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NetSuite CRM+ Connector

v1.0

Administrator Guide

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Applicability
This document applies to Protection! NetSuite CRM+ Connector v1.0 software.

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Chapter 1

Overview

This document describes how to setup and administer *Protection! NetSuite CRM+ Connector* application (hereafter "*Connector*").

Connector provides integration between Protection! Enterprise and NetSuite CRM+ (hereafter NetSuite). It is a J2EE application responsible for handling Protection! Connect™ events and for adding/updating data in *NetSuite CRM+* (i.e., adding contacts or creating opportunities). With this *Connector* all of the licensing and customer activities in the Protection! Enterprise will be correctly reflected in NetSuite CRM+ providing up-to-date data for Sales, Management and Marketing staff.

The following is a brief description of *Connector* workflow:

1. On create or update event for an Evaluation license:
    a. Create a new Opportunity.
    b. Create or update corresponding Account and/or Contact.
    c. Associate Opportunity with corresponding Campaign (optional).
2. On create or update event for an Extended Evaluation license:
    a. Create or update Opportunity with increased probability percentage.
    b. Create or update corresponding Account and/or Contact.
    c. Associate Opportunity with corresponding Campaign (optional).
3. On create or update event for a Commercial license:
    a. If Opportunity exists then update its Sales Stage with status Closed-Won.
    b. Create or update corresponding Account and/or Contact.
    c. Create an Asset for the license and associate it with the corresponding Account.
    d. Optionally create an order that corresponds to the issued Commercial license.
4. On create or update event for a Customer:
    a. Create or update corresponding Account and/or Contact.

Note

Connector requires Protection! Connect™ application to be properly configured, up and running. Please consult the <PROTECTION_ENTERPRISE_HOME>/server/connect/doc/Protection_Connect_Administrator_Guide.doc document on how to configure and deploy Protection! Connect™.

Chapter 2

NetSuite CRM+ Configuration

The *Connector* requires its NetSuite CRM+ Bundle to be installed and properly configured. This topic outlines how to install and configure it.

2.1 NetSuite CRM+ Bundle Installation

The following steps are needed to install NetSuite CRM Connector Bundle on your account:

1. Go to *Setup* | *Customization* | *Install Bundle* page.
2. Type the *Protection! NetSuite CRM Connector* keywords in the “Keywords” field.
3. Press the “Search” button.
4. Choose the “*Protection! NetSuite CRM Connector*” bundle from the list.
5. Press the “Install” button and follow the NetSuite CRM+ installation and deployment instructions.

2.2 Setting up Products

License and License Action events cannot be processed without existence of corresponding products in NetSuite CRM+. Therefore all the products used by Protection! Enterprise must be listed in NetSuite CRM+ to allow working with them. The easiest way to setup products is exporting them using Enterprise Manager but it is also possible to setup/maintain them manually if desired.

All the products can be added to NetSuite CRM+ by choosing the *File* | *Export* | *Products to Protection! Connect* menu item in the Enterprise Manager. In NetSuite CRM+ the Protection! Products are presented as *“Non-inventory Item for Sale”* items composed as two-level hierarchy, if they have Editions, and single-level hierarchy if do not. First level of the hierarchy represents Products themselves. If a Product has Editions they are located under the Product.

After Products have been imported the Items' basic price should be specified. Both Opportunities and Sales Orders (Transactions) require the item price and cannot be created without it.

Chapter 3

Connector Deployment and Configuration

3.1 Deployment on GlassFish Application Server

To deploy *Connector*:

1. The `NetSuiteConnector.properties` configuration file needs to be modified (see section Connector Configuration below), and then copied to the GlassFish domain's configuration folder: `<GLASSFISH_HOME>/domains/domain1/config`
2. The `NetSuiteConnector.license` license file must be copied to the `<GLASSFISH_HOME>/domains/domain1/config` folder. If you need a license you may either:
   - Buy a commercial license at: Protection! Store.
   - Request a trial license at: NetSuite CRM+ Connector page.
3. The `NetSuiteConnector.ear` enterprise application needs to be copied to the GlassFish domain's auto deploy folder: `<GLASSFISH_HOME>/domains/domain1/autodeploy` or to be deployed via GlassFish's Admin Console.

