



## Oracle NetSuite Integration Guide

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# Introduction

## Audience

This document is directed to customers and prospective customers interested in using Tenfold in an Oracle NetSuite environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with NetSuite APIs, NetSuite administration, general networking, and Tenfold.

## Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed NetSuite/Tenfold integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with your Tenfold Customer Success Manager (CSM) and/or Regional Sales Manager (RSM).

## Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this NetSuite integration:

- **Application Programing Interface (API):** A set of clearly defined methods of communication used by Tenfold for reading and writing data.
- **Click to Dial:** A feature in the Tenfold UI which allows agents to click a phone number to dial a contact.
- **Restlet:** Server-side scripts that interact with NetSuite data following RESTful principles. RESTlets extend the SuiteScript API to allow custom integrations with NetSuite and improve performance.
- **Tenfold Cloud:** A set of Web Services that receives events from the telephony system and takes further action such as querying and saving to the CRM.
- **Tenfold User Interface (TUI):** An agent facing user interface which agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

## Customer Responsibilities

You are responsible for supplying the physical and/or IP connection(s) to NetSuite and LAN, and for obtaining and loading any licensing required by NetSuite. You are also responsible for configuring Netsuite to support the Tenfold integration. Responsibilities for Netsuite management include, but are not limited to: Maintaining a customized Role within Netsuite with the minimum amount of permissions required for a viable integration, and maintaining the RESTlet scripts loaded into the Netsuite scripts folder.

## Integration Overview

### NetSuite Requirements

#### Connection Requirements

Accessible via TCP port 443 (https) to Tenfold Cloud  
Dedicated Service Account (i.e. API User)

#### Version Requirements

NetSuite 2017.2  
NetSuite 2018.1

#### Considerations

If using non-standard forms please consult with Tenfold to understand supportability.

## Permissions Requirements

The Netsuite Role that is provisioned for the integration user will require access to specific Lists in Netsuite to ensure a working solution, and that specific actions can be taken via the different series of API calls. The following Lists should be provided "FULL" access to the provisioned role:

### Lists

- Contact
- Companies
- Customers
- Phone Calls
- Tasks
- Employee
- Employee Record

### Transactions

- Find Transaction
- Opportunity
- Estimate

## Installation

### Installation Requirements

<b>Service Account Email</b>	The username for the dedicated Tenfold service account (i.e. API User)
<b>Service Account Password</b>	The password for the dedicated Tenfold service account (i.e. API User)
<b>Account ID</b>	Your NetSuite Account ID*
<b>Role ID</b>	Your NetSuite Role ID*
<b>RESTlet Script Endpoints</b>	The endpoint URLs for the (4) provisioned RESTlet scripts deployed in Netsuite environment

\* More information on obtaining your Account ID and Role ID can be found at

<https://jcurvesolutions1.zendesk.com/hc/en-us/articles/209987966-Finding-your-NetSuite-Account-Number>

<https://searchspring.zendesk.com/hc/en-us/articles/201185029-Where-do-I-find-my-NetSuite-account-Role-ID->

# Installation Process

## 1) Provision Service User in Netsuite for API Connection

Purpose: This section provides the procedural steps to set up token-based authentication in NetSuite to provide a secure connection from Tenfold to NetSuite.

### Steps

**Enabling the Feature:** Token-Based Authentication must first be enabled in the account. Under **Setup > Company > Enable Features** navigate to the **SuiteCloud** subtab. Enable the required features:

**Manage Authentication**

☒ SUITESIGNON  
USE NETSUITE AS THE TRUSTED SYSTEM TO AUTHENTICATE ACCESS TO INTEGRATED EXTERNAL APPLICATIONS THROUGH SINGLE SIGN-ON. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☐ OPENID SINGLE SIGN-ON  
ENABLE GOOGLE OPENID AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☐ OPENID CONNECT (OIDC) SINGLE SIGN-ON  
ENABLE OPENID CONNECT (OIDC) AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☒ SAML SINGLE SIGN-ON  
ENABLE SAML AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

☒ TOKEN-BASED AUTHENTICATION  
ENABLE TOKEN-BASED AUTHENTICATION AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).

