NetSuite Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

OVERVIEW

STEP 1: ENABLING SUITETALK

In order for Vertify to connect to NetSuite, please make sure that SuiteTalk (i.e. NetSuite Web Services) is enabled along with Token-Based Authentication.

To enable SuiteTalk and Token-Based Authentication, follow these steps:

1. First, log into NetSuite and follow these navigation steps:

   Setup → Company → Enable Features → SuiteCloud

2. Within the SuiteCloud subtab, locate the section named SuiteTalk (Web Services) and then check the Web Services box. You will be asked to accept the license agreement.

3. Locate the section named Manage Authentication and then check the Token-Based Authentication box. You will be asked to accept the license agreement once more.

4. Scroll back to the top of the screen and click Save.

STEP 2: BUNDLE INSTALLATION

Vertify's integration between Marketo and NetSuite is supported by a bundle that needs to be installed in NetSuite. This bundle provides a structure for organizing Marketo application data within NetSuite. It also includes additional features such as Marketo Sales Insight that can be added to a sales rep's dashboard.

To install the bundle, please follow these directions:

1. Your Vertify Implementation Specialist will request your NetSuite Account ID to push the bundle to the appropriate NetSuite account. It can be obtained by going to Setup -> Integration -> Web Services Preferences.

2. Once your specialist indicates that the bundle is available for installation, follow these navigation steps to install it:

   Customization → SuiteBundler → Search & Install Bundles → Advanced

3. Within the Location picklist, select Production Account. For the Account ID, enter 3595190 and then choose Search.

4. Click the bundle called Vertify Marketo Integration and select Install on the next screen.

5. Leave options as is and select Install once more.

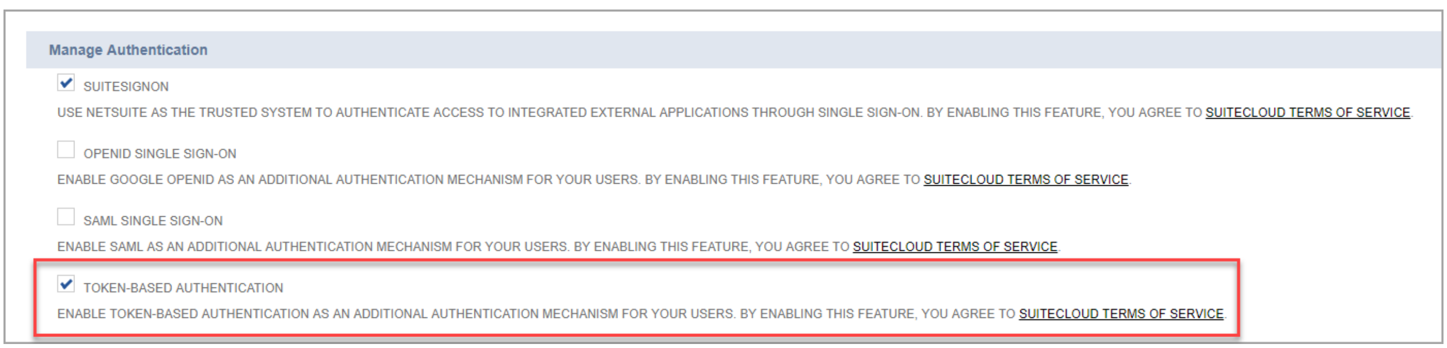
STEP 3: NETSUITE TOKEN-BASED AUTHENTICATION SET UP

Vertify has the ability to connect to NetSuite using Token-Based Authentication (TBA) instead of the traditional username and password credentials. Since NetSuite has password policy rules that require users to reset their password on a regular basis, using TBA eliminates the need to have to reset passwords in Vertify every time they expire in NetSuite.

