

4.5.8. How to Import Data from NetSuite

In this article, we describe:

- [integration limitations](#),
- [imported data](#), and
- [the data import workflow](#).

Integration Limitations

Currently, Streamline does not import the on-hand history of products from NetSuite, however, this can be accounted for by customizing the [default SQL scripts](#). This limitation makes Streamline unable to:

- calculate inventory [turn-over](#),
- compute the number of days in the period you had run out of inventory ([Stockout days](#)), and
- automatically determine whether lost sales are caused by a stock-out or zero demand.

Imported data

Data imported into Streamline is described in the [Inventory Management Systems](#) article.

Data Import Workflow

Streamline imports data from NetSuite by executing SuiteQL queries through REST Web Services. SuiteQL is a query language based on the SQL-92 revision of the SQL database query language. SuiteQL supports the syntax for both SQL-92 and Oracle SQL. However, you cannot use both syntaxes in the same query.

As NetSuite is a highly customizable system, Streamline pulls data that is commonly used by most customers, however, it can be easily adjusted to the needs of a particular customer by changing the default SQL queries.

Streamline uses Token-based Authentication (TBA) to pull NetSuite data. It needs you to provide [client credentials](#) (*Consumer key* and *Consumer secret*) and [access token credentials](#) (*Token ID* and *Token secret*). The next section of this page explains how to obtain those credentials.

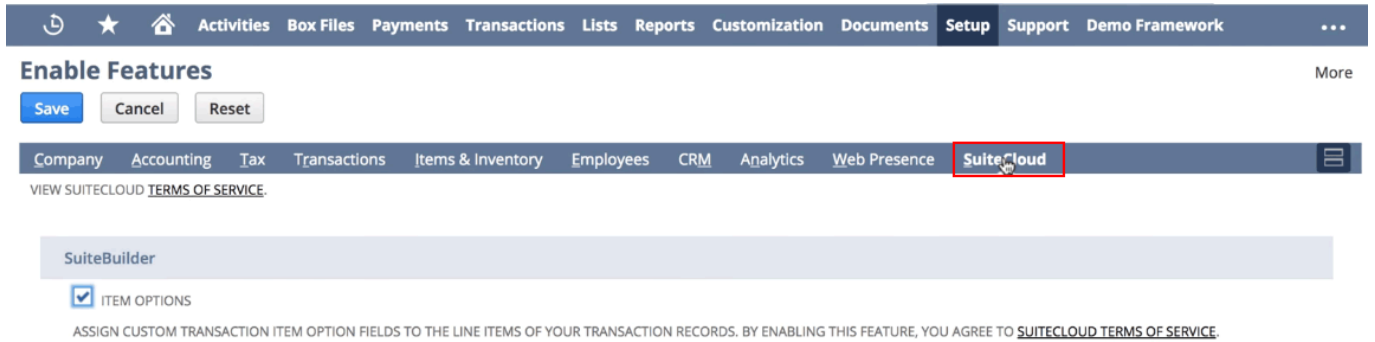
Retrieving Authentication Credentials

To set up TBA for your NetSuite account and get credentials mentioned earlier, do the following:

1. Enable REST Web Services and TBA in your NetSuite account.

1.1. Log in to your NetSuite account as Administrator and go to the menu **Setup > Company > Enable Features**.

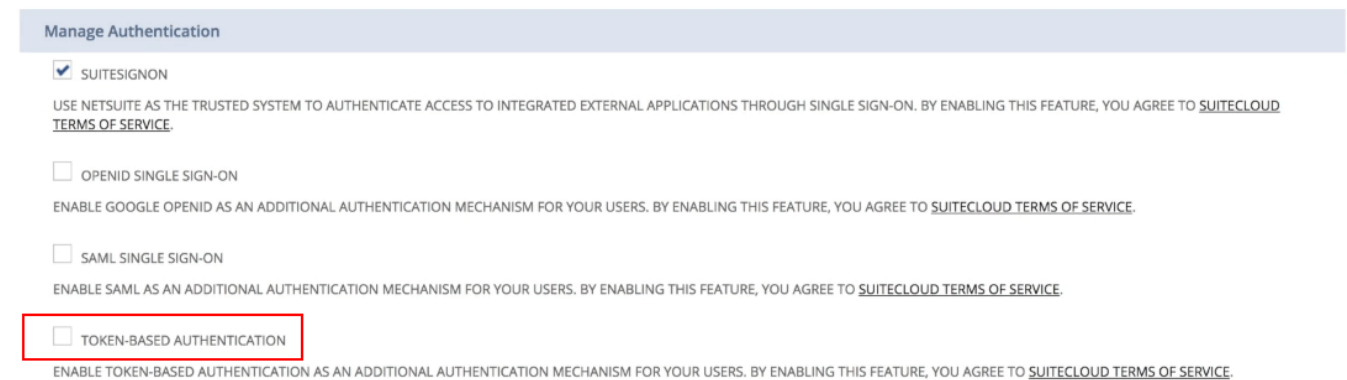
1.2. Click on the **SuiteCloud** subtab (see figure below).



