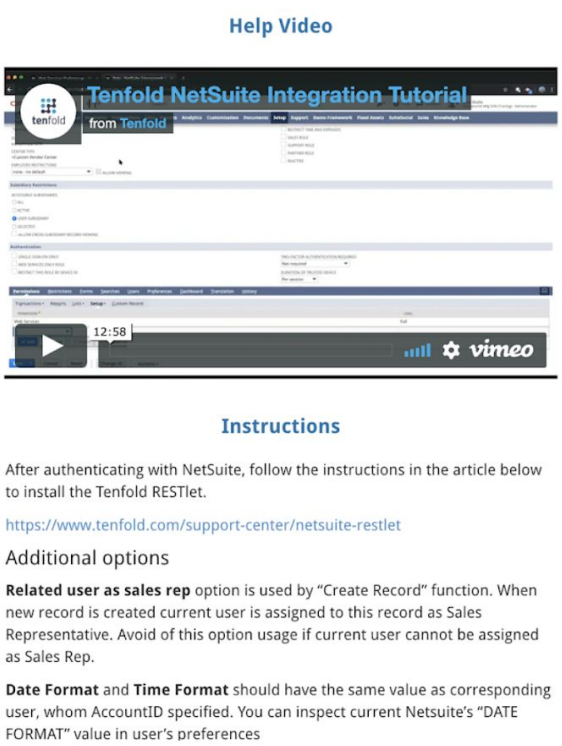
- Start by navigating to your Tenfold dashboard at https://dashboard.tenfold.com/
- Select the **Company Settings** link in the top navigation
- In the sub-navigation, select **CRM**
- Select **Oracle NetSuite** as your CRM

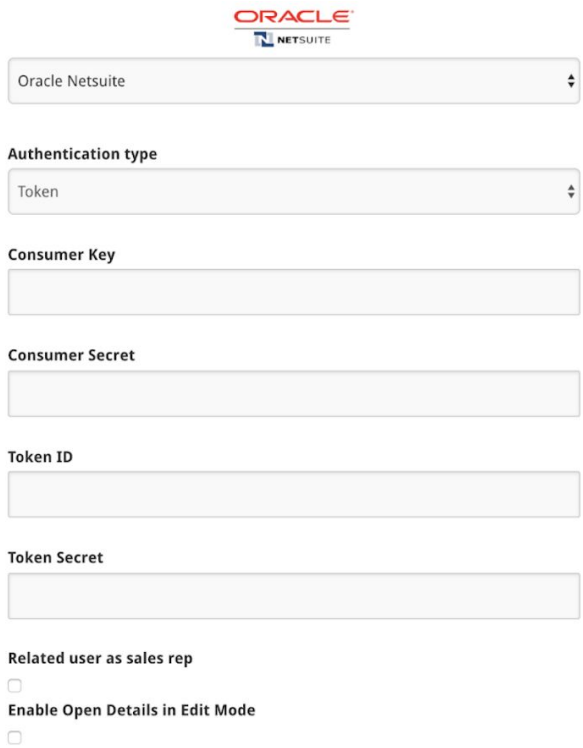
- Select Authentication type as **Token** from the dropdown
- Enter the following information into the form:

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.





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

RingCentral 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

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 RingCentral 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 RingCentral phone number.

What do I do when Tenfold does not detect my inbound or outbound calls but my RingCentral 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 RingCentral 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?

RingCentral 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.