

# Zendesk Netsuite Integration

# **Operating Manual**









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# Compatibilities

This software is currently compatible with any vendor supported versions of:

Netsuite

Zendesk

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# **Overview**

The Zendesk Netsuite Integration by Faye seamlessly brings Netsuite data into Zendesk, providing users with a more holistic account view. This integration allows users to effortlessly synchronize Netsuite customers, contacts to Zendesk in real-time, resulting in streamlined processes, automated tasks, and increased productivity. At same time, created and modified end users from Zendesk are synced to Netsuite. Finally, there is option to see invoices from Netsuite directly in Zendesk ticket/user/organization sidebar that are related to ticket requester, end user or organization.

# **Key Benefits**

- **Streamlined Operations:** Simplify processes, ensuring a smooth transition from lead engagement to cash flow.
- **Improved Accuracy:** Eliminate manual information and data entry, reducing errors and improving data quality.
- Enhanced Customer Service: Empower teams with real-time data, enhancing customer service and fostering stronger client relationships.







# **Onboarding Form**

When purchasing the Zendesk Netsuite Integration from Zendesk Marketplace the following onboarding form needs to be completed and emailed to fayeintegrations@fayedigital.com

IMPL	EMEN	TATION COMPONENT	RESPONSE
INTEGRATION INFORMATION			
1	Email	address(es) for sync error notifications	
NETSU	JITE INF	ORMATION	
2	NetSu	uite URL	
3		name (admin user, but does not need to be a dedicated user)	
4	Confirm User Role and Permissions are setup and assigned to user in step #5 (refer to "NetSuite Setting up User Roles and Permissions" document)		
5	API key information (refer to "NetSuite Generate an API Access Key" document)		
ZENDE	SK INF	ORMATION	
4	Zendesk URL		
5	Username (admin user, but does not need to be a dedicated user)		
5	5 Password		
CURRE	ENT EST	IMATED VOLUME	
7	Numb	per of Customers in Netsuite	
8	Number of Contacts inNetsuite		
9	Number of Organizations in Zendesk		
10	Number of End Users in Zendesk		
11	1 Number of Invoices in Netsuite		
CONFIGURATION			
	Syncs	Required	Note if sync is required (Y/N)
12	а	Netsuite Customers to Zendesk Organizations	
	b	Netsuite Contacts to/from Zendesk End Users	
	С	Netsuite Invoice Show in Zendesk	
CUSTOM REQUIREMENTS			
	a	Any custom fields required for syncing?	
13	b	Any custom modules required to sync?	
	С	Other?	







# **Installation and Configuration**

The installation and configuration entails three major steps:

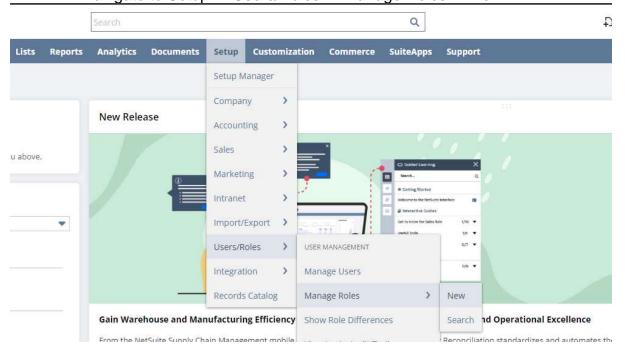
- 1. Submission of the Onboarding Form for the provisioning of the integration bridge by Faye
- 2. Netsuite Configuration
- 3. <u>Installation of Zendesk NetSuite Integration App in Zendesk</u> (configuration parameters to be provided by Faye after the integration bridge is provisioned)

# **NetSuite Configuration**

# **Setup User Roles and Permissions**

Any user can be used for the integration, but we must create a role for that user with sufficient permissions for integration to function properly. Role permissions need to be given exactly as shown in this document. Any deviation in role setup will cause portions of the integration to stop functioning.

