



Informatica® Cloud Application Integration
September 2024

Create NetSuite Sales Orders from Dynamics 365 Opportunities

© Copyright Informatica LLC 2024

This software and documentation contain proprietary information of Informatica LLC and are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright law. Reverse engineering of the software is prohibited. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC. This Software may be protected by U.S. and/or international Patents and other Patents Pending.

Use, duplication, or disclosure of the Software by the U.S. Government is subject to the restrictions set forth in the applicable software license agreement and as provided in DFARS 227.7202-1(a) and 227.7702-3(a) (1995), DFARS 252.227-7013(1)(ii) (OCT 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14 (ALT III), as applicable.

The information in this product or documentation is subject to change without notice. If you find any problems in this product or documentation, please report them to us in writing.

Informatica, Informatica Platform, Informatica Data Services, PowerCenter, PowerCenterRT, PowerCenter Connect, PowerCenter Data Analyzer, PowerExchange, PowerMart, Metadata Manager, Informatica Data Quality, Informatica Data Explorer, Informatica B2B Data Transformation, Informatica B2B Data Exchange Informatica On Demand, Informatica Identity Resolution, Informatica Application Information Lifecycle Management, Informatica Complex Event Processing, Ultra Messaging, Informatica Master Data Management, and Live Data Map are trademarks or registered trademarks of Informatica LLC in the United States and in jurisdictions throughout the world. All other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties, including without limitation: Copyright DataDirect Technologies. All rights reserved. Copyright © Sun Microsystems. All rights reserved. Copyright © RSA Security Inc. All Rights Reserved. Copyright © Ordinal Technology Corp. All rights reserved. Copyright © Aandacht c.v. All rights reserved. Copyright Genivia, Inc. All rights reserved. Copyright Isomorphic Software. All rights reserved. Copyright © Meta Integration Technology, Inc. All rights reserved. Copyright © Intalio. All rights reserved. Copyright © Oracle. All rights reserved. Copyright © Adobe Systems Incorporated. All rights reserved. Copyright © DataArt, Inc. All rights reserved. Copyright © ComponentSource. All rights reserved. Copyright © Microsoft Corporation. All rights reserved. Copyright © Rogue Wave Software, Inc. All rights reserved. Copyright © Teradata Corporation. All rights reserved. Copyright © Yahoo! Inc. All rights reserved. Copyright © Glyph & Cog, LLC. All rights reserved. Copyright © Thinkmap, Inc. All rights reserved. Copyright © Clearpace Software Limited. All rights reserved. Copyright © Information Builders, Inc. All rights reserved. Copyright © OSS Nokalva, Inc. All rights reserved. Copyright Edifecs, Inc. All rights reserved. Copyright Cleo Communications, Inc. All rights reserved. Copyright © International Organization for Standardization 1986. All rights reserved. Copyright © ej-technologies GmbH. All rights reserved. Copyright © Jaspersoft Corporation. All rights reserved. Copyright © International Business Machines Corporation. All rights reserved. Copyright © yWorks GmbH. All rights reserved. Copyright © Lucent Technologies. All rights reserved. Copyright © University of Toronto. All rights reserved. Copyright © Daniel Veillard. All rights reserved. Copyright © Unicode, Inc. Copyright IBM Corp. All rights reserved. Copyright © MicroQuill Software Publishing, Inc. All rights reserved. Copyright © PassMark Software Pty Ltd. All rights reserved. Copyright © LogiXML, Inc. All rights reserved. Copyright © 2003-2010 Lorenzi Davide, All rights reserved. Copyright © Red Hat, Inc. All rights reserved. Copyright © The Board of Trustees of the Leland Stanford Junior University. All rights reserved. Copyright © EMC Corporation. All rights reserved. Copyright © Flexera Software. All rights reserved. Copyright © Jinfonet Software. All rights reserved. Copyright © Apple Inc. All rights reserved. Copyright © Teleric Inc. All rights reserved. Copyright © BEA Systems. All rights reserved. Copyright © PDFlib GmbH. All rights reserved. Copyright © Orientation in Objects GmbH. All rights reserved. Copyright © Tanuki Software, Ltd. All rights reserved. Copyright © Ricebridge. All rights reserved. Copyright © Sencha, Inc. All rights reserved. Copyright © Scalable Systems, Inc. All rights reserved. Copyright © jQWidgets. All rights reserved. Copyright © Tableau Software, Inc. All rights reserved. Copyright © MaxMind, Inc. All Rights Reserved. Copyright © TMate Software s.r.o. All rights reserved. Copyright © MapR Technologies Inc. All rights reserved. Copyright © Amazon Corporate LLC. All rights reserved. Copyright © Highsoft. All rights reserved. Copyright © Python Software Foundation. All rights reserved. Copyright © BeOpen.com. All rights reserved. Copyright © CNRI. All rights reserved.

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>), and/or other software which is licensed under various versions of the Apache License (the "License"). You may obtain a copy of these Licenses at <http://www.apache.org/licenses/>. Unless required by applicable law or agreed to in writing, software distributed under these Licenses is distributed on an "AS IS" BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the Licenses for the specific language governing permissions and limitations under the Licenses.

This product includes software which was developed by Mozilla (<http://www.mozilla.org/>), software copyright The JBoss Group, LLC, all rights reserved; software copyright © 1999-2006 by Bruno Lowagie and Paulo Soares and other software which is licensed under various versions of the GNU Lesser General Public License Agreement, which may be found at <http://www.gnu.org/licenses/lgpl.html>. The materials are provided free of charge by Informatica, "as-is", without warranty of any kind, either express or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose.

The product includes ACE(TM) and TAO(TM) software copyrighted by Douglas C. Schmidt and his research group at Washington University, University of California, Irvine, and Vanderbilt University, Copyright (©) 1993-2006, all rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (copyright The OpenSSL Project. All Rights Reserved) and redistribution of this software is subject to terms available at <http://www.openssl.org> and <http://www.openssl.org/source/license.html>.

This product includes Curl software which is Copyright 1996-2013, Daniel Stenberg, <daniel@haxx.se>. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at <http://curl.haxx.se/docs/copyright.html>. Permission to use, copy, modify, and distribute this software for any purpose with or without fee is hereby granted, provided that the above copyright notice and this permission notice appear in all copies.

The product includes software copyright 2001-2005 (©) MetaStuff, Ltd. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at <http://www.dom4j.org/license.html>.

The product includes software copyright © 2004-2007, The Dojo Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at <http://dojotoolkit.org/license>.

This product includes ICU software which is copyright International Business Machines Corporation and others. All rights reserved. Permissions and limitations regarding this software are subject to terms available at <http://source.icu-project.org/repos/icu/icu/trunk/license.html>.

This product includes software copyright © 1996-2006 Per Bothner. All rights reserved. Your right to use such materials is set forth in the license which may be found at <http://www.gnu.org/software/kawa/Software-License.html>.

This product includes OSSP UUID software which is Copyright © 2002 Ralf S. Engelschall, Copyright © 2002 The OSSP Project Copyright © 2002 Cable & Wireless Deutschland. Permissions and limitations regarding this software are subject to terms available at <http://www.opensource.org/licenses/mit-license.php>.