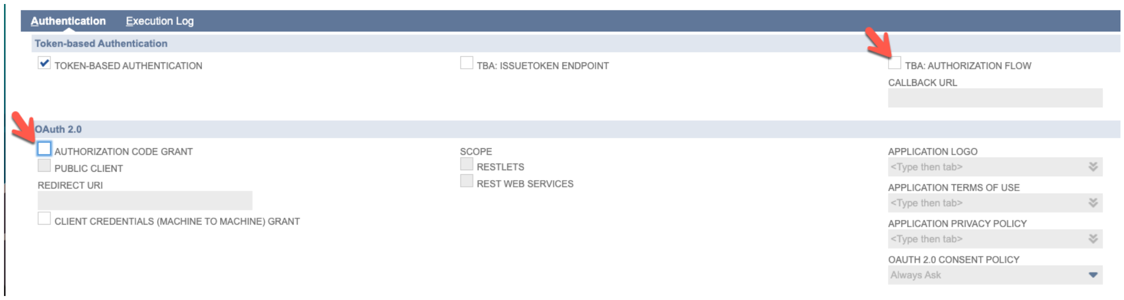
The following instructions assume that the user is logged into NetSuite as an administrator using the **Classic Center** (the default for the native Administrator role).

To enable Token-Based Authentication, follow these instructions:

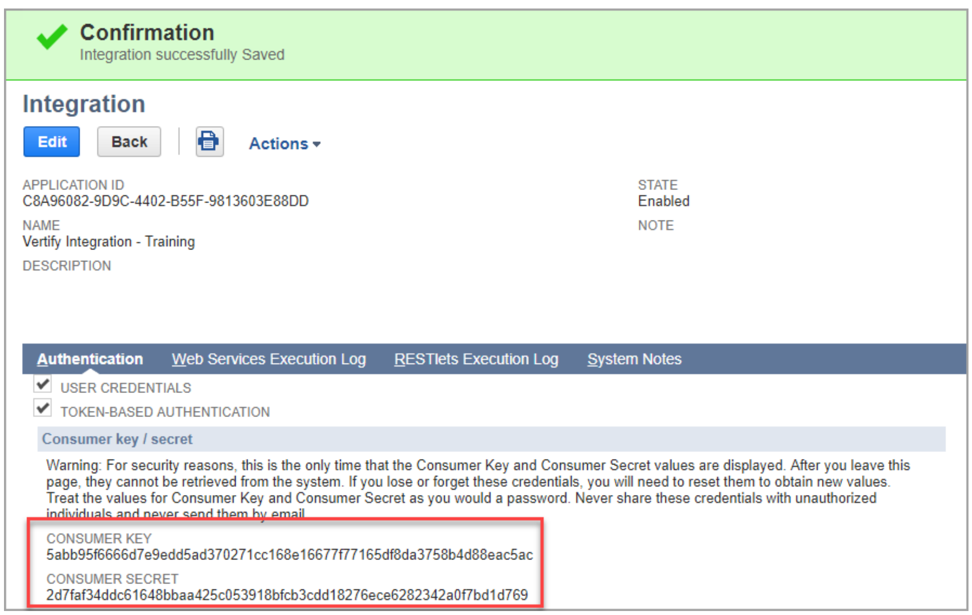
1. Go to **Setup → Company → Enable Features.**
2. On the SuiteCloud tab, locate the **Manage Authentication** section and check the box to enable Token-Based Authentication.
3. The terms and conditions will appear in a new window - scroll down to the bottom and choose **I Agree.**
4. Scroll to the top and click **Save** to enable the feature.



5. Now we'll set up an Integration Record that uses TBA. To do so, go to **Setup → Integration → Manage Integrations → New.**
6. Enter the name to give the Integration record (e.g. "Vertify Integration").
7. On the **Authentication** subtab, check **Token-Based Authentication** and click **Save.**
8. *Uncheck* the **TBA: Authorization Flow** and **Authorization Code Grant** checkboxes if checked.