Note

If there are several domains setup on the GlassFish AS then the correct domain name must be used instead of above-mentioned `domain1`.

3.2 Getting NetSuite CRM+ WebServices URL

The *Connector* requires a valid URL of NetSuite CRM+ WebServices for its functionality. This URL can be obtained from the SuiteTalk documentation at:

http://www.netsuite.com/portal/developers/resources/suitetalk-documentation.shtml

You need to view WSDL online and browse it for the `location` attribute, which represents needed URL:

`/definitions/service/port/soap:address/@location`

Part of WSDL to look for can look like:

```
<service name="NetSuiteService">
  <port name="NetSuitePort" binding="tns:NetSuiteBinding">
    <soap:address location="https://webservices.netsuite.com/services/NetSuitePort_2009_1"/>
  </port>
</service>
```

3.3 Connector Configuration

To configure *Connector* enterprise application the `NetSuiteConnector.properties` file needs to be modified.

Note

Some of the properties allow using `[DO NOT USE]` constant as a property value. If such value is specified then corresponding field of NetSuite entity will not be modified by Connector preserving field's original value or value assigned by NetSuite.

The following properties are available:

Name	Default Value	Description
url	https://webservices.netsuite.com/services/NetSuitePort_2008_2	URL of NetSuite CRM+ WebServices. See the preceding topic on how to obtain it.
login.account		NetSuite's account ID. To get it go to *"Support | Customer Service | Contact Support by Phone"*. Your account number will be displayed in a pop-up window.
login.email		User login
login.password		User password.
customer.individual.name	{0} {1} ({2})	Format for composing Customer's name when Company was not specified and a new Customer should be created as an Individual. Available arguments are: • {0} – First Name • {1} – Last Name • {2} – E-mail
customer.status_eval	Closed Won	Customer Status for the Evaluation license when creating a new Customer. All the available values can be found in the *"Setup | Sales | Customer Statuses"*. Accepts [DO NOT USE] value.
contact.locked	false	Default value for the "Locked" status on the Contact's creation. When lock is on (true) the record won't be updated on the Customer Updated event.
contact.asset.note.title	License [{0}] - {1}	Format for composing Contact's Asset Note title. Available arguments are: • {0} – License Number • {1} – License Action
contact.opportunity.note.title	Opportunity: {0}	Format for composing Contact's Opportunity Note title. Available arguments are: • {0} – Opportunity Title
opportunity.title	{0}_{1}	Format for composing Opportunity's title. Available arguments are: • {0} – Product (Item) Name • {1} – Product Version

opportunity. close_days	30	The duration in days of opportunity lifespan
opportunity. status_eval	Opportunity Identified	Opportunity's Status for the Evaluation License. All the available values can be found in the *"Setup* | *Sales* | *Customer Statuses"* page. Accepts [DO NOT USE] value.
opportunity. status_exteval	In Discussion	Opportunity's Status for the Extended Evaluation License. All the available values can be found in the *"Setup* | *Sales* | *Customer Statuses"* page.
opportunity. status_commercial	Closed Won	Opportunity's Status for the Commercial license. Updated only if an open Opportunity with the same combination of *product+edition+version* found for the commercial license. This status is applied to the Opportunity if the sales_order.create value is false.
opportunity.note. title	License [{0}] - {1}	Format for composing Opportunity's note title. Available arguments are: • {0} – License Number • {1} – License Action
sales_order. create	true	Specifies whether to create a Sales Order for a Commercial License.
asset.name	{0}_{1}	Format for composing Asset's name. Available arguments are: • {0} – Product Name • {1} – Product Version • {2} – Customer Name • {1} – License Number
asset.locked	false	Default value for the "Locked" status on the Asset's creation. When lock is on (true) the record won't be updated on the License Updated/License Action events.
asset.note. title	License [{0}] - {1}	Format for composing Asset's note title. Available arguments are: • {0} – License Number • {1} – License Action
log.level	INFO	Logging level. Possible values are: • ALL - log all messages. • FINE – log debug messages, information messages, warnings and errors. • INFO – log information messages, warnings and errors. • WARNING – log warnings and errors. • SEVERE – log errors only.

