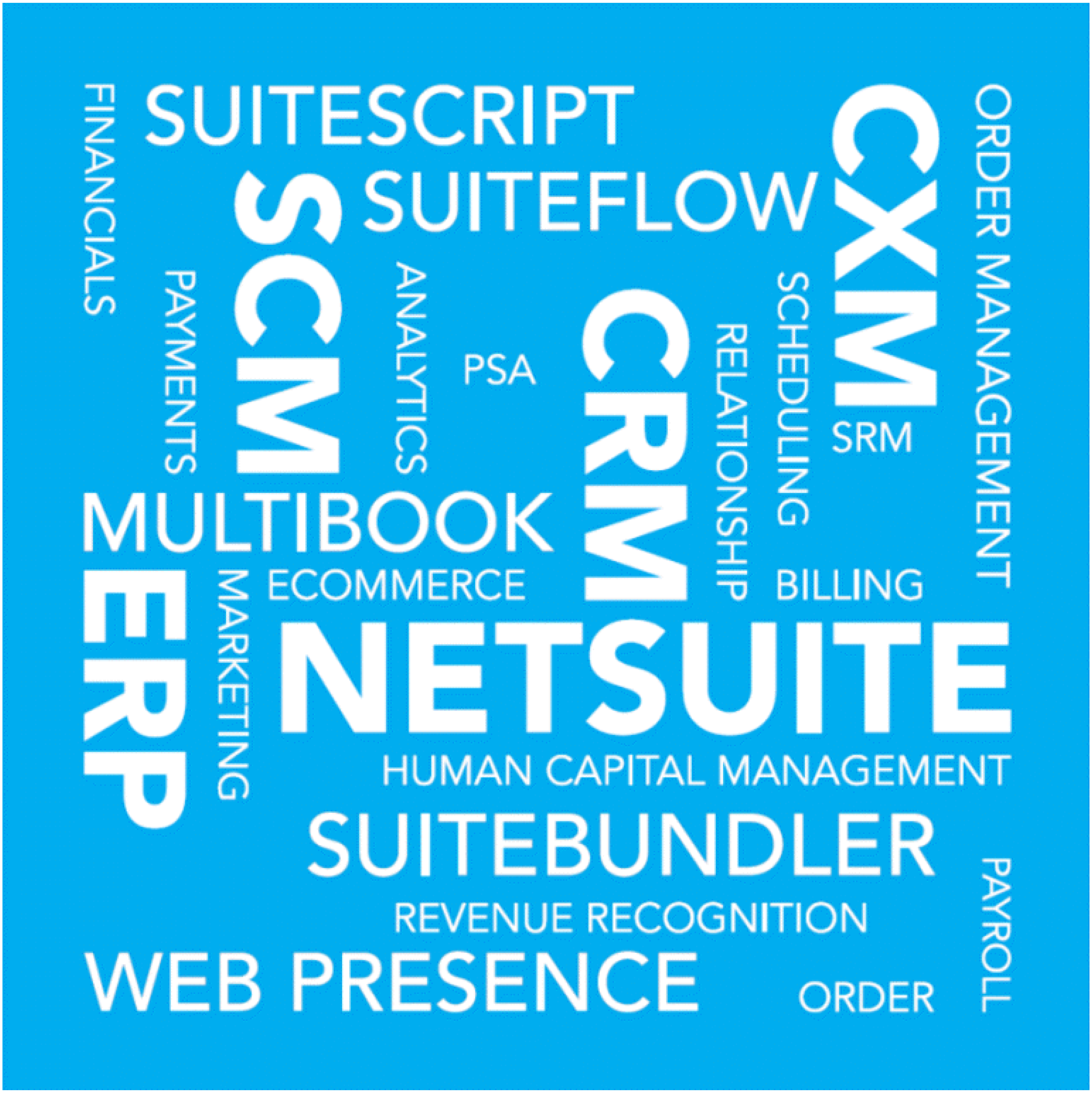
NetSuite for Outlook



February 28, 2018 2018.1

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NetSuite for Outlook

NetSuite for Outlook is a Windows-based application that enables you to save email messages from Outlook into NetSuite and to synchronize your events, tasks, phone calls, and contacts. To get the SuiteApp, see Installing the NetSuite for Outlook SuiteApp.

You can control how frequently you sync, which records from your account are synced, and how conflicts between NetSuite and Outlook are resolved, enabling you to configure the application to work seamlessly with your current business processes.

If you need information on Outlook integration 2.0 (2008), see the Outlook Integration 2.0 (2008) User Guide.

Limitations

Currently, the NetSuite for Outlook SuiteApp has the following limitations:

- NetSuite for Outlook is not available for roles that do not have an Outlook permission. For example, the application is not available to the Employee Center role.
- NetSuite for Outlook is not supported in the NetSuite Japan edition.
- If you want to log in to the SuiteApp using either Two-factor Authentication or Single Sign-On roles, you can only do so by using access tokens.
- NetSuite for Outlook uses the native NetSuite design for token-based authentication, and will also have the same limitations.
- Syncing to mobile devices such as smartphones and tablets are not supported.
- NetSuite for Outlook is not compatible with Mac.
- NetSuite for Outlook cannot be used with web-based email clients. You must have a supported Microsoft Outlook version installed in your local machine. NetSuite for Outlook is compatible with Office 365 but requires that you have a supported Microsoft Outlook version installed in your local machine.
- Customers logged in to NetSuite using the Partner Center role will not be able to sync phone call and task records. This is due to the insufficient permissions on the Partner Centre role, which makes the fields required to sync the records, unavailable to the role.

For more information about supported Microsoft Outlook versions, see System Requirements.

Email

Email messages from Outlook can be saved to contact, customers, jobs or projects, opportunities, estimates, sales orders, invoices, and cash sales in NetSuite, to enable you to track your business communication.

When you write and receive email in Outlook, you are presented with a list of records in NetSuite based on the email addresses you are corresponding with. You can choose which NetSuite records you want to attach email to. Email you write is saved to those records in NetSuite immediately upon sending. Messages you receive in Outlook are saved to NetSuite when you select records and click **Save Changes** in the message pane.

For more information, see Saving Email with NetSuite for Outlook.

Contacts, Events, Tasks, and Phone Calls

If you sync from Outlook into NetSuite, your records are saved immediately to your NetSuite account whenever you add, edit, or delete a record in Outlook. Synchronization of contacts, events, tasks, and phone calls runs behind the scenes as you work, keeping your data current and consistent across applications.

Synchronization from NetSuite into Outlook can be scheduled to run automatically at regular times, and you can also initiate a sync manually at any time.

If a record is created in one application, NetSuite for Outlook can create that record in the other application and link the records so that whenever they are changed in one place, they are updated in the other.

For more information on each type of record you can sync, see the following:

- Synchronizing Events with NetSuite for Outlook
- Synchronizing Contacts with NetSuite for Outlook
- Synchronizing Tasks with NetSuite for Outlook
- Synchronizing Phone Calls with NetSuite for Outlook

Administrator Controls

NetSuite for Outlook includes extensive controls that let administrators pre-configure the application to control how users synchronize their data.

To do this, administrators create NetSuite for Outlook configurations based on NetSuite roles. This includes being able to:

- Choose which record types are available for synchronization.
- Set criteria that determine which records can be synced.
- Define other sync preferences like how conflicts between records are resolved and the frequency and direction of synchronization.
- Select the required fields for contacts in Outlook.

These administrator settings can either be the defaults settings for individual users, or administrators can choose to lock settings so they cannot be modified by individual users.

System Requirements

To install the application, you must either have administrator rights to your computer, or it must be installed by your company's system administrator.

NetSuite for Outlook is compatible with:

- Microsoft Outlook 2007
- Microsoft Outlook 2010 (both the 32- and 64-bit versions)
- Microsoft Outlook 2013 (both the 32- and 64-bit versions)
- Microsoft Outlook 2016 (both the 32- and 64-bit versions)

- Click-to-Run installations of Microsoft Outlook (both the 32- and 64-bit versions)

> **Important:** NetSuite for Outlook requires that you have one of these versions of Microsoft Outlook installed locally. NetSuite for Outlook cannot be used with web-based email clients.

> **Important:** NetSuite for Outlook is compatible with Office 365 but requires that you have a supported Microsoft Outlook version installed in your local machine.

NetSuite for Outlook has the following network requirements:

- NetSuite for Outlook is supported by Outlook running in Exchange, Citrix, or Terminal Server environments.
- NetSuite for Outlook supports folder redirection. This can be useful in a Terminal Server environment that uses roaming profiles.

  To use a roaming profile, redirect your profile folder on the client terminal to its location on the server.

It can be used with the following operating systems:

- Windows XP

  Service Pack 2 is required for 64-bit, and Service Pack 3 is required for the 32-bit.
- Windows Vista
- Windows 7
- Windows 8
- Windows 10

  > **Note:** Some features may not yet be available in Windows 10. If you encounter issues, please contact your NetSuite administrator.

NetSuite for Outlook also requires a supported version of Internet Explorer. For a list of supported browsers, see the help topic Supported Browsers for NetSuite.

If you do not have Microsoft .NET Framework 4.0 and Microsoft Visual Studio Tools for Office (VSTO) 4.0 installed on your computer, they are installed automatically before NetSuite for Outlook is installed. If you work in a terminal server environment, .NET and VSTO need to be installed for all users, and NetSuite for Outlook must be installed for each user individually.

> **Note:** The NetSuite for Outlook administrator tools (used to create Outlook configurations) are not compatible with Internet Explorer versions 8 and up in compatibility mode.

To get started using NetSuite for Outlook, refer to the following:

- NetSuite for Outlook: Quick Start Guide for Users
- NetSuite for Outlook: Quick Start for Administrators

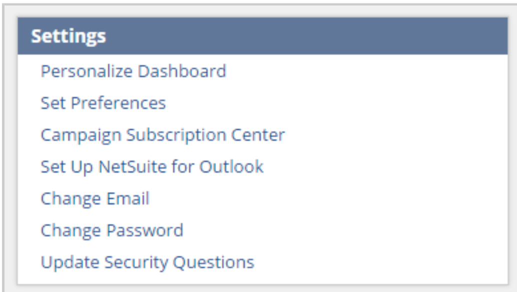
For more detailed information on NetSuite for Outlook, refer to the following:

- NetSuite for Outlook User Guide
- NetSuite for Outlook Administrator's Guide
- Troubleshooting NetSuite for Outlook

NetSuite for Outlook: Quick Start Guide for Users

Use the following procedures to install and set up NetSuite for Outlook.

1. Go to Home > Set Up NetSuite for Outlook in the Settings portlet.

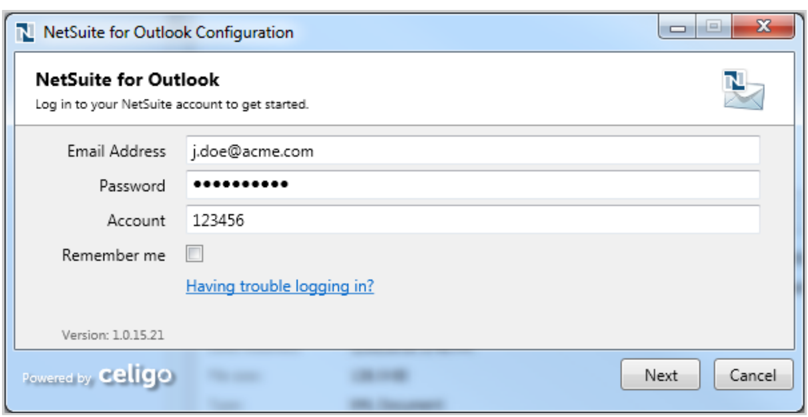


2. Click the link in step 3 to install NetSuite for Outlook. If you are using Internet Explorer or Safari, select **Run**. If you are using Firefox or Chrome, after the installer downloads, open and run the file.

> **Important:** You must have administrative rights to install the application on your computer. Contact your administrator if you do not have these rights.

3. Close Outlook, and then run the NetSuite for Outlook installation file, and follow the instructions in the installer. If prompted to do so, restart your computer, and the installation will continue.

   After you have installed the application, the configuration opens.

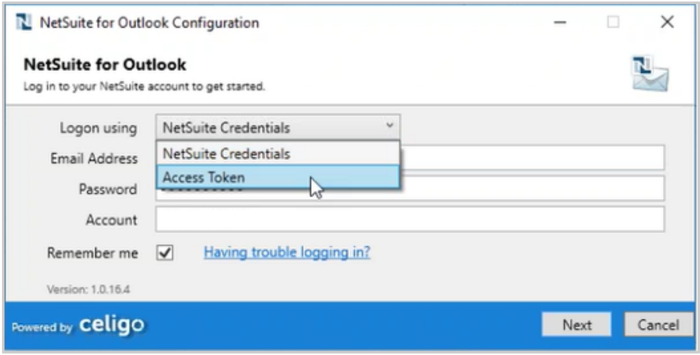


4. Enter your login information and the account ID for the NetSuite role you are syncing with. You can find the account ID in step 5 at Home > Set Up NetSuite for Outlook.