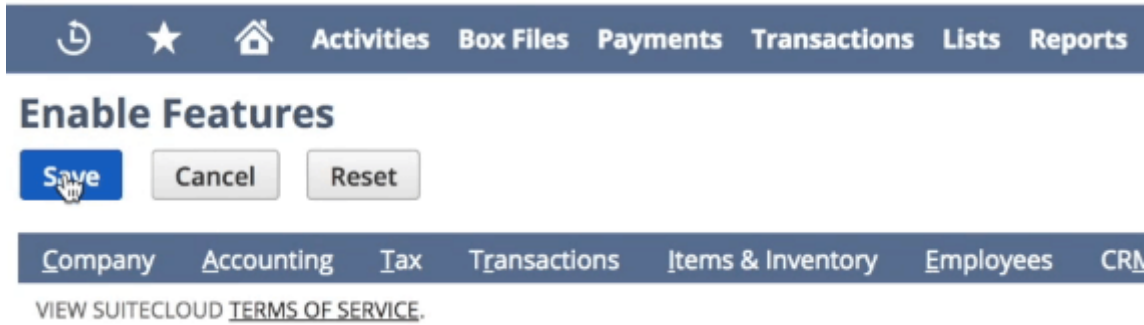
1.3. Scroll down to the **SuiteTalk (Web Services)** section and check the **REST WEB SERVICES** option (see figures below). Agree to the NetSuite terms and conditions.



1.4. Scroll down to the **Manage Authentication** section and check **TOKEN-BASED AUTHENTICATION** (see figures below). Agree to the NetSuite terms and conditions.



1.5. After that, click the **Save** button at the top of the page (see figure below).



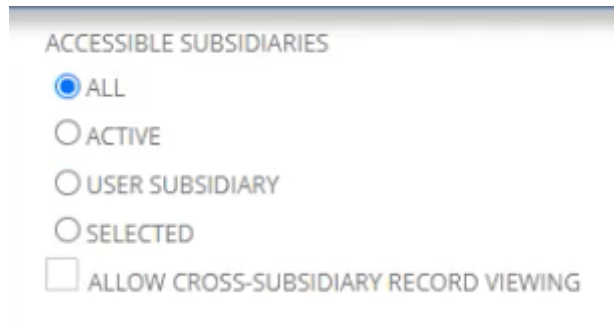
2. Create a role that will use TBA.

2.1. Go to the menu **Setup > Users & Roles > Manage Roles > New**.

2.2. Give it a name, for example, **TBA Access Role** (see figure below).

2.3. Set the option **Web services only role** checked in the **Authentication** section (see figure below).

2.4. Set this role as having access to all your subsidiaries by selecting the **ALL** option (see figure below).



2.5. Click on the **Permissions** tab, and add permissions shown in the figures below.

Permissions	
TRANSACTIONS •	REPORTS •
PERMISSION *	LEVEL
Adjust Inventory	Full
Adjust Inventory Worksheet	Full
Build Assemblies	Full
Build Work Orders	Full
Cash Sale	View
Cash Sale Refund	View
Close Work Orders	Full
Count Inventory	Full
Credit Memo	View
Find Transaction	Full
Invoice	View
Issue Components	Full
Item Fulfillment	Full
Item Receipt	Full
Purchase Order	Full
Refund Returns	Full
Return Auth. Approval	Full
Return Authorization	Full
Sales Order	Full
Transfer Funds	Full
Transfer Inventory	Full
Transfer Order	Full
Transfer Order Approval	Full
Unbuild Assemblies	Full
Work Order	Full
Work Order Close	Full
Work Order Completion	Full
Work Order Issue	Full