1. Navigate to Setup -> Users/Roles -> Manage Roles -> New







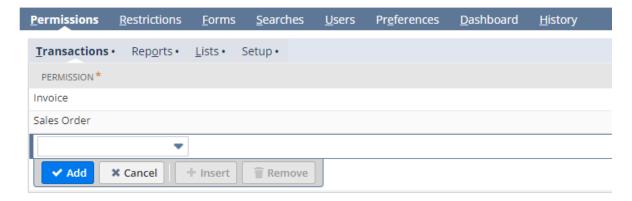


2. Add a name to the role it can be anything but my suggestion is FBSG\_{INTEGRATION NAME}\_INTEGRATION

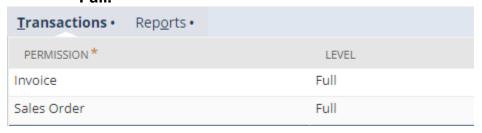


Once you save the role you will get an ID note it down we will need it later.

3. Navigate to sub-records section and select **Permissions** tab



4. Select **Transactions** sub-tab and add Invoice and Sales Orders to it set permission level to **Full**.



5. Select **Reports** sub-tab and add Inventory and SuiteAnalytics Workbook with following levels.







<u>Transactions</u> • Reports • Lists • Setup •	
PERMISSION*	LEVEL
Inventory	View
SuiteAnalytics Workbook	Edit

6. Select **Lists** sub-tab and add the following permissions and levels.

	<u> </u>
PERMISSION*	LEVEL
Contacts	Full
Customers	Full
Employee Record	View
Employees	View
Items	View
Perform Search	Full
Units	View

<sup>\*</sup> If multi-currency is enabled then also add "Currency" view level permissions

7. Select **Setup** sub-tab and add the following permissions and levels.

PERMISSION*	LEVEL
Accounting Lists	Full
CRM Lists	Full
Customer Status	Full
Log in using Access Tokens	Full
REST Web Services	Full
Records Catalog	View
SOAP Web Services	Full
Sales Territory	Full

8. This concludes role setup once done navigate to the top of the page and click Save

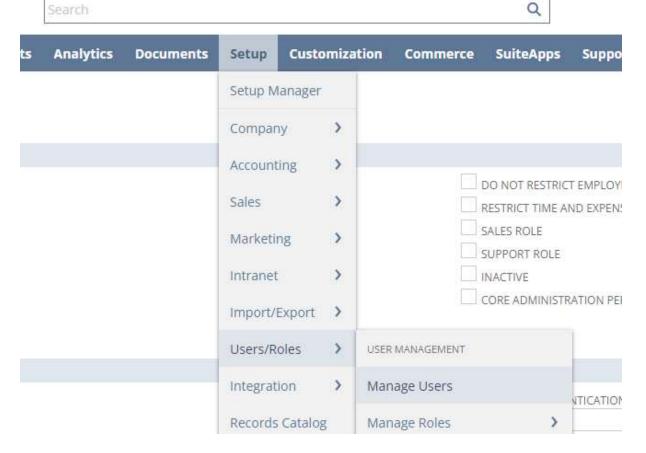








9. Navigate to Setup -> Users/Roles -> Manage Users and click it



10. Find a user that is going to be used for the integration and open it







# **Manage Users**



# Click **EDIT**

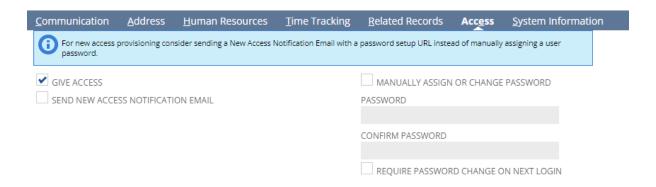


11. Navigate to sub-records section and click on Access tab

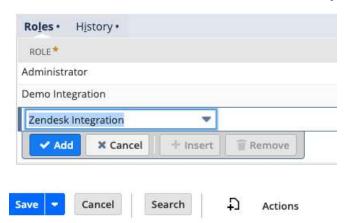








12. In the Roles sub-tab find a role we just created and add it to the list

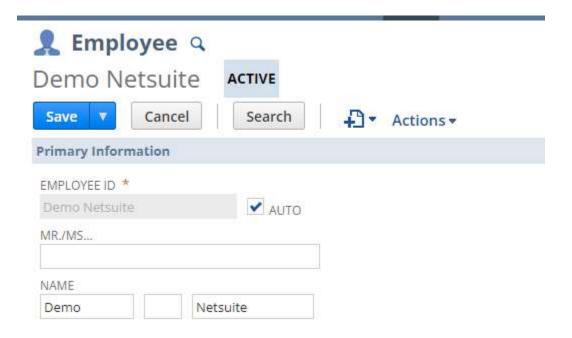


13. Navigate to the top or the bottom and click Save









We are now done with both Role and User setup.