		• `OFF` – log no messages.
`log.path`	`../logs/ProtectionConnect`	Path to log files. When related path is specified, absolute folder location depends on particular Application Server. For example, default path would be <GLASS_FISH_HOME>/domains/domain1/logs/ProtectionConnect for GlassFish

The following are a sample of the `NetSuiteConnector.properties` file:

```
url=https://webservices.netsuite.com/services/NetSuitePort_2008_2
login.email=
login.password=
login.account=

customer.status_eval=Opportunity Identified

contact.locked=false
contact.asset.note.title=License [{0}] - {1}
contact.opportunity.note.title=Opportunity: {0}

opportunity.title={0}_{1}_{2}
opportunity.close_days=30
opportunity.status_eval=Opportunity Identified
opportunity.status_exteval=In Discussion
opportunity.status_commercial= Closed Won

opportunity.note.title=License [{0}] - {1}

sales_order.create=true
asset.name={0}_{1}
asset.locked=false
asset.note.title=License [{0}] - {1}

campaign.other.code=other

log.level=INFO
log.path=../logs/ProtectionConnect
```

Tip

Connector tracks the changes of `NetSuiteConnector.properties` file and is able to apply them at runtime. So neither GlassFish Application Server nor *Connector* application need to be restarted to apply changes in configuration.

Chapter 4

Known Issues and Limitations

This chapter describes known problems and associated workarounds for the Protection! NetSuite CRM+ Connector v1.0 software. If a summary statement does not specify a particular platform, the problem applies to all platforms.

1. Invalid Content-Type:text/html Exception

Some of CRM Web Services implementations may return textual errors instead of valid SOAP responses. Such results cannot be processed in current implementations and no actual error messages are shown and logged. The following approache can be used to see actual responses:

Use some HTTP monitor application like Fiddler (http://www.fiddlertool.com) to see and analyze all the HTTP traffic. You may need to instruct Connector implementation to connect to the CRM through the Fiddler acting as a Web Proxy. To do so the following system properties must be set up:

```
http.proxyHost=127.0.0.1
http.proxyPort=8888
```

2. Cannot associate Opportunities with Contacts

Current NetSuite Web Services implementation doesn't expose methods to allow association of Opportunities with Contacts. Therefore Connector is not able to make such associations yet. The *"User Notes"* field for Opportunity and Contact provides textual information of such association so far. Also the "Custom | *Attached Contacts"* field contains textual reference to the Contact.

Appendix A

Connector Workflow

This topic outlines *Connector* workflow and provides description of the custom entities and fields were introduced.

a.1 NetSuite CRM+ Connector Bundle Custom Fields

The NetSuite CRM+ Connector Bundle installs the following custom fields:

a.1.1 Contact Entity Custom Fields

These fields can be accessed via the *Setup* | *Customization* | *Lists, Records, & Fields* | *Entity Fields* page.

Attribute	Value
`Label`	`Locked`
`ID`	`_locked` (after saving should be `custentity_locked`)
`Type`	`Check Box`
`Applies To`	`Contact`
`Display`	`Subtab -> Main`
`Help`	Allows locking the record to prevent its update by Connector.

a.1.2 Opportunity Entity Custom Fields

These fields can be accessed via the *Setup* | *Customization* | *Lists, Records, & Fields* | *Transaction Body Fields* page.

Attribute	Value
`Label`	`Code`
`ID`	`_code` (after saving should be `custbody_code`)
`Type`	`Free-Form Text`
`Applys To`	`Opportunity`
`Display`	
`Help`	Opportunity's code. Composed as concatenations of the “Product ID”, “Product Edition ID” and “Product Version” attributes divided by underscore sign. Do not modify value of this field – it is for internal use only.

Attribute	Value
`Label`	`Licenses Id`
`ID`	`_licenses_id` (after saving should be `custbody_licenses_id`)
`Type`	`Long Text`
`Applys To`	`Opportunity`
`Display`	

Help	A list of Evaluation Licenses ID's attached to the Opportunity. Do not modify value of this field – it is for internal use only.

