# Workstation – NetSuite Integration

## Brief Overview

NetSuite is an ERP system (Enterprise Resource Planning). This product exists around 20 years and was acquired by Oracle. It is a native cloud solution.

The NetSuite app on Workstation allows to search for the following NetSuite objects:

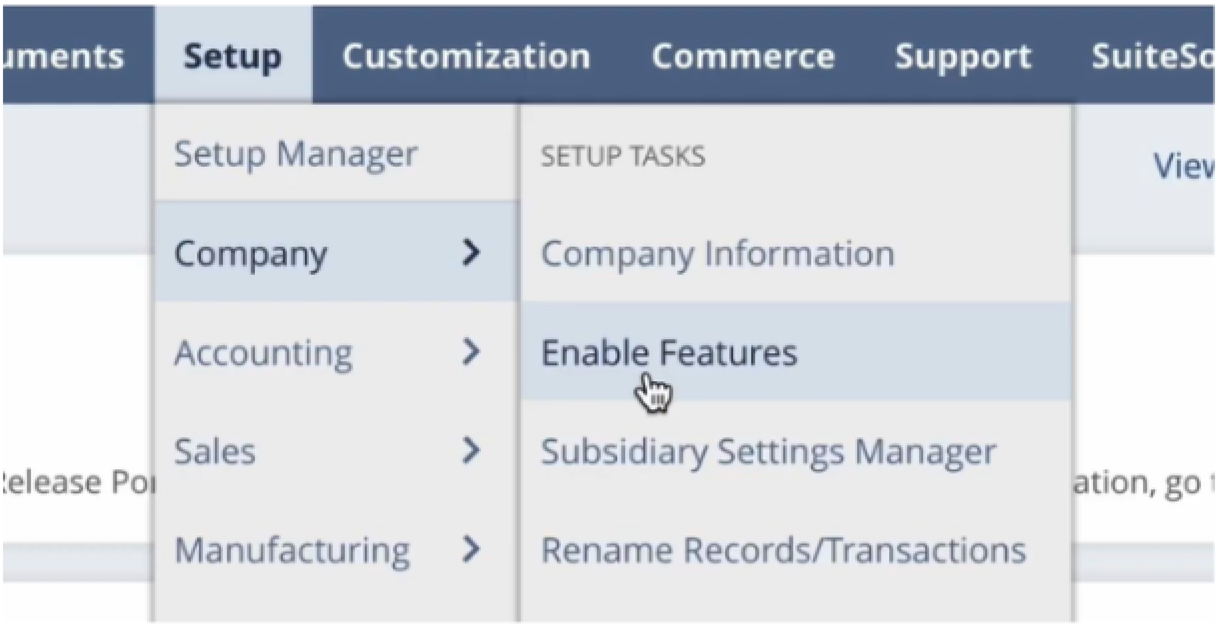
1. Employee
2. Customer
3. Vendor
4. Contact
5. Vendor Bill
6. Purchase Order
7. Sales Order
8. Invoice