9. VERY IMPORTANT: Once you save the Integration Record, a **Consumer Key** and **Consumer Secret** will appear under the **Authentication** subtab.
    - These values will ONLY appear this one time. Once the page is closed, the values will disappear and they cannot be retrieved without resetting them and generating a new pair of values.
    - You'll need to send these credentials to your Implementation Specialist later on, so be sure you highlight the values and then copy and paste them to a safe location, such as a text document.



STEP 4: INTEGRATION ROLE SET UP

If you have installed the Vertify Marketo Bundle, a role for the Vertify Integration user exists called **Vertify Marketo Integration**.

You can use this role as-is, or make a copy of it to add additional permissions.

Alternatively, you can create a brand new role to use for the integration - please see below to create a new integration role.

<u>To create a new integration role, follow these steps</u>:

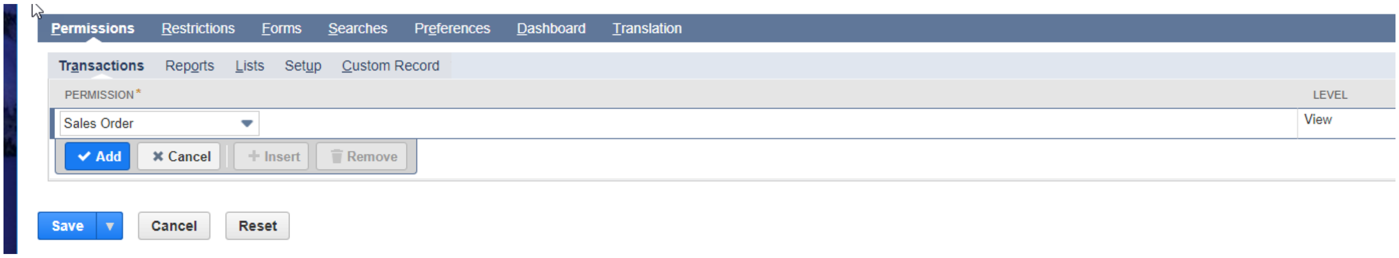
1. Go to Setup → Users/Roles → Manage Roles.

2. Find the Sales Administrator standard role.
    - Note: The Show Inactives checkbox may need to be ticked at the top of your screen in order to see this role.
    - Next, click the Customize link next to the Sales Administrator role.
        - IMPORTANT: Always start with a standard role and customize it. Standard roles in NetSuite have some native permissions that CANNOT be assigned to a custom role. The Sales Administrator role is a good role to start with, because it has most of the Setup functions that Vertify needs to be able to pull out schema information from NetSuite.

3. Under Permissions, make sure the following permissions are selected. You can add any additional permissions under each section as necessary:
    - Transactions
        - Find Transaction (Full)
    - Reports
        - None
    - Lists
        - Perform Search (View)
    - Setup
        - CRM Lists (View)
        - Custom Body Fields (View)
        - Custom Column Fields (View)
        - Custom Entity Fields (View)
        - Custom Entry Forms (View)
        - Custom Event Fields (View)
        - Custom Fields (View)
        - Custom Lists (View)
        - Custom Record Types (View)
        - Custom Subtabs (View)
        - Custom Transaction Fields (View)
        - Custom Transaction Forms (View)
        - Log in using Access Tokens (Full)
        - SOAP Web Services (Full)
        - View SOAP Web Services Log (View)
    - Custom Record
        - Charge

4. Click Save to save the new role.

5. The edited role will now have the term Custom attached to the name (ex: "Custom Sales Administrator").



STEP 5: INTEGRATION USER SET UP

Now you'll create a new user account to use with the Vertify integration. For auditing purposes, it is strongly recommended that a separate employee record be created for the integration, rather than using an existing employee record.