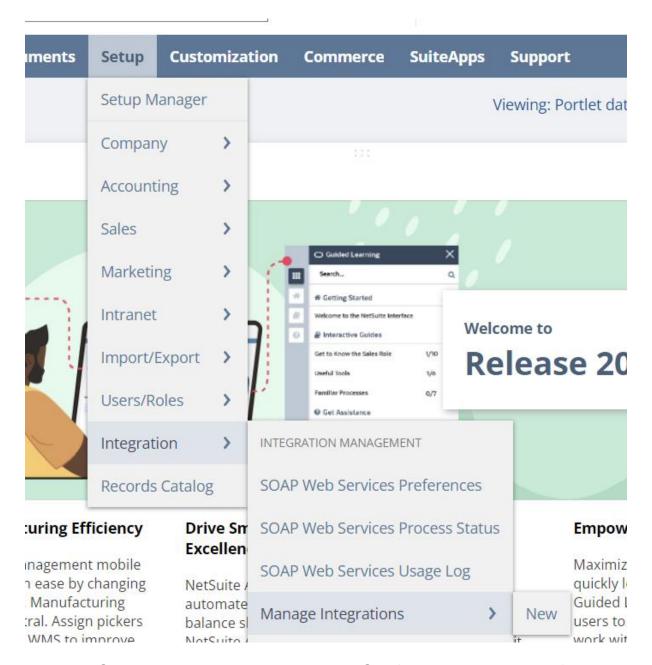
# **Generate NetSuite API Key**

1. Go to Setup -> Integration -> Manage Integrations -> New and click it.



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2. Give integration a name I suggest FBSG\_{INTEGRATION NAME}\_INTEGRATION









3. Scroll down and in the sub-record section select **Authentication** tab and unselect everything except **TOKEN-BASED AUTHENTICATION** 



4. Navigate to top or bottom and click Save



5. Once you save and get confirmation scroll to the bottom of the record and write down **CONSUMER KEY / CLIENT ID** and **CONSUMER SECRET / CLIENT SECRET. NOTE:** this will only be shown once If you do not write it down you cannot recover it you will have to reset the integration.



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### Client Credentials

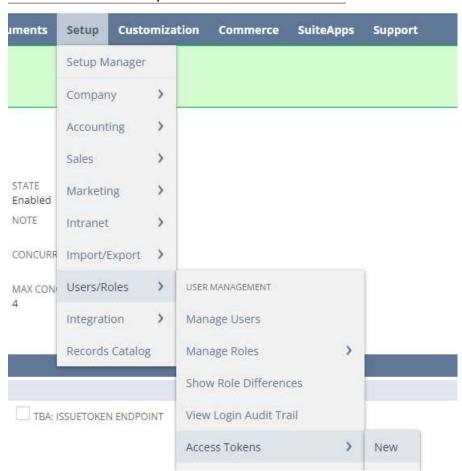
Warning: For security reasons, this is the only time that the Client Credentials values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values.

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

CONSUMER KEY / CLIENT ID b4c1fd24a6c7569284738d79df35d87

CONSUMER SECRET / CLIENT SECRET 3145f757463f97bb44ef5c88d23b849a

# 6. Go to Setup -> Users/roles -> Access Tokens -> New and click it.









7. Select **Application Name** (integration), user and role. Token name will automatically populate once you do that. After you are done click **Save**.

# **Access Token**



8. Once its saved it's going to give you a confirmation and at the bottom of the page it's going to give you **TOKEN ID** and **TOKEN SECRET** you will need to write this down it will only be shown once.

# Token Id / secret Warning: For security reasons, this is the only time that the Token ID and Token Secret values are displayed. After you le Treat the values for Token ID and Token Secret as you would a password. Never share these credentials with unauthoriz TOKEN ID 312d21c25ba53c9d1d57364181ee03bbdff7d671957ec733829e5ab30b209703 TOKEN SECRET edaa12ff847c324774ce71f8e2e804a83e2f7821eedb25d84a7f7eaace83d43f

- 9. Once you are done with this create a document with the following information.
  - a. CONSUMER KEY / CLIENT ID
  - b. CONSUMER SECRET / CLIENT SECRET
  - c. TOKEN ID
  - d. TOKEN SECRET
  - e. ACCOUNT ID

Provide created document to an engineer assigned to the integration. They will deploy middleware and then provide you with parameters that you need in order to install a script in NetSuite that will allow us to capture events that we need in order to make sync function.







