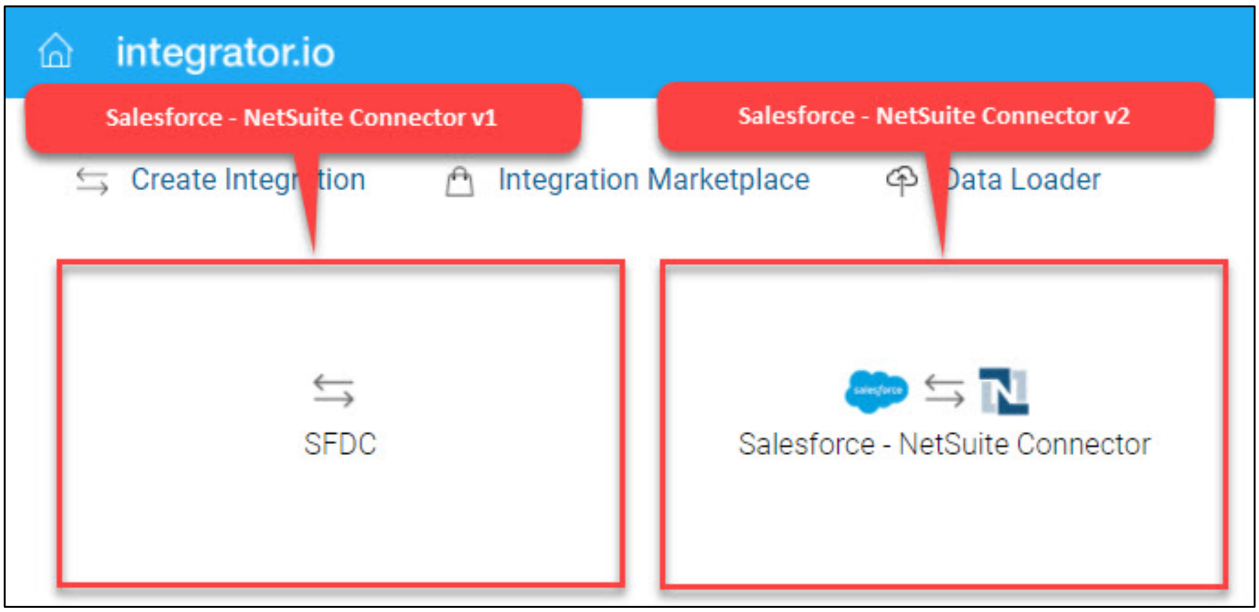
There are two versions of the Salesforce – NetSuite SmartConnector. To determine if you are on the latest version ("V2") or the older Java ("V1") version:

1. Log into your Celigo integrator.io account.
2. On the home page, if you see an integration tile called **Salesforce – NetSuite Connector** with the NetSuite and Salesforce logos, you are on the V2 version. If you see an integration tile that just has a double set of arrows without any logos, then you are on the V1 version.
3. Follow the instructions based on your version



*NOTE: If you have customized integration flows, please file a Support ticket or send an email netsuite-token@celigo.com for assistance.

Salesforce V2 Instructions

For Salesforce V2, you will need to do the following steps:

1) Enable NetSuite for Token-Based Authentication
2) Create a custom NetSuite Role
3) Select NetSuite User and assign Role created in #2
4) Create a new Salesforce integration in NetSuite
5) Generate NetSuite tokens for the Salesforce integration
6) Generate NetSuite tokens for integrator.io connection
7) Update the integrator.io connection with token authentication
8) Update the Salesforce connection with token authentication

NetSuite Steps

A. Enable your NetSuite account with Token-Based Auth (TBA)

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Company > Enable Features**.
3. Click **SuiteCloud** subtab.
4. Scroll down to **Manage Authentication** section.
5. Check the **TOKEN-BASED AUTHENTICATION** checkbox.
6. **Save** your changes.

B. Create a custom NetSuite Role

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Manage Roles**.
3. Click **Customize** beside **Celigo integrator.io Full Access w/o 2FA** role.
4. Clone the role by creating a new name. Add other permissions as needed.
5. Click **Save**.

