

Informatica[®] Cloud Application Integration September 2024

Create NetSuite Sales Orders from Dynamics 365 Opportunities

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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:



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

Setup Manager		More
SEARCH SETUP TASKS	Transaction Body Field Save Cancel Change ID Apply to Forms Actions LABEL * * * </th <th>LISTIFIECORD</th>	LISTIFIECORD
Litis Record Types Custom Segments Ently Fields Item Fields CRM Fields CRM Fields Transaction Line Fields Transaction Line Fields Transaction Line Fields Other Record Fields Other Record Fields Other Record Fields Other Sandard Other Sandard Other Sandard Other Sandard Other Sandar		
Centers and Tabs SuiteBundler Translations SuiteCiloud Development	TRANSFER ORDER ITEM RECEIPT VIEW FROM ORDER ONLY TEM FULFILLMENT VIEW FROM ORDER ONLY NIVENTORY ADJUSTMENTS VIEW ROBER / ASSEMBLY BUILD	PRINT ON PICKING TICKET PRINT ON BOM PRINT ON PACKING SUP PRINT ON STATEMENT OTHER

These values are used for searching the matching sales order.

5. Click Save.

Creating a custom field in Dynamics 365 account entity

Create a new netsiteid custom field in the Dynamics 365 account entity.

- 1. 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:

III Dynamics 365 Dy	namics 365 — custom	₽ Search	Q + 🙆 ? (A)
A This is a legacy app and might h	ave features or customizations that aren't supported in Unified Interface. For best results, crea	e a model-driven app for Unified Interface.	Cattings
=	← 🗄 🖬 Save 👹 Save & Close J* Save & Route 🕚 Refresh	+ New 🖸 Resolve Case 🔯 Cancel Case 🔗 Assign 😰 Add to Queue 🕫 Create swarm	Queue Item Details C, Cr
 ᢙ Home ③ Recent ∨ 	Bovenko title - Saved Case - Case ~	0	Normal 4/10/2024 12:14 PM About About Privacy & Conkies Cf
🖈 Pinned 🗸 🗸	Phone to Case Process Addive for 51 hours Kidentify (1)	1 Hrs) Research	Lenal terms _C1
My Work	Summary Case Relationships Associated Knowledge Records	Enhanced SLA Details Additional Details Social Details Articles and Contract Informatio	n Related V More Settings
2 Activities	CASE DETAILS	Timeline + D V II :	Personalization Settings
Customers	Case Title * Bovenko title	P Search timeline Proter a note	Advanced Settings C2 Notifications Toast Notification Display Time
R Contacts	6 ID CAS-01192-M0V0G4	V. Band	No notifica
(A) Social Profiles	Subject	Auto-post on Case Bovenko title: 4/10/2024,12:14 PM Case created by # MSDynamicsAPI for Contact HirsText LastText	Check back later to s
Service	Customer * 🕅 FirstTest LastTest		
Cases	Origin		CUSTOMER DETAILS
S Knowledge Article	Contact		🔒 LastTest
Collateral	Entitiement		A Company
Products Products Services	Product		쓴 Email 合 Mobile
Goals	DESCRIPTION		
Goals	Bovenko description		RECENT CASES
S Service			Bt Active

3. On the **Settings** page, click **Customizations**.

4.

The following image shows the **Customizations** option on the **Settings** page:

⊞ Dy	namics 365	Settings	ement						
Settings	Q.	Go to Settings Ar	ea						
Busine	ess	Customization	System		Process Center	1	Application	Upgrade Logs	
в	usiness Manageme	Customizations	So Administration	Email Configuratio	Processes		Apps	Upgrade Runs	
	emplates	Solutions	Security	Activity Feeds Cor	nfi dicrosoft Flows	s			
P	roduct Catalog	Microsoft AppSource	Data Management	Activity Feeds Rul	es				
* ~ 6 S	ervice Management	Plug-In Trace Log	System Jobs	Dynamics 365 App	o f				
N	lobile Offline	Solutions History	Document Manage	Sales Insights					
¢¦ộ S	ync Error		Auditing						
	Sites Create new sites or office lo	scations where service operations take p	lace. Add and remove resources, change	e site information, or delete sites.			Subjects Manage the subject hierarchy for yo	our organization's products, literature, and articles.	
2	Currencies Add new currencies or char	nge the exchange rates for existing curre	ncies.				Connection Roles Create, edit, and delete the standard	d labels used to define connections between records.	
	Automatic Record C Create and manage rules for	reation and Update Rules or automatic record creation and update	s. You can set up rules for either out-of-	the-bax entities or custom entities.		Ď	Rollup Queries Go to your list of Rollup Queries the	at you can use to gather data about a group of related re	cords.
in	LinkedIn Sales Navig Manage settings relating to	gator Linkedin Sales Navigator integration							
Click	Customi	ze the Syste	m						
The f	ollowing	image show	s the Custor	nize the Sy	stem option	on	the Custom	ization page:	
Custom	nization								