### **Install Webhooks into NetSuite**

NetSuite webhook script is a very simple and straightforward solution to making NetSuite react to events in real time. Webhook script will not access records on its own and it will only pass id and the type of the record required for further processing and synchronization.

There are several steps that need to be performed to successfully deploy a NetSuite webhook script. And these are the following:

- 1. Upload script file.
- 2. Create a script record using the uploaded script file.
  - a. Add parameters to the script record.
  - b. Make all parameters mandatory.
  - c. Remove formatting from the integer type parameter/parameters.
- 3. Create deployments for each record type that you would like to sync:
  - a. Supported record types:
    - i.Customers
    - ii.Contacts
    - iii.Inventory Part
    - iv.Service
    - v.Invoice
  - b. Each deployment will require you to provide the parameters specified in the script record parameters section.
  - c. Each deployment will have AUDIENCE set to ALL EMPLOYEES
  - d. Each deployment **NEEDS** to be executed as the role created for the integration.
  - e. Each deployment **NEEDS** to have ignore role set to the **ID** of the role that was created for the integration.

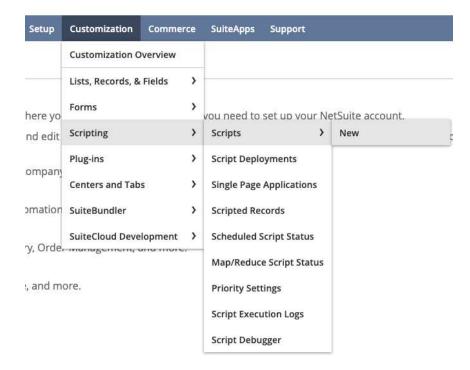
# Complete the following steps:

1. Upload script file by navigating to Customizations -> Scripting -> Scripts -> New

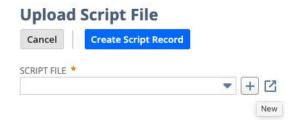








2. Click the plus sign to get a file explorer window which will allow you to browse and select the provided script file and then click **Create Script Record**.

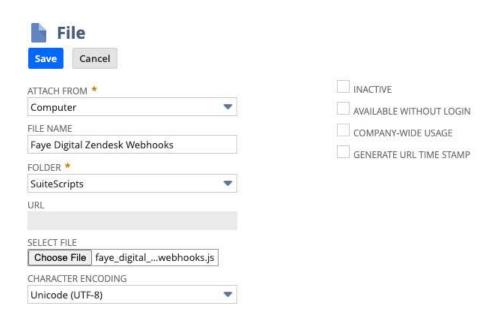


3. This will open a new window, name the script file something descriptive and save it.

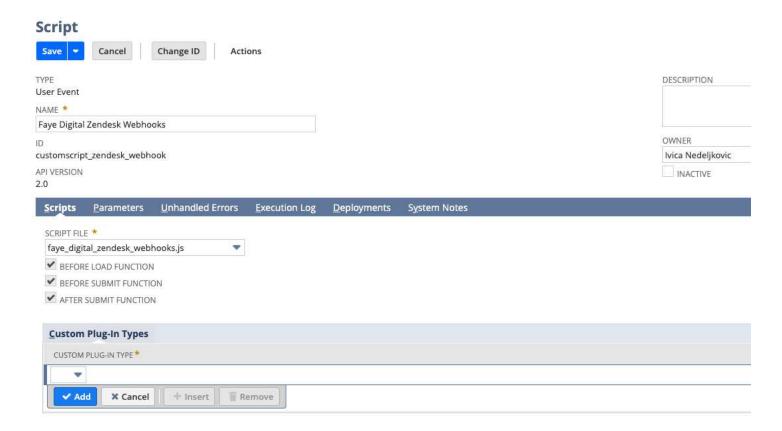


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4. Open newly created script file.