Transactions • Reports •	
PERMISSION	LEVEL
SuiteAnalytics Workbook	Edit

Permissions		Restrictions	Forms
Transactions •		Reports •	Lists •
PERMISSION *	LEVEL		
Bill Of Materials Inquiry	Full		
Bill of Materials	Full		
Component Where Used	Full		
Contacts	View		
Costed Bill Of Materials Inquiry	View		
Customers	Full		
Employee Record	View		
Employees	Full		
Inbound Shipment	View		
Item Collection	Full		
Item Revisions	Full		
Items	Full		
Locations	Full		
Manufacturing Cost Template	View		
Manufacturing Routing	View		
Resource	Full		
Subsidiaries	View		
Units	View		
Vendors	View		

Transactions •		Reports •	Lists •	Setup •	Custom Record •
PERMISSION *	LEVEL				
Log in using Access Tokens	Full				
REST Web Services	Full				
SOAP Web Services	Full				
SuiteScript	Full				
User Access Tokens	Full				

In case you have *SuiteAnalytics Connect* enabled in your NetSuite account, add the corresponding permissions on the **Setup** tab (see figure below).

PERMISSION	LEVEL
Log in using Access Tokens	Full
REST Web Services	Full
SOAP Web Services	Full
SuiteAnalytics Connect	Full
SuiteAnalytics Connect - Read All	Full
SuiteScript	Full
User Access Tokens	Full

2.6. Then, click the **Save** button.

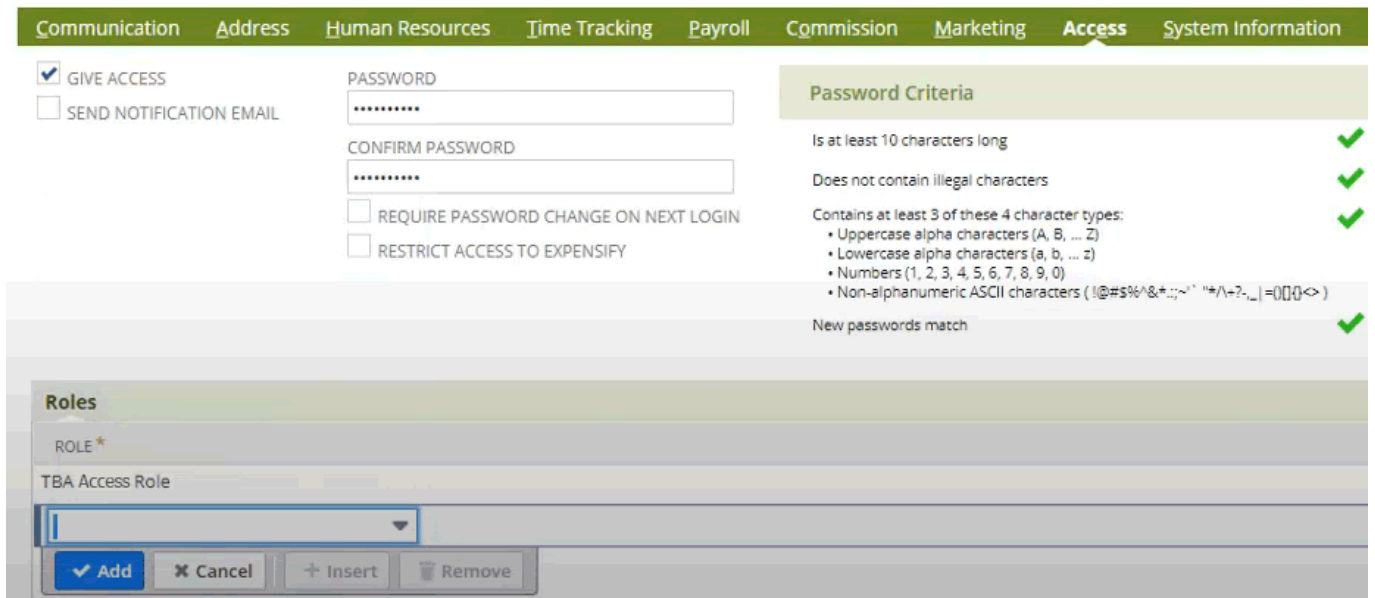
3. Create a login (employee) that will use the created role.