This product includes software developed by Boost (<http://www.boost.org/>) or under the Boost software license. Permissions and limitations regarding this software are subject to terms available at http://www.boost.org/LICENSE_1_0.txt.

This product includes software copyright © 1997-2007 University of Cambridge. Permissions and limitations regarding this software are subject to terms available at <http://www.pcre.org/license.txt>.

This product includes software copyright © 2007 The Eclipse Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at <http://www.eclipse.org/org/documents/epl-v10.php> and at <http://www.eclipse.org/org/documents/edl-v10.php>.

This product includes software licensed under the terms at <http://www.tcl.tk/software/tcltk/license.html>, <http://www.bosrup.com/web/overlib/?License>, <http://www.stlport.org/doc/license.html>, <http://asm.ow2.org/license.html>, <http://www.cryptix.org/LICENSE.TXT>, <http://hsqldb.org/web/hsqldbLicense.html>, <http://httpunit.sourceforge.net/doc/license.html>, <http://jung.sourceforge.net/license.txt>, http://www.gzip.org/zlib/zlib_license.html, <http://www.openldap.org/software/release/license.html>, <http://www.libssh2.org>, <http://slf4j.org/license.html>, <http://www.sente.ch/software/OpenSourceLicense.html>, <http://fusesource.com/downloads/license-agreements/fuse-message-broker-v-5-3-license-agreement>; <http://antlr.org/license.html>; <http://aopalliance.sourceforge.net/>; <http://www.bouncycastle.org/licence.html>; <http://www.jgraph.com/jgraphdownload.html>; <http://www.jcraft.com/jsch/LICENSE.txt>; http://jotm.objectweb.org/bsd_license.html; <http://www.w3.org/Consortium/Legal/2002/copyright-software-20021231>; <http://www.slf4j.org/license.html>; <http://nanoxml.sourceforge.net/orig/copyright.html>; <http://www.json.org/license.html>; <http://forge.ow2.org/projects/javaservice/>; <http://www.postgresql.org/about/license.html>, <http://www.sqlite.org/copyright.html>, <http://www.tcl.tk/software/tcltk/license.html>, <http://www.jaxen.org/faq.html>, <http://www.jdom.org/docs/faq.html>, <http://www.slf4j.org/license.html>; <http://www.iodbc.org/dataspace/iodbc/wiki/IODBC/License>; <http://www.keplerproject.org/md5/license.html>; <http://www.toedter.com/en/jcalendar/license.html>; <http://www.edankert.com/bounce/index.html>; <http://www.net-snmp.org/about/license.html>; <http://www.openmdx.org/#FAQ>; http://www.php.net/license/3_01.txt; <http://srp.stanford.edu/license.txt>; <http://www.schneier.com/blowfish.html>; <http://www.jmock.org/license.html>; <http://xsom.java.net>; <http://benalman.com/about/license/>; <https://github.com/CreateJS/EaselJS/blob/master/src/easeljs/display/Bitmap.js>; <http://www.h2database.com/html/license.html#summary>; <http://jsoncpp.sourceforge.net/LICENSE>; <http://jdbc.postgresql.org/license.html>; <http://protobuf.googlecode.com/svn/trunk/src/google/protobuf/descriptor.proto>; <https://github.com/rantav/hector/blob/master/LICENSE>; <http://web.mit.edu/Kerberos/krb5-current/doc/mitK5license.html>; <http://jibx.sourceforge.net/jibx-license.html>; <https://github.com/lyokato/libgeohash/blob/master/LICENSE>; <https://github.com/hjiang/jsonxx/blob/master/LICENSE>; <https://code.google.com/p/lz4/>; <https://github.com/jedisct1/libsodium/blob/master/LICENSE>; <http://one-jar.sourceforge.net/index.php?page=documents&file=license>; <https://github.com/EsotericSoftware/kryo/blob/master/license.txt>; <http://www.scala-lang.org/license.html>; <https://github.com/tinkerpop/blueprints/blob/master/LICENSE.txt>; <http://gee.cs.oswego.edu/dl/classes/EDU/oswego/cs/dl/util/concurrent/intro.html>; <https://aws.amazon.com/asl/>; <https://github.com/twbs/bootstrap/blob/master/LICENSE>; <https://sourceforge.net/p/xmlunit/code/HEAD/tree/trunk/LICENSE.txt>; <https://github.com/documentcloud/underscore-contrib/blob/master/LICENSE>, and <https://github.com/apache/hbase/blob/master/LICENSE.txt>.

This product includes software licensed under the Academic Free License (<http://www.opensource.org/licenses/afl-3.0.php>), the Common Development and Distribution License (<http://www.opensource.org/licenses/cddl1.php>), the Common Public License (<http://www.opensource.org/licenses/cpl1.0.php>), the Sun Binary Code License Agreement Supplemental License Terms, the BSD License (<http://www.opensource.org/licenses/bsd-license.php>), the new BSD License (<http://opensource.org/licenses/BSD-3-Clause>), the MIT License (<http://www.opensource.org/licenses/mit-license.php>), the Artistic License (<http://www.opensource.org/licenses/artistic-license-1.0>) and the Initial Developer's Public License Version 1.0 (<http://www.firebirdsql.org/en/initial-developer-s-public-license-version-1-0/>).

This product includes software copyright © 2003-2006 Joe Walnes, 2006-2007 XStream Committers. All rights reserved. Permissions and limitations regarding this software are subject to terms available at <http://xstream.codehaus.org/license.html>. This product includes software developed by the Indiana University Extreme! Lab. For further information please visit <http://www.extreme.indiana.edu/>.

This product includes software Copyright (c) 2013 Frank Balluffi and Markus Moeller. All rights reserved. Permissions and limitations regarding this software are subject to terms of the MIT license.

See patents at <https://www.informatica.com/legal/patents.html>.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATION AND OTHER TORTS.

Publication Date: 2024-10-01

Table of Contents

Preface	5
Chapter 1: Introduction to Create Netsuite Sales Orders from Dynamics 365 Opportunities recipe	6
Prerequisites.	6
Creating a custom field in the NetSuite sales order entity.	6
Creating a custom field in Dynamics 365 account entity.	7
Creating a webhook in Dynamics 365.	9
Chapter 2: Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe contents	14
Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe assets.	15
Chapter 3: Using the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe	17
Step 1: Copy and access the recipe.	17
Step 2: Configure and publish the Email connection.	18
Step 3: Configure and publish the Dynamics 365 connection.	20
Step 4: Configure and publish the NetSuite connection	20
Step 5: Configure and publish the processes.	21
Step 6: Invoke the process.	22
Rules and guidelines.	22

Preface

Use *Create NetSuite Sales Orders from Dynamics 365 Opportunities* to learn how to create a NetSuite sales order from a Dynamics 365 opportunity based on a webhook request from Dynamics 365. This guide assumes that you have an understanding of the Dynamics 365 Connector, NetSuite Connector, and Email Connector concepts.

CHAPTER 1

Introduction to Create Netsuite Sales Orders from Dynamics 365 Opportunities recipe

The Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe is based on REST and SOAP APIs. Use the recipe to create a NetSuite sales order from a Dynamics 365 opportunity based on a webhook request from Dynamics 365 as an incoming parameter.

