Invoice reminders (INR) setup guide

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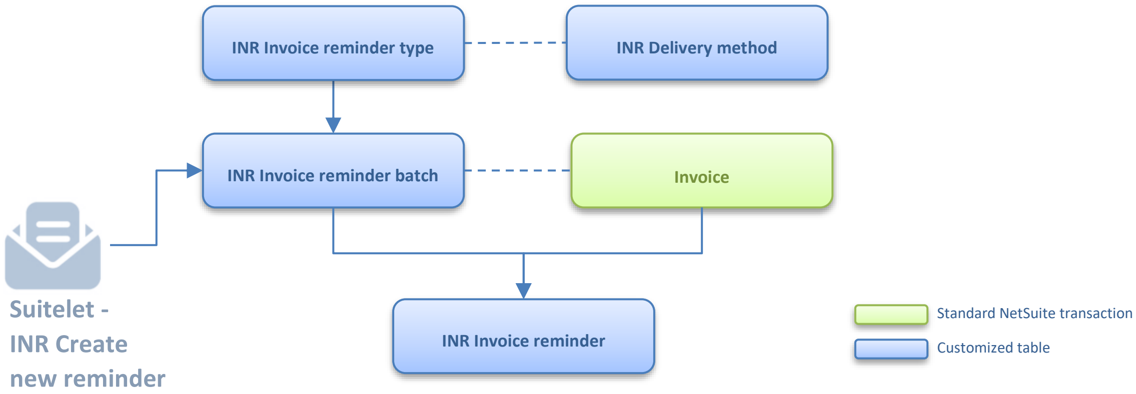
OVERVIEW

This document describes how the INR Bundle is installed and what steps must be followed in order to set it up according to the Customer needs.

CUSTOMIZATIONS

Hereinafter is a description of the components in the reminder function.



Type	Name	ID
Custom record	INR Invoice reminder type	customrecord_inr_type
Custom record	INR Invoice reminder batch	customrecord_inr_batch
Custom record	INR Invoice reminder	customrecord_inr_invoice
Custom record	INR Delivery method	customrecord_inr_delivery_method
Custom list	INR Invoice batch status	customlist_inr_batch_status
Custom list	INR Invoice status	customlist_inr_inv_status
Transaction body field	INR Current reminder	custbody_inr_current_reminder
Transaction body field	INR Current reminder date	custbody_inr_current_reminder_date
Transaction body field	INR Reminder block	custbody_inr_reminder_block
Transaction body field	INR Reminder block cause	custbody_inr_reminder_block_cause
Transaction body field	INR Reminder block to date	custbody_inr_reminder_block_to
Transaction body field	INR Reminder block on customer	custbody_inr_customer_reminder_block
Entity field	INR Reminder block	custentity_inr_reminder_block
Entity field	INR Reminder block cause	custentity_inr_reminder_block_cause
Entity field	INR Reminder block to date	custentity_inr_reminder_block_to
Scrip - Suitelet	AVNS INR Create Invoice Reminder	customscript_avns_inr_create_invoice_rem
Scrip - RESTlet	AVNS INR GetFile	customscript_avns_inr_getfile
Scrip - RESTlet	AVNS INR GetListOfFiles	customscript_avns_inr_getlistoffiles
Scrip - Client	AVNS INR Invoice Reminder Client	customscript_avns_inr_client
Scrip - Scheduled	AVNS INR Invoice Reminder Job	customscript_avns_inr_invoice_rem_job
Scrip - Workflow Action	AVNS INR RunAgain	customscript_avns_inr_runagain
Workflow	INR Copy invoice	customworkflow_inr_copy_invoice
Workflow	INR Invoice batch status	customworkflow_inr_batch
Workflow	INR Invoice reminder type	customworkflow_inr_invoice_reminder_type
Workflow	INR TEMPLATE Send e-mail	customworkflow_inr_send_email

SETUP GUIDE

The following sections must be done by a user with Administrator Responsibility.

Bundle installation

Install bundle **164076** – AVNS INR Invoice Reminder from the Repository.

Prerequisites

Periods must have allow non-G/L changes on closed periods.