<u>To create the integration user account, follow these instructions</u>:

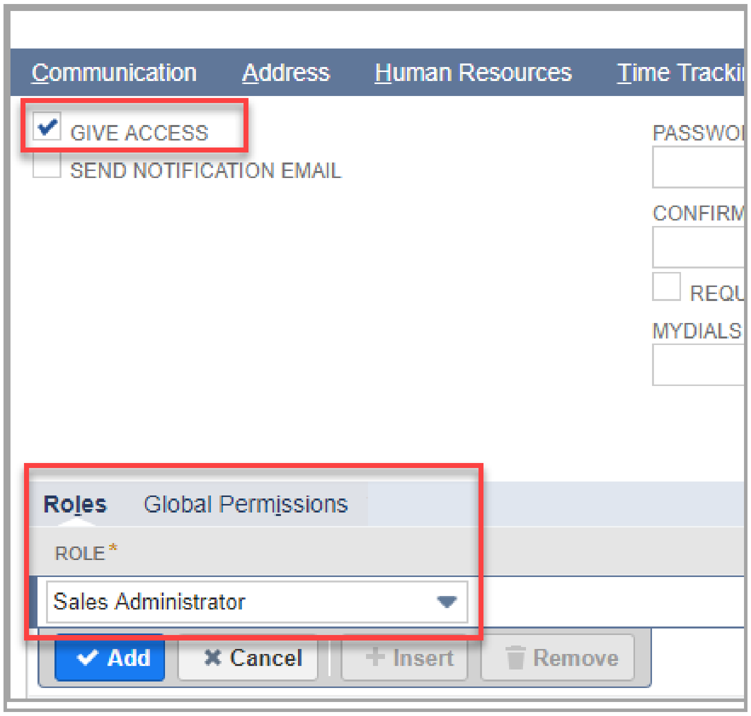
1. Navigate to **Lists** → **Employees** → **Employees** → click **New** to add a new employee record.
   - The email address for the new employee record should follow this format: <u>passwords+nameofyourcompany@vertify.com</u>

2. Make sure all required fields, including an email address, are entered.

3. On the **Access** subtab, make sure **Give Access** is checked.
   - Enter a password and confirm password for the account.
   - NOTE: NetSuite requires you to enter a password to grant access to a user. This password will only be used to access the NetSuite UI through a browser - it's not used for TBA through Vertify.

4. Under **Role**, choose the integration role that you created previously.

5. Click **Add**, then scroll to the top and click **Save**.



The final step in creating the user for the Vertify integration is to generate an access token. This set of credentials will be entered into Vertify and will allow us to use TBA instead of the username and password authentication method.

<u>To create a new Access Token, follow the steps below</u>:

1. Navigate to Setup → Users/Roles → Access Tokens → New.

2. Enter the following:
    - Application Name: This is the name of the integration record you created.
    - User: This is the employee record assigned the integration role.
    - Role: This is the integration role to use for Token-Based Authentication.
    - Token Name: This is auto-generated using the values selected. The default token name can be used, or an alternative token name can be used if desired.

3. Click Save.

4. VERY IMPORTANT: Once you save the access token, the Token ID and Token Secret will appear under the Authentication subtab.
    - These values will ONLY appear this one time. Once the page is closed, the values will disappear and they cannot be retrieved without resetting them and generating a new pair of values.
    - You'll need to send these credentials to your Implementation Specialist later on, so be sure you highlight the values and then copy and paste them to a safe location, such as a text document.