**Integration:** Before connecting with a token, an integration record is required for authentication. A new integration should be used and can be created by navigating to **Setup > Integration > Manage Integrations > New**.

1. Set the name to "Tenfold Integration". Please make sure to check the Token-Based Authentication option.
2. If you already have an integration record for Tenfold Integration, you can reuse it by editing the integration and checking the Token-Based Authentication option.
3. Please copy Consumer Key and Consumer secret values to be used in the user role configuration.
  - a. Please take note that **Consumer Key** and **Consumer Secret** values are displayed only once, so please make sure you copy them before going to another page.

**Integration**

[Edit](#) [Back](#) [Actions](#)

APPLICATION ID: D01CF748-44EE-40A8-861F-657...CB87AF4

NAME: Tenfold Integration

DESCRIPTION:

STATE: Enabled

NOTE:

CONCURRENCY LIMIT: 4

MAX CONCURRENCY LIMIT: 4

CREATED: 2019-11-27 00:00:00.0

CREATED BY: Alex Wolfe

LAST STATE CHANGE: 2019-11-27 00:00:00.0

LAST STATE CHANGED BY: Alex Wolfe

**Authentication** Execution Log System Notes

☒ TOKEN-BASED AUTHENTICATION (TBA)

☐ TBA: ISSUETOKEN ENDPOINT

☐ TBA: AUTHORIZATION FLOW

CALLBACK URL:

☐ USER CREDENTIALS

**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: 55cbd24ba657983633e393a40a03f44f5d47221adf27dfa093dd09b2f9091a76ee

CONSUMER SECRET: ad5ed06c409bdb5448e4df36104162fdxc951c3c5ece97a7ac298427c265972

[Edit](#) [Back](#) [Actions](#)

**Role:** Token-based authentication is a per-user authentication and requires certain permissions in NetSuite. An existing role can be used (recommended) or a new role can be created.

#### Access Token Management:

- Users with this permission can create, assign, and manage tokens for any user in the company.
- Users with this permission cannot use token-based authentication to log in to the NetSuite UI.

#### Login using Access Tokens:

- Users with this permission can manage their own tokens using the Manage Access Tokens link in the Settings portlet, and they can log in using a token.

#### User Access Tokens:

- Users with only this permission can log in using a token, that is, they can to use tokens to call a RESTlet.
- Users with only this permission cannot manage tokens or access pages where tokens are managed.

#### Steps:

1. Go to **Setup > Users/Roles > Manage Roles > New**.
2. Create a role and assign necessary permission for Tenfold Integration.
  - a. Please see the **Mandatory Minimum Permissions Set for "Transactions" and "Lists"** below for the list of permissions required for Tenfold Integration.
3. The role must have **"User Access Tokens"** permission for integration using **TBA**.
4. Assign the Role to the desired user that will be used for integration. Go to **Lists > Employees > Employees > edit user > Access tab > Roles** subtab.

**General**

NAME \*  
 Tenfold Integration Role

ID

CENTER TYPE  
 \*Custom Vendor Center

EMPLOYEE RESTRICTIONS  
 none - no default

☐ ALLOW VIEWING

☐ DO NOT RESTRICT EMPLOYEE FIELDS  
☐ RESTRICT TIME AND EXPENSES  
☐ SALES ROLE  
☐ SUPPORT ROLE  
☐ PARTNER ROLE  
☐ INACTIVE

**Subsidiary Restrictions**

ACCESSIBLE SUBSIDIARIES  
☐ ALL  
☐ ACTIVE  
☒ USER SUBSIDIARY  
☐ SELECTED  
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING

**Authentication**

☐ SINGLE SIGN-ON ONLY  
☐ WEB SERVICES ONLY ROLE  
☐ RESTRICT THIS ROLE BY DEVICE ID

TWO-FACTOR AUTHENTICATION REQUIRED  
 Not required

DURATION OF TRUSTED DEVICE  
 Per session

**Permissions** Restrictions Forms Searches Preferences Dashboard Translation

Transactions Reports Lists Setup

PERMISSION \* LEVEL

Web Services Full

User Access Tokens Full

**Permissions** Restrictions Forms Searches Users Preferences Dashboard Translation History

Transactions Reports Lists Setup

PERMISSION	LEVEL
Cases	Full
Companies	Full
Contacts	Full
Customers	Full
Employee Record	Full
Employees	Full
Phone Calls	Full
Tasks	Full

## Create an Access Token for the Integration record, User, and Role:

1. With the integration record created and proper role assigned, a token can be created for authentication. To create a token, have the user with the token authentication role login. Click the 'Manage Access Tokens' link available on the home dashboard under settings or go to **Setup > Users/Roles > Access Token > New**.



