FLODocs Training

Integration Import Guide

FLODocs Integration Import Overview

FLODocs automatically documents customizations in your NetSuite account. However, you may wish to also wish to document integrations between your NetSuite account and external systems.

There are five steps to add integrations to your FLODocs documentation:

1. Set up an External System record and aRecord representing each corresponding record
2. Set up an Integration Process Record (optional)
3. Create an import file using our import template
4. Import the data using the FLO Integration Import Template
5. Complete any Incomplete Records

Step 1: Setting Up The Records

An external system is represented by at least two FLO Customization records. These are created under the FLODocs tab. Select 'Customizations>FLO Customizations>New' to create each record

1. External System: This record represents the system itself (eg Provisioning System). Enter the Name of the external system and select the Type: External System and then save.
2. External Record / Table: This record represents a table in the External System with which you will be integrating.
    a. Enter the Name of the Table or Record - if it is the same as a NetSuite record prepend an acronym (eg SP Customer)
    b. Select Type: Standard Record / Record depending on whether it is standard or a custom extension of the external system.
    c. Set the External System field to match your External System (ie Provisioning System)

NOTE: Note the internal ids of both records, you will need them for the import.

Setting Up the Integration Process Record

The Integration Process record is a standard FLODocs process record representing the integration. This is not required but takes only a few seconds. It is usually an operational process that is part of a broader process flow. However, it could be a high level process record whose parent is a Supporting Process.   To create it follow these steps:

1. If you have not already done so, create a parent process (eg Provision Account).
2. Create a High-Level Process representing the integration (eg NS - PS Customer Synch) . You can add more detail in steps later to document more complex customizations. However, you can often simply attach or link to the documentation generated by your integration tool.

TIP: You can create the Integration process using the Process Assistant or the Process Library interface but for quick setups like this where you will need the id of the process, it is often simpler to go to ‘Manage Processes>FLO Processes>New’ to create the record

Enter the name, a number and the type (High Level Process)

Step 2: Create the Import File

The import is completed via a single csv upload using the a Saved Import in NetSuite. You can find a template csv by searching for 'FLODocs Integration Import CSV Template' in your general search bar. Any form of NS-compliant csv file will work provided it has the following columns:

External System: This is the internalid of the External System record you created in step 1

Parent: This is the internalid of the FLO Customization record that you created in step 1

Name: This is the name of the field in your external system

Data Type: This is the data type (eg String) from your external system. You could match it to the NS data type but that is not necessary.

ID: This is the unique id of the field in your external system

Additional Data: This is anything you want added into the Description field on the resulting FLO Customization in NetSuite. It could be the field description and/or include other fields.

Mapping: This field represents the target NS field (It is discussed in more detail in the next slide)

Step 3: Mapping the Relationships

Relationships between fields can be quickly defined by using the mapping notation described below. **This is the equivalent of editing the customization record for the target field (ie the NS field) to specify the new field as data source for the internal NS field** and the Integration Process as the process that integrates it.

- The standard notation is {target field scriptid}[:{integration process id}] (eg custentity_company_size:1234). The integration process is optional.
- Multiple field relationships can be designated on successive lines or using comma separated values. For example: 'custentity_shoe_size:1234, custbody_shoe_size:1234' means that the Company Size field from your external system provides data to both the Customer Company Size field and a corresponding transaction body field.
- Linkages can also be made to standard fields (eg firstname), FLODocs will automatically create any missing field and prompt you to complete the record.

To map an NS field as being the source of the external field: prepend a "-" in front of the scriptid (ie -custentity_company_size:11234 - means the external field is populated from the NS field). To indicate a bi-directional synch via the same process, prepend a "+".

Step 4: Import the Data

Importing the data, like all imports, is a multiple step process:

1. Create a sample import file matching the template (add 5 or six records)
2. Import the file using the Saved Import (FLO Integration Import).
3. Review and fix any errors
4. If there are no errors, go to the ERD diagram and select your external record. You will see the fields.
5. Open a field and check that:
    a. The Integration Process is set in the Integration Process field (on the Data Sources and Integration tab) and in the Process field
    b. The Data Sourcing Relationships are shown on the same tab. All fields that the given field is a source to are shown in the sublist on that tab.
6. Import the rest of the data.

Step 5: Complete Incomplete Records

If you have imported a connection to a field you do not yet have in the your NetSuite FLODocs documentation (either because it is a standard field or because it does not yet exist), FLODocs will create a field to represent it and alert you to complete the field.

The alerts are generated by the FLODOcs Incomplete Record Alert.

They will provide links to the record in question. You will need to specify the field type. You should also specify the parent.