Transactions Status

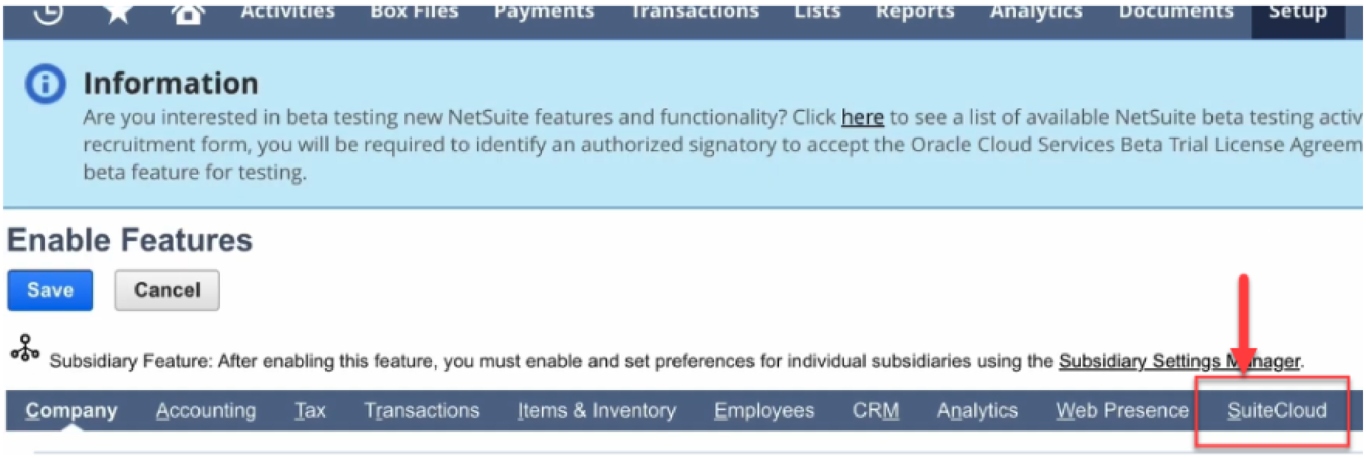
The status which appears on the transactions search results is the Posting Approval Status.

## Configure an integration in NetSuite for Workstation

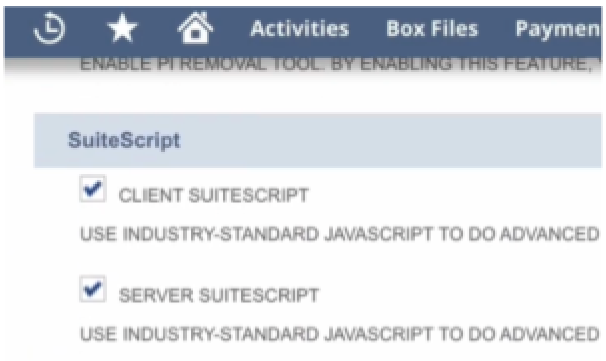
1. Sign in into NetSuite using an admin account
2. Go to Setup -> Company -> Enable Features