**Access Token** List

[Edit](#) [Back](#) [Actions](#)

**Primary Information**

APPLICATION NAME  
Tenfold Integration

USER  
Tenfold API

ROLE  
Tenfold Integration Role

TOKEN NAME  
Tenfold Integration - Tenfold API, Tenfold Integration Role

☐ INACTIVE

**Token Id / secret**

Warning: For security reasons, this is the only time that the Token ID and Token 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 Token ID and Token Secret as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

TOKEN ID  
e6c855aad17f60b2d5b33e0affd95d67934b764be653e6469c2eee27debba771

TOKEN SECRET  
21f8ee33205d38db42dfded51d390c5f5de285af0123b843805dccc1cfa25f745

After the above steps are completed, you can now use the Consumer Key, Consumer Secret, Token ID, and Token Secret in the Tenfold Dashboard to setup your CRM Connection.

### **Mandatory Minimum Permissions Set for “Transactions” and “Lists”:**

Mandatory permissions:

- Lists (Please provide Full access):
  - Contact
  - Companies
  - Customers
  - Phone Calls
  - Tasks
  - Employee
  - Employee Record (Yes both)
- Transaction (Please provide full access) Find Transaction
  - Opportunity
  - Estimate

## 2) RESTlet Setup

Purpose: This section outlines the procedural steps in provisioning and deploying the Tenfold RESTlet scripts within your Netsuite environment. The completion of this process will allow for you to configure the script endpoints within the Tenfold system, and greatly improve performance for both read and write operations in Netsuite.