C. Select NetSuite User and assign Role

Select the NetSuite user account that will be used to connect your Salesforce SmartConnector:

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Manage Users**.
3. On **Manage Users** page, click on the user that you wish to connect your Salesforce SmartConnector.
4. On that user's **Employee** page, select **Edit**.
5. Go to **Access > Roles**.
6. Select the role that was created in the prior Step B.
7. Click **Save**. The **Confirmation** message appears.

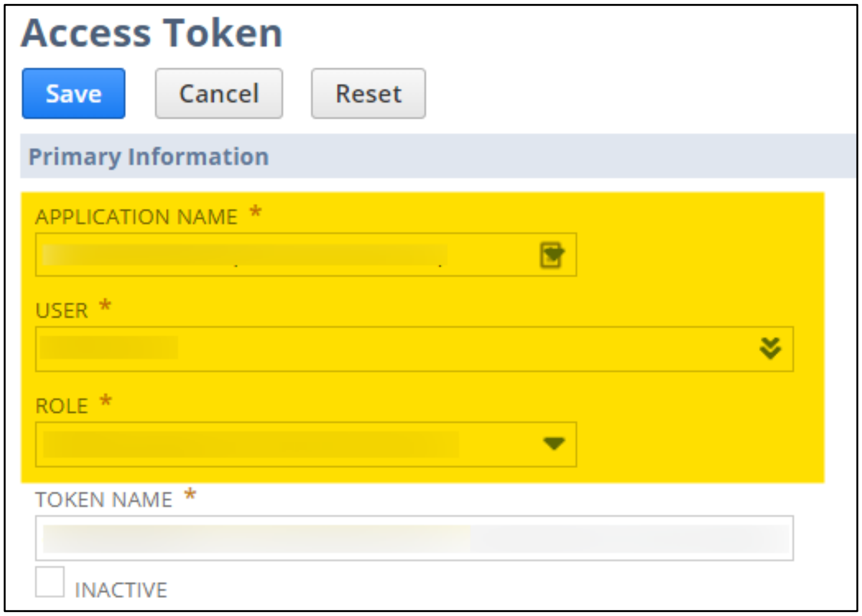
D. Create an Integration in NetSuite

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Integration > Manage Integrations > New**.
3. In the **NAME** text box, provide a name (e.g., "Salesforce V2 TBA").
4. Keep **State** as **Enabled**.
5. Check **Token-Based Authentication** checkbox in the Authentication section.
6. Click **Save**.
7. **Consumer Key** & **Consumer Secret** will be displayed. Save the keys in a place where you can copy it into your Celigo connection as described in the next section.

   ***Note**: Consumer Key and Consumer Secret are only <u>displayed once & cannot be retrieved</u> again. We recommend that you save them in a secure location, such as a password manager application, if you need to reference them later. Or else you will need to go through these steps again.*

E. Generate NetSuite Access Tokens for Salesforce Connector

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Access Tokens > New**.