3. Go to the SuiteCloud tab-

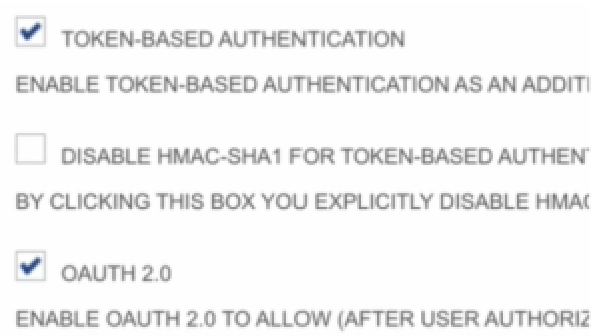



4. Scroll down and make sure these 3 checkboxes are checked –

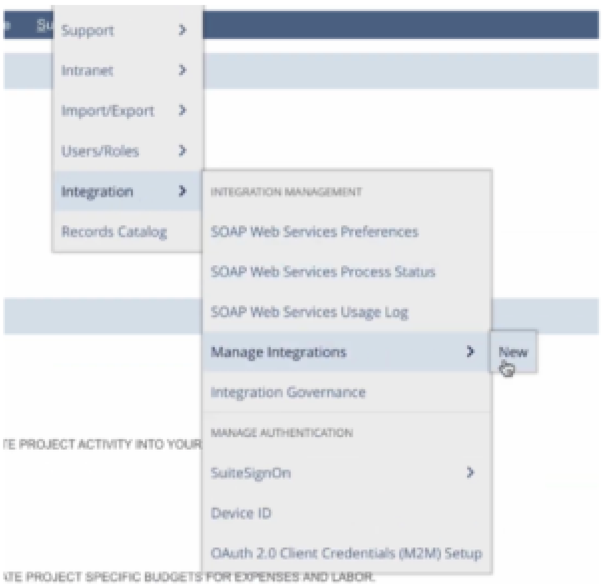



5. Scroll down and make sure these 2 checkboxes are checked –


6. Scroll down and make sure these 2 checkboxes are checked –




7. Go to Setup -> Integration -> Manage Integrations -> New

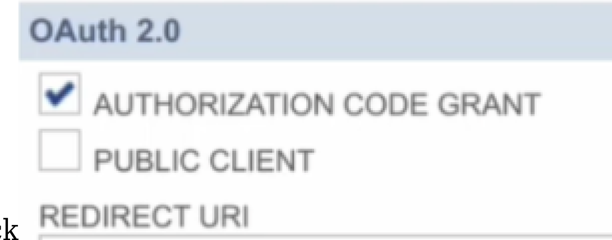



8. Fill the integration form with these details-

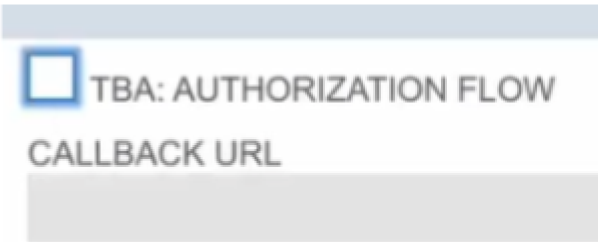
- Name – Workstation

- State – Enabled

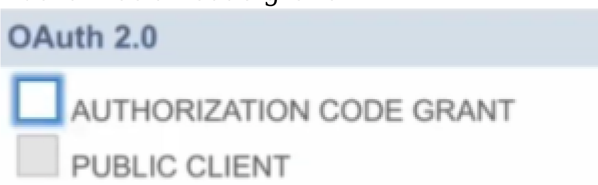

- Token-Based Authentication – check
- Callback URL- choose one of these URL's:
  - If US- https://workstation.walkme.com/netsuite/connected
  - If EU- https://eu-workstation.walkme.com/netsuite/connected




- Authorization Code Grant- check
- Redirect URL – choose one of these URL's:
  - If US- https://workstation.walkme.com/netsuite/connected
  - If EU- https://eu-workstation.walkme.com/netsuite/connected
- Make sure that these 2 boxes are **NOT** checked:
  - TBA: Authorization Flow