### Steps

a) Add Scripts to Netsuite

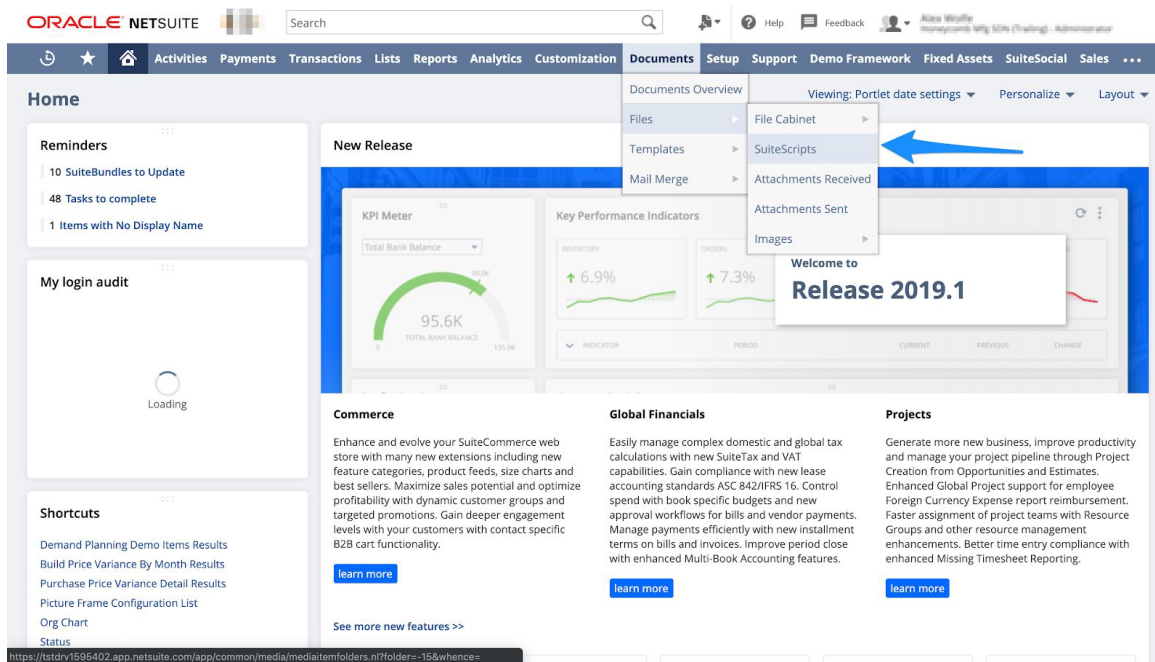
## b) Setup RESTlet Endpoints

### Add Scripts to Netsuite:

1. Download the Netsuite RESTlet scripts. Netsuite RESTlet scripts can be found in the Tenfold Knowledge base [here](#) or via the zipped file at the following URL:

<https://storage.googleapis.com/tenfold-netsuite-restlet/tenfold-oracle-netsuite-restlet.zip>

2) Once downloaded, go to “Documents” > “Files” > “Suitescripts” in Netsuite.



3) Click on “Advanced Add.” Under “Zip Archive to Add,” click on the “Choose File” to select the *tenfold-oracle-netsuite-restlet.zip* file that was just downloaded.

**ORACLE NETSUITE** Search

Activities Payments Transactions Lists Reports Analytics Customization **Documents** Setup Support Demo Framework Fixed Assets SuiteSocial Sales ...

### Advanced Add

Reset Add Add & New

To add multiple files to the File Cabinet, create a .zip archive of your items ([download Winzip](#) to create .zip archives). If you want the .zip file to automatically unzip, check the "Unzip files" checkbox. [Charges may apply](#). Please note that zipfiles containing filenames with international characters are not supported.

ZIP ARCHIVE TO ADD  
Choose File **tenfold-oracle...estlet (1).zip** Zipped file selected

CHARACTER ENCODING  
Unicode (UTF-8)

URL

DESTINATION FOLDER \*  
SuiteScripts

☒ UNZIP FILES  
☐ MAKE ALL FILES AVAILABLE WITHOUT LOGIN  
☐ MAKE ALL FILES INACTIVE  
☒ OVERWRITE FILES WITH SAME NAME

Reset Add **Add & New**

4) Click on "Add & New" button to create a new folder titled "tenfold-restlet." The upload will take a moment. Navigate back to "Documents" > "Files" > "Suitescripts" to verify the new folder has been created. Make sure that *load.js*, *endpoint.js*, *search.js*, and *upsert.js* are included in the folder.

ORACLE NETSUITE

Search

Q

🔍

?

 Help

🗉

 Feedback

👤

 Alex Woffle  
My Profile My Settings My Recent Activity My Recent

## Setup RESTlet Endpoints

1) You will now be generating **four** RESTlet endpoints corresponding to each of the following four uploaded files: *load.js*, *search.js*, *upsert.js*, and *endpoint.js*. Navigate to "Customization" > "Scripting" > "Scripts."

ORACLE NETSUITE

Search

Help Feedback New Workflow (Training) Administrator

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial

## Scripts

View Deployments

**New Script**

**FILTERS**

TYPE: RESTlet API VERSION: - All - SCRIPT FILE: - All - FROM BUNDLE:

☐ SHOW INACTIVES TOTAL: 22

EDIT   VIEW	NAME	FROM BUNDLE	ID	API VERSION	DEPLOYMENTS	SCRIPT	LIBRARY SCRIPT	INTERNAL ID
Edit   View	Create Record RESTlet		customscript_ife_create_record_ri	1.0	Deployments	recordCRD.js		166
Edit   View	MitelCRM Search		customscript554	1.0	Deployments	search.js	netsuite_toolkit.js	554
Edit   View	New RESTlet Search		customscript567	1.0	Deployments	search.js	netsuite_toolkit.js	567
View	SuiteSocial News Feed RESTlet	25250	customscript_newsfeed_restlet	1.0	Deployments	newsfeed_ui.js		491
Edit   View	Tenfold Create		customscript550	1.0	Deployments	initialize.js	netsuite_toolkit.js	550
Edit   View	Tenfold Dispositions		customscript555	1.0	Deployments	disposition.js	netsuite_toolkit.js	555
Edit   View	Tenfold Endpoint		customscript559	1.0	Deployments	endpoint.js	netsuite_toolkit.js	559
Edit   View	Tenfold Endpoint CR		customscript563	1.0	Deployments	endpoint.js	netsuite_toolkit.js	563
Edit   View	Tenfold Initialize Record		customscript553	1.0	Deployments	initialize.js	netsuite_toolkit.js	553
Edit   View	Tenfold Load		customscript548	1.0	Deployments	load.js	netsuite_toolkit.js	548
Edit   View	Tenfold Load		customscript549	1.0	Deployments	load.js	netsuite_toolkit.js	549
Edit   View	Tenfold Load		customscript556	1.0	Deployments	load.js	netsuite_toolkit.js	556

2) Click on the "New Script" button at the top of the page. You will be going through the following process **four** times for each of the **four** scripts.

3) Click on the down arrow in the "Script File" dropdown. Click on "List." within the "-All-" dropdown, Select "SuiteScripts - tenfold-restlet." Select the script you are setting up (Will be done once per **four** files.) Click "Create Script Record." Select "RESTlet" 1.0 Script Type.

ORACLE NETSUITE

Search

Help Feedback New Workflow (Training) Administrator

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial

## Upload Script File

Reset Cancel Create

SuiteScripts : tenfold-restlet : tenfold-restlet

SCRIPT FILE \*  
<Type then tab>

Search

endpoint.js  
load.js  
netsuite\_toolkit.js  
search.js  
upsert.js

3) Name the script "Tenfold <script name>" based on the script you are making. That will be Tenfold Endpoint, Tenfold Load, Tenfold Search, and Tenfold Upsert depending on the script you are making. Order does not matter, but all **four** must be created.

ORACLE NETSUITE

Search

Activities Payments Transactions Lists Reports Analytics Customization Documents Setup Support Demo Framework Fixed Assets SuiteSocial

RESTlet

NAME \*  
Tenfold Endpoint

ID

API VERSION  
1.0

OWNER  
Alex Wolfe

☐ INACTIVE

Scripts Parameters Unhandled Errors Deployments

SCRIPT FILE \*  
endpoint.js

GET FUNCTION

POST FUNCTION  
endpointPostHandler

DELETE FUNCTION

PUT FUNCTION

Libraries Custom Plug-In Types

LIBRARY SCRIPT FILE \*  
netsuite\_toolkit.js

<Type then tab>

Add Cancel Insert Remove

Save Cancel Reset

4) In the "POST FUNCTION" field, enter "script name>PostHandler." The corresponding names are shown below. Under "Libraries" include "netsuite\_toolkit.js" for each of the four scripts.

load.js -> loadPostHandler

search.js -> searchPostHandler

upsert.js -> upsertPostHandler

endpoint.js -> endpointPostHandler

**ORACLE NETSUITE** Search

Activities Payments Transactions Lists Reports Analytics **Customization** Documents Setup Support Demo Framework Fixed Assets SuiteSocial ...

RESTlet

NAME \*  
Tenfold Endpoint

ID

API VERSION  
1.0

OWNER  
Alex Wolfe

☐ INACTIVE

Scripts Parameters Unhandled Errors Deployments

SCRIPT FILE \*  
endpoint.js

GET FUNCTION

POST FUNCTION  
endpointPostHandler

DELETE FUNCTION

PUT FUNCTION

Libraries Custom Plug-In Types

LIBRARY SCRIPT FILE \*  
netsuite\_toolkit.js

<Type then tab>

Add Cancel Insert Remove

Save Cancel Reset

5) Click "Save" and then "Deploy Script." Setup the deployment in the following page as follows: **"Status - Released."** **"Departments - Admin."** **"Employees - All."** Press "Save."

**ORACLE NETSUITE** Search

Activities Payments Transactions Lists Reports Analytics **Customization** Documents Setup Support Demo Framework Fixed Assets SuiteSocial Sales ...

