NetSuite Addin Guide

For information on setting up dialing with NetSuite, please click here.

This page will guide you through configuration and basic use of the CRM Connect NetSuite Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the 'User Guide' for these topics.

NetSuite and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

CRM Connect must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

Information You'll Need

- Windows account username and password
- NetSuite account number*, login email and password (if password protected)

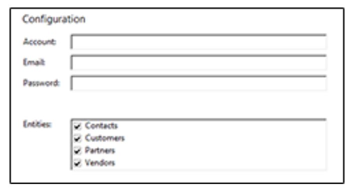
* Instructions on where to find this information are given below if required.

Configuration

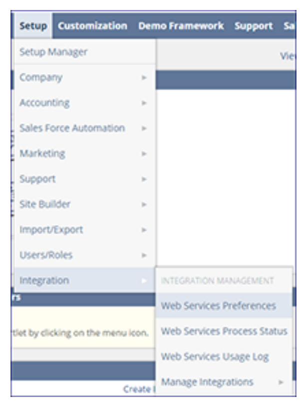
Right-click the CRM Connect tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'NetSuite' from the 'Type' dropdown box and then click the 'Set' button.

On the Configuration group, enter your NetSuite account login information.

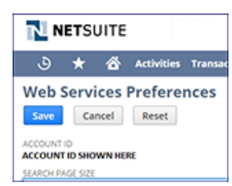
In the 'Account' box, you need to enter your NetSuite account number.



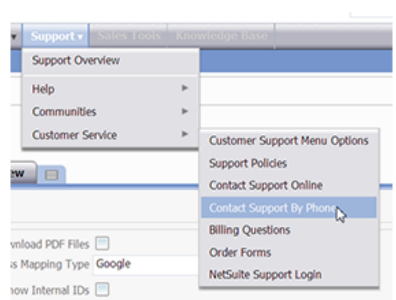
NetSuite 2015 users: You can find your NetSuite account number by logging into your account and clicking on 'Setup » Integration » Web Services Preferences' from the tabs near the top of your dashboard.



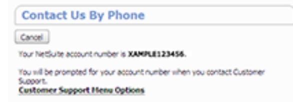
Your NetSuite account number is shown near the top right hand corner of the 'Web Services Preferences' window.



Other NetSuite version users: You can find your NetSuite account number by logging into your account and clicking on 'Support » Customer Service » Contact Support By Phone' from the tabs near the top of your dashboard.



Your NetSuite account number is shown on the 'Contact Us By Phone' window that pops up.



Back in CRM Connect, enter your email and password into the appropriate text boxes.

In the 'Entities' section, select the NetSuite account contact types you want to be used by checking the corresponding boxes.

Click the 'Save' button to store the information you've entered and apply the configuration.

Testing

To test if the configuration worked, enter a phone number from your NetSuite account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

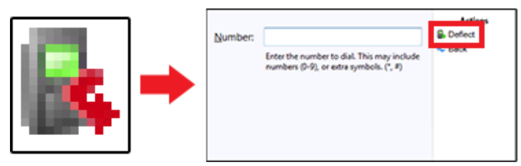
If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Functionality

When a call comes in, the CRM Connect 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognized as one of your contacts from NetSuite, their details will also be displayed and you can 'pop' their NetSuite contact record by clicking the 'NetSuite' button in the window.

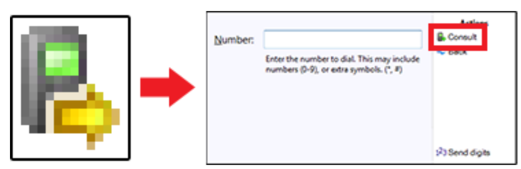
You can also pop recognized callers' NetSuite contact records by clicking the 'NetSuite' button on the 'Phone Window'.

Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number into the 'Number' box and then clicking the 'Deflect' button next to it or pressing 'Enter'.



To answer a call on either the 'Preview' or 'Phone' window, you just need to click the 'Answer' button.

To speak to a colleague during an active call, click the 'Consult' button, enter the extension number into the 'Number' box and then click the 'Consult' button next to it or press 'Enter'. The active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.



To transfer a call to another extension, click the 'Transfer' button, enter the extension number into the 'Number' box and then click the 'Transfer' button next to it or press 'Enter'.