The process is triggered by a webhook to check the status of the Dynamics 365 opportunity. If the opportunity status is Won, the process retrieves and stores the key information, such as the associated account, currency, and products, and creates all the products from the opportunity in NetSuite. Otherwise, the process is terminated. If a product with the same name already exists, the process retrieves the product's ID instead of creating a new product.

The process then creates or updates the customer record in NetSuite based on the opportunity's account information. The process searches for an existing sales order in NetSuite with the Dynamics ID custom field field that match the opportunity ID. If the sales order exists, an email notification is sent. Otherwise, a new sales order is created based on the data from the Dynamics 365 opportunity.

The process then sends an email notification with the results to confirm the successful creation of the sales order or to report errors encountered during the process.

The process does not update the existing sales orders. If an existing sales order is found, a notification is sent through email, but no further action is taken.

Prerequisites

To create a NetSuite sales order from a Dynamics 365 opportunity, the following prerequisites must be met:

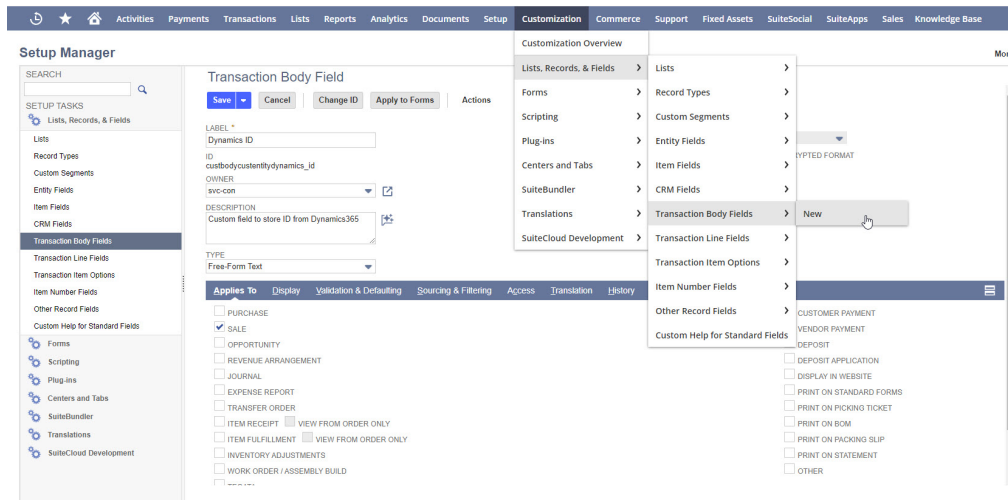
- Create a custom field in the NetSuite sales order entity
- Create a custom field in the Dynamics 365 account entity
- Create a webhook in Dynamics 365

Creating a custom field in the NetSuite sales order entity

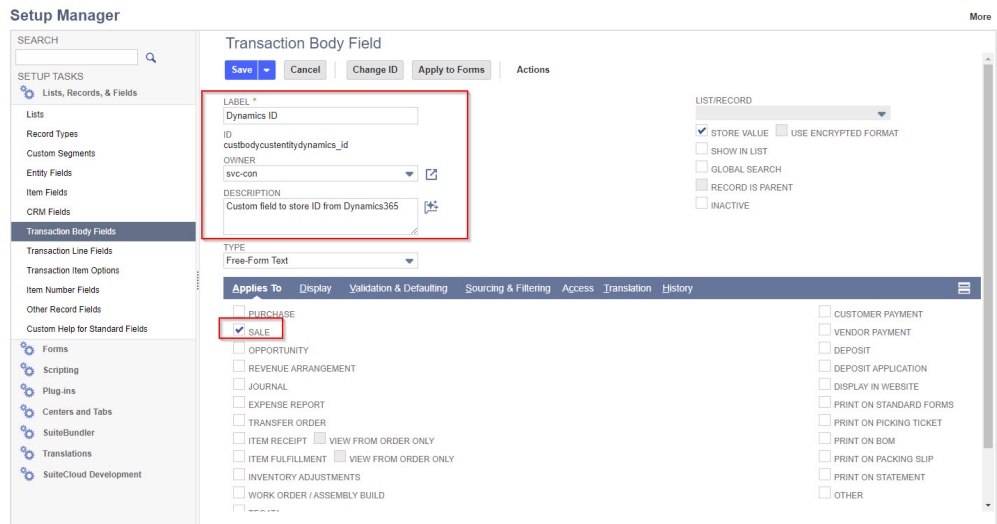
Create a `Dynamics ID` custom field in the NetSuite sales order entity.

1. Log in to the NetSuite organization.

- Go to **Customization > Lists, Records, & Fields > Transaction Body Fields > New**.
The following image shows the **Transaction Body Field** page:



- On the **Transaction Body Field** page, enter the value as `Dynamics ID` in the **LABEL** field and `custbodycustentitydynamics_id` in the **ID** field.
- Select **SALE** in the **Applies To** tab as shown in the following image:



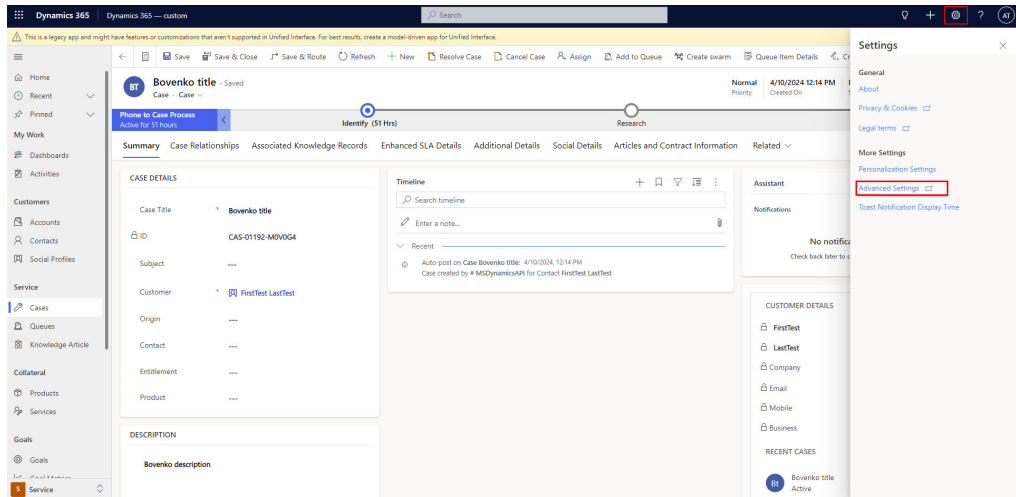
These values are used for searching the matching sales order.

- Click **Save**.