STEP 6: DATA CLEAN UP

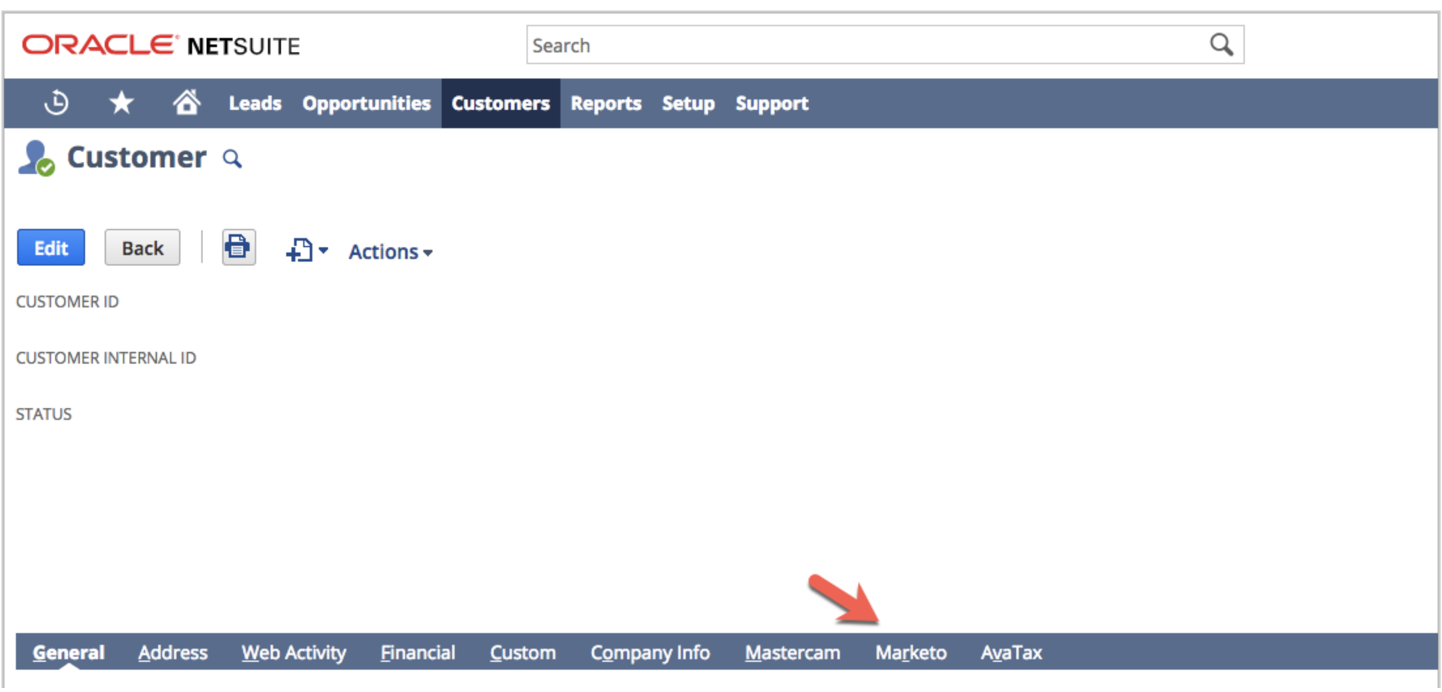
Standard practice for duplicate records in the CRM will be to merge into Marketo based on email. If this is **not** the desired behavior, duplicates should be **removed** from the CRM or the Sync to Marketo flag **should be set to false** for any record that you don't want to sync to Marketo.

NOTE: This cleanup should occur *before* data is collected into Vertify.

STEP 7: CUSTOMIZE THE MARKETO TAB

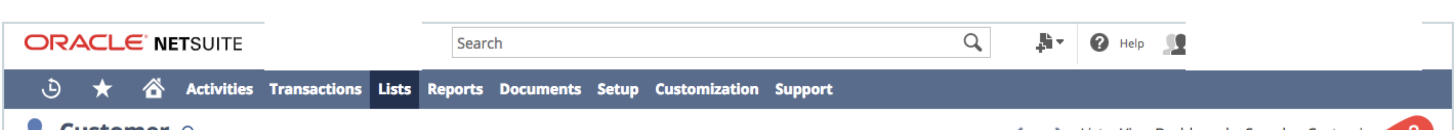
All synced Marketo activities, including Interesting Moments, are brought into a consolidated tab for every Lead, Prospect, Customer, and Contact in NetSuite.