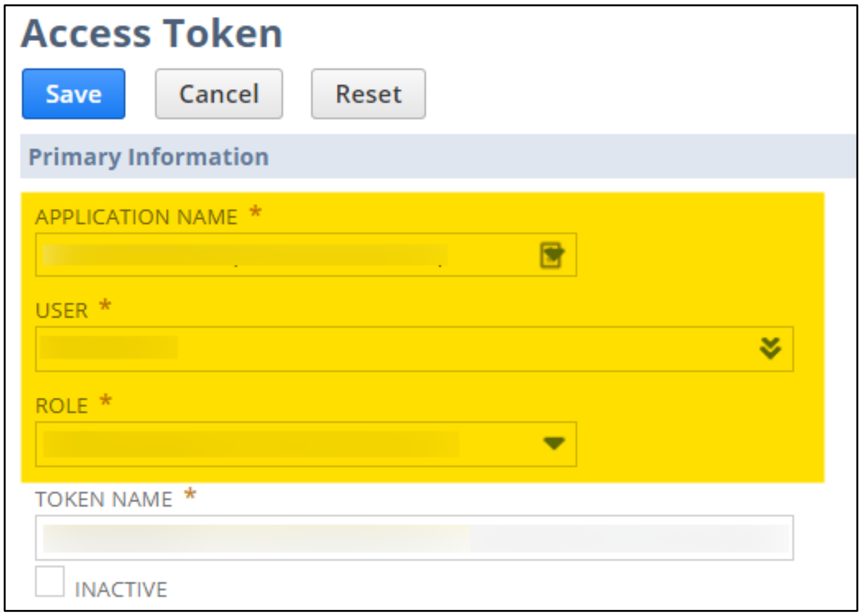


3. In the **APPLICATION NAME** drop-down box, select the integration you added in the prior step (e.g., “Salesforce V2 TBA”).
4. In the **USER** drop-down list box, type in the NetSuite user that you designated for the Celigo integration in the prior Section B or else Search for the user.
5. In the **ROLE** drop-down list box, select the role that was assigned to the user.
6. The **TOKEN NAME** populates automatically. Modify the name as needed.
7. Click **Save**.
8. **Token ID** & **Token Secret** for your Salesforce integration will be displayed. Save the tokens so you can copy it into your Celigo connection as described later. Make sure to identify it as tokens for your Salesforce integration.

F. Generate NetSuite Access Tokens for Integrator.io

Repeat the steps in Section C except when in **Application Name**, select **integrator.io**:

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Access Tokens > New**.



3. In the **APPLICATION NAME** drop-down box, select:

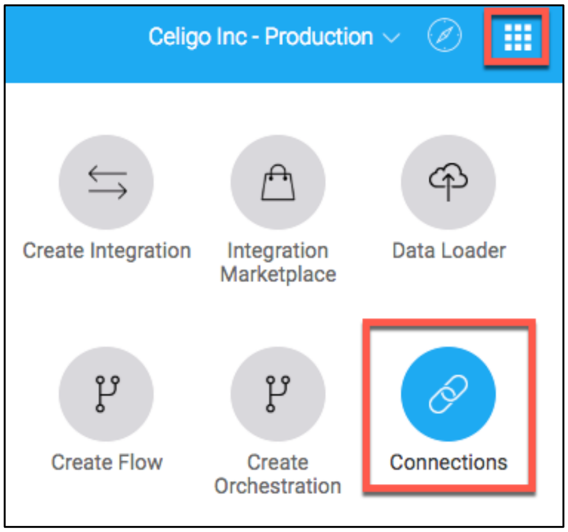
   integrator.io (Token-Based Auth)

4. In the **USER** drop-down list box, type in the NetSuite user that you designated for the Celigo integration in the prior Section B or else Search for the user.
5. In the **ROLE** drop-down list box, select the role that was assigned to the user.
6. The **TOKEN NAME** populates automatically. Modify the name as needed.
7. Click **Save**.
8. **Token ID** & **Token Secret** for your integrator.io integration will be displayed. Save the tokens so you can copy it into your Celigo connection as described later. Make sure to identify it as tokens for your integrator.io integration.