3.1. Go to the menu **Lists > Employees > New**.

3.2. Give the login a name, for example, **TBA Access User** (see figure below).

The screenshot shows the 'Employee' creation form in NetSuite. At the top, there are 'Save', 'Cancel', and 'Reset' buttons. Below is the 'Primary Information' section with fields for 'TEMPLATE', 'EMPLOYEE ID *' (containing 'TBA' and an 'AUTO' checkbox), 'MR./MS...', 'NAME' (with 'TBA' and 'Access User' in separate boxes), 'INITIALS', 'JOB TITLE', and 'SUPERVISOR'. At the bottom, there is an 'Access' tab highlighted in green, with sub-sections for 'Email', 'Phone', and 'Address'.

3.3. Click on the **Access** tab and: 1) check the **Give access** checkbox; 2) set a password for the login; 3) add the newly created role to the login (see figure below).



3.4. Click the **Save** button.

4. Create an integration record to use TBA. Integration record is an entity that represents a 3rd party system that wants to have access to the NetSuite data. In our case, that will be Streamline.

4.1. Go to the menu **Setup > Integration > Manage integrations > New** .

4.2. Give the application a name, for example, *GMDH Streamline*.

4.3. Under the **Authentication** tab, uncheck the **User credentials** option and check the **Token-based authentication** option (see figure below).

Integration

Save Cancel Reset

NAME *
GMDH Streamline

DESCRIPTION

STATE *
Enabled

NOTE

Authentication Web Services Execution Log RESTlets Execution Log

USER CREDENTIALS
 TOKEN-BASED AUTHENTICATION

Save Cancel Reset

4.4. Click the **Save** button. The confirmation page displays the client credentials (**Consumer Key** and **Consumer Secret**) for our application (see figure below).

 **Confirmation**
Integration successfully Saved

Integration

[Edit](#) [Back](#) |  [Actions](#) ▾

APPLICATION ID	STATE
GMDH Streamline	Enabled
NAME	NOTE
GMDH Streamline	
DESCRIPTION	

Authentication | [Web Services Execution Log](#) | [RESTlets Execution Log](#) | [System Notes](#)

- USER CREDENTIALS
- TOKEN-BASED AUTHENTICATION

Consumer key / secret

Warning: For security reasons, this is the only time that the Consumer Key and Consumer Secret values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values. Treat the values for Consumer Key and Consumer Secret as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

CONSUMER KEY
[Redacted]

CONSUMER SECRET
[Redacted]

4.5. NetSuite displays the **Consumer Key** and **Consumer Secret** only the first time you save the integration record. Thus, copy and paste these credentials into a text file. We will use them when will be connecting from Streamline to NetSuite further.

5. Issue an access token for the created integrated application and employee.

5.1. Go to the menu **Setup > Users/Roles > Access Tokens > New**.

5.2. Select our integrated application in the **Application name** selector. In our case it is GMDH Streamline.

5.3. Choose the user, we created for TBA in the **User** selector. In our case it is TBA Access User.

5.4. Select the role, we created for TBA in the **Role** selector. In our case it is TBA Access Role. (see figure below).

Access Token

Primary Information

APPLICATION NAME *
GMDH Streamline ▼


USER *
TBA Access User ▼

ROLE *
TBA Access Role ▼

TOKEN NAME *
GMDH Streamline - TBA Access User, TBA Access Role

INACTIVE

5.5. Click the **Save** button. The confirmation page displays the *Token ID* and *Token Secret* (see figure below). This information is only presented once. Let's also copy and paste these into the text file we used before. These credentials are also needed when connecting to NetSuite from Streamline.