   If you are using the NetSuite for Outlook version that supports token-based authentication, an additional login option will be available to you. From the Logon using dropdown, select your preferred option to log in to NetSuite for Outlook:

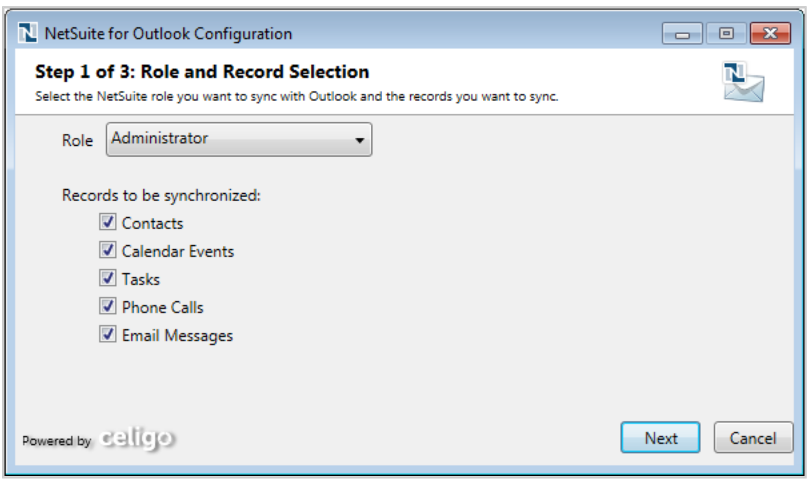
   - **NetSuite Credentials** — Enter your login information and the account ID for the NetSuite role you are syncing with. You can find the account ID at Home > Set Up NetSuite for Outlook.
   - **Access Token** — Log in using the User Token and User Secret provided by your administrator.

ORACLE NETSUITE



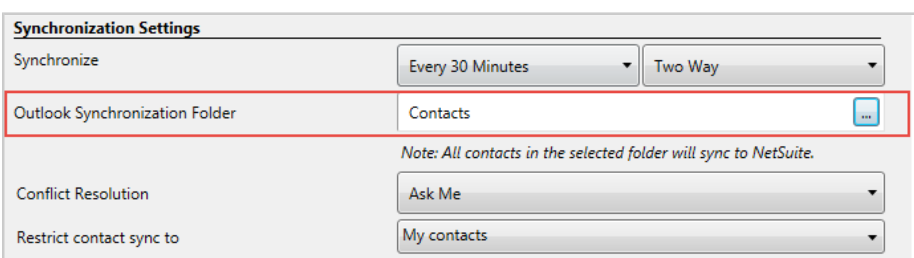
5. Select the role you are syncing with, and choose the types of records you want to sync.

> **Note:** When using access tokens to log in to the application, the **Role** selection will automatically be set to the role associated with the token. The **Role** dropdown is also disabled.



6. Set preferences for each record type you are syncing.

   You must choose the Outlook folder you want to sync with.



   You can also optionally set filters to limit which records are synced.

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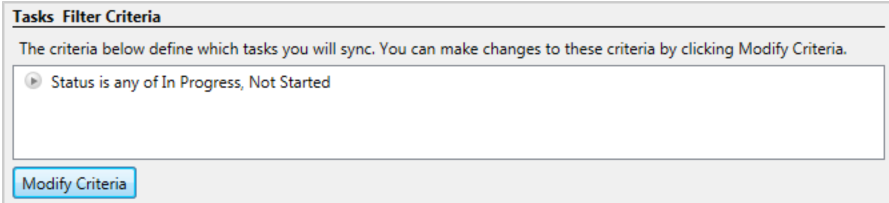
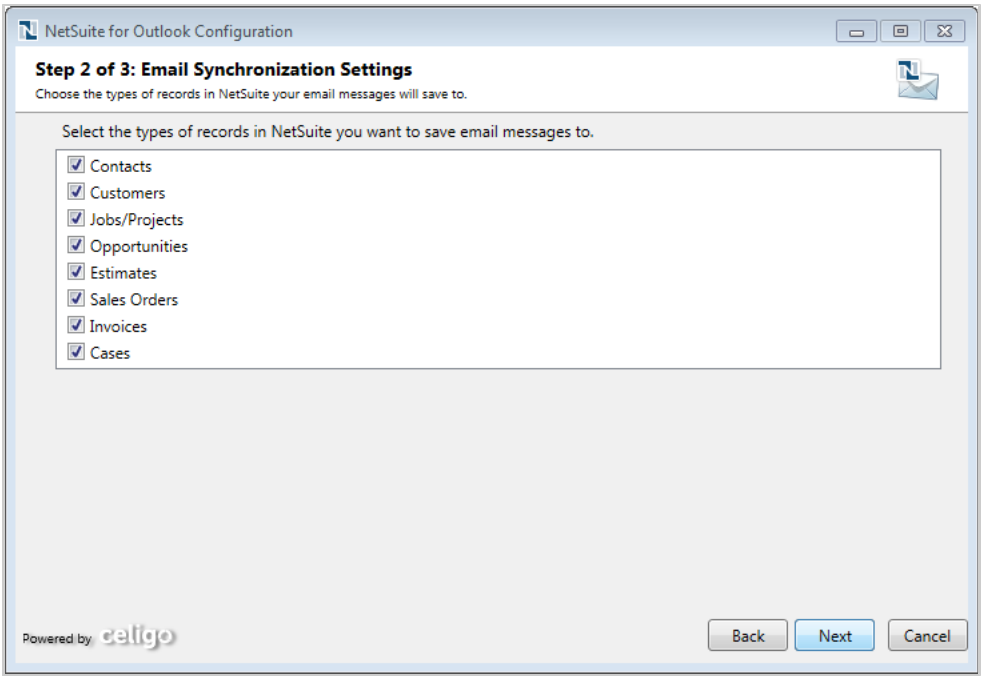
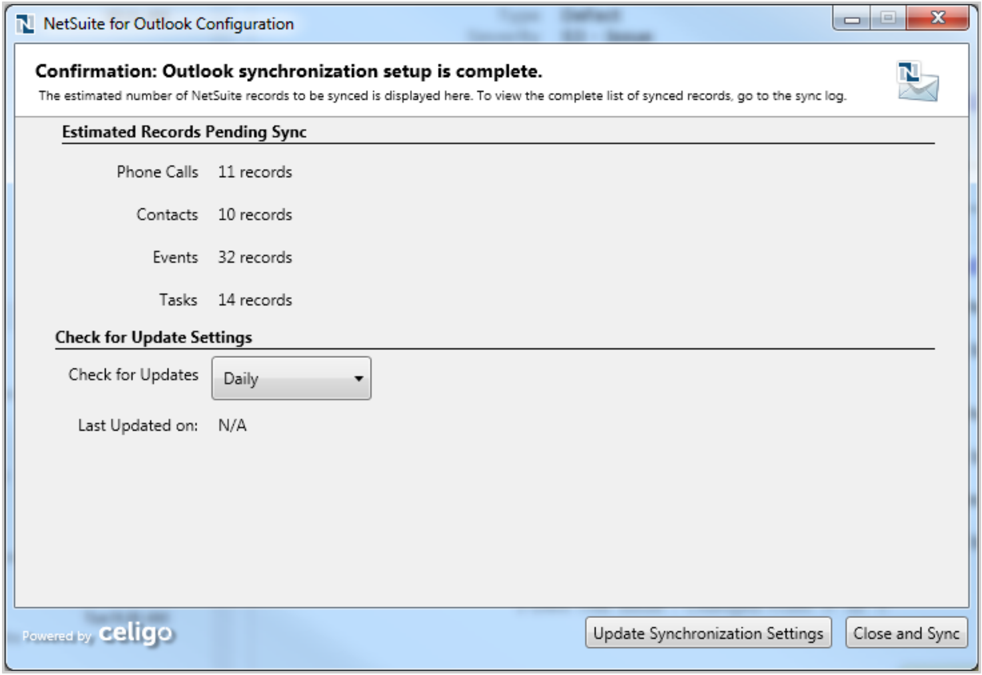


7. Choose the types of records you want to save email to.



8. Review the number of records from NetSuite that will sync to Outlook.



9. Save your configuration, and initiate the first sync.

NetSuite for Outlook User Guide

To begin using NetSuite for Outlook, complete the procedures below and familiarize yourself with how to work with the client.

This guide is intended for users of the NetSuite for Outlook client. For information on the administrator configuration and installation information, see NetSuite for Outlook Administrator's Guide.

To set up NetSuite for Outlook, first complete the following steps:

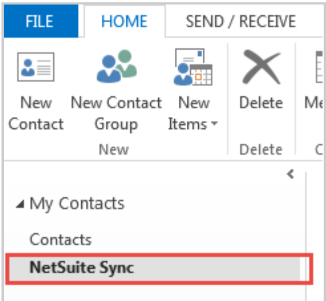
1. Uninstall all previous versions of NetSuite for Outlook.
2. Make sure you have administrator rights to install applications on your computer. For more information, see Installing the NetSuite for Outlook Client for Employees Without Administrator Rights.
3. Creating Sync Folders in Outlook for Contacts, Events, and Tasks
4. Downloading and Installing NetSuite for Outlook
5. Logging in to NetSuite for Outlook
6. Configuring NetSuite for Outlook

> **Note:** If you encounter an error saying your role does not have access to NetSuite for Outlook, contact your administrator to request for access.

Creating Sync Folders in Outlook for Contacts, Events, and Tasks

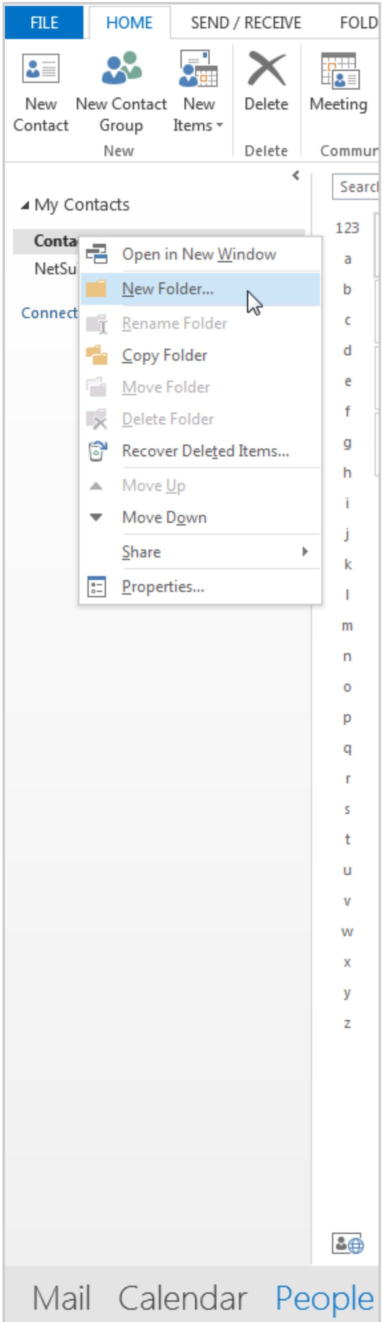
NetSuite for Outlook enables you to choose specific folders in Outlook that you want to synchronize with NetSuite.

For example, if you have personal contacts in Outlook, you can create a sync folder to keep all of your NetSuite contacts in one place.



After you create your sync folders, move the contacts, events, and tasks you want to sync into those folders.

You can create new sync folders before you set up the client or you can create them from within the configuration.



Note: Outlook only tracks event responses for events created in the top-level calendar folder. If you create another calendar folder for NetSuite events, Outlook will not track responses for events you sync.

Downloading and Installing NetSuite for Outlook

Before installing NetSuite for Outlook, do the following:

- Make sure you have administrative rights to install applications on your computer. This is required to install Microsoft .NET Framework 4.0 and Microsoft Visual Studio Tools for Office (VSTO) 4.0.

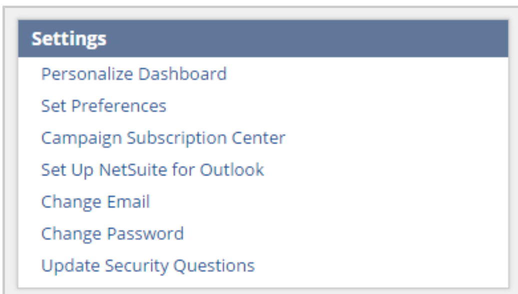
If you do not have these rights, contact your account administrator or your company's IT department to have them install it for you.

For more information, see Installing the NetSuite for Outlook Client for Employees Without Administrator Rights.