This tab, along with all the fields and lists within the tab, can be viewed, edited, and restricted using native NetSuite role-based access control settings. If access should be restricted for other accounts, please be sure to provide full access permissions to the Vertify user account.



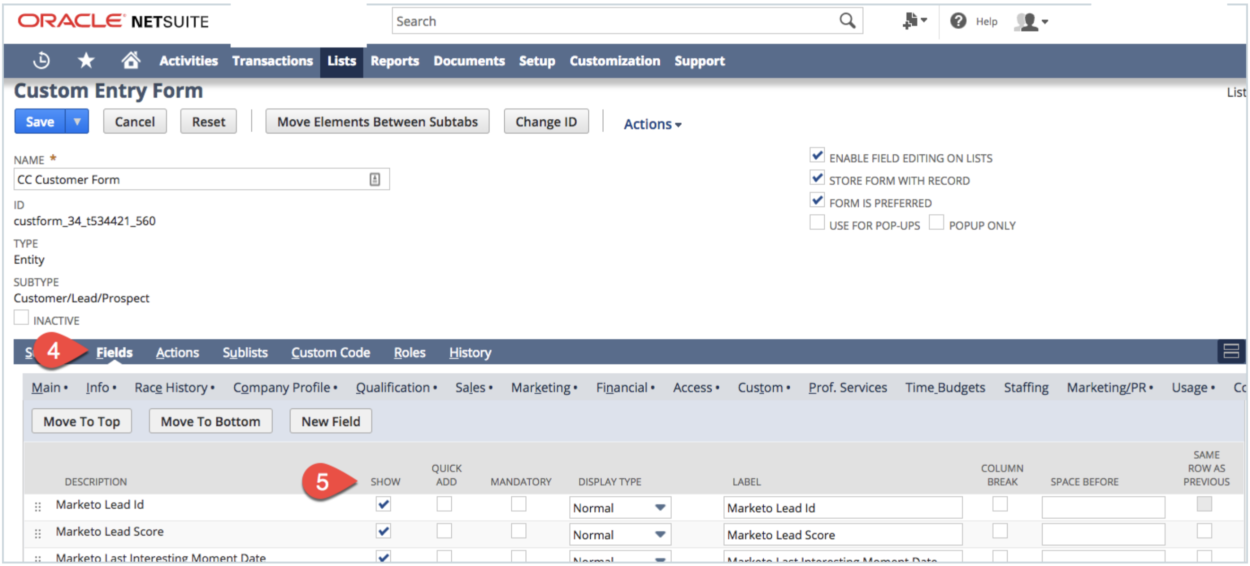
<u>To adjust the custom fields that show on the Marketo tab, edit the Custom Form utilized for the Customer/Contact record(s) in NetSuite following these instructions</u>:

1. Find a Customer record in NetSuite and click **Edit**.
2. Select the appropriate **Custom Form** from the dropdown.
3. Select **Customize**.



4. Find the **Fields** subtab and choose **Marketo**.

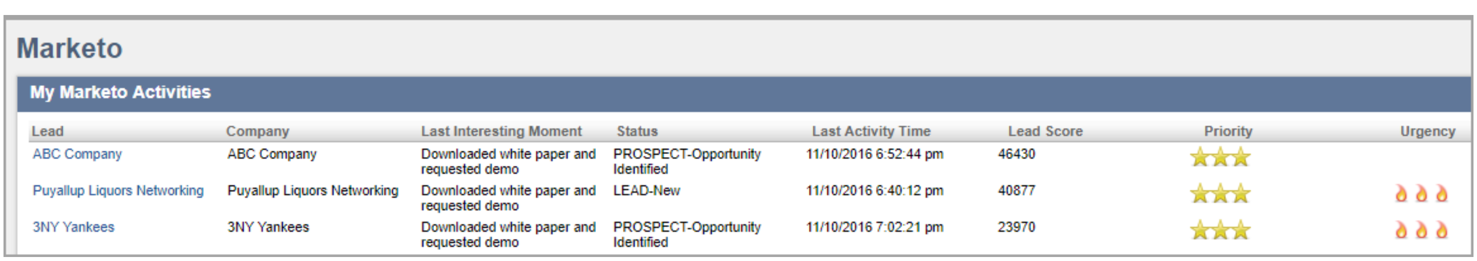
5. Check the boxes next to the fields needed to **Show**.