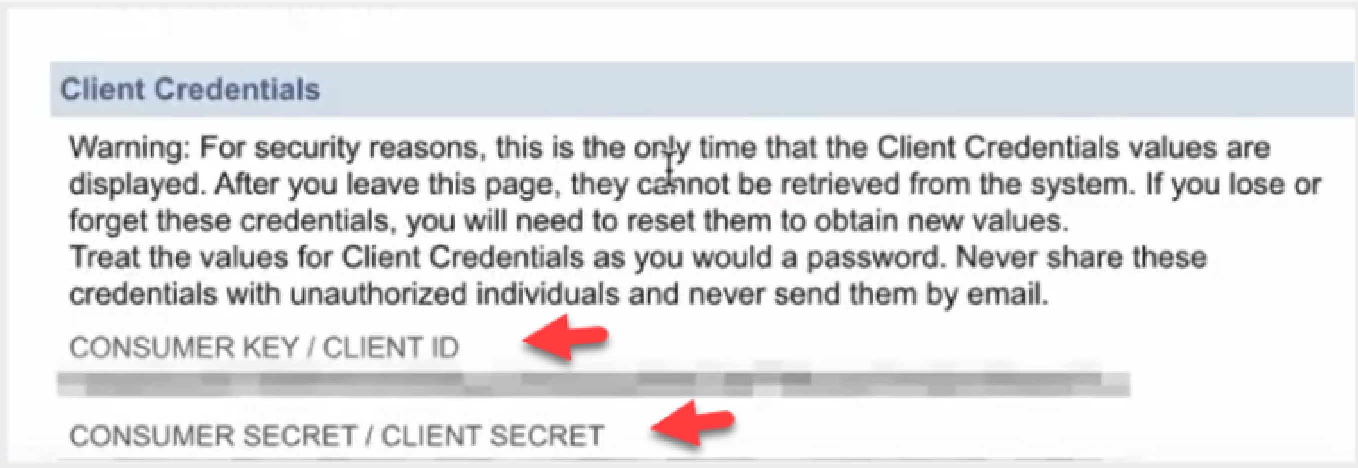



  - Authorization code grant

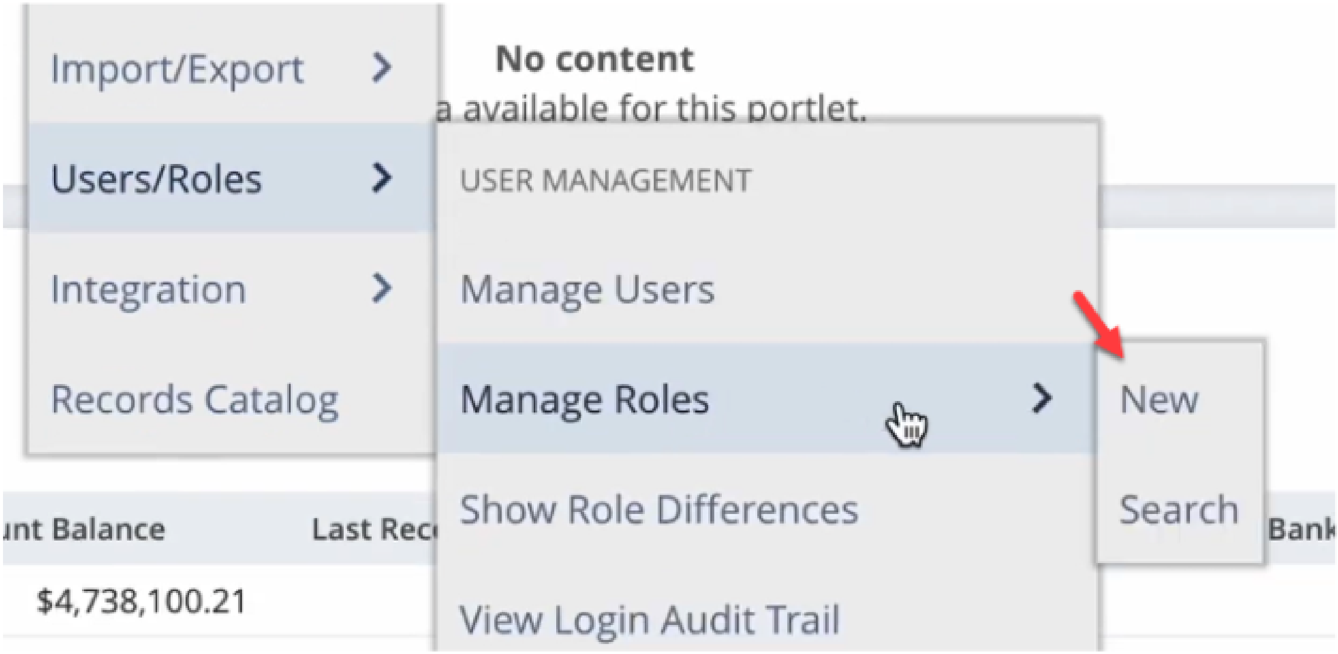



- Click Save to create the new integration


9. In the same screen, on the bottom, you will now have a Client Credentials section. Copy the Consumer Key and Consumer Secret, it will be required later on and there will be no access to them again.

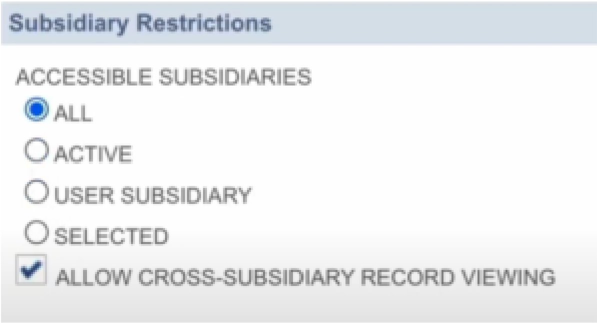



10. Go back to the home screen, go to Setup -> User/Roles -> Manage Roles -> New




11. Fill the role form with these details-

- Name- Workstation Integration Role
- Subsidiary Restrictions- Choose ALL and check the last box