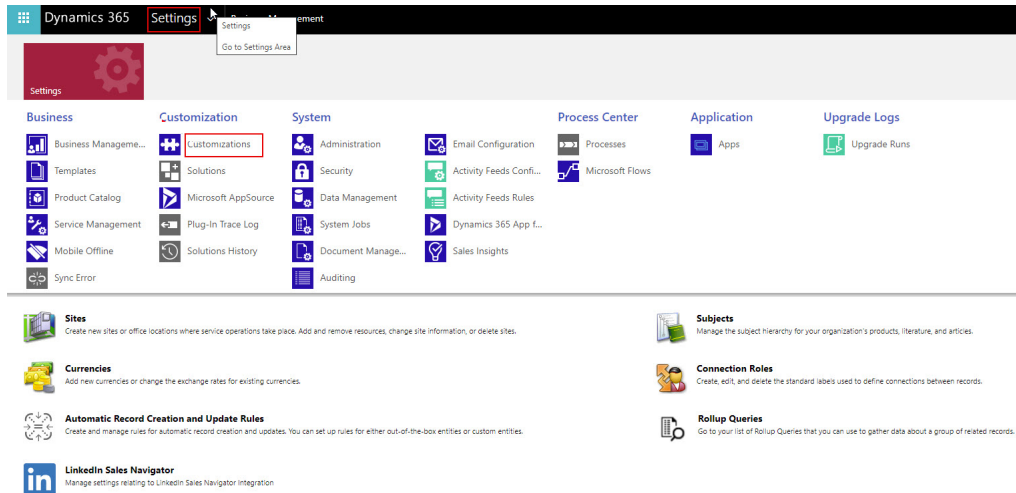
Creating a custom field in Dynamics 365 account entity

Create a `new_netsiteid` custom field in the Dynamics 365 account entity.

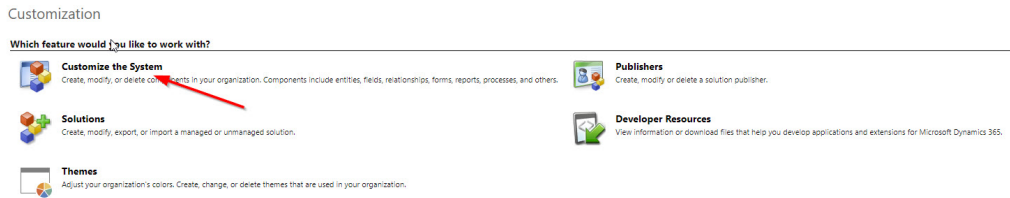
- Log in to the Dynamics 365 organization.
- Go to **Settings > Advanced Settings**.
The following image shows the **Advanced Settings** option on the **Dynamics 365** page:



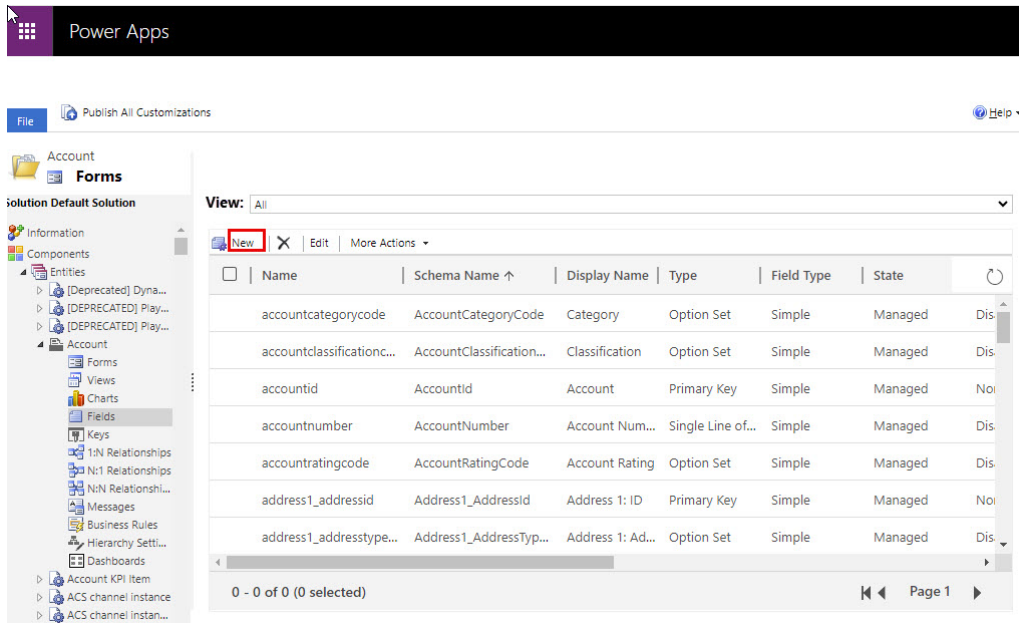
- On the **Settings** page, click **Customizations**.
The following image shows the **Customizations** option on the **Settings** page:



- Click **Customize the System**.
The following image shows the **Customize the System** option on the **Customization** page:

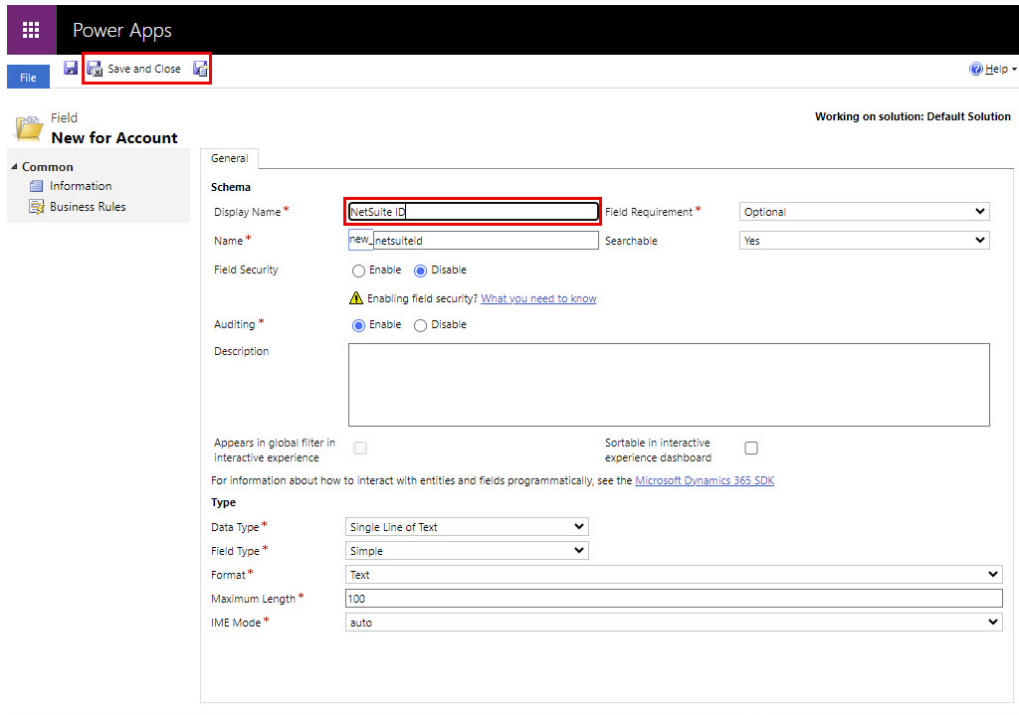


- Go to **Components > Entities > Account > Fields**, and then click **New**.
The following image shows the **New** button on the **Account Fields** page:



- In the **Display Name** field, enter the value as **NetSuite ID** and click **Save and Close**. The value in the **Name** field is automatically set to **new_netsuiteid**.