STEP 8: PERSONALIZE THE SALES INSIGHT DASHBOARD

Within the Sales Insight Dashboard in NetSuite, stars and flames represent the Marketo Lead Score and recent Marketo activities associated with Leads. These attributes are dynamic and are constantly updated by Vertify from Marketo.

This dashboard view runs in the context of the sales rep that is viewing it in NetSuite, so each sales rep receives a custom qualification and activity view of their assigned leads.

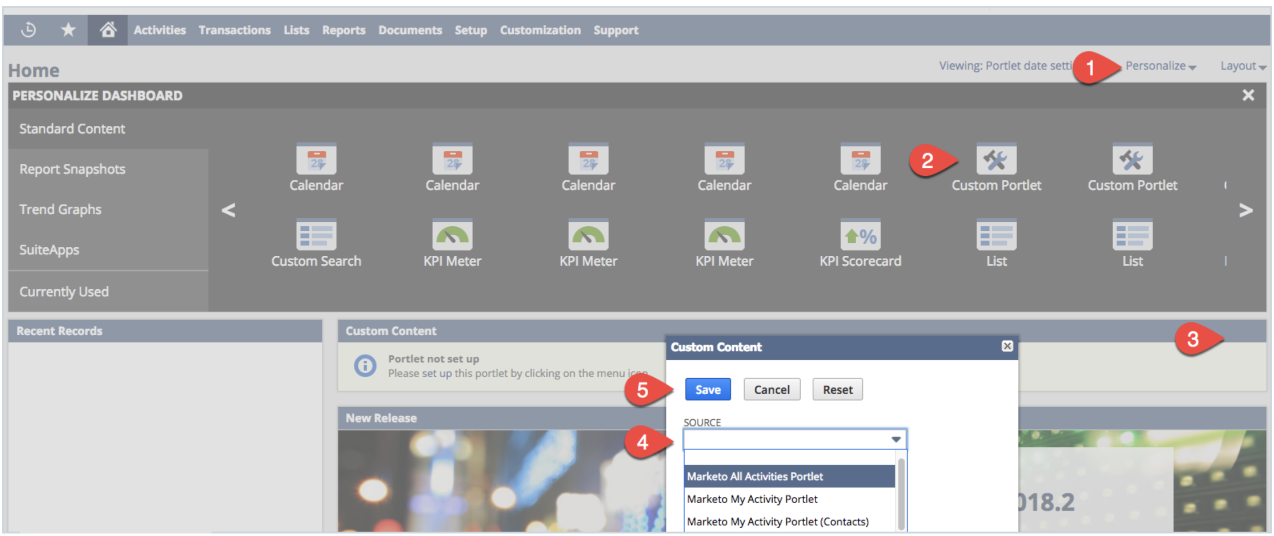


<u>To install the Sales Insight Dashboard, follow these instructions</u>:

1. From your NetSuite Dashboard, select **Personalize** and then choose **Custom Portlet**.

2. Within the header of the custom portlet, choose **Setup**.

3. Select the appropriate portlet from the **Source** picklist and press **Save**.
   - The All Activities Portlet will show activities for all Leads in NetSuite.
   - The My Activity Portlet will only show Marketo activities for the Leads that are assigned to that sales rep.



INITIAL SETUP CHECKLIST

Enable SuiteTalk	☑
Install the Vertify Bundle	☑
Create Token-Based Authentication Credentials (<u>Provide Vertify with Application ID, Token ID/Secret, and Consumer Key/Secret</u>	☑