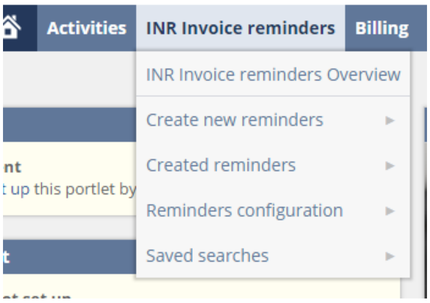
Administrator Setup

Center Tab and Center Categories

Create custom center link for Suitelet “AVNS INR Create Invoice Reminder”.
Observe! The name should be in the same language as the company standard. Use translate for other languages that the company uses.

Create custom center tab “INR Invoice reminders” (Fakturapåminnelser) with the following categories (You could also create a dashboard with relevant reminder information):

- Create new reminders (Skapa nya påminnelser)
    - Create new reminders (Suitelet center link). Create a center link (Get link from Suitelet script “AVNS INR Create Invoice Reminder” under deployments).
- Created reminders (Skapade påminnelser)
    - INR LIST Invoice reminder batch Results
    - INR LIST Invoice reminder Results
    - Print Checks and Forms
- Reminders configuration (Konfigurera påminnelser)
    - INR Invoice reminder type
    - INR Delivery method
- Saved searches (Sökningar)
    - INR Open Credit memo Results
    - INR Invoices with reminder block Results
    - INR Invoice reminder not delivered Results
    - INR Reminder status Results



Give Custom Roles access to INR Custom Records

Once you have set up the role(s) that will have access to INR functionality you need to give these roles permission to access the following Custom Records:

- INR Delivery method - view
- INR Invoice reminder - edit
- INR Invoice reminder batch - edit
- INR Invoice reminder type - edit

Form customization for custom records

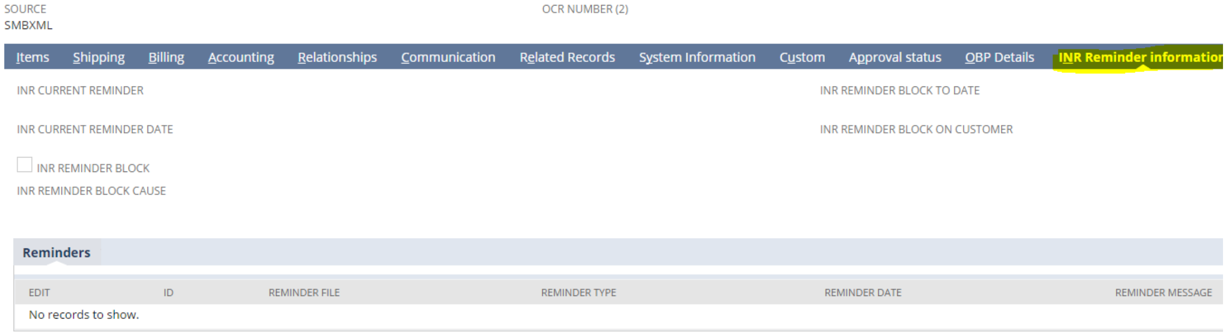
Copy forms for the following custom records and setup the new form as primary (example: “COMPANYNAME Invoice reminder”):

- INR Invoice reminder - AVNS INR Invoice reminder
- INR Invoice reminder batch - AVNS INR Invoice reminder batch

- INR Invoice reminder type - AVNS INR Invoice reminder type

Tab “INR Reminder information” setup for transaction and entity

Make “INR Reminder information” tab and fields visible on relevant invoice and customer forms.



PDF and transaction form layout customization

Create a reminder printout layout with reminder text and date. Best practice is to copy current invoice layout and create a reminder layout from it with reminder customized fields:

- {custbody_inr_current_reminder.custrecord_inr_batch_message}
- {custbody_inr_current_reminder_date}

NOTE! If you use Advanced PDF/HTML template, make sure you check “Advanced HTML/PDF” field on reminder types.

File Cabinet Folder

Create a folder for the reminded invoices PDF-files. Set restrictions on folder if you would like to limit folder access. Make a note with the folder id for the reminder types setup. You can have the same folder for all reminder types or a unique folder for each reminder type. Best practice is one folder for all types. Name does not matter, example “Invoice Reminder”.