The following image shows the **New for Account** page:



Creating a webhook in Dynamics 365

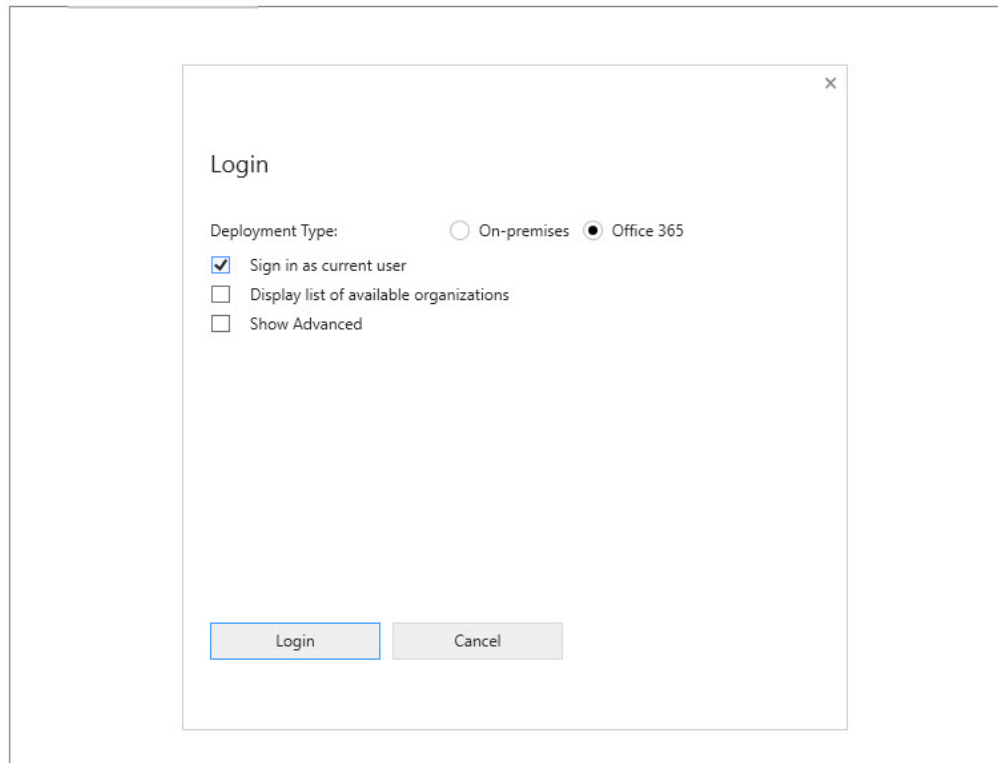
Webhooks are a way to communicate when an event occurs in one system with another system.

You can create webhooks in various ways. In this recipe, we have used the Plug-in Registration Tool.

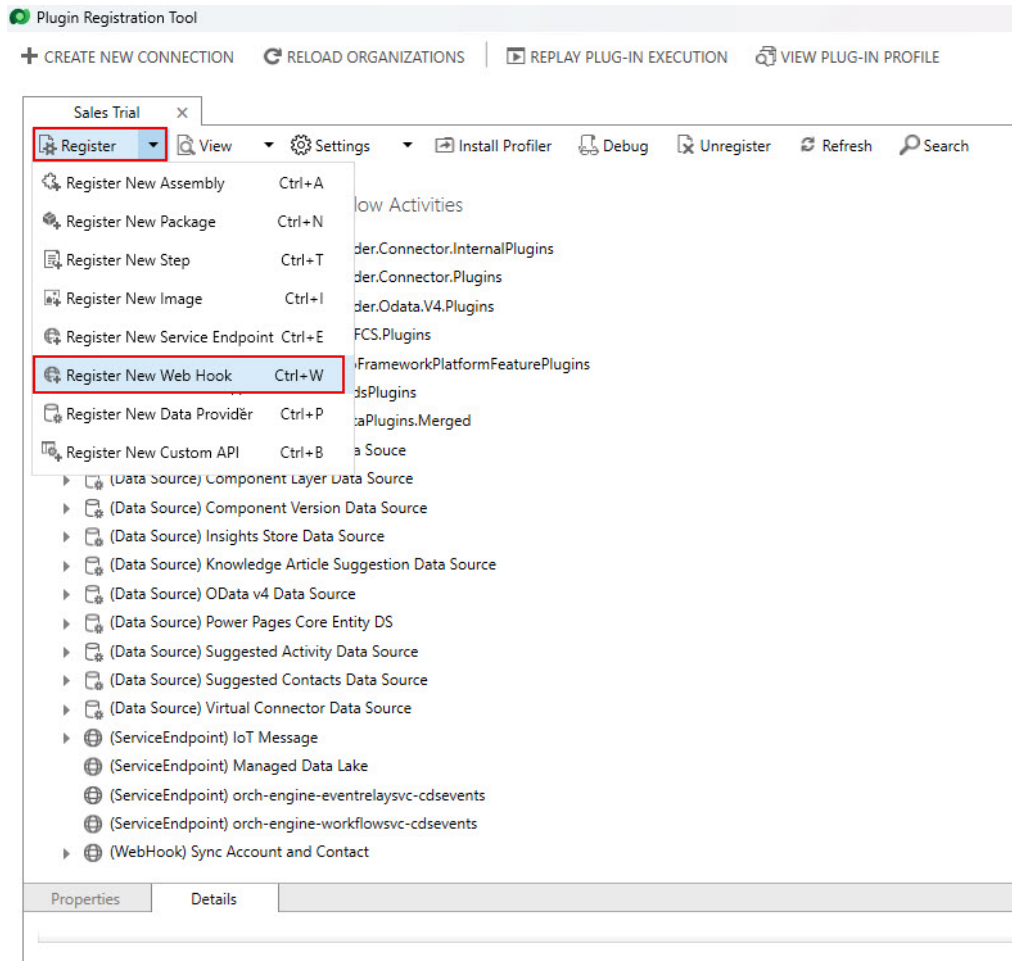
Use the Plug-in Registration Tool to [register a webhook](#). To get the Plug-in Registration Tool, see [Dataverse development tools](#).

To create a webhook in Dynamics 365, perform the following steps:

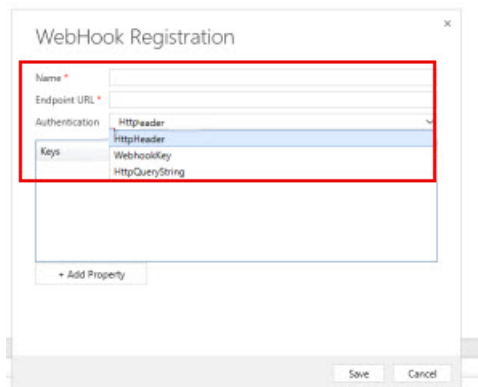
1. Open the Plug-in Registration Tool and log in to your organization.
2. Click **CREATE NEW CONNECTION** on the **Plugin Registration Tool** page.
The following image shows the **CREATE NEW CONNECTION** button on the **Plugin Registration Tool** page:



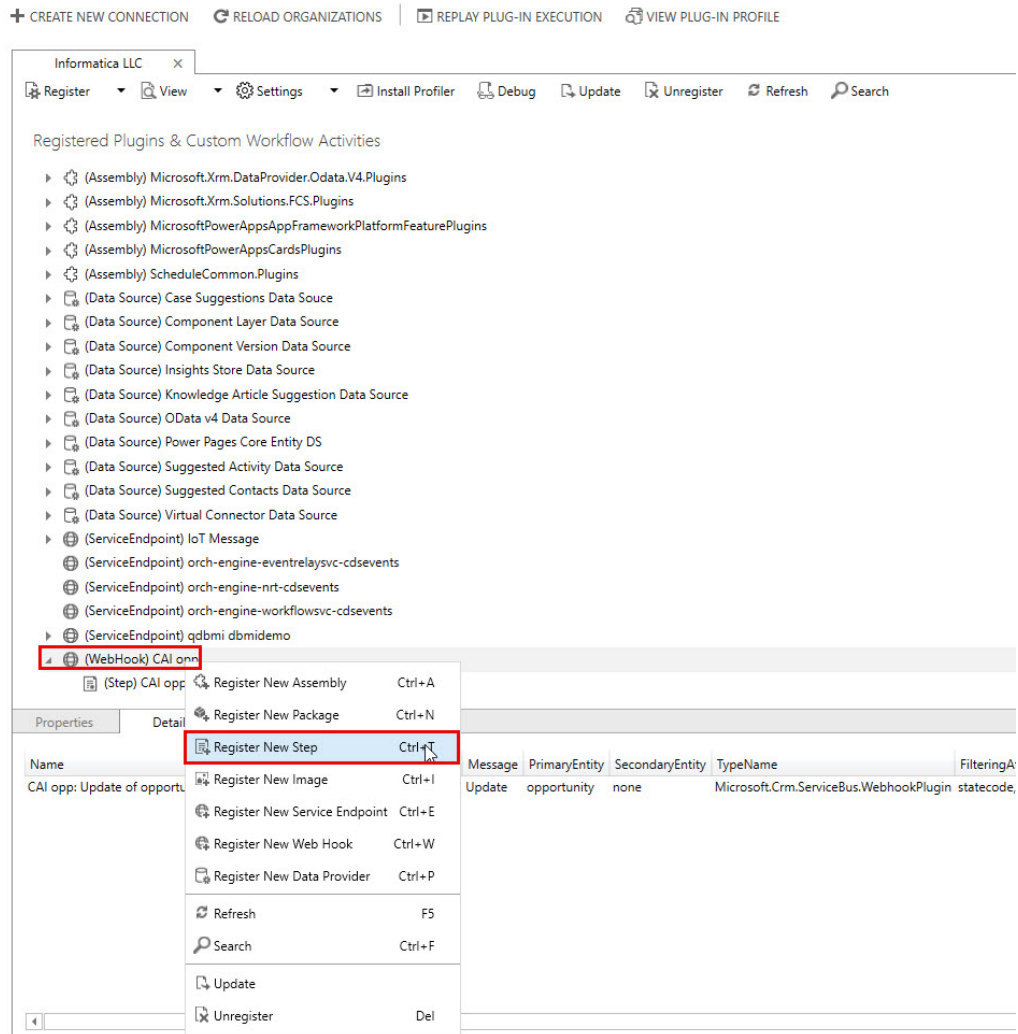
3. Go to **Register** and select **Register New Web Hook**.
The following image shows the **Register New Web Hook** option on the **Register** menu:



4. Enter the webhook name, the [“Step 6: Invoke the process” on page 22](#) that you copied while invoking the process in the **Endpoint URL** field, and the authentication method in the **Authentication** field. The following image shows the **WebHook Registration** dialog box:



5. Go to **WebHook** and select **Register New Step**. The following image shows the **Register New Step** option:



- In the **Update Existing Step** page, enter the value as **Update** in the **Message** field, **opportunity** in the **Primary Entity** field, and select **Asynchronous** in the **Execution Mode** field. The following image shows the **Update Existing Step** page:

Update Existing Step

General Configuration Information

Message *	Update
Primary Entity	opportunity
Secondary Entity	none
Filtering Attributes	statecode, statuscode
Event Handler	(WebHook) CAI opp
Step Name *	CAI opp: Update of opportunity
Run in User's Context	Calling User
Execution Order *	1
Description	CAI opp: Update of opportunity

Event Pipeline Stage of Execution: PostOperation

Execution Mode: Asynchronous Synchronous

Deployment: Server Offline

Delete AsyncOperation if StatusCode = Successful

Unsecure Configuration

Secure Configuration

Update Step Cancel

- In the **Select Attributes** dialog box, clear all the fields and select the **Status** and **Status Reason** custom fields to trigger the webhook when the opportunity status is updated. The following image shows the **Status** and **Status Reason** custom field attributes in the **Select Attributes** dialog box:

Update Existing Step

General Configuration Information

Message *	Update
Primary Entity	opportunity
Secondary Entity	none
Filtering Attributes	statecode, st
Event Handler	(WebHook) C
Step Name *	CAI opp: Upd
Run in User's Context	Calling User
Execution Order *	1
Description	CAI opp: Upd

Event Pipeline Stage of Executi

PostOperation

Delete AsyncOperation if StatusCod

Select Attributes

Select All / Deselect All

<input type="checkbox"/> Scheduled Follow up (Qualify)	schedulefollowup_qualify	DateTime
<input type="checkbox"/> Segment Id	msdyn_segmentid	Lookup
<input type="checkbox"/> Send Thank You Note	sendthankyounote	Boolean
<input type="checkbox"/> Skip Price Calculation	skippricecalculation	Picklist
<input type="checkbox"/> SLA	slaid	Lookup
<input type="checkbox"/> Source Campaign	campaignid	Lookup
<input checked="" type="checkbox"/> Status	statecode	State
<input checked="" type="checkbox"/> Status Reason	statuscode	Status
<input type="checkbox"/> Teams Followed	teamsfollowed	Integer
<input type="checkbox"/> Time Spent by me	timespentbymeonemailandmeeti	String
<input type="checkbox"/> Time Zone Rule Version Number	timezoneruleversionnumber	Integer
<input type="checkbox"/> Timeline	timeline	Picklist
<input type="checkbox"/> Topic	name	String
<input type="checkbox"/> Total Amount	totalamount	Money
<input type="checkbox"/> Total Amount (Base)	totalamount_base	Money
<input type="checkbox"/> Total Detail Amount	totallineitemamount	Money

OK Cancel

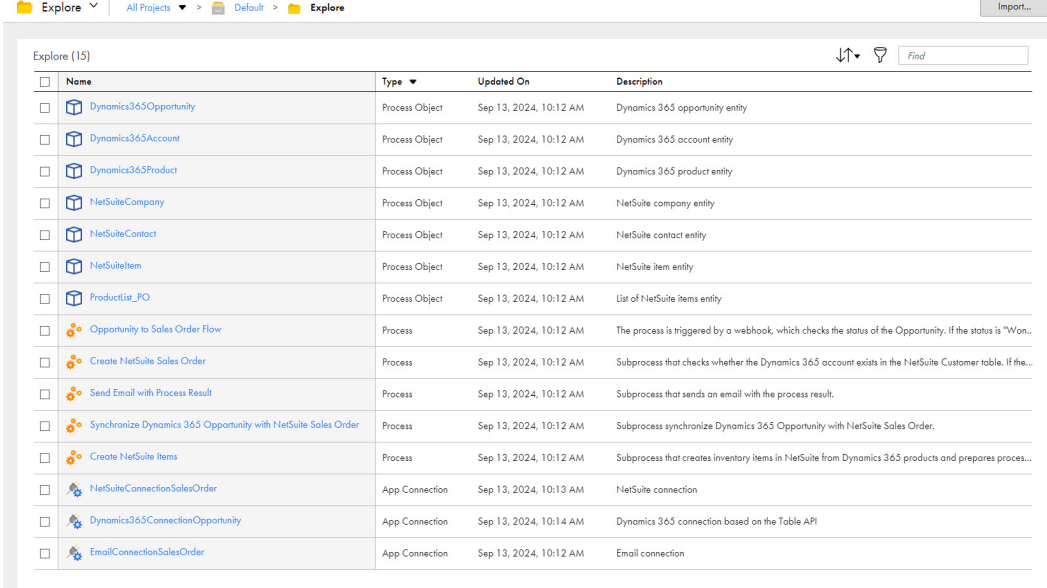
Update Step Cancel

CHAPTER 2

Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe contents

The recipe contains multiple assets, such as process objects, app connections, and processes.