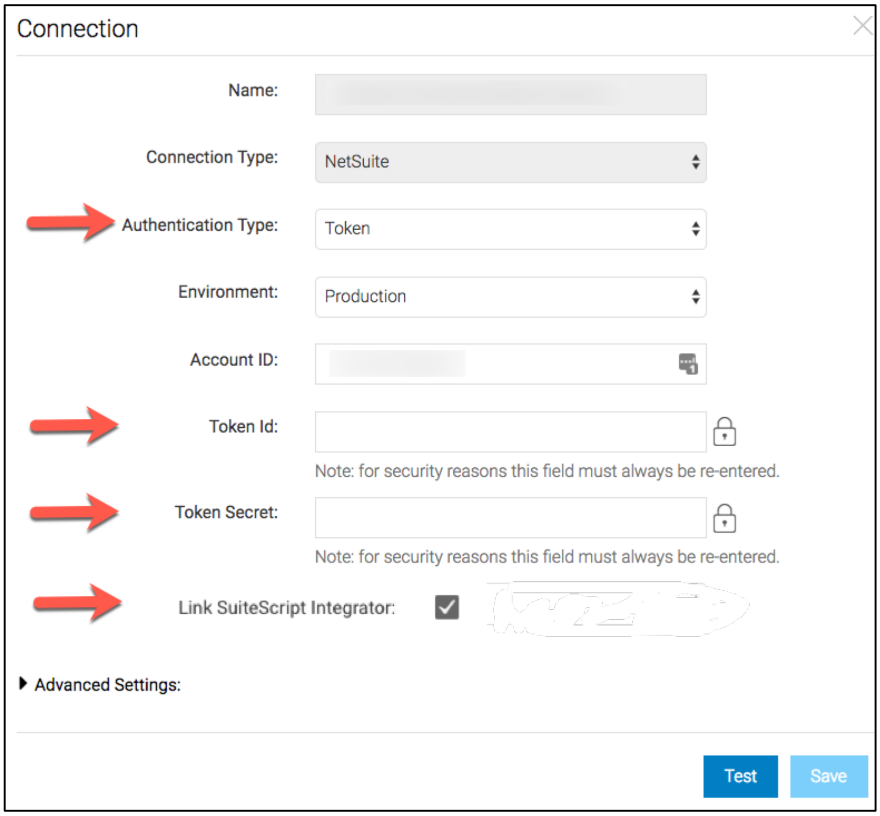
Celigo Steps

A. Update your integrator.io connection to Token-Based Authentication

1. Log into your Celigo integrator.io account as either account Owner or Manager.
2. From the home page of integrator.io, go to the upper right corner and select the waffle icon and click **Connections**.



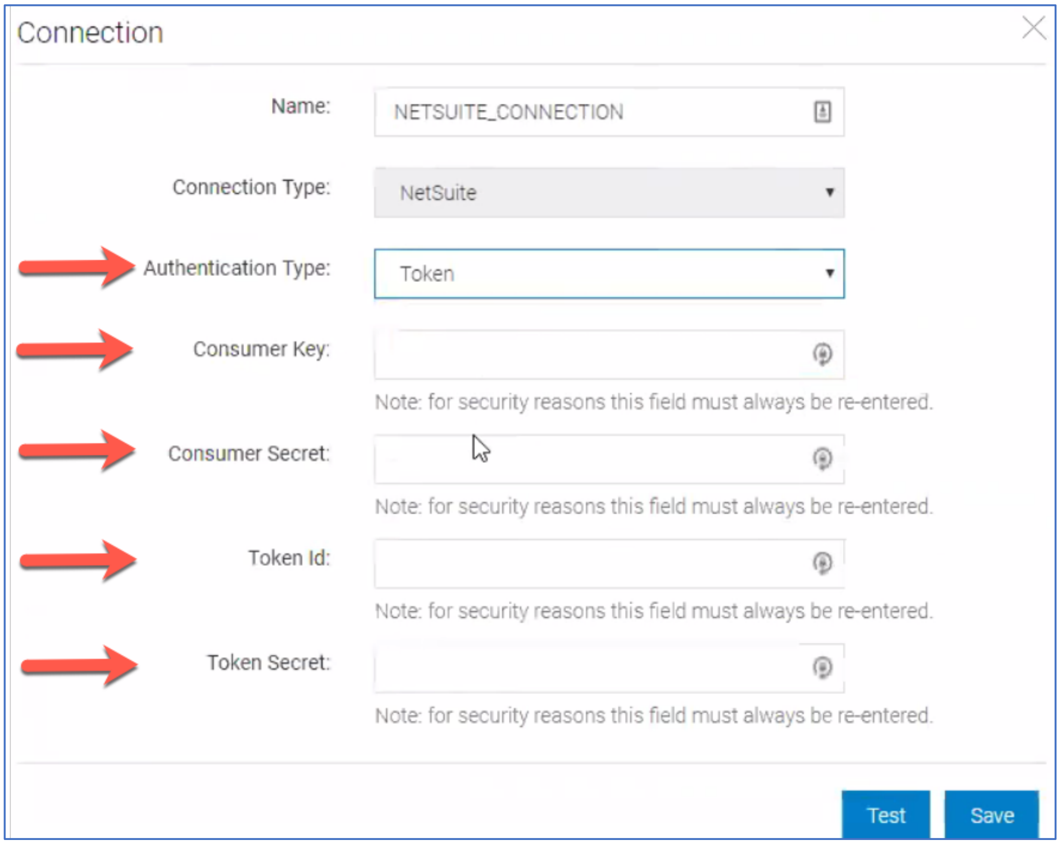
3. Find the NetSuite Connection and select the **Edit pencil** icon.