## Permissions

### Transactions

1. Access Payment Audit Log View
2. Bill Purchase Orders View
3. Bills View
4. Cash Sale View
5. Check View
6. Create Allocation Schedules View
7. Credit Card View
8. Credit Card Refund View
9. Credit Memo View
10. Credit Returns View
11. Currency Revaluation View
12. Customer Deposit View
13. Customer Payment View
14. Deposit View
15. Deposit Application View
16. Enter Opening Balances View
17. Enter Vendor Credits View
18. Find Transaction View
19. Fulfill Orders View
20. Generate Price Lists View
21. Generate Statements View
22. Invoice View
23. Invoice Approval View
24. Invoice Sales Orders View
25. Item Fulfillment View
26. Item Receipt View
27. Journal Approval View
28. Make Journal Entry View
29. Pay Bills View

30. Pay Sales Tax View
31. Pay Tax Liability View
32. Post Vendor Bill Variances View
33. Posting Period on Transactions View
34. Purchase Order View
35. Reconcile View
36. Return Authorization View
37. Revenue Arrangement View
38. Revenue Arrangement Approval View
39. Sales Order View
40. Set Up Budgets View
41. Transfer Funds View
42. Vendor Bill Approval View
43. Vendor Return Auth. Approval View
44. Vendor Return Authorization View
45. Vendor Returns View
46. View Gateway Asynchronous Notifications View
47. View Payment Events View

Reports

1. Account Detail View
2. Accounts Payable View
3. Accounts Payable Graphing View
4. Accounts Receivable View
5. Accounts Receivable Graphing View
6. Amortization Reports View
7. Balance Sheet View
8. Deferred Expense Reports View
9. Employee Reminders View
10. Expenses View
11. Financial Statements View
12. General Ledger View
13. Income View
14. Income Statement View
15. Lead Snapshot/Reminders View
16. Net Worth View
17. Purchase Order Reports View
18. Purchases View
19. Reconcile Reporting View
20. Report Customization View

21. Report Scheduling View
22. Revenue Recognition Reports View
23. Sales View
24. Sales Order Fulfillment Reports View
25. Sales Order Reports View
26. Sales Order Transaction Report View
27. SuiteAnalytics Workbook View
28. Tax View
29. Transaction Detail View
30. Trial Balance View

List

1. Accounts View
2. Accounts Payable Register View
3. Accounts Receivable Register View
4. Amortization Schedules View
5. Bank Account Registers View
6. Billing Schedules View
7. CRM Groups View
8. Calendar View
9. Commit Orders View
10. Contacts View
11. Credit Card Registers View
12. Currency View
13. Custom Recognition Event Type View
14. Custom Record Entries View
15. Customers View
16. Deferred Revenue Registers View
17. Departments View
18. Documents and Files View
19. Email Template View
20. Employee Record View
21. Employees View
22. Equity Registers View
23. Events View
24. Export Lists View
25. Fair Value Formula View
26. Fair Value Price View
27. Fixed Asset Registers View
28. Item Revenue Category View

29. Items View
30. Locations View
31. Long Term Liability Registers View
32. Mass Updates View
33. Memorized Transactions View
34. Non Posting Registers View
35. Notes Tab View
36. Other Asset Registers View
37. Other Current Asset Registers View
38. Other Current Liability Registers View
39. Other Names View
40. Perform Search View
41. Phone Calls View
42. Platforms View
43. Publish Search View
44. Record Custom Field View
45. Related Items View
46. Resource Create
47. Revenue Element View
48. Revenue Recognition Field Mapping View
49. Revenue Recognition Plan View
50. Revenue Recognition Rule View
51. Revenue Recognition Schedules View
52. Statistical Account Registers View
53. Subsidiaries View
54. Tasks View
55. Track Messages View
56. Unbilled Receivable Registers View
57. Units View
58. Vendors View
59. Work Calendar View