- Close Microsoft Outlook, and make sure all Outlook processes have ended by pressing Ctrl+Alt +Delete and opening the Task Manager.
- Uninstall older versions of NetSuite for Outlook (version 1.0 and 2.0) by going to Control Panel > Add or Remove Programs.

To install NetSuite for Outlook:

1. Close Outlook.
2. Go to Home > Set Up NetSuite for Outlook in the Settings portlet.



3. Follow the instructions on the page to download the installation file.

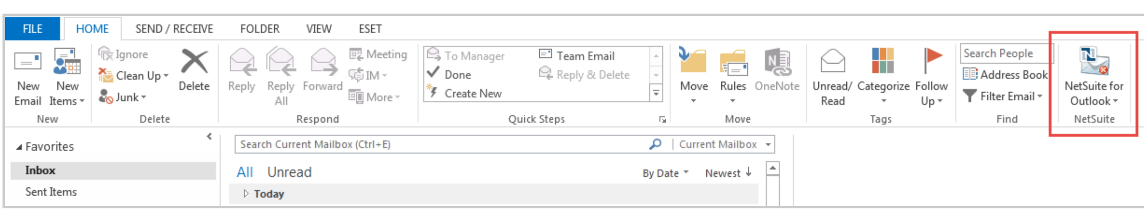
> **Important:** You must have administrative rights to install the application on your computer. Contact your administrator if you do not have these rights.

4. Open the NetSuite for Outlook installation file, and follow the instructions in the installer. If prompted to do so, restart your computer, and the installation will continue.

   After you have installed the application, the configuration opens.

The NetSuite for Outlook installer checks to see if Microsoft .NET Framework 4.0 and Microsoft Visual Studio Tools for Office (VSTO) 4.0 are installed on your computer and downloads the appropriate files. If prompted, restart your computer, and the installation will continue after restarting.

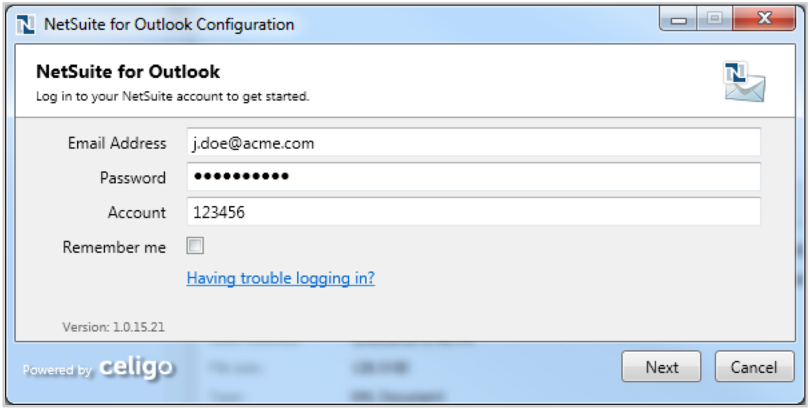
If the NetSuite for Outlook client installed successfully, you see a NetSuite for Outlook icon in your desktop system tray as well as a new button in your Outlook toolbar.



Logging in to NetSuite for Outlook

After installation, when the configuration window opens automatically, enter your NetSuite account ID and login information. If the configuration window does not open, open Outlook.

You can find your NetSuite account ID by logging in to NetSuite. On the Settings portlet of the home screen, click **Set Up NetSuite for Outlook**. Your account ID is shown in step 5.



Checking the **Remember Me** box stores your login information and uses it to sync with NetSuite. If you choose not to store your login credentials, you will need to log in each time you begin a new session.

> **Important:** NetSuite for Outlook does not support synchronization if your login email address is different from your Outlook email address.

Configuring NetSuite for Outlook

After you log in, you can set preferences for how you sync. This includes

- Choosing which record types you sync.
- Setting criteria that determine which records are synced.
- Choosing how conflicts between records are resolved.
- The frequency and direction of synchronization.

Locked Preferences

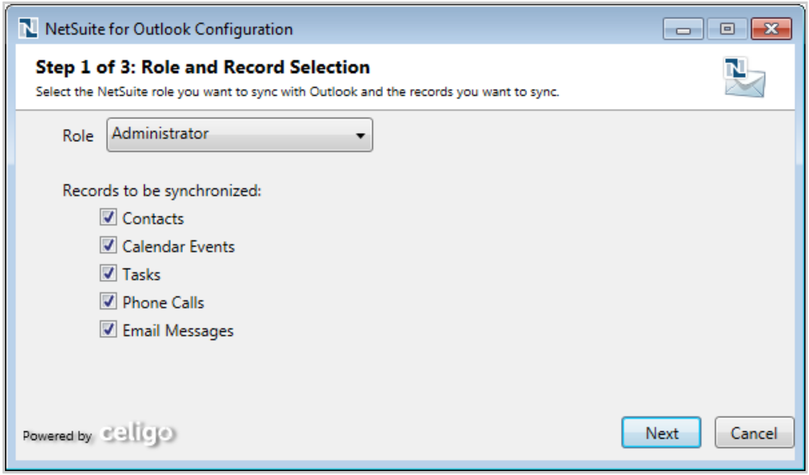
Some NetSuite for Outlook preferences may be preset by your account administrator, making it so that you cannot change them. You can still view these locked preferences in the client configuration, but they are grayed out.

Step 1 of 3: Role and Record Selection

In the first step of the configuration, you can select the role you want to sync with, choose the types of records you want to sync and whether you want to sync email from Outlook into NetSuite or not.

To choose your role and the record types you want to sync:

1. Choose the NetSuite role you want to synchronize with.



Any restrictions placed on this NetSuite role are also applied to synchronization. For example, if sales representatives only have access to customers assigned to them, representatives can only save messages from Outlook to those customers as well.

> **Note:** Roles that require two-factor authentication are currently not supported by NetSuite for Outlook. Select the N **SC Calendar Access w/ Outlook** role, which is a custom role with similar data access but does not require two-factor authentication, to proceed with login.

2. Check the box for each type of record you want to sync with Outlook.
3. Click **Next**.

Step 2 of 3: Contact, Event, Task, and Phone Call Synchronization Settings

In this step of the configuration, you choose how contacts, events, tasks, and phone calls are synced by NetSuite for Outlook.

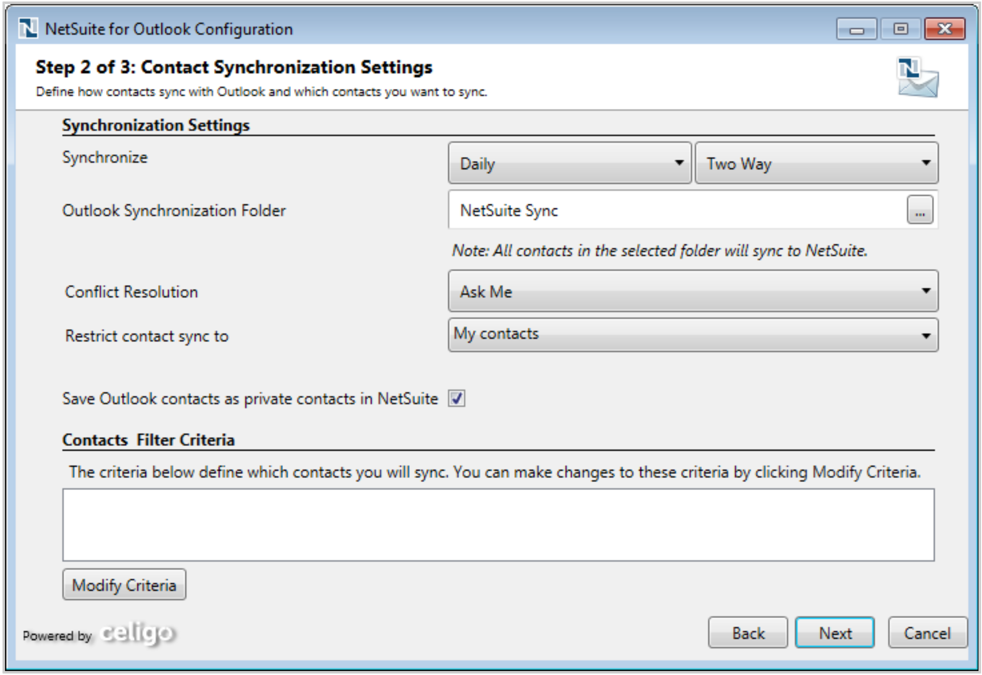
For each of these records, you can choose how often records are synced, which Outlook folder you want to sync with, and whether records are marked as private in NetSuite. You can also set criteria to determine which NetSuite records will sync with Outlook.

Use the following procedures for each of the record types you have chosen to sync.

To set record synchronization preferences:

1. Under Synchronization Settings, in the Synchronize fields, choose how often sync occurs and how each record type is synced between Outlook and NetSuite.

   You can choose to sync from Outlook to NetSuite, from NetSuite to Outlook, or in both directions.



2. If you created folders in Outlook for the records you want to sync with NetSuite, select the folder in the **Outlook Synchronization Folder** field.

   If you sync from Outlook to NetSuite, all records stored in this folder will sync with NetSuite. Phone calls are synced to the same folder as events.

   > **Important:** If you change the sync folder after you have performed a sync, right-click the NetSuite for Outlook icon in the system tray, and select View Sync Log. Then, click the **Reset this sync** link for the record type you changed the folder for.

   > **Note:** If you used older versions of NetSuite for Outlook, you may see multiple backup folders. Typically, the first folder listed is the most up to date.

3. In the **Conflict Resolution** field, choose how NetSuite for Outlook resolves situations where information on a record in NetSuite differs from the information in Outlook. You can choose the following:
   - **Ask Me** – You are prompted by the client when there is a conflict and must choose which data you want to use.
   - **Use NetSuite** – NetSuite for Outlook uses the data from NetSuite.
   - **Use Outlook** – NetSuite for Outlook uses the data from Outlook.
4. For contacts, in the **Restrict contact sync to** field, choose which contacts you want to sync. You can choose any of the following:
   - **My contacts** – If you are syncing with a sales rep role, you only sync contacts associated with your customers. If you are not a sales rep, this selection syncs only contact records you created.
   - **My and my team's contacts** – If you are syncing with a sales rep role, you only sync contacts associated with your customers and associated with your subordinates' customers. If you are not a sales rep, this selection syncs only contact records created by you or your subordinates.
   - **Do not restrict** – All contacts are synced.

> **Note:** This restriction is applied along with any other additional contact criteria you define below.

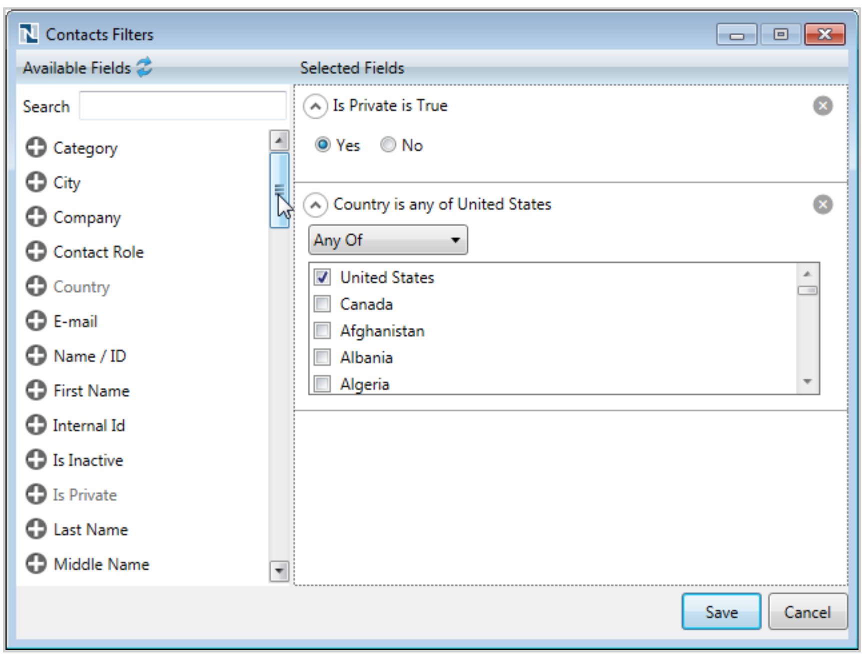
5. For contacts and tasks, check the box under the **Conflict Resolution** field if you want contact or task records to be marked as private when synced to NetSuite.

> **Note:** Only you can view your records that are marked as private in NetSuite.

6. For events, check the **Sync Event Reminders** box if you want to sync reminder settings.
7. Click **Modify Criteria** to define which records you want to sync between NetSuite and Outlook. This enables you to control which records that are synced into your NetSuite account.