The following image shows the assets that the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe package contains:



Name	Type	Updated On	Description
Dynamics365Opportunity	Process Object	Sep 13, 2024, 10:12 AM	Dynamics 365 opportunity entity
Dynamics365Account	Process Object	Sep 13, 2024, 10:12 AM	Dynamics 365 account entity
Dynamics365Product	Process Object	Sep 13, 2024, 10:12 AM	Dynamics 365 product entity
NetSuiteCompany	Process Object	Sep 13, 2024, 10:12 AM	NetSuite company entity
NetSuiteContact	Process Object	Sep 13, 2024, 10:12 AM	NetSuite contact entity
NetSuiteItem	Process Object	Sep 13, 2024, 10:12 AM	NetSuite item entity
ProductList_PO	Process Object	Sep 13, 2024, 10:12 AM	List of NetSuite items entity
Opportunity to Sales Order Flow	Process	Sep 13, 2024, 10:12 AM	The process is triggered by a webhook, which checks the status of the Opportunity, if the status is "Won...
Create NetSuite Sales Order	Process	Sep 13, 2024, 10:12 AM	Subprocess that checks whether the Dynamics 365 account exists in the NetSuite Customer table. If the...
Send Email with Process Result	Process	Sep 13, 2024, 10:12 AM	Subprocess that sends an email with the process result.
Synchronize Dynamics 365 Opportunity with NetSuite Sales Order	Process	Sep 13, 2024, 10:12 AM	Subprocess synchronize Dynamics 365 Opportunity with NetSuite Sales Order.
Create NetSuite Items	Process	Sep 13, 2024, 10:12 AM	Subprocess that creates inventory items in NetSuite from Dynamics 365 products and prepares proces...
NetSuiteConnectionSalesOrder	App Connection	Sep 13, 2024, 10:13 AM	NetSuite connection
Dynamics365ConnectionOpportunity	App Connection	Sep 13, 2024, 10:14 AM	Dynamics 365 connection based on the Table API
EmailConnectionSalesOrder	App Connection	Sep 13, 2024, 10:12 AM	Email connection

Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe assets

The following table lists the assets that the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe package contains:

Asset Name	Asset Type	Description
Dynamics365Product	Process object	Dynamics 365 product entity.
Dynamics365Account	Process object	Dynamics 365 account entity.
NetSuiteItem	Process object	NetSuite item entity.
ProductList_PO	Process object	List of NetSuite items entity.
NetSuiteCompany	Process object	NetSuite company entity.
NetSuiteContact	Process object	NetSuite contact entity.
Dynamics365Opportunity	Process object	Dynamics 365 opportunity entity.
Dynamics365ConnectionOpportunity	App connection	Connects to Dynamics 365 based on the Table API.
NetSuiteConnectionSalesOrder	App connection	NetSuite connection.
EmailConnectionSalesOrder	App connection	Email connection.
Create NetSuite Sales Order	Process	Subprocess that checks whether the Dynamics 365 account exists in the NetSuite Customer table. If the account does not exist, the process creates a customer based on the account data. The process then checks if a sales order has already been created based on the Dynamics 365 opportunity. If a sales order exists, the user is notified. Otherwise, the process creates a new sales order and provides a confirmation message.
Create NetSuite Items	Process	Subprocess that creates inventory items in NetSuite from Dynamics 365 products and prepares process objects for creating sales orders.
Synchronize Dynamics 365 Opportunity with NetSuite Sales Order	Process	Subprocess that synchronizes Dynamics 365 opportunity with NetSuite sales order.

Asset Name	Asset Type	Description
Send Email with Process Result	Process	Subprocess that sends an email with the process result.
Opportunity to Sales Order Flow	Process	The process is triggered by a webhook to check the status of the Dynamics 365 opportunity. If the status is Won, the process creates sales orders based on the opportunity. When the sales order is created, the process sends an email with the results.

CHAPTER 3

Using the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe

To use the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe, you must perform the following steps manually:

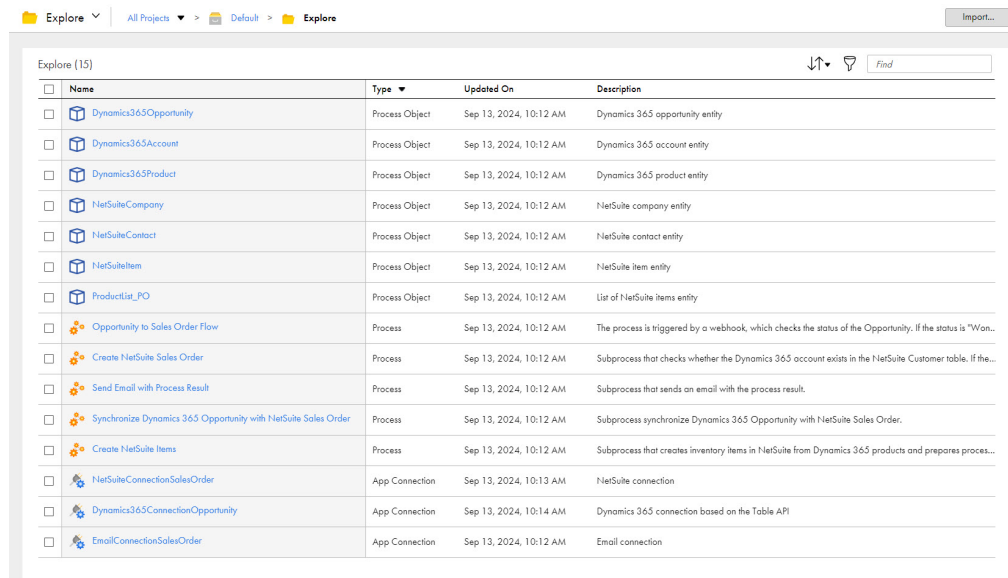
- Step 1: Copy and access the recipe
- Step 2: Configure and publish the Email connection
- Step 3: Configure and publish the Dynamics 365 connection
- Step 4: Configure and publish the NetSuite connection
- Step 5: Configure and publish the processes
- Step 6: Invoke the process

Step 1: Copy and access the recipe

Copy the pre-configured assets in the recipe to a separate project or folder.