- 5. Navigate to the **Parameters** section and add two new parameters related to the script. Parameter **ID** is in the form of \_{integration\_name}\_{parameter\_name}. These two required parameters are \_zendesk\_webhook\_url, \_zendesk\_ignore\_role.
  - a. Click on New Parameter
  - b. Label: either Zendesk Webhook URL, or Ignore Role
  - c. ID: \_{integration\_name}\_{parameter\_name} format such as "\_zendesk\_webhook\_url", "\_zendesk\_ignore\_role"
  - d. Type: leave default "Free-Form Text" for all parameters EXCEPT Ignore Role which should be set to Integer
  - e. For the Ignore Role script, also go to Display to deselect "Apply Formatting" as shown below
  - f. Under Validation & Defaulting select Mandatory for all script fields

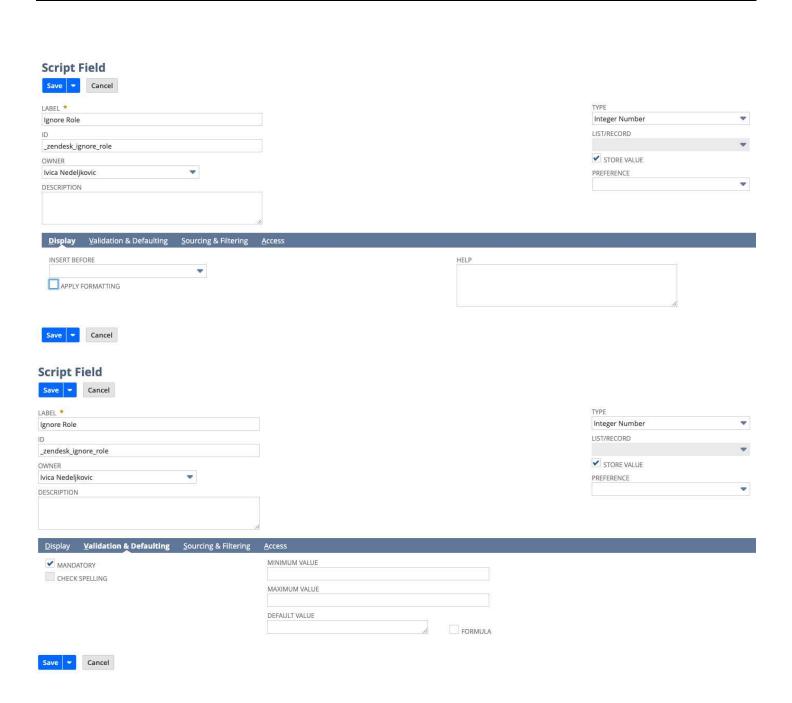




# Fayezendesk

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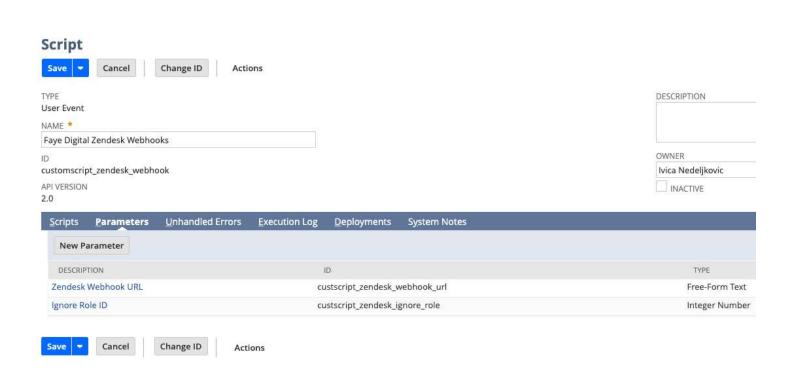










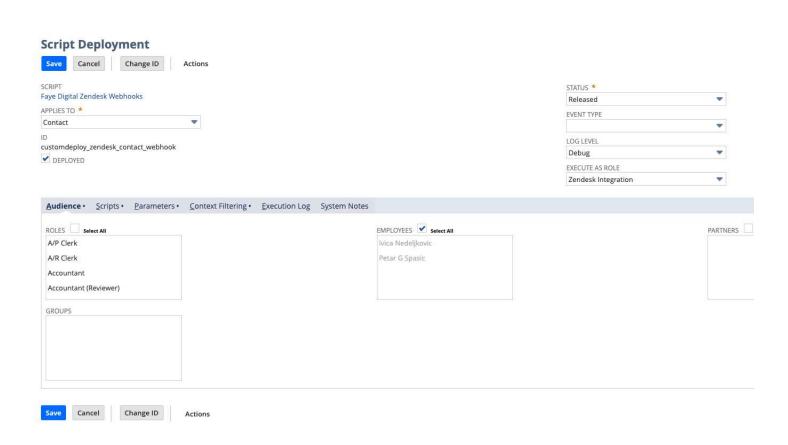


Navigate to the **Deployments** tab of the script and create deployments for it by clicking on "Deploy Script" button on bottom of page, and deploy script for three modules **Contact, Customer** and **Invoice.** Below is screenshot how deployment for one Contacts module might look like, ensure that script is "Deployed, status is set to "Released", Execute as Role is set to "Zendesk Integration", and that you select roles and/or users for whichthis webhook will be triggered.