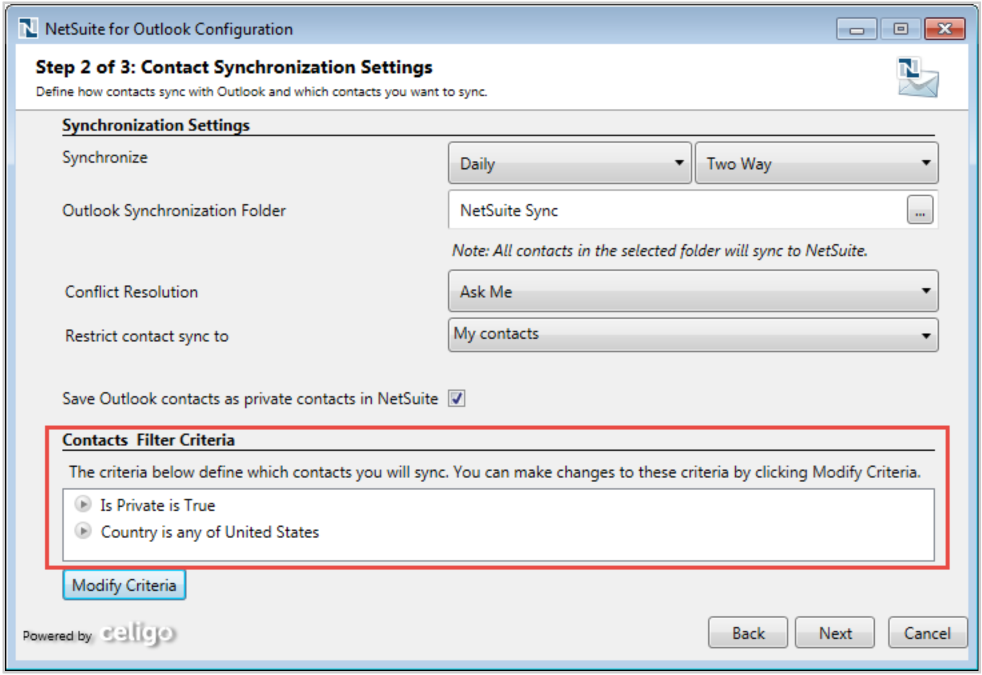
> **Note:** By default, events are filtered to only synchronize those events that take place today or in the future. Recurring events scheduled in the past and that have future occurrences are synced with this filter.

8. To set a filter:
    1. In the filters dialog that opens, select a field, and set the criterion for those records in NetSuite that you want to sync to Outlook.



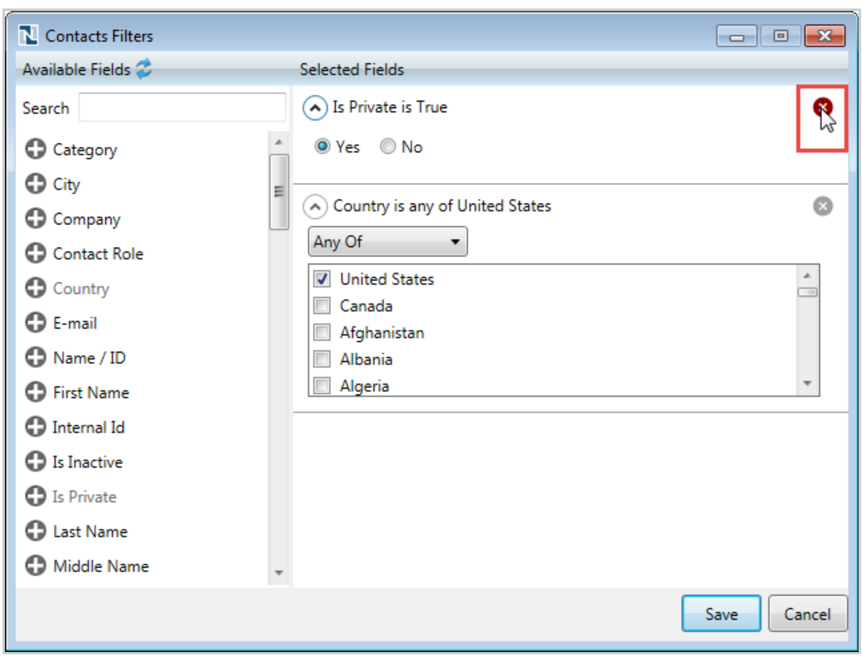
    2. Repeat this for each criterion you want to use to define which records you sync.
    3. When you finish defining criteria, click **Save**.

    The criteria are now listed under Contacts Filter Criteria.



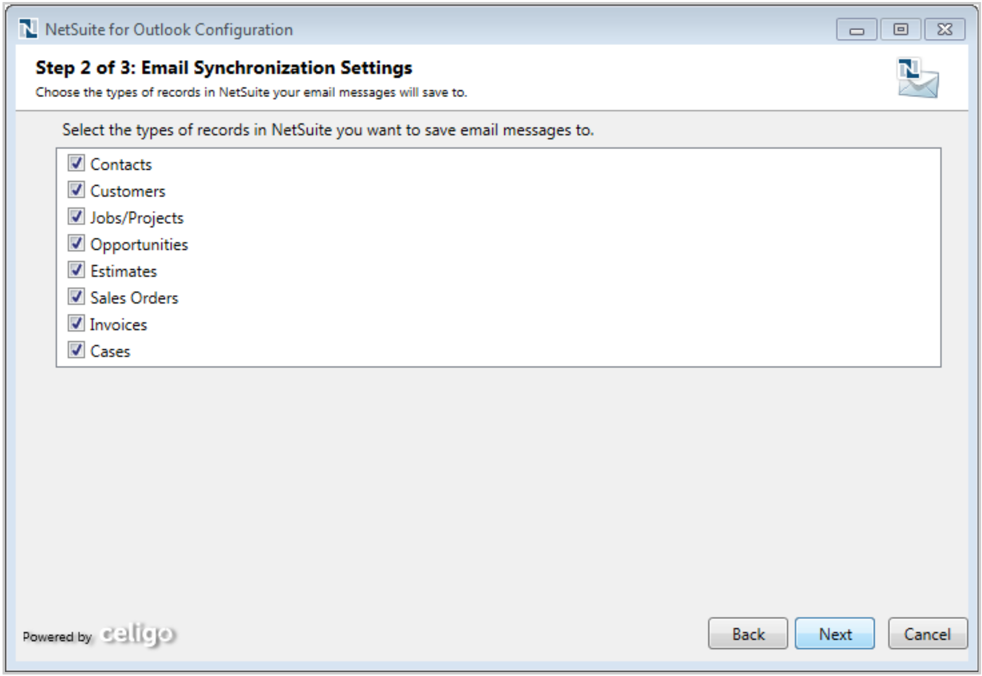
9. Click **Next**.

   To remove criteria later, click **Modify Criteria**, and then click the X next to the criterion you want to remove. Then, click **Save**.

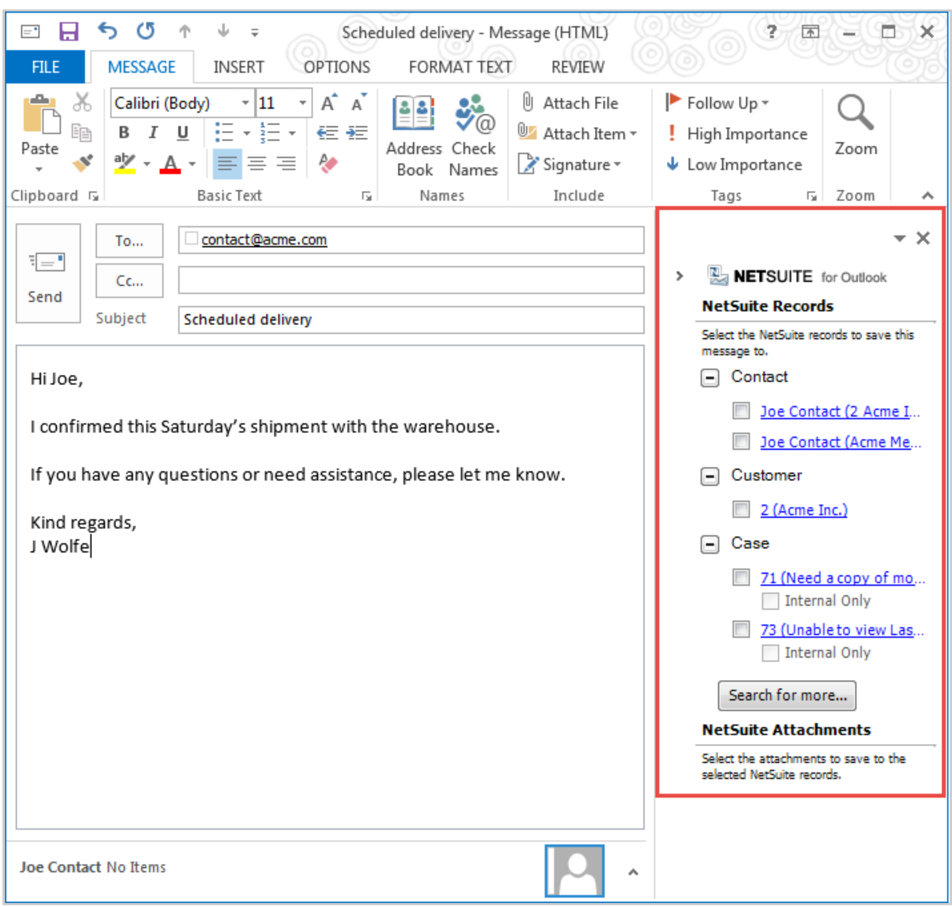


Step 2 of 3: Email Synchronization Settings

After you have configured contacts, events, tasks, and phone calls, you can choose which records in NetSuite you can save Outlook email to.



Your selections here determine the types of records that are presented to you in the message pane when you are writing or viewing email.



You can choose to save email to contacts, customers, jobs and projects, opportunities, estimates, sales orders, invoices, and support cases.

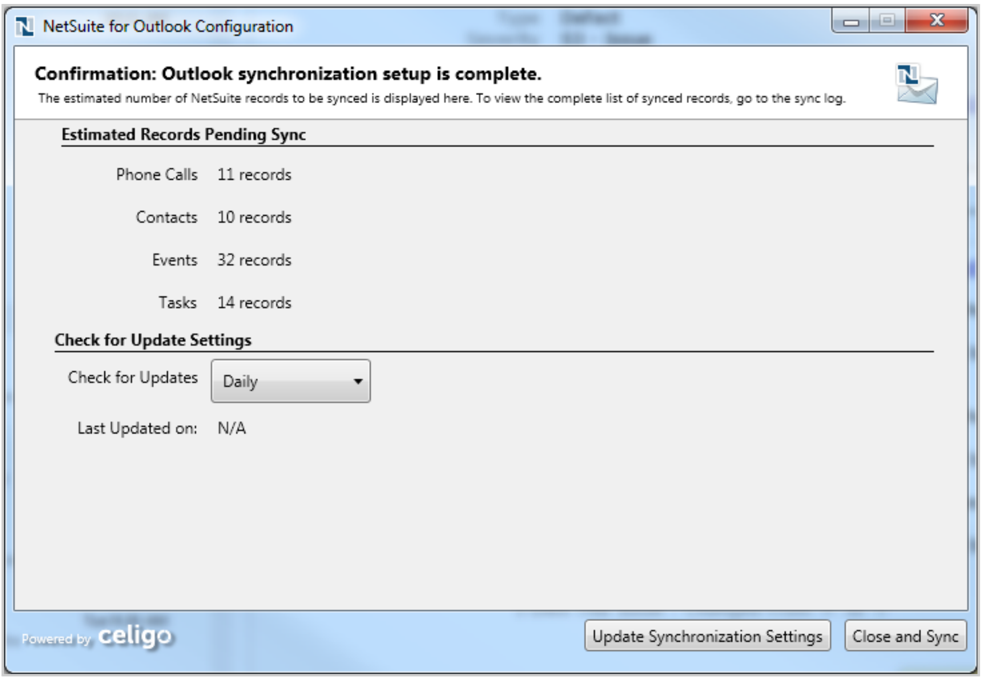
Note: You can only save email from Outlook to NetSuite. You cannot sync email sent from your NetSuite account.

For more information on saving email, see Saving Email with NetSuite for Outlook.

Step 3 of 3: Saving Your Client Configuration

After you have configured NetSuite for Outlook, you are presented with an estimate of the number of each type of record that will be synced when you save your configuration.

NetSuite for Outlook can sync a maximum of 3000 records at a time. If the number of records to be synced exceeds this, the **Close and Sync** button will be disabled. If this occurs, click **Update Synchronization Settings** and modify the filter criteria, such as the Start Date, to reduce the number of records to be synced. If the settings are locked, inform your NetSuite administrator.



Popup notification lets you know that sync has begun and also when it is completed.