Setup

1. Accounting Book View
2. Accounting Lists View
3. Accounting Management View
4. Allow Non G/L Changes View
5. Auto-Generated Numbers View
6. Custom Body Fields View
7. Custom Column Fields View

8. Custom Entity Fields View
9. Custom Item Fields View
10. Custom Lists View
11. Custom Record Types View
12. Deleted Records View
13. Log in using Access Tokens View
14. Log in using OAuth 2.0 Access Tokens View
15. Manage Accounting Periods View
16. Mobile Device Access View
17. OAuth 2.0 Authorized Applications Management View
18. Other Custom Fields View
19. Other Lists View
20. REST Web Services View
21. SOAP Web Services View
22. Set Up Company View
23. SuiteAnalytics Connect View
24. SuiteAnalytics Connect – Read All View
25. Vicarious emails View
26. View SOAP Web Services Logs View

Custom Records

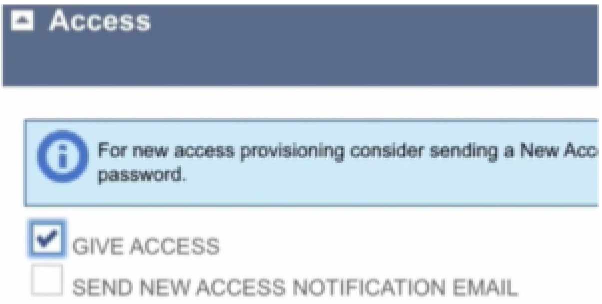
- If you have custom records that are required for processes, it might be a blocker for this integration. We recommend providing permissions to all custom records

- Click Save to create the new integration

12. Now you will need to assign the new integration role to a new integration user. Go to Setup -> Users/Roles -> Manage Users


13. Create a new user, make sure the user is of type Employee. Fill the role form with these details-

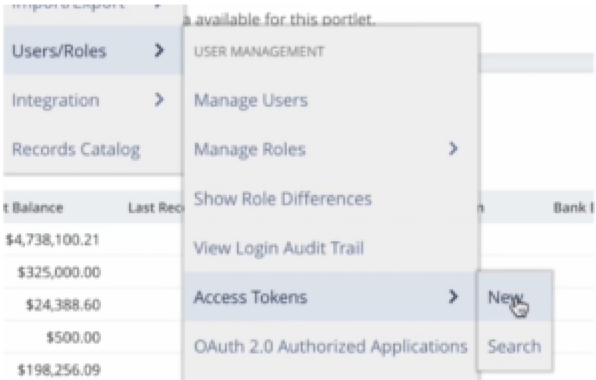
- Name- Workstation Integration User
- Email- any email
- Subsidiary- your organization subsidiary
- Access – check the box-




- Roles- assign the integration role you had previously created ("Workstation Integration Role")-