Which fea	ture would the to work with?		
	Customize the System Create, modify, or delete contents in your organization. Components include entities, fields, relationships, forms, reports, processes, and others.	8.	Publishers Create, modify or delete a solution publisher.
*	Solutions Create, modify, export, or import a managed or unmanaged solution.	P	Developer Resources View information or download files that help you develop applications and extensions for Microsoft Dynamics 365.
	Themes Adjust your organization's colors. Create, change, or delete themes that are used in your organization.		

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

File Publish All Customizatio	ons							() <u>H</u> elp
Account								
olution Default Solution	View:	All						~
Components	🕞 Nev	v 🗙 🛛 Edit 🗍 More Actio	ns 🕶					
Entities IDeprecated Dyna		Name	Schema Name 🛧	Display Name	Туре	Field Type	State	Ö
 DEPRECATED] Play DEPRECATED] Play 		accountcategorycode	AccountCategoryCode	Category	Option Set	Simple	Managed	Dis.
Account		accountclassificationc	AccountClassification	Classification	Option Set	Simple	Managed	Dis
💮 Views		accountid	AccountId	Account	Primary Key	Simple	Managed	Noi
Fields		accountnumber	AccountNumber	Account Num	Single Line of	Simple	Managed	Dis
1:N Relationships N:1 Relationships		accountratingcode	AccountRatingCode	Account Rating	Option Set	Simple	Managed	Dis
N:N Relationshi		address1_addressid	Address1_AddressId	Address 1: ID	Primary Key	Simple	Managed	Noi
Business Rules 🖧 Hierarchy Setti		address1_addresstype	Address1_AddressTyp	Address 1: Ad	Option Set	Simple	Managed	Dis 🖕
E Dashboards								•

6. 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:

III Pc	ower Apps							
File	Save and Close	6					0	0 <u>H</u> elp •
Field New	for Account						Working on solution: Default S	olution
⊿ Common		General						
Informa	ition	Schema						
Eg Busines	s Rules	Display Name *	NetSuite ID	Fi	eld Requirement *	Optional		~
		Name *	new_netsuiteid	S	earchable	Yes		~
		Field Security	O Enable O Disable					
			A Enabling field security? What yo	u need to know				
		Auditing *	Enable Disable					
		Description						-
		Appears in globai filter in interactive experience		Si e:	ortable in interactive sperience dashboard			
		For information about how	to interact with entities and fields pro	ogrammatically, see	the Microsoft Dynamic	s 365 SDK		
		Туре						
		Data Type *	Single Line of Text	~				
		Field Type *	Simple	~				
		Format*	Text					~
		Maximum Length *	100					
		IME Mode *	auto					~

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 <u>register a webhook</u>. 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.
- 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:

CREATE NEW CONNECTION	C RELOAD ORGANIZATIONS	▶ REPLAY PLUG-IN EXECUTION	ପ୍ରି VIEW PLUG-IN PROFILE
Log	jin		×
Dep	oyment Type: On- Sign in as current user Display list of available organization: Show Advanced	-premises Office 365	
	Login Cancel		