You can also select how frequently NetSuite for Outlook will check for and notify you about updates:

- **Manual** – Check for updates manually by right-clicking the NetSuite for Outlook icon in your system tray and clicking **Check for Updates**. This option also displays when NetSuite for Outlook was last updated.
- **Daily** – This enables NetSuite for Outlook to automatically check for updates daily and display a notification in the system tray if an update is found.

- **Monthly** – This enables NetSuite for Outlook to automatically check for updates monthly and display a notification in the system tray if an update is found.

For more information about updating NetSuite for Outlook, see Updates to NetSuite for Outlook.

If you need to make changes to your settings, click **Update Synchronization Settings** to go through the configuration again.

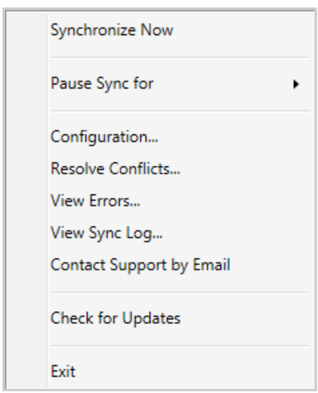
You can then choose to sync your records immediately, or you can close the configuration and sync later. This initial synchronization can take a few minutes to complete.

Resetting Your Sync

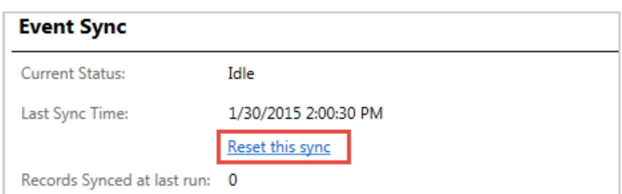
If you make changes to your sync configuration, you should reset your sync so that NetSuite for Outlook checks all records for possible updates.

To reset your sync:

1. Right-click the NetSuite for Outlook icon in your system tray.
2. Click **View Sync Log...**



3. In the Sync Log popup, click the **Reset this sync** link for each record you want to reset the sync for.



4. Click **Close**.

Duplicate Records and NetSuite for Outlook

When you sync with NetSuite for Outlook, the client checks your contacts, events, and phone calls for duplicates, both in NetSuite and in Outlook.

Contacts in Outlook with identical email addresses are considered duplicates. Events and phone calls that share date, time, and title are considered duplicates. Tasks with the same due date, start date, and title are considered duplicates.

If multiple contacts in NetSuite have the same email address as a contact in Outlook, you must open the contact record in Outlook and select the matching record in NetSuite.

If attendees to events match the email addresses of multiple records in NetSuite, you must open the event in Outlook and choose which records in NetSuite you want to associate with the event.

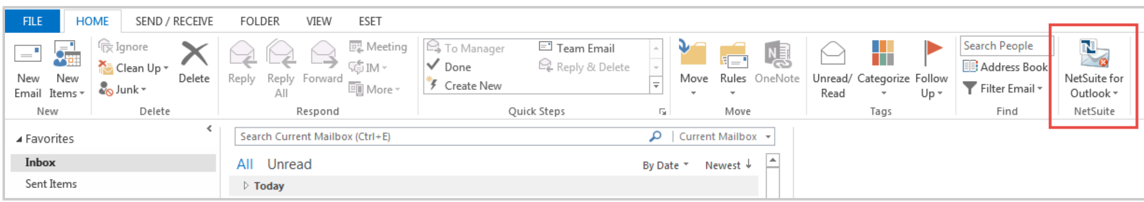
When you have resolved the duplicates, the records you chose are synchronized the next time a NetSuite for Outlook sync occurs.

Working with NetSuite for Outlook

NetSuite for Outlook enables you save messages from Outlook to records in your NetSuite account and to synchronize contacts, events, tasks, and phone calls between NetSuite and Outlook.

> **Note:** You can only use NetSuite for Outlook when you are connected to the Internet.

When you install NetSuite for Outlook, a NetSuite button is added to Outlook.

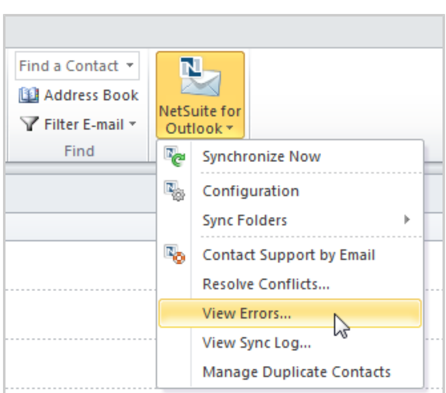


Click this button to do any of the following:

- **Synchronize Now** – NetSuite for Outlook syncs according to the frequency you set in the configuration, but you can choose to sync anytime by choosing this option.

  > **Note:** There can be a short delay between the sync process being completed and Outlook processing the changes.

- **Pause Sync for** – This option enables you to pause synchronization and select a time period to resume it.
- **Configuration** – This option lets you change your synchronization preferences. For more information, see Configuring NetSuite for Outlook.
- **Contact Support by Email** – Send email to NetSuite customer support to report issues with NetSuite for Outlook.
- **Resolve Conflicts** – If there is differing information between the Outlook and NetSuite versions of the same record, you can choose which information you want to use.
- **View Errors** – If NetSuite for Outlook encounters problems with records, you can view those errors and resolve the problems.



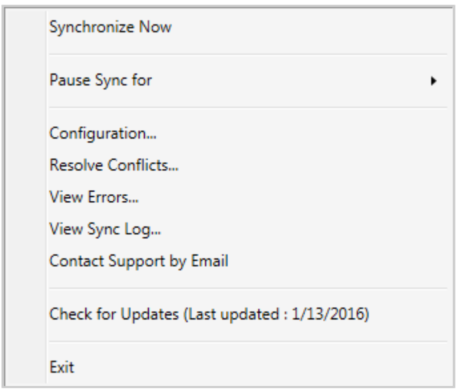
- **Manage Duplicate Contacts** – If there are duplicate contacts in your sync folder in Outlook, you can choose which of these contacts you want to sync with NetSuite.

  The contacts you select are synced going forward; the remaining duplicates remain in the sync folder but are not synced.

- **View Sync Log** – This enables you to see the status, last sync time, and number of records of each type that synced the last time the sync ran.

  If you make changes to your configuration, view the sync log and click **Reset this sync** for the record type you changed settings for.

Some of these options are also available by right-clicking the NetSuite for Outlook icon in the system tray.

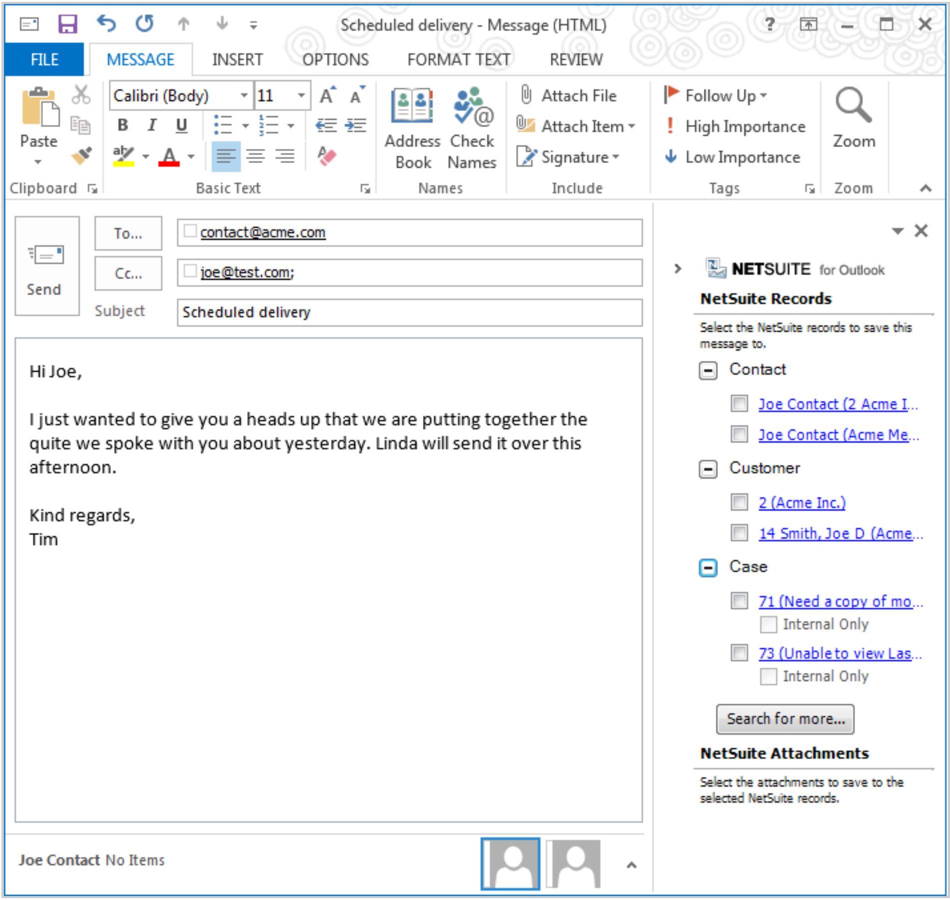


In addition, when an update is available for NetSuite for Outlook, you can choose to install the update by right-clicking the icon in the system tray.

Saving Email with NetSuite for Outlook

When you are viewing or writing an email message in Outlook, NetSuite for Outlook searches your NetSuite account for records with the email addresses you have entered in the **To** and **CC** fields. A list of possible matches is shown in the NetSuite for Outlook message pane.

Note: The NetSuite for Outlook message pane can only show up to five possible matching records of each type. To access more records, click Search for More...



These records are grouped by type (for example, customers, projects, jobs, opportunities, and support cases), and you can expand or collapse these groupings. If the list of matching records is long, click the **View All** link to see the entire list. The types of records presented are determined by your client configuration settings. For more information, see Step 2 of 3: Email Synchronization Settings.

If the email address of a lead, prospect, or customer is included on an email message, any open opportunities or estimates and any support cases for that entity are included as possible matches in the message pane. If you send email to a contact, you can save that message to the contact record, to the company the contact is associated with, and any other record associated with that contact or customer.

For entity records, the name of each matching record is shown. For sales transactions and support cases, the transaction or case number is shown. The names of contact records attached to companies are appended by the company name in parentheses. You can click the name of any of these records to open them in NetSuite.

If a record you want to save the message to is not shown in the message pane, click **Search for more** to enter search criteria to locate the record.

NetSuite for Outlook can only search for the first 15 email addresses listed in the message you are sending. To search for additional records, click **Search for more...** If an email message matches too many records, an error is shown, and you can click **Search for more...** to find the records you want to save the message to.

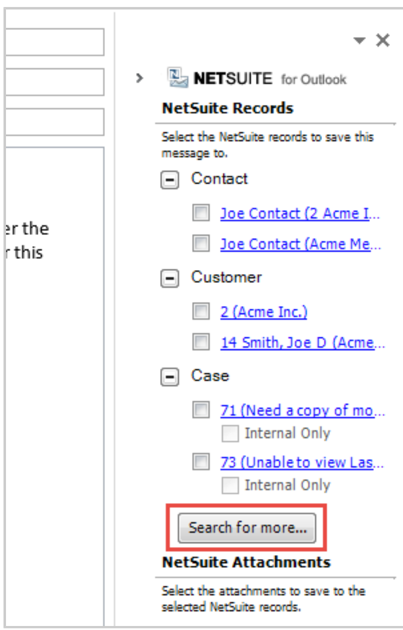
To save a message to a NetSuite record:

1. If the message pane is closed, click it to open it.
2. Under NetSuite Records, check the boxes next to the records and transactions you want to save the message to.

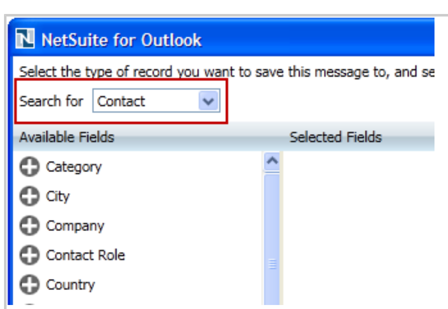
   Only the first five matching records for each type of records are show in the message pane. To view the entire list, click the **View All** link.

   When you choose a record to save email to, that record will be selected by default each time it is returned as a matching record until you deselect it on a message. This ensures that complete email threads are tracked on records.

