

Seamlessly Integrate the Data Flow Between Your Projects and Financials with **NS Connector!**

HOW DOES CONNECTOR WORK?

- Connector uses a simple process for data exchange that allows you to maximize time and effort and ensure data accuracy between NetSuite and OpenAir
- Set up simple and advanced mappings using a visual user interface
- Manual processes such as Credit/Rebill can be automated with integration points

WHAT CAN CONNECTOR DO FOR ME?

- Improve your financial and project management operations
- Give users in both systems greater visibility into services delivery, billings, and expenses
- Increase communication with frequent scheduled (up to 24 per day), real-time, and on-demand updates



Financials



Revenue
recognition



Resource
management



Project
management

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Credentials Screen

Use the Credentials screen to setup Login and Single sign-on credentials for the integration.

Enter the user credentials, including Account ID, E-mail, and password, and click Save. Then, click the "Retrieve NetSuite roles" link. Finally, select one of the retrieved Web Service roles if applicable, and select if the credentials are for a NetSuite sandbox or beta account.

Enter Single sign-on credentials here, including a Consumer key and Shared secret.

Netsuite integration [Credentials](#) | [Automate](#) | [Real-time](#) | [Mapping](#) [Cancel](#) [Save](#) [Run](#)

Login credentials
API access will be performed using these user credentials

Account ID: E-mail:

Password: Confirm password:

Web Service Role:

[Retrieve Netsuite roles](#)

☐ Netsuite sandbox account ☐ Netsuite beta account
Check this if credentials are for a sandbox account Check this if credentials are for a beta account

Single sign-on credentials
Outbound single sign-on verification will be performed using these credentials

Consumer key: Shared secret:

Real-time Screen

Use the Real-time screen to set up the integration to run when various approval events occur.

Disable a real-time integration trigger.

Delete a real-time integration trigger.

Add a real-time integration trigger.

Netsuite integration [Credentials](#) | [Automate](#) | [Real-time](#) | [Mapping](#)

Real-time integrations

Active	Object	Event
<input checked="" type="checkbox"/>	Invoice	on Approval
<input checked="" type="checkbox"/>	Expense report	on Approval
<input checked="" type="checkbox"/>	Timesheet	on Approval

[Add real-time integration](#)

Select an object and event which trigger a real-time integration.

Automate Screen

On the Automate screen you can set the maximum allowed integration scheduled runs. The default is 10, and can be set to a maximum of 24 runs per day.

Delete a scheduled run.

Disable a scheduled run.

Add a new scheduled run.

Enter email addresses to send error messages to.

Select to send the email in HTML format.

Select to receive a log for manual integration runs.

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Automatically run the integration

Active: ☒ Day: at Times are in U.S. Eastern Time

[Add schedule](#)

Email the errors to:
You can enter multiple email addresses, also complete log will be attached to the email.

☒ Send HTML email ☐ Email log for manual integration run

Email the results to:
You can enter multiple email addresses, "Email the results to:" is required if "Email the errors to:" has been specified.

☐ Do not include additional details for NetSuite integration errors

Select the day and time to run the integration.

Enter email addresses to send results to.

Select to exclude additional details for NetSuite integration errors.

Mapping Screen

Use the Mapping Screen to set up chapters and define field-level mappings for the integration.

Open the Filters window. From here you can filter records which are exchanged in the integration. When filters exist, this title appears in **bold**.

Sample filter notation for Employee.department field:

```
NS_FIELD department
FILTER <<END
department = '1,3'
END
```

Chapters are listed down the left-hand side in the order of execution. They are organized according to whether the chapter is pulling data **from NetSuite** or pushing data **to NetSuite**.

Add a new chapter. New chapters are automatically placed in the correct predefined order for the integration.

Remove field mappings from a chapter.

Exclude a chapter from the integration.

OpenAir record (NetSuite record)

Delete the chapter configuration.

Each chapter contains mapping groups containing individual mapping fields. Every mapping group corresponds to one old-style Integration Point Tag. Pullback Integration Point Tags are merged with their corresponding PUSH tags.

When there are too many mapping groups to show at once, click the ... icon to view additional chapter records.

Adjust settings for each chapter independently.

Netsuite integration | Credentials | Automate | Real-time | **Mapping**

Cancel Save Run

Employees (Employees) **Invoices (Invoices)** **Settings**

Invoice Project Invoice Line Expense Line Purchase Line Bill Line Vendor Bill Line ...

Active	NetSuite field	Direction	OpenAir field
ON	Invoice.entity	←	Customer.id OR Project.id
ON	Invoice.tranDate	←	Invoice.date
ON	Invoice.tranId	←	Invoice.number
ON	Invoice.job	←	Invoice.project_id
ON	Invoice.custbody_oa_invoice_number	←	Invoice.number
ON	Invoice.createdDate	←	

+ New chapter

+ Mapping row + Pullback row

Copy a mapping row, including any rule.

Add a new Mapping Row.

Remove a Mapping Row. Default mapping rows cannot be removed, but can be disabled.

Add a new Pullback row. Pullback rows define reverse mapping for OpenAir records from exported NetSuite records.

The arrow shows the direction of the mapping flow.

Define Advanced mapping rules. See pages 4 and 5 for examples.

Common Mapping Examples

Below are examples of the different types of mappings possible within the Connector interface. As in the interface itself, NetSuite fields are on the left, and OpenAir fields are on the right.

Value to Value - Fixed

ON ☐ = "1" User.primary_filter_set

Value to Value - from Schema

ON ☐ Employee.lastName User.last

Value to Value - Macros

ON ☐ # Macro User.hire_date__c

Advanced Cancel OK

```
# Macro
hire_date__TODAY
```

Value to Value - Lookup

ON ☐ # Lookup User.line_manager_id

Advanced Cancel OK

```
# Lookup
NS_FIELDS supervisor
line_manager_id lookup=supervisor:lookup_table=user:lookup_by=netsuite_user_id:lookup_return=id
```

Common Mapping Examples, continued

Value to Value – List Map

The screenshot shows the 'Value to Value – List Map' configuration window. At the top, there is a toolbar with an 'ON' toggle, a trash icon, a dropdown menu, a settings icon, a green arrow icon, and a field labeled 'User.department_id'. Below the toolbar is an 'Advanced' tab with a 'Cancel' button and an 'OK' button. The main text area contains the following XML-like code:

```
# List map
NS_FIELDS department

<department_id department>
'1' '11'
'2' '12'
'3' '13'
</department_id>
```

Values to Values – All IF

The screenshot shows the 'Values to Values – All IF' configuration window. At the top, there is a toolbar with an 'ON' toggle, a trash icon, a dropdown menu, a settings icon, a green arrow icon, and a dropdown menu. Below the toolbar is an 'Advanced' tab with a 'Cancel' button and an 'OK' button. The main text area contains the following code:

```
# All IF definitions
NS_FIELDS department, location, class, subsidiary
OA_FIELDS ns_class_note, ta_approver
OA_CUSTOM_FIELDS ns_class_note

IF <<END
IF (department = '1') AND (location = '1') THEN department_id '1'
IF (department = '2') THEN department_id '2'
IF (class = '1') THEN ns_class_note 'Management'
IF (class = '2') THEN ns_class_note 'Development'
IF (subsidiary = '1') THEN ta_approver '123'
END
```