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

🔘 Plugin Registration Tool

🛊 Register 🔹 🔂 View 🔹 🐼 Sett	ngs 🔻 🖻 Install Profiler 🐰 Debug 🕞 Unregister 😂 Refresh 🔎 Search
Register Vew Assembly Register New Assembly Register New Package Ctrl+A Register New Vackage Ctrl+T Register New Image Ctrl+I Register New Service Endpoint Ctrl+E Register New Web Hook Ctrl+W Register New Data Providěr Ctrl+P Register New Custom API Ctrl+B G (Data Source) Component Layer D G (Data Source) Insights Store Data S G (Data Source) Obata v4 Data Soure Ctrl+D Ctrl+B Ctrl+C Register New Custom API Ctrl+B Ctrl+B Ctrl+B Ctrl+B Ctrl+B Ctrl+C Register New Custom API Ctrl+B Ctrl+B Ctrl+C Register New Custom API Ctrl+B Ctrl+B Ctrl+C Register New Custom API Ctrl+C Register New Custom API Ctrl+B Ctrl+C Register New Custom API Register	ngs ▼ Install Profiler LS Debug LS Unregister Refresh Search W Activities der.Connector.InternalPlugins der.Odata.V4.Plugins FCS.Plugins FCS.Plugins FFrameworkPlatformFeaturePlugins dsPlugins aPlugins.Merged a Souce tra Source Data Source e tity DS ata Source
 Cata Source) Suggested Contacts Cata Source) Virtual Connector D. (Data Source) Virtual Connector D. (ServiceEndpoint) IoT Message (ServiceEndpoint) Managed Data I 	Data Source ta Source ake
(ServiceEndpoint) orch-engine-eve (ServiceEndpoint) orch-engine-wo (WebHook) Sync Account and Con	ntrelaysvc-cdsevents kflowsvc-cdsevents

4. Enter the webhook name, the <u>"Step 6: Invoke the process" on page 22</u> 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:

rid point URL * UtherRotation HttpPaader WebhookKey HttpDueryString + Add Property	Name *		
kutherfloation Http/wader Http/wader Http/keder Keys WebhookKey HttpDueryString + Add Property	indpoint URL*		
Http:Hader Keys WethookKey Http:QueryString + Add Property	Authentication	Http/eader	
webhookkey HttpQueryString + Add Propetty	Kaur	HttpHeader	
+ Add Property	Neja	WebhookKey	
		instancion and	

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

 CREATE NEW 	CONNE	ECTION	C RELOAD ORGANIZATION	IS REPI	LAY PLUG-	IN EXECUTION	C VIEW PLUG	IN PROFILE		
Informat	ica LLC	×]							
Register	• [View	🔹 🖏 Settings 🔹 🖻	Install Profiler	🔓 Deb	ug 🔂 Upda	ate 🔒 Unregis	ter 🛛 Refresh	Search	
Registered	d Plugi	ns & (Custom Workflow Activitie	s						
► <3 (As:	sembly)	Micros	oft.Xrm.DataProvider.Odata.V4.P	lugins						
▶ {3 (As:	sembly)	Micros	oft.Xrm.Solutions.FCS.Plugins							
▶ {3 (Ase	sembly)	Micros	oftPowerAppsAppFrameworkPlat	tformFeaturePlu	igins					
▶ {3 (Ass	sembly)	Micros	oftPowerAppsCardsPlugins							
▶ <͡3 (Ass	sembly)	Schedu	uleCommon.Plugins							
🕨 🖓 (Da	ta Sourc	ce) Case	e Suggestions Data Souce							
) 🕞 (Da	ta Sourc	ce) Com	nponent Layer Data Source							
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) 🕞 (Da	ta Sourc	ce) Sug	gested Contacts Data Source							
▶ 🕞 (Da	ta Sourc	ce) Virtu	ual Connector Data Source							
Ger (Ser	rviceEnd	lpoint)	loT Message							
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► 🕀 (Ser	viceEnd	point)	qdbmi dbmidemo							
⊿ 💮 (We	ebHook)	CALor	n							
	(Step) C	Al opp	🖏 Register New Assembly	Ctrl+A						
Properties		Detail	🍬 Register New Package	Ctrl+N						
Name			🗟 Register New Step	Ctrl	Message	PrimaryEntity	SecondaryEntity	TypeName		Filtering
CAI opp: Upd	ate of o	pportu	🙀 Register New Image	Ctrl+I	Update	opportunity	none	Microsoft.Crm.Sen	viceBus.WebhookPlugin	statecode
				int Ctrl+E						
			🛱 Register New Web Hook	Ctrl+W						
			🕞 Register New Data Provider	Ctrl+P						
			₿ Refresh	F5						
			P Search	Ctrl+F						
			🗘 Update							
4			🗟 Unregister	Del						

6. 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:

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		~	Secure Configuration
Execution Order *	1			Secure comiguation
Description	CAI opp: Update of opportunity			
Event Pipeline Stag	ge of Execution	Execution Mode	Deployment *	
PostOperation	~	 Asynchronous 	✓ Server	
		○ Synchronous	Offline	
 Delete AsyncOpera 	tion if StatusCode = Successful			

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:

General Configura	tion Information	1		Unsecure C	onfiguration
Message *	Update	Select Attributes			
Primary Entity	opportunity		Select	<u>A</u> ll / Deselect All	
Secondary Entity	none	Scheduled Follow up (Qualify)	schedulefollowup_qualify	DateTime ^	
Filessian Assilester	statosodo st	Segment Id	msdyn_segmentid	Lookup	
rintering Authorites	statecode, st	Skip Price Calculation	senounankyounote	Picklist	
Event Handler	(WebHook) C.	SLA	slaid	Lookup	
Step Name *	CAI opp: Updi	Source Campaign	campaignid	Lookup	-
	6 IF 11	✓ Status	statecode	State	
Run in User's Context	Calling User	✓ Status Reason	statuscode	Status	guration
Execution Order *	1	TeamsFollowed	teamsfollowed	Integer	5
	CALoppi Lindi	Time Spent by me	timespentbymeonemailandmeeti	String	
Description	ся орр. ора	Time Zone Rule Version Number	timezoneruleversionnumber	Integer	
Event Pineline Star	ne of Executic		timeline	Picklist	
Event ripeline stag	ge of Excedite		name	String	
PostOperation		Total Amount (Paca)	totalamount baca	Money	
		Total Detail Amount	totallineitemamount	Money	
		<	KANNIN II TUUTKANI	>	
Delete AsyncOpera	tion if StatusCod				
			OK	Cancel	
				test to	

×

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:

Exp	olore 🗡 All Projects 🔻 > 📄 Default > 🚞 Explore			Import
Explo	re (15)			↓↑• 🖓 Find
	Name	Туре 💌	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
	Copportunity 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
	A NetSuiteConnectionSalesOrder	App Connection	Sep 13, 2024, 10:13 AM	NetSuite connection
	Manual Dynamics365ConnectionOpportunity	App Connection	Sep 13, 2024, 10:14 AM	Dynamics 365 connection based on the Table API
	K 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_P0	Process object	List of NetSuite items entity.
NetSuiteCompany	Process object	NetSuite company entity.
NetSuiteContact	Process object	NetSuite contact entity.
Dynamics3650pportunity	Process object	Dynamics 365 opportunity entity.
Dynamics365ConnectionOpport unity	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.

5. 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:

Ex	olore Y All Projects V > C Default > Explore			Import
Explo	ore (15)			↓↑ ▼ Find
	Name	Туре 💌	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 "Wor
	🝰 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
	K NetSuiteConnectionSalesOrder	App Connection	Sep 13, 2024, 10:13 AM	NetSuite connection
	A Dynamics365ConnectionOpportunity	App Connection	Sep 13, 2024, 10:14 AM	Dynamics 365 connection based on the Table API
	Section Sales Order	App Connection	Sep 13, 2024, 10:12 AM	Email connection

Step 2: Configure and publish the Email connection

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

- 1. Open the EmailConnectionSalesOrder connection.
- 2. From the Type list, select IICS Cloud Application Integration Email Service (Licensed for use).
- 3. 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: notifyme@mydomain.com

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 mail.mydomain.com, or an IP address, such as 192.168.1.1.
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: https://login.microsoftonline.com/xxxxxx-xxxx-xxxx-xxxx-xxxx-xxxx-xxxx-
Token Request	Enter the OAuth token request URL that handles token requests.
URL	<pre>For example: https://login.microsoftonline.com/xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</pre>
	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:
	https://outlook.office.com/SMTP.Send offline_access

Configure the following common properties on the connection creation page:

Property	Description	
Host	Email server's DNS name, such as mail.mydomain.com, or an IP address, such as 192.168.1.1.	
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.

4. 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:
	https://[accountid].suitetalk.api.netsuite.com
Certificate Private Key	NetSuite certificate private key. Enter the PKCS8 certificate as a Base64-encoded string in the following format:
	BEGIN PRIVATE KEYEND PRIVATE KEY

5. 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.
 - 1. Create NetSuite Items
 - 2. Create NetSuite Sales Order
 - 3. Synchronize Dynamics 365 Opportunity with NetSuite Sales Order
 - 4. Send Email with Process Result
- 2. Open the Opportunity to Sales Order Flow process.
- 3. 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.
- 4. 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.
- 5. 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.

- Open the Opportunity to Sales Order Flow process and click Actions > Properties Details > Copy Service URL.
- 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 <u>"Creating a webhook in Dynamics 365" on</u> 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.