   If you have previously saved this message to NetSuite, the records you selected before are shown as marked and grayed out.
3. If you do not see the records or transactions you want to save the message to, click **Search for more...** and do the following:



   1. Select the type of record you want to search for.



   2. Click the icon next to the field you want to search.
   3. Enter criteria for the field you selected.

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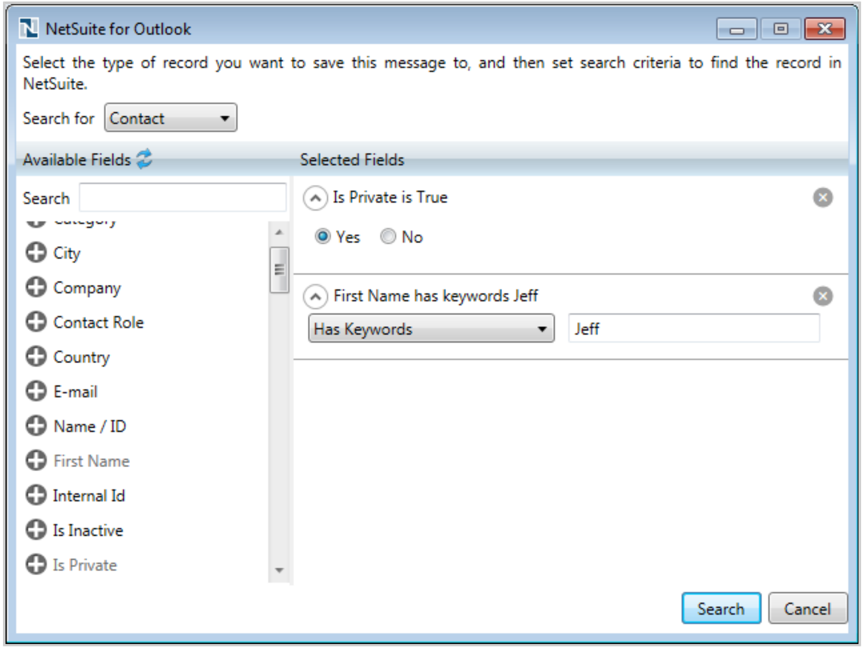
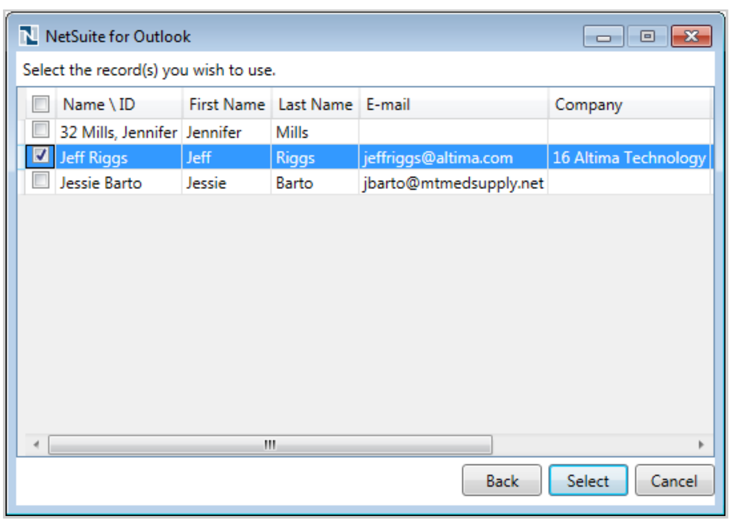


4. Repeat these steps to set additional criteria for finding the record you want to save the message to.
5. Click **Search**.
6. When the search results are returned, select the records you want to save the message to.



7. Click **Select**.

4. Under Attachments, select the attachments you want to save to the records you selected.

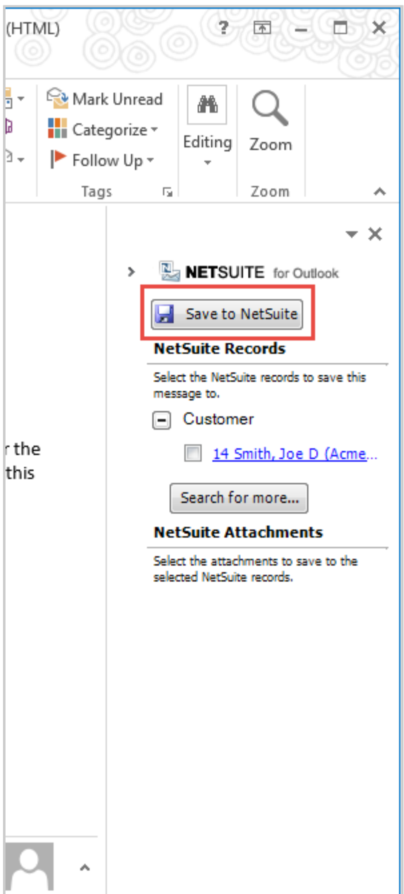
   These attachments are saved to the **Files** subtab of the records and transactions you selected. They are saved in the NetSuite file cabinet in a folder selected by your administrator. You can only save attachments that are supported file types. For a list of these, see the help topic File Types Recognized in the File Cabinet.

> **Note:** You cannot save a message and attachments larger than 10 MB total in a single save. Additionally, each attachment cannot be larger than 5 MB in size individually.

If your message has multiple files with a total size of more than 10 MB, you can save some of the attachments now and then open the message again to save the others.

For more information regarding email attachments, see the help topic Working with Files Attached to Email Messages.

5. To save the message:
   - If you are viewing a message that has already been sent, click **Save to NetSuite**.



   - If you are writing a new email message, clicking **Send** saves it to the records you selected.

Saving messages to NetSuite happens instantly—you won't need to do a separate sync. The NetSuite logo will be displayed to confirm the save has been successful.

> **Note:** If a message has multiple recipients in Outlook, when you view that message on an entity record in NetSuite, the email address for that entity record shows in the Recipient column on the messages list. All other recipients are shown in the CC column.

> **Note:** NetSuite for Outlook does not search for email sent to you as part of this default search. If you want to save email to your contact record, you must click **Search for more...** and search for your contact record.

> **Note:** If a message has multiple recipients in Outlook and is saved to an employee record, NetSuite saves several copies of the message, depending on the number of recipients. For example, if you save an email with five recipients including the employee, NetSuite will save the message five times on the employee record.

Saving Messages to Transactions

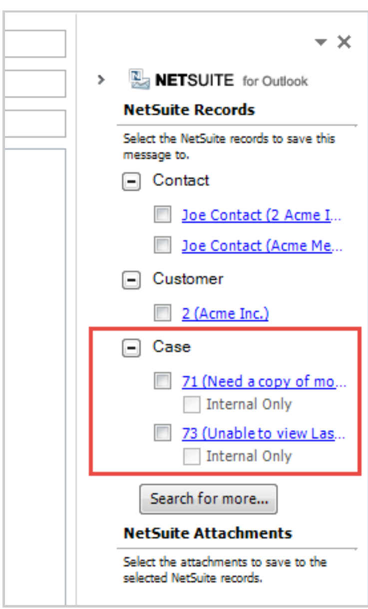
You can only save email messages to open estimates and opportunities in NetSuite.

If you save a message to a transaction, a copy is also saved to the lead, prospect, or customer record on that transaction. If you save the same message to two different transactions, the lead, prospect, or customer record will show that message listed twice.

Saving Messages to Cases

You can save email messages to open support cases in your NetSuite account.

When you enter the email address for a customer's contacts in a message, all open cases for that customer are shown as matching records in the message pane.



Check the box next to the case record you want to save the message to. If you do not want this message to be visible to customers when they view the case, check the **Internal Only** box. That ensures that only your company's support reps can view this message.

> **Note:** If you check the **Internal Only** box, only the sender and the message itself is saved. NetSuite does not save the recipients, subject, and any attachments on the case record. To save all information on the email message, you must add it manually to the record.

Email messages are saved on the **Communication** subtab under the **Message** subtab.

Synchronizing Contacts with NetSuite for Outlook

NetSuite for Outlook keeps your contacts in NetSuite and in Outlook synchronized with the most up-to-date information. Contacts are synced to the contact sync folder you chose in the NetSuite for Outlook configuration.

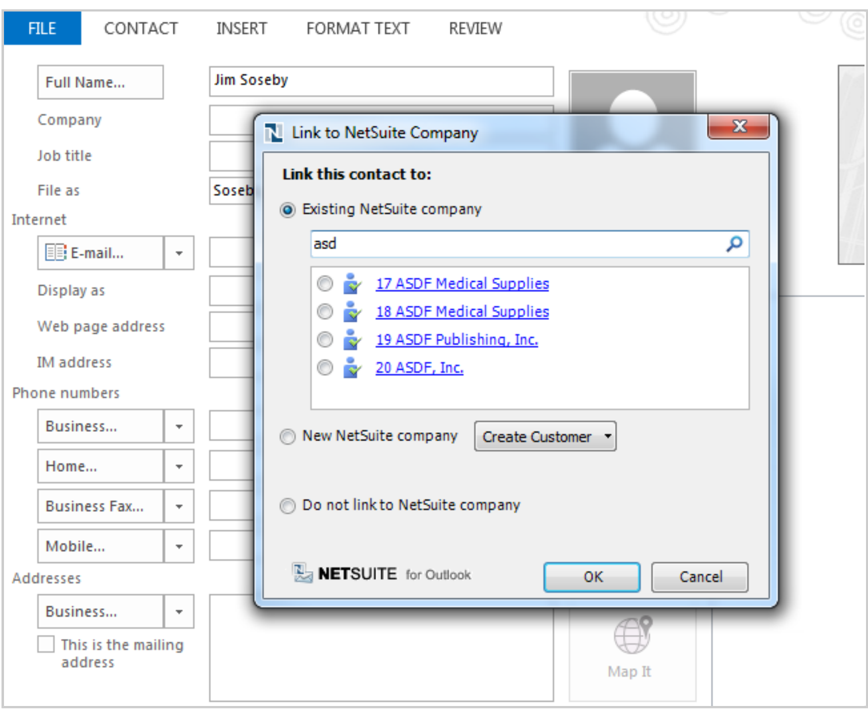
Required Contact Fields

Your account administrator might require that certain fields in Outlook be filled in before a contact can be synced into NetSuite. For a list of these required fields, contact your account administrator.

Linking Outlook Contacts to NetSuite Companies

When you enter a name or make changes to the company name on a contact record in Outlook, NetSuite for Outlook searches your NetSuite account for matching company records.

You have the option to attach the contact to an existing record, to create a new NetSuite company record (lead, prospect, customer, or partner), or to not associate the contact with a company record.



If you are creating a new company record, click the dropdown arrow to choose the type of record. The choices in this dropdown are restricted to the records you have access to in your NetSuite role.

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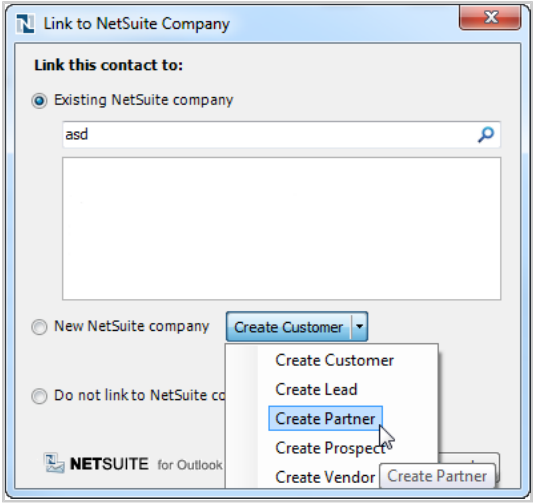
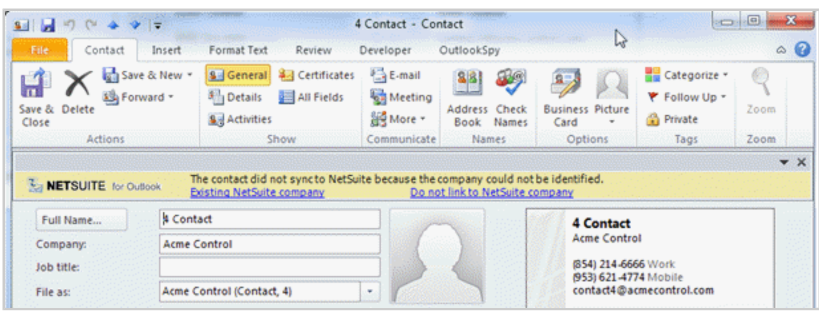


This opens a new record form that you can fill out and save in your NetSuite account. (The record form that opens is your company's preferred form in NetSuite.)

If you choose to not link the contact to a company, it will be synchronized as a standalone contact record in NetSuite. You can always associate a contact with a company at a later time by editing the contact record in Outlook and selecting the company.

If you have an existing contact in Outlook whose company does not match the company name in NetSuite exactly, when you view that contact record, you see a notice that no match can be determined.



If you click **Find Company**, you can choose to either search for a company in NetSuite or create a new company record in NetSuite. If you click **Not a NetSuite company**, it is as if you selected **Do not link to NetSuite company**, and the contact will be a standalone contact record in NetSuite.

Deleting Contacts

If you delete a synced contact in Outlook, the next time you sync, the contact is deleted in NetSuite only if the contact is private and if you are the creator of the contact record. If the contact record in NetSuite has child records, it is inactivated instead of deleted.