After change is deployed for all three modules, Deployments section under Script should look like this:









# **Installation of Zendesk Netsuite Integration Package into Zendesk**

**Note:** This step cannot be completed until the <u>Onboarding Form</u> is submitted and the integration bridge is provisioned by Faye. Upon successful provisioning, you will be provided with your configuration settings needed to complete step 6 below.

- 1. Log in to your Zendesk Support using an account with administrative privileges.
- 2. Go to the Administration page within Zendesk (Click "Admin Center" in the upper right corner).

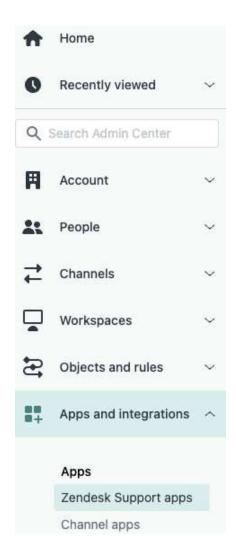


3. In Left Menu click on "Apps" link and then under "Apps" section click on "Zendesk Support Apps"

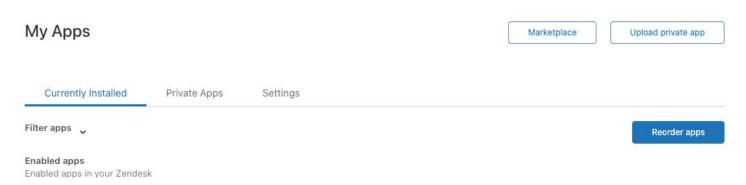


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4. Click on Upload private app



5. For App Name enter for example "Netsuite Invoices", and upload provided Zendesk package file and wait file to be uploaded and after that click on "Upload" button

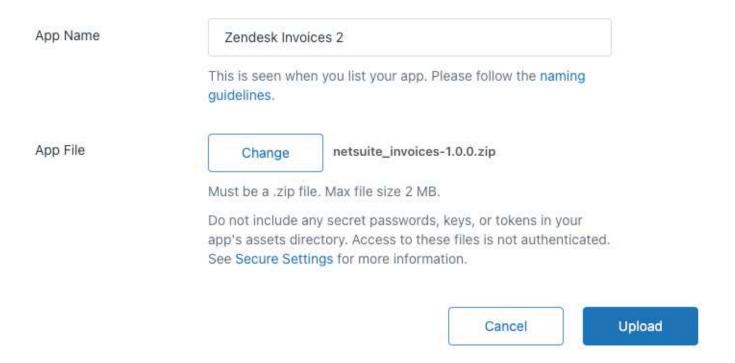






# **Upload App**

This is where you upload your private apps. Private apps appear in your account only. If you want to submit a public app or learn more about how to build your own private app, check out our Developer documentation.



6. You will get warning popup that app is not approved by Zendesk which is fine, and click on "Upload" again







# Creating a new App Please be aware that the app you are attempting to upload has not been reviewed or approved by Zendesk for use in connection with your Zendesk account. Please also be aware of the following: 1. It may not operate as intended 2. If you have obtained this from a third party, it may have been developed in breach of our Terms of Service and Developer and API License 3. It may include malicious software which could materially or adversely impact your data and your Zendesk account 4. Any functionality associated with this App may be limited or disabled by future modifications to Zendesk By clicking Upload, you agree to the above language and the Zendesk Marketplace Terms of Use. Upload

7. On next page, change title if you want, and enter Middleware Host Url and Middleware Access token with provided values and click "Install". You can ignore other parameters for now. Be aware that Middleware Access Token once saved will not be visible.