Attribute	Value
Label	Attached Contacts
ID	_attached_contacts (after saving should be custbody_attached_contacts)
Type	Text Area
Applys To	Opportunity
Display	
Help	Opportunity's Contacts

a.2 NetSuite CRM+ Connector Bundle Custom Record Types

The NetSuite CRM+ Connector Bundle installs the following custom record types:

a.2.1 Asset Record Type

This record type can be accessed via the *Setup* | *Customization* | *Lists, Records, & Fields* | *Record Types* page.

The following are Asses record type attributes:

Name	Value
Name	Asset
ID	_asset (after saving should be customrecord_asset)
Checkboxes	The following checkboxes should be turned ON: • Show Notes • Records are Ordered • Allow Quick Search
Subtabs	License, Contacts
Links	Select any desired Centers and their Sections. By default use Classic center and Transactions sections. Specify *Assets* as Label.
Help	Stores commercial licenses

a.2.1 Asset Record Type Fields

The following are fields for this record type:

Name	Value
Label	Customer
ID	_asset_customer (after saving should be custrecord_asset_customer)
Type	List/Record

List/Record	Customer
Checkboxes	All are ON
Display	Parent Subtab -> Assets
Validation	Mandatory is ON
Help	License's Customer (Company of the Contact)

Name	Value
Label	Item
ID	_asset_item (after saving should be custrecord_asset_item)
Type	List/Record
List/Record	Item
Checkboxes	All are ON
Display	Parent Subtab -> Assets
Validation	Mandatory is ON
Help	License's Product (Item)

Name	Value
Label	Opportunity
ID	_asset_opportunity (after saving should be custrecord_asset_opportunity)
Type	List/Record
List/Record	Opportunity
Checkboxes	Store Value and Record is Parent are ON
Display	Parent Subtab -> Assets
Help	An Opportunity associated with the Asset (commercial license)

Name	Value
Label	Sales Order
ID	_asset_salesorder (after saving should be custrecord_asset_salesorder)
Type	List/Record
List/Record	Transaction
Checkboxes	Store Value and Record is Parent are ON
Display	Parent Subtab -> Assets
Help	A Sales Order created for the commercial license

Name	Value

Label	Locked
ID	_asset_locked (after saving should be custrecord_asset_locked)
Type	Check Box
Checkboxes	Store Value is ON
Help	Allows to lock the record to prevent its update by Connector

Name	Value
Label	License #
ID	_asset_licenseno (after saving should be custrecord_asset_licenseno)
Type	Free-Form Text
Checkboxes	Store Value and Show In List are ON
Display	Subtab -> License
Validation	Mandatory is ON
Help	License Number

Name	Value
Label	Quantity
ID	_asset_quantity (after saving should be custrecord_asset_quantity)
Type	Decimal Number
Checkboxes	Store Value is ON
Display	Subtab->License
Validation	Mandatory is ON
Help	License number of copies

Name	Value
Label	Amount
ID	_asset_amount (after saving should be custrecord_asset_amount)
Type	Currency
Checkboxes	Store Value is ON
Display	Subtab -> License
Validation	Mandatory is ON
Help	Number of Copies * Item base price

Name	Value
Label	Purchase Date

ID	_asset_purchdate (after saving should be custrecord_asset_purchdate)
Type	Date
Checkboxes	Store Value is ON
Display	Subtab -> License
Validation	Mandatory is ON
Help	License action date

Name	Value
Label	Install Date
ID	_asset_instdate (after saving should be custrecord_asset_instdate)
Type	Date
Checkboxes	Store Value is ON
Display	Subtab -> License
Help	License activation date

Name	Value
Label	Usage End Date
ID	_asset_usgenddate (after saving should be custrecord_asset_usgenddate)
Type	Date
Checkboxes	Store Value is ON
Display	Subtab -> License
Help	License expiration date

Name	Value
Label	Description
ID	_asset_desc (after saving should be custrecord_asset_desc)
Type	Long Text
Checkboxes	Store Value is ON
Display	Subtab -> License
Help	License description

Name	Value
Label	Contacts

ID	`_asset_contacts` (after saving should be `custrecord_asset_contacts`)
Type	Multiple Select
List/Record	Contact
Checkboxes	`Store Value` and `Record is Parent` are ON
Display	Parent Subtab -> Assets Subtab -> Contacts Display Type -> Show as List
Help	A list of Contacts of the Customer requested an evaluation license

a.3 NetSuite CRM+ Connector Bundle Custom Subtabs

The NetSuite CRM+ Connector Bundle requires certain custom subtabs to be installed. It can be done via the *Setup* | *Customization* | *Subtabs* page. The following subtabs need to be installed:

1. Assets for the following types:
    a. Transaction.
    b. Entity.
    c. Item.

a.4 NetSuite CRM+ Connector Workflow

Connector handles "Added" and "Updated" events for the Customer, License and License Action entities by executing the following corresponding workflows.