 **Confirmation**
Access Token successfully Saved

Access Token

Edit Back | Actions ▾

Primary Information

APPLICATION NAME
GMDH Streamline

USER
TBA Access User

ROLE
TBA Access Role

TOKEN NAME
GMDH Streamline - TBA Access User, TBA Access Role

INACTIVE

Token Id / secret

Warning: For security reasons, this is the only time that the Token ID and Token Secret values are displayed. credentials, you will need to reset them to obtain new values.
Treat the values for Token ID and Token Secret as you would a password. Never share these credentials with

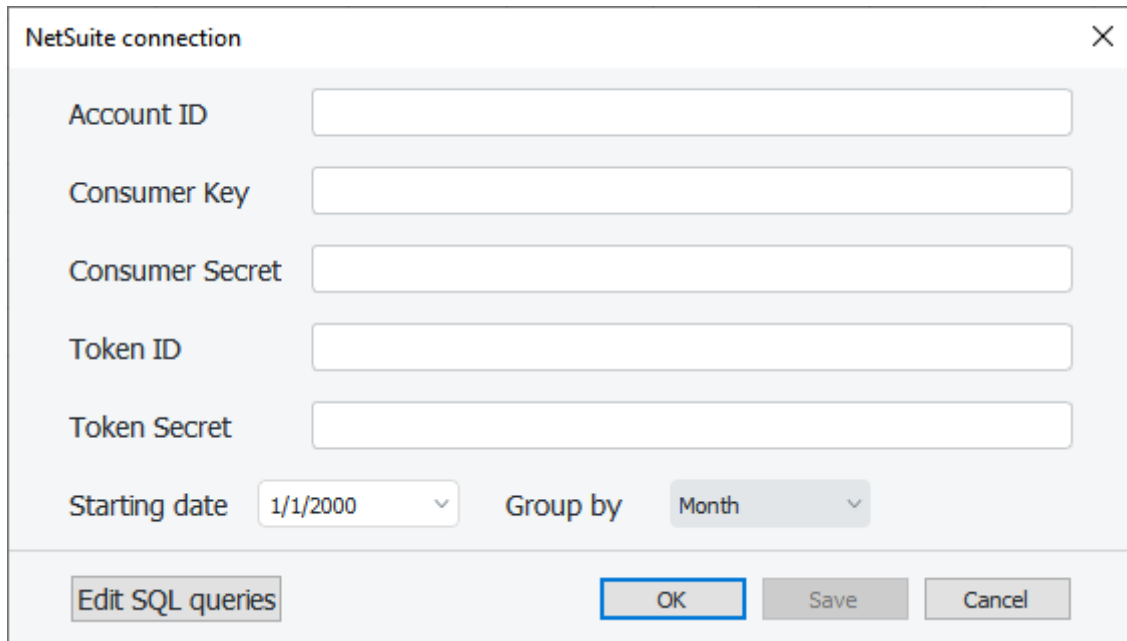
TOKEN ID
[blurred text]

TOKEN SECRET
[blurred text]

Importing Your Data

To create a new Streamline project from NetSuite data:

1. Go to the menu **File > New > NetSuite connection**. The **NetSuite connection** dialog appears (see figure below).

A dialog box titled "NetSuite connection" with a close button (X) in the top right corner. It contains five text input fields: "Account ID", "Consumer Key", "Consumer Secret", "Token ID", and "Token Secret". Below these fields are two dropdown menus: "Starting date" with the value "1/1/2000" and "Group by" with the value "Month". At the bottom, there are four buttons: "Edit SQL queries", "OK", "Save", and "Cancel".

2. Enter your NetSuite account ID into the **Account ID** field.
3. Enter the authentication credentials that we got earlier into the **Consumer Key, Consumer Secret, Token ID, Token Secret** accordingly.
4. Enter or choose the date to start the import from in the **Starting date** control.

To get accurate forecasts, we recommend providing Streamline with at least 24 months of sales history.

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5. Choose the data aggregation period in the **Group by** control. Streamline automatically aggregates your data in the given periods (days, weeks, or months). For example, if you want to see the forecasts, replenishment plans, and other reports in months, group the data by month.

6. Click **OK** to start the import.

Customizing Default SQL Queries

The **Edit SQL queries** button opens the [Database connection dialog](#) where you can customize default SQL-queries to meet your requirements.

[Next: Odoo](#)

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