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## App details

Version: 1.0.0

Framework Version: 2.0 Email: support@fayebsg.com

Location: Ticket, User Profile, Organization Profile

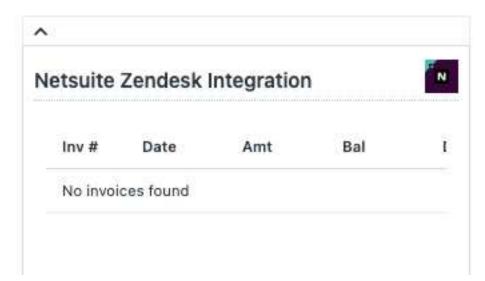
Title <u></u>	
Zendesk Invoices	2
Middleware Host Url	*
Please enter middlev	ware host url.
① Field is required	
Middleware Access	Token,*
Please enter middlev	vare access token.
Items Per Page Please enter number	of items to show per page.
Debug?	
The state of the s	s. If you are not debugging issues, turn
Enable role resti	rictions?
Select the roles that	should have access to this app:
Enable group re	etrictione?
	should have access to this app:
By installing this app	you hereby agree to the Zendesk







8. Open now any ticket, user or organization and in sidebar you should be able to see Netsuite invoice app, probably without any invoices for now:









# **Standard Syncs**

# **Netsuite Customers to Zendesk Organizations**

This is a uni-directional sync between Netsuite Customers and Zendesk Organizations. This sync will create and update records in Zendesk. This sync is triggered by creating or editing an Customer Record in Netsuite.

## **Notes:**

- 1. The following scenarios can prevent a Customer from successfully syncing from Netsuite to Zendesk due to record validation logic within Freshdesk:
  - a. More than one Customer with the same domain/website address (only the "first" record in order of processing will sync)
  - b. An invalid URL in the website field

For the default mapping please see Netsuite Customers Zendesk Organization map

# **Netsuite Contacts to/from Zendesk End Users**

This is a bi-directional sync between Netsuite Contacts and Zendesk End Users. This sync will create and update records in both systems.

# **Notes:**

- 1. The following scenarios can prevent a Contact from successfully syncing from Netsuite to Zendesk due to record validation logic within Zendesk:
  - a. Email address is invalid
  - Email address exists on another Contact record (only the "first" record in order of processing will sync)
  - d. Office/Work Phone exists on another Contact record (only the "first" record in order of processing will sync)
  - e. The contact doesn't have one of Zendesk's "primary fields" populated (email, work phone).

For the default mapping please see Netsuite Contacts – Zendesk End Users Mapping

# **Netsuite Invoices in Zendesk App**







This feature allow users to see Netsuite Invoice and invoice Lines in Zendesk App on Ticket, User or Organization view.

On Ticket view sidebar application will show Invoices from Netsuite that are related to ticket requester organization.

On End User view, sidebar application will show Invoices from Netsuite that are related to use organization On Organization view, sidebar application will show Invoices from Netsuite that are related to the organization. **Notes**:

The following scenarios can prevent an Invoice from Netsuite to be shown in the Zendesk App:

- 1. If ticket requester(end user), or its related organization is not synced to middleware
- 2. If mapping between requester user and parent organization is not set
- 3. If mapping between Netsuite Customers and Zendesk Organization is not set







# **Default Field Mappings**

# **Netsuite Customer - Zendesk Organization Map**

ZENDESK ORGANIZATIONS	SYNC DIRECTION	NETSUITE CUSTOMERS
ID	←.	Company ID
Name	←.	Company Name
Website	←.	Website

# **Netsuite Contacts - Zendesk End User Map**

ZENDESK CUSTOMERS	SYNC DIRECTION	NETSUITE CONTACTS
ID	→·	Contact ID
Name	← →·	Name
Organization	← →·	Company Name
Phone	← →·	Main Phone
Email	← →·	Email

# **Netsuite Invoices to Zendesk Invoices Map**

ZENDESK INVOICE HISTORY (Custom App)	SYNC DIRECTION	NETSUITE INVOICES	
HEADER			
Invoice Number	←.	Invoice Number	
Customer Name	←·	Customer Name	
Invoice Date	<b>←·</b>	Invoice Date	
Invoice Due Date	←·	Due Date	
Sales Rep	←·	Sales Rep	
Invoice Amount	←·	Invoice Amount	
Invoice Balance	←·	Invoice Balance	
LINE ITEMS			
Line Number	←·	Line Number	
Item Number	←·	Item Name/Number	
Item Description	←.	Display Name /Number	
Quantity	←·	Quantity	
Unit Price/Rate	←·	Rate	
Extension Amount	←·	Amount	







# **Additional Technical Notes**

- 1. Does not include Assigned Groups
- 2. Does not include Custom fields and Custom Objects