If a synced contact is inactivated or deleted in NetSuite, it is deleted in Outlook during the next sync.

Contact Field Mapping

When a contact record is synced between NetSuite and Outlook, the data maps according to the following table:

Outlook Field	NetSuite Field
Full Name	Name
Company	Company
Job Title	Job Title
Email	Email
Email 2	Alt. Email
Business Phone	Main Phone
Home Phone	Home Phone
Business Fax	Fax
Mobile	Mobile Phone
Business Address	Default Billing Address
Other Address	Default Shipping Address
Private (button)	Private
Notes	Comments
Subsidiary	Subsidiary

Synchronizing Events with NetSuite for Outlook

NetSuite for Outlook enables you to keep track of your meetings and appointments in one place and have them synchronize between both applications.

In your initial sync, NetSuite for Outlook synchronizes the events in both applications (depending on your configuration).

By default, events are filtered to sync only those that occur on and after the date you install NetSuite for Outlook. This includes recurring events scheduled in the past that have future occurrences.

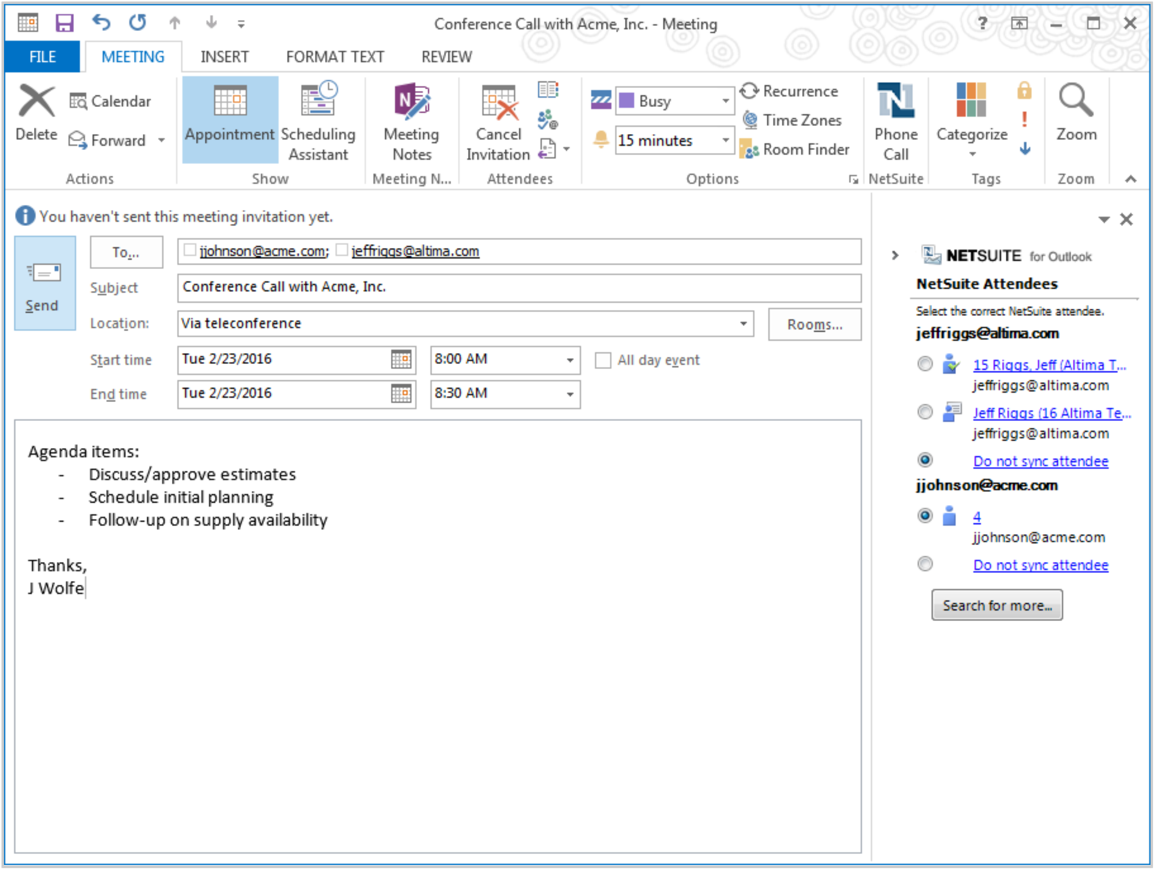
Events are synced to the calendar folder you selected in the NetSuite for Outlook configuration.

Note: Existing events created in your Outlook sync folder with more than 100 attendees cannot be synced to NetSuite. If you change your sync folder, any events with more than 100 attendees cannot be synced to NetSuite. After you have synced for the first time, you can create events with more than 100 attendees and sync those events between NetSuite and Outlook.

When you sync events created in NetSuite with any highlighted text in the message body, the text will appear as normal text in Outlook.

Scheduling Appointments and Meetings in Outlook

If you synchronize appointments and meetings from Outlook to NetSuite, when you create an event in Outlook and select attendees, you can choose which NetSuite records you want to attach the event to.



NetSuite for Outlook searches for records in NetSuite with email addresses that match the attendees you select on the event. You can choose which of the matching records you want to associate the event with or click **Search for more...** to find other NetSuite records to attach the event to. You can hover over the icon next to a name to see the type of record. If you select a record, that entity is included as an attendee on the event in NetSuite, and that event shows on the Activities subtab on the entity's record.

Note: If you are inviting a colleague who uses the same NetSuite account you do, be sure to select that person's employee record if you want the event to appear on their NetSuite calendar.

If you choose not to sync the attendee, that entity does not appear on the event record in NetSuite, and the event does not show on the **Activities** subtab of the entity record.

For events created in Outlook, you can only view the availability of attendees who are also syncing with NetSuite for Outlook.

Events that are scheduled by people who do not have contact records in your NetSuite account show Outlook External Organizer in the Organizer field.

Multi-Day Events and Recurrence

If you sync a multi-day meeting that lasts all day from Outlook, that event is created in NetSuite as a one day all-day recurring event. If you sync a multi-day meeting that does not last all day, that event is created In NetSuite as a series of single events that span the work day hours you have defined in your NetSuite calendar preferences for each day of the event's duration.

For example, an all-day meeting scheduled in Outlook lasts from July 1 to July 5. It will be created as one all-day event, recurring on July 1 to 5.

For a multi-day meeting scheduled in Outlook that does not last all day on July 1 to July 5, five events are created when it is synced in NetSuite - one event for each day from July 1 through July 5 lasting from your calendar's daily start time to its end time.

If the synchronization setting is configured as two-way, Outlook will also create five separate events to match what is in NetSuite.

Note: If you edit any single occurrence within a recurring series, that instance will be removed from the recurrence and recreated as a single independent event in Outlook and in NetSuite.

Some recurrence patterns that are available in Outlook are not supported by NetSuite. Events that use these recurrence patterns will not sync. This includes events that occur:

- monthly on day 29 or later
- on the last date of a month
- monthly on a weekday or weekend day
- yearly on a day, weekday, or weekend day

Important: Recurring events will only sync from Outlook when the time zone of the event is the same as your time zone in NetSuite.

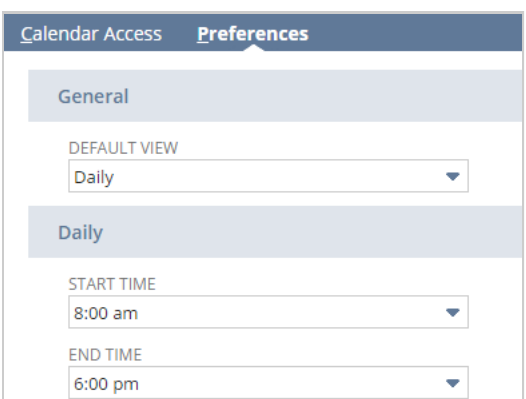
Event Responses

When someone accepts an event you created in NetSuite, that person's status is updated in Outlook to reflect that they accepted. If an invitee's response changes (from accepted to declined, for example), it is updated in Outlook when it syncs.

Outlook only tracks responses for appointments in your main Outlook calendar. If you have a separate Outlook calendar folder that you use for your NetSuite events, the responses for those events will not be tracked in Outlook.

All-Day and Untimed Events

In Outlook, an all-day event lasts from 12 AM one day until 12 AM the next. In NetSuite, an all-day event lasts from your daily start time until your daily end time. All-day events synced into NetSuite from Outlook are created as timed events that begin at your NetSuite calendar's daily start time and ending at your daily end time. All-day events created in NetSuite are created as all-day events in Outlook.



Untimed events in NetSuite are synced to Outlook as all-day events.

Syncing Outlook with Smartphones

Many smartphones and similar devices can only sync with the top-level Calendar folder in Outlook. If you want your NetSuite events to sync to those devices, you must set NetSuite to sync to the top-level Calendar folder.

Event Field Mapping

When an event is synced between NetSuite and Outlook, the data maps according to the following table:

Outlook Field	NetSuite Field
Subject	Title
Location	Location
Start Time (Date)	Date
Start Time (Time)	Start Time
End Time (Time)	End Time
All Day Event	All Day
Reminder *	Reminder *
Show Time as Busy	Event Access: Show as Busy
Show Time as Free	Event Access: Private
Show Time as Tentative	Status: Tentative Event Access: Public (unless events are synced as private)
Message **	Message **

***** If you set your NetSuite for Outlook configuration to sync reminder settings, the default reminder type is used in both applications, and the reminder timing is synced.

****** The message length limit in NetSuite is 4000 characters. Messages longer than this are truncated in NetSuite which may affect formatting.

Synchronizing Tasks with NetSuite for Outlook

NetSuite for Outlook can synchronize task records between both applications. Tasks sync to the task folder you selected in the NetSuite for Outlook configuration.

You can only sync tasks that are assigned to you; tasks you create for others are not synced. The Owner field in Outlook is only synced to NetSuite if you use the same login email address in both applications.

Additionally, if you sync a task that is later reassigned in NetSuite to another person, that task is deleted from Outlook with the next sync. If you reassign a task in Outlook to another person, the new assignee will not sync to NetSuite.

When a task is synced between NetSuite and Outlook, the data maps according to the following table:

Outlook Field	NetSuite Field
Subject	Title
Due Date*	Due Date
Start Date*	Start Date
Status	Status
Priority	Priority
Owner**	Assigned To**
Reminder	Reminder
Message	Notes

* Tasks in Outlook must have start and due dates to sync to NetSuite.

** For the **Owner** field in Outlook to sync to the **Assigned To** field in NetSuite, the login address used to log in to NetSuite for Outlook must match the login you use in NetSuite.

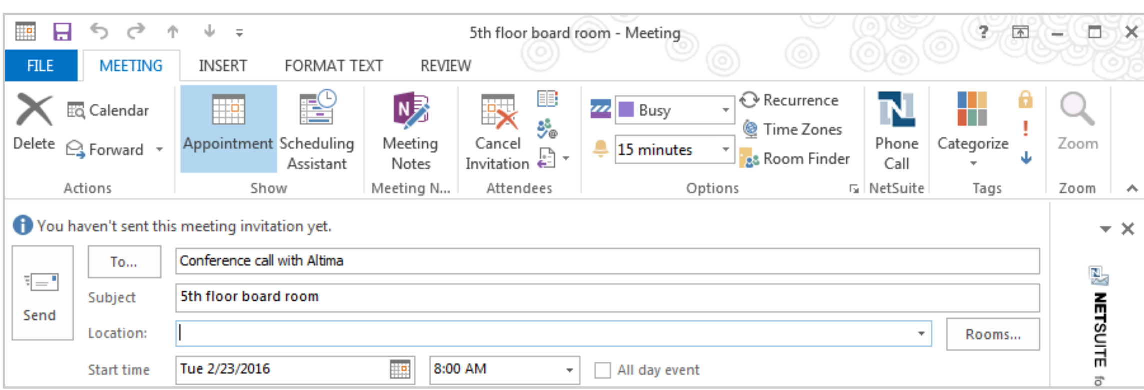
The following fields in NetSuite are not synced to Outlook:

- Reserve Time
- From
- To
- Date Completed
- Send Email
- Insert Below

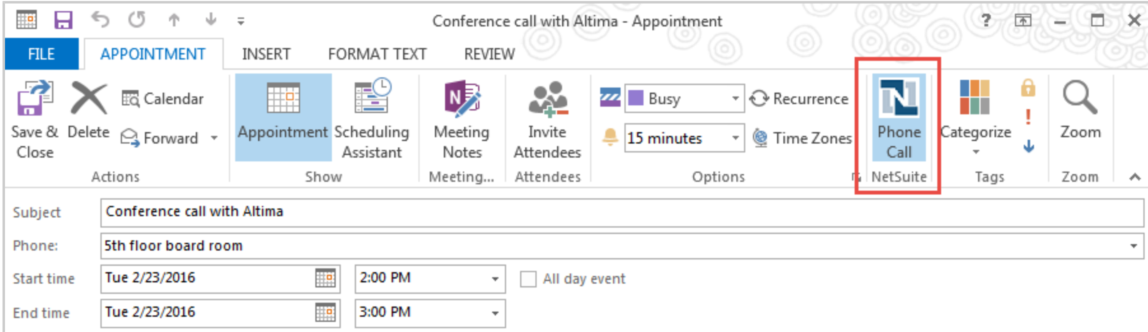
The **% Complete** field in Outlook is not synced.