Note

If no Company is specified for Contact it will not be created / updated in NetSuite CRM+; a Customer (Individual) will be created / updated instead. Therefore all the corresponding workflows are adjusted to use just Customer (Individual) only.

a.4.1 Customer Added/Updated

If corresponding Contact exists and if Contact's *"Locked"* field is unchecked then Contact will be updated with the Customer data that came from Protection!. If such Contact does not exist, then a new Contact will be created. The existence of the Contact is checked by searching for Customer Id in the Contact's *"ExternalId"* field and then, if not found, by the Contact's Email. The Contact's Customer (Company) will be created, if not exists, based on Protection! Customer's Company and Customer's address data.

The Customer "status" will be the `customer.status_eval` value from the `NetSuiteConnector.properties` file.

a.4.2 License Updated

This event will be handled for commercial licenses only. Commercial licenses are stored as Asset entities. The Product (Item), for which license action is requested, must exist in NetSuite CRM+.

First, License Id in Asset's *"ExternalId"* field will be searched for existence of the license to be updated. If such license is not found, then it will be searched by the combination of the *"License Number"* (Serial#), *"Product (Item)"* and *"Customer"*. If License (Asset) has been found and the *"Locked"* field is set to false (unchecked), then the Asset's

"Quantity", *"Price"*, *"Serial#"*, *"Install Date"*, *"Usage End Date"* and *"Description"* fields will be updated.

a.4.3 License Action Added/Updated

a.4.3.1 Evaluation License

Evaluation licenses are represented within NetSuite as Opportunity entities. The Product (Item), for which license is requested, must exist in NetSuite.

Evaluation License processing by steps:

1. Attempt to find Contact by Protection! Customer's Id. If not found, then attempt to find Contact by Email. If not found by either, then create a new Contact.
2. Attempt to find Customer (Company) by Protection! Customer's Company name. If not found, then create a new Customer (Company) using Customer's Company and Address data. Set Customer's *"Status"* to `customer.status_eval` value from the `NetSuiteConnector.properties` file.
3. Find License's Product (Item) by *"Product ID"* or if applicable by concatenation of *"Product ID"* and *"Product Edition ID"*. Continue if found. Stop, if not.
4. Search for "Open" Opportunity (searching for the appropriate Opportunity by Protection! License's ID). If not found, then search for the Opportunity by combination of the Contact's Customer and the Opportunity's Code.
5. If "Open" Opportunity has not been found then it will be created with the following attributes:
   - *"Title"* – combination of Product Name, License Version Number composed according to `opportunity.title` format specified in the `NetSuiteConnector.properties` file.
   - *"Company"* – Contact's Customer (Company).
   - *"Expected Close"* – calculated based on the *"License Action Date"* + `opportunity.close_days` value from the `NetSuiteConnector.properties` file.
   - *"Status"* – for Evaluation license – `opportunity.stage_eval`; for Extended Evaluation license – `opportunity.stage_exteval` value from the `NetSuiteConnector.properties` file.
   - *"Opportunity_Code"* – hidden field containing combination of the *"Product Code"* + *"Product Edition"* + *"Product Version"*. This code is used to find the appropriate Opportunity so it could be closed when related Asset is created.
   - *"Items"* – the License's Product (Item).
6. If the Opportunity exists and License type is Extended Evaluation the following fields would be updated:
   - *"Status"* – `opportunity.stage_exteval` value from the `NetSuiteConnector.properties` file.
   - *"Exprected Close"* – calculated based on the *"License Action Date"* + `opportunity.close_days` value from the `NetSuiteConnector.properties` file.
7. Add or update Opportunity *"User Note"* with License details. Check whether the Note has been previously created (searching for appropriate Note its title). Create a new Note if it has not been found; update found Note otherwise.
8. Fill Opportunity's *"Attached Contacts"* field with textual reference to the Contact.
9. Associate Opportunity with Campaign (through the *"Lead Source"* field), if either Campaign's code or Campaign's name is provided in the License Action and corresponding Campaign has been found in the Campaigns List by either Campaign's *"Code"* or Campaign's *"Name"*. If corresponding Campaign has not been found, then try to find and associate Opportunity with a Campaign specified by the `campaign.other.code` value in the `NetSuiteConnector.properties` file.