4. Change **Authentication Type** to **Token**.
5. Make sure **Environment** and **Account ID** are correct.
6. Enter the NetSuite **Token ID** and **Token Secret** that were generated for your integrator.io integration.
7. Make sure the **Link SuiteScript Integrator** checkbox is checked so that your Salesforce integration information remains available on your account dashboard.
8. Click **Test** to verify the connection is work.
9. Click **Save**.

B. Update your Salesforce integration connection to Token-Based Authentication

1. Log into your Celigo integrator.io account (you must be the owner of the Salesforce SmartConnector integration).
2. From the home page of integrator.io, go to your Salesforce-NetSuite SmartConnector integration tile and click the **Settings** icon.
3. From the Setting section on the left menu, select **Connections**.
4. Find the NetSuite Connection and select the **Edit pencil** icon.



5. Change **Authentication Type** to **Token**.
6. Enter **Consumer Key** and **Consumer Secret** that were generated for the Salesforce integration in NetSuite.
7. Enter the NetSuite **Token ID** and **Token Secret** that were generated for your Salesforce integration.
8. Click **Test** to verify the connection is work.
9. Click **Save**.

We recommend that you test some integration flows to make sure your NetSuite connection is working properly.

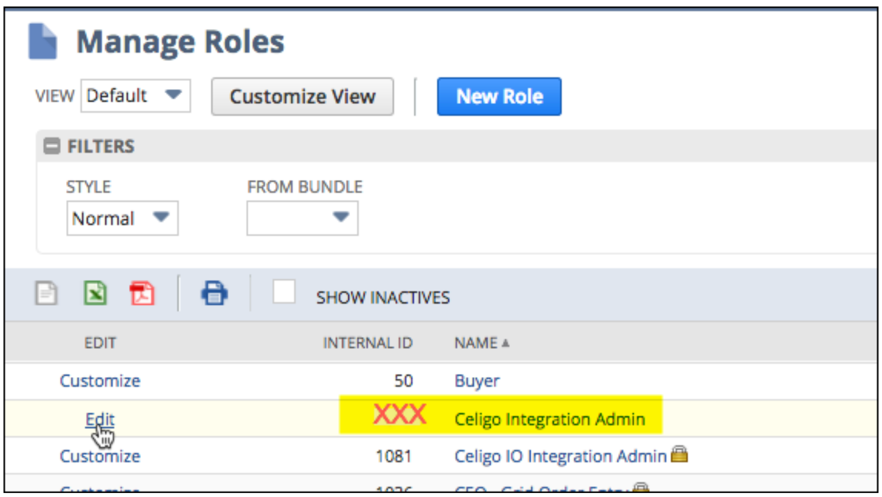
Salesforce V1 Instructions

Salesforce V1 does not support token-based authentication. Therefore, the NetSuite connection used by the connector must have a role that will not require 2 Factor Authentication (2FA) by NetSuite.

NetSuite Steps

A. Look up customized Celigo Integration Admin role

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Manage Roles**.
3. Find the **Celigo Integration Admin** role. Note the **Internal ID** listed for the role.