1. Open the **Create NetSuite Sales Orders from Dynamics 365 Opportunities** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.
It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.
4. After the recipe is copied, click **Explore** to access the recipe content.

- Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box. All the assets in the recipe are displayed as shown in the following image:



Step 2: Configure and publish the Email connection

Configure the authentication type and authentication details in the EmailConnectionSalesOrder connection, and then publish the connection.

- Open the **EmailConnectionSalesOrder** connection.
- From the **Type** list, select **IICS Cloud Application Integration Email Service (Licensed for use)**.
- From the **Run On** list, select **Cloud Server or any Secure Agent**.
- From the **Authentication Type** list, select **Password** or **OAuth** as needed. Based on the authentication type selected, perform one of the following steps:
 - For **Password** authentication, enter values for the following properties in the **Connection Properties** section:

Property	Description
Authentication	Select Enable . Email Connector authenticates the user name and password that you enter in the email connection properties.
User Name	User name to log in to the email server. The user name is either the account name or the email address that is used to send the email with the synchronization results. For example: <code>notifyme@mydomain.com</code>

Property	Description
Password	Password for the email address.
Security	Select SSL for the Email connection to use the SSL protocol.

Configure the following common properties on the connection creation page:

Property	Description
Host	Email server's DNS name, such as <code>mail.mydomain.com</code> , or an IP address, such as <code>192.168.1.1</code> .
Port	Port for communication between the Process Server and the email server. Default is 25 .

- For **OAuth** authentication, enter values for the following properties in the **Connection Properties** section:

Property	Description
Authorization URL	Enter the OAuth authorization URL for the email service that is used to authorize the user request. For example: <code>https://login.microsoftonline.com/xxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxx/oauth2/v2.0/authorize</code>
Token Request URL	Enter the OAuth token request URL that handles token requests. For example: <code>https://login.microsoftonline.com/xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxxx/oauth2/v2.0/token</code> The refresh token expires in 90 days. The user must authenticate again and publish the connection before the token expires.
Client ID	Specify the identifier value from the OAuth provider.
Client Secret	Enter the client secret to connect to the email application.
Scope	Specify the scope. The scope in OAuth authentication limits an application's access to a user's account. You can select multiple scopes for a single client. To enter multiple scopes, separate each value with a space. For a Microsoft Outlook email account, enter the following scope: <code>https://outlook.office.com/SMTP.Send offline_access</code>

Configure the following common properties on the connection creation page:

Property	Description
Host	Email server's DNS name, such as <code>mail.mydomain.com</code> , or an IP address, such as <code>192.168.1.1</code> .
Port	Port for communication between the Process Server and the email server. Default is 25 .

5. Save and publish the connection.

Step 3: Configure and publish the Dynamics 365 connection

Configure the tenant and client details in the Dynamics365ConnectionOpportunity connection, and then publish the connection.

1. Open the **Dynamics365ConnectionOpportunity** connection.
2. From the **Type** list, select **Dynamics365**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
Tenant_ID	Dynamics 365 tenant ID to get the access token. Enter the tenant ID that you generated under Microsoft Entra ID > App registrations in Dynamics 365 after creating the client credentials.
Client_ID	Dynamics 365 client ID to generate a valid access token. Enter the client ID that you generated under Microsoft Entra ID > App registrations in Dynamics 365.
Client_Secret	Dynamics 365 client secret that you generated under Microsoft Entra ID > App registrations in Dynamics 365.
Grant_type	Grant type that the Dynamics 365 instance uses to get an access token for third-party client authorization. Enter the value as client_credentials .
Resource_URL	URL to access the Dynamics 365 instance.

5. Save and publish the connection.

Step 4: Configure and publish the NetSuite connection

Configure the client ID, instance URL, certificate ID, and private key in the NetSuiteConnectionSalesOrder connection, and then publish the connection.

1. Open the **NetSuiteConnectionSalesOrder** connection.
2. From the **Type** list, select **NetSuite**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.

- In the **Connection Properties** section, enter values for the following properties:

Property	Description
Client ID	NetSuite OAuth 2.0 client ID to generate a valid access token. Enter the client ID that you generated from the Integration page in NetSuite.
Certificate ID	NetSuite certificate ID that you generated using OAuth 2.0 Client Credentials under Setup > Integration > Manage Authentication > OAuth 2.0 Client Credentials (M2M) Setup in NetSuite.
Instance URL	NetSuite applications suite instance URL. Enter the instance URL in the following format: <code>https://[accountid].suitetalk.api.netsuite.com</code>
Certificate Private Key	NetSuite certificate private key. Enter the PKCS8 certificate as a Base64-encoded string in the following format: <code>-----BEGIN PRIVATE KEY----- -----END PRIVATE KEY-----</code>

- Save and publish the connection.

Step 5: Configure and publish the processes

Configure the allowed user or group for authorization, email ID for sending the notification, and subsidiary ID to create a customer in NetSuite, and publish the process.

- To publish the following processes, click **Actions** in the row that contains the processes in the order specified and select **Publish**.
 - Create NetSuite Items
 - Create NetSuite Sales Order
 - Synchronize Dynamics 365 Opportunity with NetSuite Sales Order
 - Send Email with Process Result
- Open the **Opportunity to Sales Order Flow** process.
- On the **Start** tab of the Start step, in the **Allowed Users** or **Allowed Groups** field, enter the user or group that has access to the process service URL at run time.
- On the **Assignment** tab of the **Set Flow Configuration** step, enter values for the following fields:
 - In the **Email** field, enter the email ID to send the email notifications.
 - If your NetSuite environment uses a Subsidiary, in the **NetSuite_Subsidiary_ID** field, enter the subsidiary ID to create a customer in NetSuite.
- Save and publish the process.

Step 6: Invoke the process

When you invoke the Opportunity to Sales Order Flow process, the process creates a NetSuite sales order from a Dynamics 365 opportunity based on the webhook request from Dynamics 365.

1. Open the **Opportunity to Sales Order Flow** process and click **Actions > Properties Details > Copy Service URL**.
2. Open a text editor and add the input fields and values to the service URL as shown in the following format:

```
<Cloud Application Integration POD URL>/active-bpel/public/rt/<API_name>?
webhookRequest=<Webhook request from Dynamics 365>
```
3. Open a browser and paste the service URL.

You can also invoke the process using the Run Using option, REST or SOAP API endpoints in API clients, such as cURL, Postman, SOAP UI, or through any programming language.

You must copy the service URL to the webhook configuration in [“Creating a webhook in Dynamics 365” on page 9](#) tool. The process will be triggered automatically when an opportunity is closed in Dynamics 365.

Rules and guidelines

Consider the following rules and guidelines when working with the Create NetSuite Sales Orders from Dynamics 365 Opportunities recipe:

You must update the process according to your Dynamics 365 and Netsuite service configurations as there are many possible limitations based on different services business rules. You can find the some limitations in this topic that have been defined for the objects synchronized in the recipe process.

- The **Subsidiary** field for both the company and items must be identical. This enforces a restriction on the currency used. The currency must be the same as the currency specified in the Subsidiary settings.
- Discounts and taxes are not synchronized from Dynamics 365 because these fields are configured separately for the company and are applied based on the settings within NetSuite.
- When creating a sales order, the process passes the exchange rate. However, you must check if the NetSuite settings allow you to modify this value.