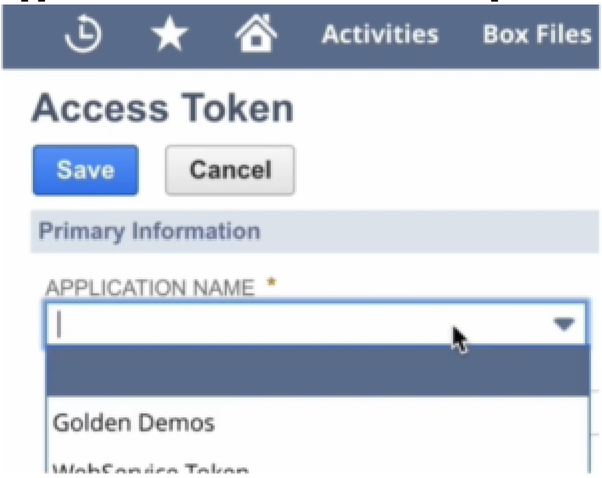

- Click Save to create the new Employee user

14. Go to Setup -> Users/Roles -> Access Tokens -> New



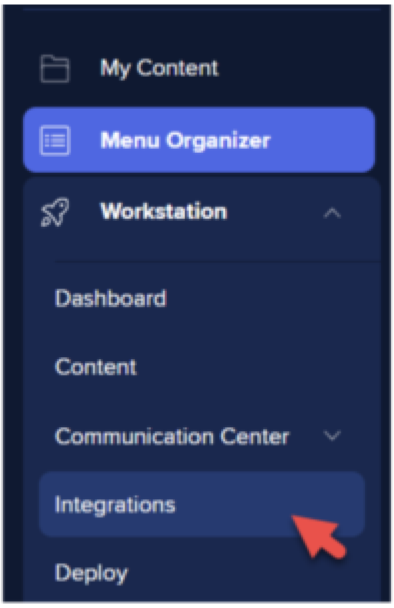

15. Create an access token. Fill the role form with these details-

- Application Name- choose in the dropdown the Workstation Integration-

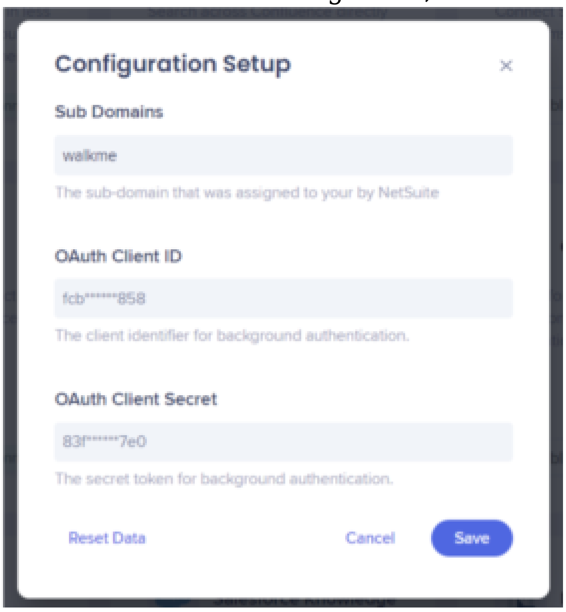



- User (from List)- Workstation Integration User
- Role- Workstation Integration Role
- Token Name- will be populated automatically
- Click Save to create the new Access Token
- In the same screen, on the bottom of the access token page, you will now have a Token ID and Token Secret


16. Go to Console to the Workstation -> Integrations page




17. On the NetSuite integration, click on Setup, and configure the following-




- Sub Domains- the domain of your NetSuite URL. For example, if your URL is https://testname.app.netsuite.com/ so your domain is "testname".
- Client ID and Client Secret- the values created previously in the process (also known as Consumer Key and Consumer Secret).
- Click Save. NetSuite integration should now work on your Workstation App.