See setup of folder id on reminder type further long in the documentation.

Workflow setup

Set workflow “INR TEMPLATE Send e-mail” to Not running.

Comments

The reminder function is now ready for reminder types setup. The templates reminder types cannot be used for reminder creation. You can copy a template and a related saved search and create your own reminder type. For more information of how to setup reminder types, see the user guide.

Optional setup

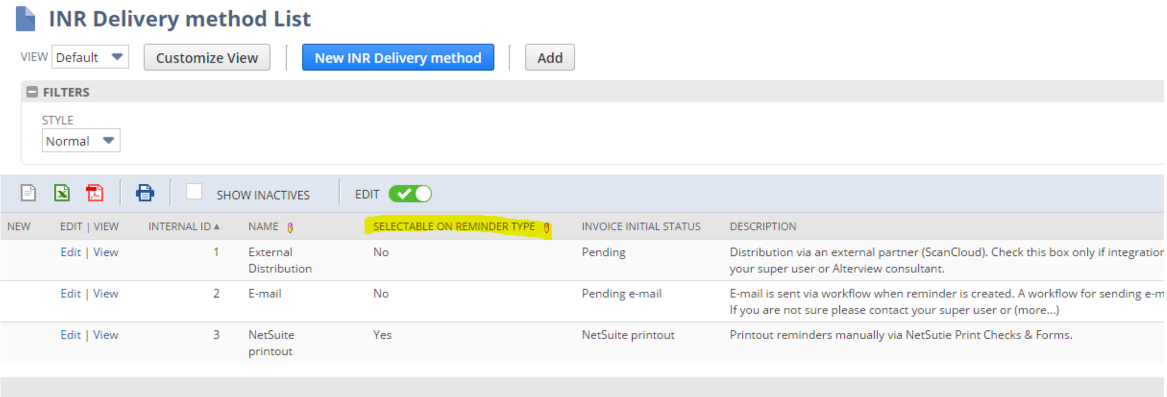
Activate “Email” delivery method

1. Set customer e-mail for reminder delivery on NetSuite standard field or create a customized filed.
2. Create a mailing user (Employee without access) if you do not want emails to be sent from current user.

3. Look at workflow “INR TEMPLATE Send e-mail”, make a copy and create a customized workflow. If you have customers with different languages, create a “Send e-mail” action for each language.
   Field you might need to update could be:
   - Condition on send email action – (choose your new reminder template)
   - Content - Body
4. “INR Delivery method” – E-mail record. Check “Selectable on reminder types” field to true. The type will now be available for creating reminder types with e-mail delivery method.

Activate “External distribution” delivery method

1. Setup integration with an external part (Scancloud). See section *Integration when using “External distribution*” below
2. “INR Delivery method” – External Distribution email record. Check “Selectable on reminder types” field to true. The type will now be available for creating reminder types with external distribution delivery method.



NEW	EDIT | VIEW	INTERNAL ID ▲	NAME	SELECTABLE ON REMINDER TYPE	INVOICE INITIAL STATUS	DESCRIPTION
	Edit | View	1	External Distribution	No	Pending	Distribution via an external partner (ScanCloud). Check this box only if integratio your super user or Alterview consultant.
	Edit | View	2	E-mail	No	Pending e-mail	E-mail is sent via workflow when reminder is created. A workflow for sending e-m If you are not sure please contact your super user or (more...)
	Edit | View	3	NetSuite printout	Yes	NetSuite printout	Printout reminders manually via NetSutie Print Checks & Forms.

Integration when using “External distribution”.

When using “External distribution “delivery there are 3 RESTLets created to handle the integration, and it is recommended to use Token based authentication to call for those RESTLets.