B. Select NetSuite User and assign Role

Select the NetSuite user account that will be used to connect your Salesforce connector:

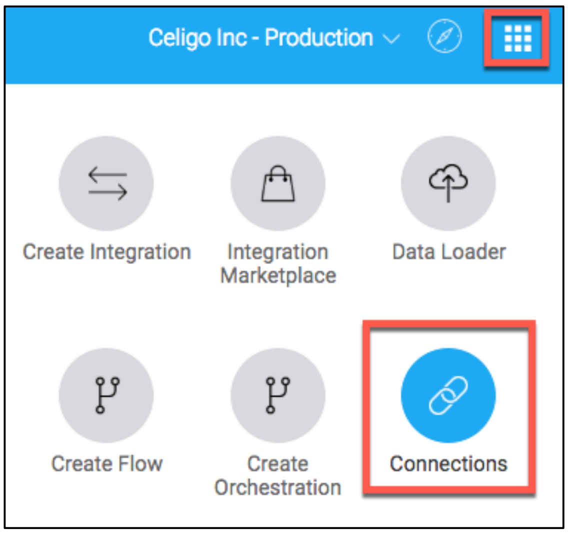
1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Manage Users**.
3. On **Manage Users** page, click on the user that you wish to connect your Salesforce connector.
4. On that user's **Employee** page, select **Edit**.
5. Go to **Access > Roles**.
6. Add **Celigo Integration Admin** role.
7. Click **Save**. The **Confirmation** message appears.

Salesforce V1 Instructions (cont)

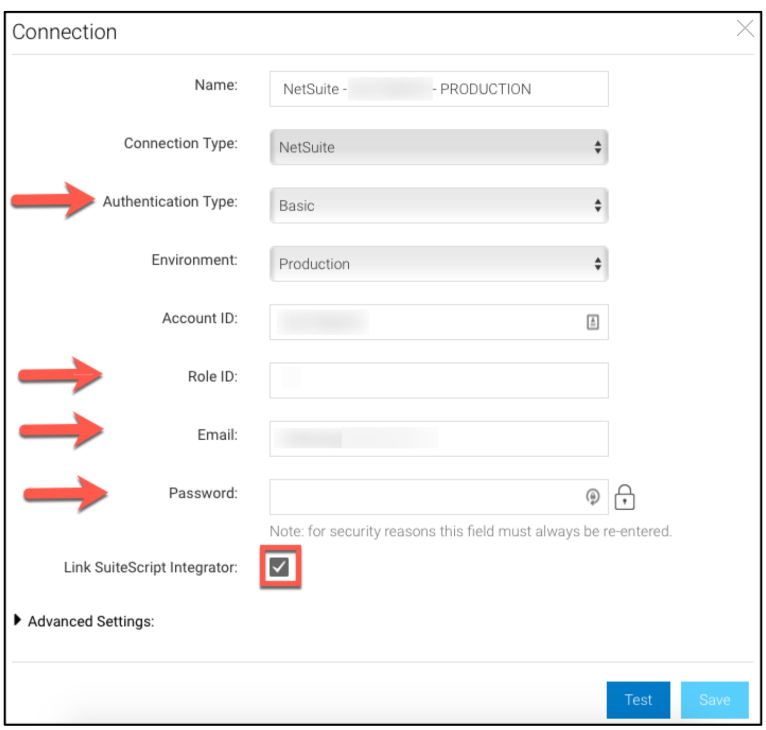
Celigo Steps

A. Update the integrator.io to NetSuite connection

1. Log into your Celigo integrator.io account as either account Owner or Manager.
2. From the home page of integrator.io, go to the upper right corner and select the waffle icon and click **Connections**.



3. Find the NetSuite Connection and select the **Edit pencil** icon.



4. Keep **Authentication Type** to **Basic**.
5. Make sure **Environment** and **Account ID** are correct.
6. Enter **Role ID** that you noted in section A of the NetSuite instructions.

   **Note: Role ID cannot be a "3" since it is a NetSuite Administrator role that requires 2FA*
7. Enter the **Email** and **Password** of the NetSuite user designated in section B.
8. Make sure the **Link SuiteScript Integrator** checkbox is checked so that your Salesforce integration information remains available on your account dashboard.
9. Click **Test** to verify the connection is work.
10. Click **Save**.

We recommend that you test some integration flows to make sure your NetSuite connection is working properly.