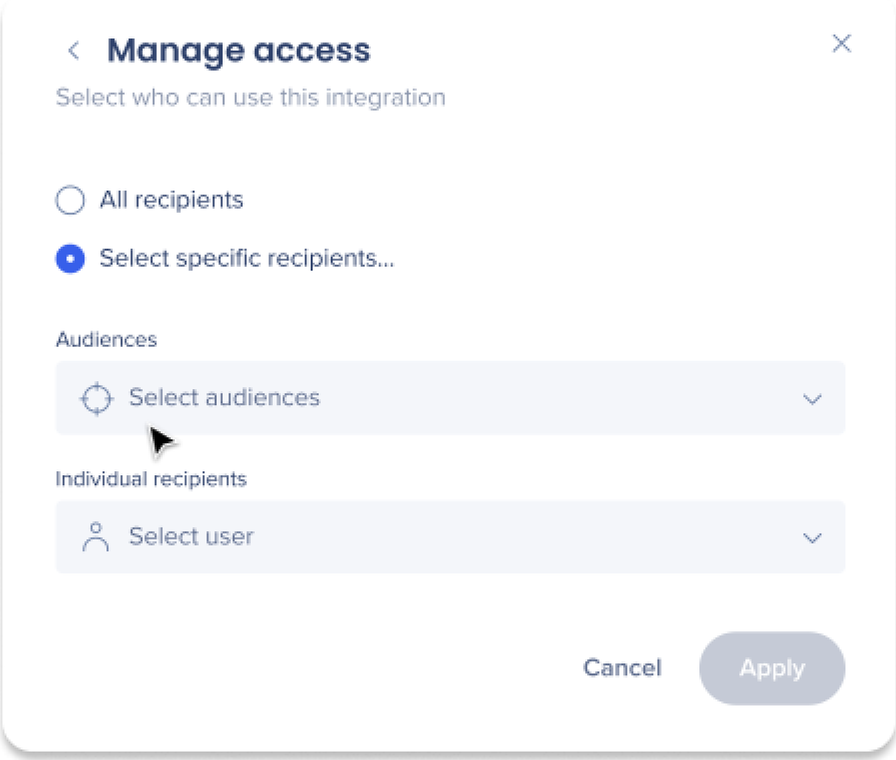
## Segmentation

Integrations can be segmented to a sub-set of users and audiences, rather than being enabled for all end-users. This feature streamlines the integration process and helps to ensure that users are only using the integrations that are relevant to their work.

To segment a Workstation integration:

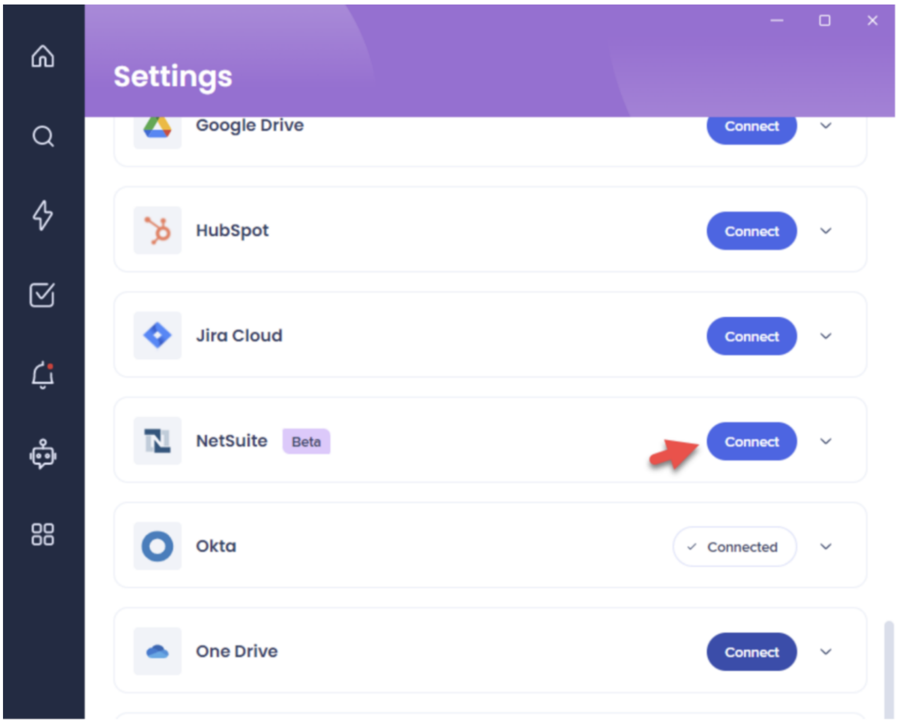
1. Navigate to the **[Workstation Integrations page]()** in the console
2. Click the **All button** on the integration you would like to segment 

3. Click **Select specific recipients** in the Manage Access popup
4. Select the audiences or individual users from the dropdowns to handpick who can use the integration
5. Click **Apply**




# Connecting NetSuite on Workstation

1. Open the Workstation Menu by clicking the widget (on Windows) / the WalkMe icon on the Mac Menu bar, or by hitting ctrl/cmd+shift+E
2. Go to Settings -> Integrations, and click Co*nnect* on the NetSuite card




If the NetSuite card is not available, contact your WalkMe Owner in your organization and ask to enable NetSuite on Workstation

## Integration Security

Read more about Workstation's integration security and Workstation's Enterprise Search.