**Script Deployment** List Search More

Save Cancel Reset

SCRIPT  
Tenfold Endpoint

TITLE \*  
Tenfold Endpoint

ID

☒ DEPLOYED

STATUS \*  
Released

LOG LEVEL  
Error

Audience Execution Log

ROLES ☒ Select All

DEPARTMENTS  
Admin  
Engineering  
Marketing  
Production

SUBSIDIARIES  
Honeycomb Holdings Inc.  
Honeycomb Holdings Inc. : Honeycomb H  
Honeycomb Holdings Inc. : test sub

GROUPS  
<Type & tab for single value>

EMPLOYEES ☒ Select All

PARTNERS ☒ Select All  
Jasper Supply

Save Cancel Reset

6) After deploying, copy the "External URL" for the script. This will be configured in the CRM settings of the Tenfold Dashboard. This is also accessible from "Customization" > "Scripting" > "Script Deployments."

## Script Deployment

<b>Edit</b>	<b>Back</b>	<b>Actions ▾</b>
-------------	-------------	------------------

SCRIPT	STATUS
Tenfold Search	Testing
TITLE	LOG LEVEL
Tenfold Search	Debug
ID	URL
customdeploy1	/app/site/hosting/restlet.nl?script=547&deploy=1
<input checked="" type="checkbox"/> DEPLOYED	EXTERNAL URL
	https://rest.na1.netsuite.com/app/site/hosting/restlet.nl?script=547&deploy=1

<b>Audience •</b>	Execution Log	History	System Notes
-------------------	---------------	---------	--------------

ROLES	SUBSIDIARIES
-------	--------------

7) Replicate steps for all **four** scripts and copy the "External URL" of each script and proceed to the next section.

### 3) Tenfold Dashboard Setup

Purpose: This section outlines the procedural steps in connecting Tenfold webservices to your Netsuite environment via the CRM configuration portal in the Tenfold dashboard. Both the API user and RESTlet endpoints will be provided within a single setup pane.

1. Start by navigating to your Tenfold dashboard at <https://dashboard.tenfold.com>
2. Select the **Company Settings** link in the top navigation
3. In the sub-navigation, select **CRM**
4. Select "Oracle NetSuite" as your CRM.
5. Enter the following information into the form
  - Service Account Username
  - Service Account Password
  - Account ID
  - Role ID (Found in section #1)
  - Load Endpoint, Search Endpoint, Upsert Endpoint, and Main Endpoint URLs (Under Change Advanced Options)
6. Click **Save**.

Upon clicking save, if the information provided is correct, Tenfold will test the connection and present a success message.

CRM connection tested successfully.

### Instructions

After authenticating with NetSuite, follow the instructions in the article below to install the Tenfold RESTlet.

<https://www.tenfold.com/support-center/netsuite-restlet>

#### Additional options

**Related user as sales rep** option is used by "Create Record" function. When new record is created current user is assigned to this record as Sales Representative. Avoid of this option usage if current user cannot be assigned as Sales Rep.

**Date Format and Time Format** should have the same value as corresponding user, whom AccountID specified. You can inspect current Netsuite's "DATE FORMAT" value in user's preferences

<https://system.netsuite.com/app/center/userprefs.nl>.

**Default inventory item** value is useful while working with Quotes. Every time user creates Quote record this value appears under "Items" field. Explore list of existing items by the link

<https://system.netsuite.com/app/common/item/itemlist.nl>

**System Region** field supposed to be used when there is a need of working with specific Netsuite Data Center. From the moment this option setup it affects all URLs that Tenfold application produces.



Oracle NetSuite

#### Email

tenfoldintegration@tenfold.com

#### Password

\*\*\*\*\*

#### Related user as sales rep

☐

#### Account id

TSTDVR1595402

#### Default inventory item

Default inventory item ID to be used when creating records requiring it (e.g.: Qu

#### Change Advanced Options

##### Role id

1071

##### Environment

## Advanced Options

**Related user as sales** Used by "Create Record" function. When a new record is created the current user is assigned to this record as a Sales Representative.

**Date Format and Time Format** should have the same value as corresponding user, whose AccountID is specified. You can inspect the current Netsuite's "DATE FORMAT" value in user's preferences <https://system.netsuite.com/app/center/userprefs.nl>.