10. Add or Update Contact *"User Note"* with License Action details. Check whether the Note has been previously created (searching for appropriate Note by its title). Create a new Note if it has not been found; update found Note otherwise.

a.3.3.2 Commercial License

Commercial licenses are stored as the Asset entities. The product, for which license action is requested, must exist in NetSuite.

Commercial License processing steps:

1. Attempt to find Contact by Protection! Customer's Id. If not found, then attempt to find Contact by Email. If not found by either, then create a new Contact.
2. Attempt to find Customer (Company) by Protection! Customer's Company name. If not found, then create a new Customer (Company) using Customer's Company and Address data. Set Customer's *"Status"* to `customer.status_eval` value from the `NetSuiteConnector.properties` file.
3. Find License's Product (Item) by *"Product ID"* or if applicable by concatenation of *"Product ID"* and *"Product Edition ID"*. Continue if found. Stop, if not.
4. Close the Opportunity for the License's Product if ones exist. Set Opportunity's "Status" field to opportunity.status_commercial value from the NetSuiteConnector.properties file.
5. If `sales_order.create` value from the `NetSuiteConnector.properties` file is `true`, check whether a Sales Order has been already created searching it by Protection! *"License ID"*.
6. If Sales Order is not found, create a new one with the following fields:
   - *"Customer"* - Contact's Customer (Company).
   - *"Opportunity"* – related Opportunity if any.
   - "Lead Source – a reference to a Campaign if either Campaign's code or Campaign's name is provided in the License Action and corresponding Campaign has been found in the Campaigns List by either Campaign's *"Code"* or Campaign's *"Name"*. If corresponding Campaign has not been found, then try to find and associate Opportunity with a Campaign specified by the `campaign.other.code` value in the `NetSuiteConnector.properties` file.
   - *"Memo"* – License Number.
   - *"Sales Effective Date"* – License's *"Issue Date"*.
   - *"Items"* – the License's Product (Item). Quantity set to License's *"Number of Copies"*.
7. Check whether the Asset has been previously created (searching for the appropriate Asset by Protection! *"License ID"*). If not found, then search for the Asset by the combination of the *"Serial#"*, *"Account"* and *"Product"* attributes.
8. If the Asset has not been found, then it will be created with the following attributes:
   - *"Name"* – combination of several attributes based on the `asset.name` format from the `NetSuiteConnector.properties` file.
   - *"Item"* – License's Product (Item).
   - *"Opportunity"* – related Opportunity if any.
   - *"Sales Order"* – related Sales Order if it has been created.
   - *"Amount"* – the multiplication of the Product's price and License's number of copies.
   - *"Quantity"* –License's number of copies.
   - *"Install Date"* – for License Action type *"Activation"* - License Action's date.
   - *"Purchase Date"* - License Issue Date.
   - *"License #"* - License's Number.
   - *"Usage End Date"* - License's Expiration Date.
   - *"Description"* – formatted License's description.

9. Associate new Asset with Customer (Company).
10. Add or update Contact *"User Note"* with License Action details. Check whether the User Note has been previously created (searching for appropriate Note by its title). Create a new Note if it has not been found; update found Note otherwise.

Feedback

As part of the continuing effort to improve our product, we welcome your comments, suggestions and general feedback regarding the product.

If you have questions about Protection! Connect™, Protection! NetSuite CTM+ Connector or Protection! Enterprise please feel free to contact us for further information at protection@jproductivity.com, or visit our web site at: http://www.jproductivity.com.

If you discover any issues or defects in Protection! please send a detailed description to protection@jproductivity.com.