Scripts description for RESTLets

Get available Reminders

The first step is to get a list of ID’s for created and yet not fetched Reminders

- Script: AVNS INR GetListOfFiles. Called via the External URL in the script
- Call Body
  - Text

```
{
    "page":"0",
    "pagesize":"1000"
```

```
}
```

  - This will result in a call for the first 1000 Reminders (Script cannot handle more than 1000 post). If there is more than 1000 Reminders the first 1000 must first be fetched and confirmed and then a new list is to be called.
- Call answer
  - Text


```
{
  "status": "OK",
  "details": [],
  "records": [
    {
      "id": "6582"
    },
    {
      "id": "6583"
    },
    {
      "id": "6584"
    },
    {
      "id": "6934"
    }
  ]
}
```


- The status will be “OK” if all went well and “ERROR” if not so, possibly with an error message
- The returned ID’s are the individual ID for each Reminder that is to be fetched using the calls below

Get Reminder PDF

The second step is to get the individual Reminder PDF’s, and this is done by calling via the ID one-by-one

- Script: AVNS INR GetFile. Called via the External URL in the script
- Call Body
  - Text


```
{
    "id": "6933"
}
```


  - The id is one of the ID’s found from the call above
- Call answer
  - Text


```
{
  "status": "OK",
  "details": [],
```

"pdf":
"JVBERi0xLjMKJd/++LIKMSAwIG9iago8PC9UeXBlL0NhdGFsb2cvUGFnZXMgMyAwIFIvVmlld2VyUHJlZmVyZW5jZXM8PC9QcmludFNjYWxpbmcvTm9uZT4.............. ",
"id": "6933"
}

- The status will be “OK” if all went well and “ERROR” if not so, possibly with an error message
- The PDF is the very long string after “pdf”

Acknowledge receiving of Reminder PDF

The third step is to confirm the receiving of the individual Reminder PDF’s, and this is done by confirming via the ID one-by-one. The confirmation will in NS change the status on the Reminder (so that it will not be picked up by the first RESTLet above)

- Script: AVNS INR AcknowledgeFile. Called via the External URL in the script
- Call Body
  - Text

{
"id":"6933",
"status":"OK"
}

  - The id is one of the ID’s found from the call above
  - The status is to be set to “OK”
- Call answer
  - Text

{
"status": "OK",
"details": [],
"id": "6933"
}

- The status will be “OK” if all went well and “ERROR” if not so, possibly with an error message

Token based Authentication

Token based Authentication (which should be used rather than individual username/password) requires a few steps to set up

Create Role

- A Role needs to be created. This can be a common Role used by an external partner for access in to NS via RESTLets.
- Access to relevant records. In this case specifically record "INR Fakturapåminnelse"
- Assign roles to relevant subsidiaries

Create Employee (user)

- An employee needs to be created. This can be a common Employee used by an external partner for access in to NS via RESTLets.
- The user needs a password to be created, but this will not be used in the integration.
- Assign Role from above to the employee

Create Integration

- Crate a new integration: Navigate to Setup -> Integration -> Manage Integrations -> New
- Fill in the form with the mandatory fields and mark only the checkbox 'TOKEN-BASED AUTHENTICATION' instead of 'User Credentials'
- Save but REMAIN on the page.
- Once saved we see **Consumer Key and Consumer Secret** at the bottom of the page. Stay on the page and SAVE both by copying the codes and store them elsewhere as they only appear this one time only. If lost then a new integration needs to be created.

Create Access Token

- Create Ecess Token: Navigate to Setup -> Users/Roles -> Access Tokens
- Click on New Access Token
- Application Name – Enter the name of the integration we saved earlier.
- User – Enter the employee we created earlier in this document.
- Role – Enter the Role created earlier in this document.
- Save BUT STAY ON THE PAGE and **SAVE Token ID and Token Secret** elsewhere as they only appear this one time only

Testing integration

Testing of the RESTLets can be done via different tools. Below is a short instruction on how to test via the POSTMAN tool

- Install Postman (https://www.getpostman.com/)
- Set up the call
  - Type: POST
  - URL: The External URL as per the script descriptions above
  - Parameters
    - Nothing needs to be filled in (will be auto filled)
  - Authentication
    - Select type: OAuth 1.0
    - Select Add authorisation data to "Request Headers"
    - Enter Consumer Key, Consumer secret, Access Token, Token secret from above notes as per above.
    - Under Advanced
      - Signature Method : AMAC-SHA1
      - Version 1.0

        - Realm: System ID (can be found in the URL)
  - Headers
    - Authorization: will be added automatically
    - Add Key “Content-Type: application/json
  - Body
    - Enter body as per the script descriptions above

  - Run the call by hitting “Send”
  - Save the call for later re-runs.