**System Region** is used when there is a need of working with a specific Netsuite Data Center.



## Appendix A) Netsuite Fields

The below tables outline the out of the box entities and respective fields that will be interacted with for the core Tenfold integration. Read and/or write permissions for additional fields, both standard and custom, may be required for your Tenfold deployment.

### User

Entity - Employee	Field	Required Permissions
Employee	email	Read
Employee	entityid	Read
Employee	firstname	Read
Employee	lastname	Read
Employee	phone	Read

### Customer, Lead, Prospect

Entity - Customer, Lead, Prospect	Field	Required Permissions
Customer, Lead, Prospect	comments	Read
Customer, Lead, Prospect	companyname	Read / Write
Customer, Lead, Prospect	datecreated	Read
Customer, Lead, Prospect	email	Read / Write
Customer, Lead, Prospect	entityid	Read
Customer, Lead, Prospect	entitystatus	Read
Customer, Lead, Prospect	firstname	Read / Write
Customer, Lead, Prospect	homePhone	Read / Write
Customer, Lead, Prospect	isinactive	Read
Customer, Lead, Prospect	isperson	Read / Write
Customer, Lead, Prospect	lastname	Read / Write

Customer, Lead, Prospect	mobilePhone	Read / Write
Customer, Lead, Prospect	phone	Read / Write
Customer, Lead, Prospect	salesrep	Read / Write
Customer, Lead, Prospect	subsidiary	Read / Write
Customer, Lead, Prospect	userid	Read / Write

## Contact

Entity - Contact	Field	Required Permissions
Contact	comments	Read
Contact	datecreated	Read
Contact	email	Read
Contact	entityid	Read
Contact	firstname	Read / Write
Contact	homePhone	Read / Write
Contact	isinactive	Read
Contact	lastname	Read / Write
Contact	mobilePhone	Read / Write
Contact	phone	Read / Write
Contact	salesrep	Read / Write
Contact	subsidiary	Read / Write
Contact	userid	Read / Write

## Phone Call

Entity - PhoneCall	Field	Required Permissions
PhoneCall	assigned	Read / Write

PhoneCall	company	Read / Write
PhoneCall	company	Read / Write
PhoneCall	completeddate	Read / Write
PhoneCall	contact	Read / Write
PhoneCall	endtime	Read / Write
PhoneCall	id	Read
PhoneCall	message	Read / Write
PhoneCall	phone	Read / Write
PhoneCall	starttime	Read / Write
PhoneCall	status	Read / Write
PhoneCall	supportcase	Read / Write
PhoneCall	timedevent	Read / Write
PhoneCall	title	Read / Write
PhoneCall	transaction	Read / Write

## Task

Entity - Task	Field	Required Permissions
Task	assigned	Read / Write
Task	company	Read / Write
Task	<a href="#">contact</a>	Read / Write
Task	duedate	Read / Write
Task	id	Read
Task	message	Read / Write
Task	title	Read / Write

## Opportunity

Entity - Opportunity	Field	Required Permissions
Opportunity	entitystatus	Read
Opportunity	expectedclosedate	Read
Opportunity	probability	Read
Opportunity	projectedtotal	Read
Opportunity	status	Read
Opportunity	title	Read
Opportunity	trandate	Read
Opportunity	tranid	Read

## SupportCase

Entity - SupportCase	Field	Required Permissions
SupportCase	assigned	Read
SupportCase	casenumber	Read
SupportCase	company	Read
SupportCase	contact	Read
SupportCase	createddate	Read
SupportCase	id	Read
SupportCase	priority	Read
SupportCase	status	Read
SupportCase	title	Read

## Estimate

Entity - Estimate	Field	Required Permissions
-------------------	-------	----------------------

Estimate	duedate	Read
Estimate	entitystatus	Read
Estimate	expectedclosedate	Read
Estimate	probability	Read
Estimate	salesrep	Read
Estimate	status	Read
Estimate	total	Read
Estimate	totalcostestimate	Read
Estimate	trandate	Read
Estimate	tranid	Read