Synchronizing Phone Calls with NetSuite for Outlook

NetSuite phone calls are synced into Outlook as appointments. To distinguish them from calendar events, there is a Phone Call button on the appointment record that you can select to indicate an appointment is a phone call.



When you click the Phone Call button, it is highlighted, and the **Location** field is changed to **Phone**, enabling you to enter the phone number you are calling. The **Phone** field in Outlook maps to the **Phone Number** field on the NetSuite record.



In most respects, phone calls are synced as events are, with the following exceptions:

- **Important:** The **Notes** field on phone call records in NetSuite syncs to the Message field in Outlook and could be viewed by others if you later make a change to the record in Outlook. If you enter sensitive information in this field, it could be seen by others.

  To prevent this from occurring, make changes to the Notes field in NetSuite rather than to the Message field in Outlook. This prevents your changes from triggering a notification to others.

  Alternatively, instead of using the **Notes** field in NetSuite, create a note under the **Communication** subtab under User Notes. These notes do not sync to Outlook.
- Phone calls in NetSuite without reserved time are synced to Outlook as all-day events. Calls with reserved time in NetSuite sync as events scheduled for the time indicated on the phone call.
- Recurring phone calls are not supported by NetSuite. If you set up recurrence for a phone call in Outlook, that record will not sync.
- After a record has synced to NetSuite as a phone call, you cannot deselect the Phone Call button in Outlook.

Related Topics

Resolving Conflicts in NetSuite for Outlook

If you synchronize records back and forth between NetSuite and Outlook, there are situations where a record might be updated in both applications between syncs, creating a conflict. These conflicts occur whenever a record is changed in both NetSuite and in Outlook. When this happens, the next time you sync, you are presented with a list of conflicts to resolve.

You can choose to resolve conflicts automatically, or you can view each conflict to decide which change you want to accept. For each conflict, click the NetSuite or Outlook links to view the record.

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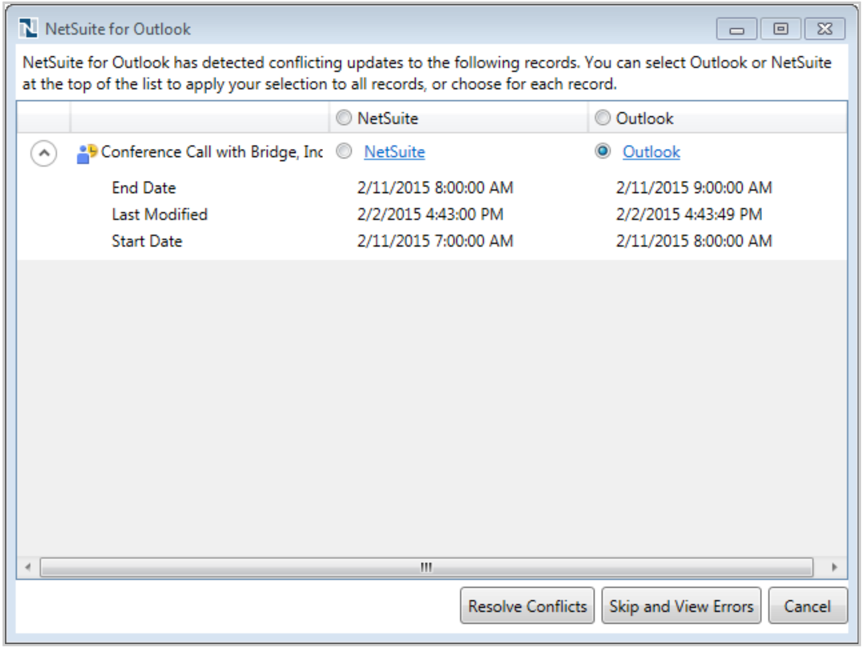


If such a conflict occurs, the sync continues for other records, and an alert notifies you that a conflict requires your attention.

Resolving Sync Errors with NetSuite for Outlook

When NetSuite for Outlook syncs, it presents a list of records that were not able to be synced and the reasons they could not sync. Links are also provided that let you open the record in Outlook and in NetSuite.

To view the errors that occurred during a sync, you can click the popup that opens over the system tray after a sync, or you can click the NetSuite for Outlook button in Outlook, then click **View Errors**.

Updates to NetSuite for Outlook

Periodically, updates are made to NetSuite for Outlook. When an update is available, a notification appears in the system tray, and a **Download Update...** option appears in the NetSuite for Outlook menu in Outlook and when you right-click the system tray icon.

You can disable automatic update notifications in the NetSuite for Outlook Configuration wizard. For more information, see Configuring NetSuite for Outlook.

Click any of these links to download the new update. After it has downloaded, close Outlook, and open the downloaded file. Follow the installation prompts, and when it has installed, you can open Outlook and continue working.

Reporting Problems with NetSuite for Outlook

If you encounter a problem with NetSuite for Outlook, you can enter a support ticket with NetSuite by clicking the NetSuite for Outlook button in Outlook and clicking Contact Support by Email. The email includes log files and information about your computer that can be used to diagnose your problem.

NetSuite for Outlook: Quick Start for Administrators

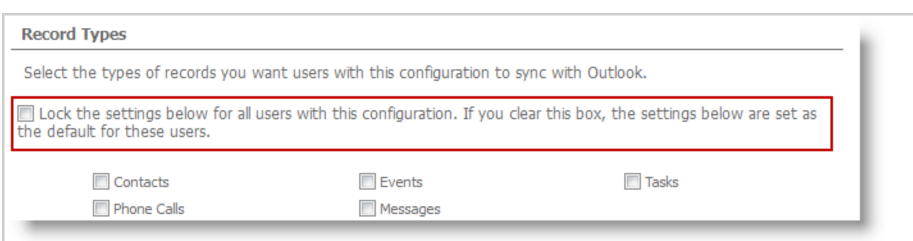
Complete the following procedures to set up your NetSuite account so that users can sync using NetSuite for Outlook.

1. First, ensure that the following features are enabled in your NetSuite account by going to Setup > Company > Setup Tasks > Enable Features and clicking the **SuiteCloud** subtab:
   - Custom Records
   - Client SuiteScript
   - Server SuiteScript
   - SuiteTalk (Web Services)
2. Go to Setup > Customization > SuiteBundler > Install Bundle, and install the NetSuite for Outlook SuiteApp.
   - Location - Production Account
   - Account ID - 3563537
   - Keywords - NetSuite for Outlook Integration
3. Go to Setup > Company > Setup Tasks > Enable Features, click the **SuiteCloud** subtab, then click the Outlook Integration link, and install the SuiteApp.
4. Go to Setup > Users/Roles > Manage Roles, and grant the following permissions to each NetSuite role that is being used to sync with Outlook:
   - Under Permissions > Lists: Perform Search - View level
   - Under Permissions > Setup: Outlook Integration 3.0 - Full level
   - Under Permissions > Setup: Web Services - Full level (**only required if you want to users to be able to enter criteria for the records they sync**)
5. Go to Setup > Company > NetSuite Account Information> Outlook Sync Configurations to create configurations for the NetSuite roles that are being used to sync with Outlook.

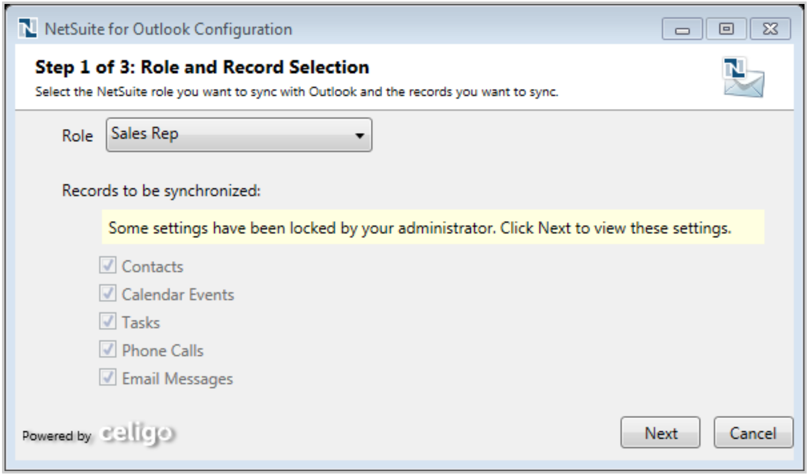
   > **Note:** You may need to log out of NetSuite and log back in again to see the link to Outlook Sync Configurations.

   You cannot create sync configurations in NetSuite for Outlook if you are using Internet Explorer versions 8 and up in compatibility mode.

   Sync configurations are used by administrators to either set default behavior for users of NetSuite for Outlook or to lock down and control how users sync. Check the **Lock the settings** box for any settings in a sync configuration.

   Any setting that is not locked is only used to determine the default, and users can change it for their own setup.

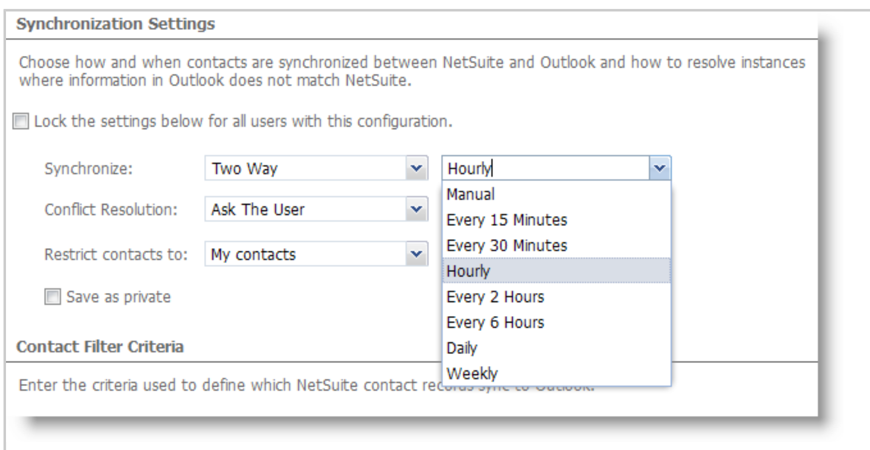


a. Click **New** to create a new configuration, or click **Copy** if you want to create a new configuration similar to one you have already created.

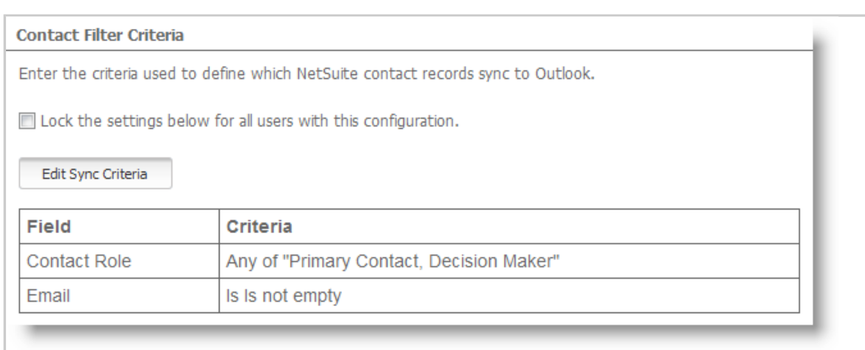
b. Enter a name for the configuration and select the roles it is applied to.

c. Select the types of records users can sync.

d. For each record type, choose the direction and frequency of synchronization, how conflicts are resolved, and other settings.



e. Set criteria to limit the records that can be synced.



f. For contacts, choose which fields in Outlook must have data before a contact can be synced to NetSuite.
g. For email messages, select the types of records users can save messages to, and choose the file cabinet folders used to store attachments in Outlook email saved to your NetSuite account.
h. Click **Finish**.

6. For any users who do not have administrator rights to their computers, you must either install NetSuite for Outlook for them or give them temporary administrator rights for the purpose of installing the application.

Now, your users can download and begin using NetSuite for Outlook.

NetSuite for Outlook Administrator's Guide

NetSuite for Outlook enables administrators to configure the application for their company's processes. Installation tasks for administrators includes the following steps:

1. Preparing for Installation
2. Installing the NetSuite for Outlook SuiteApp
3. Granting the Required Permissions for NetSuite for Outlook
4. Installing the NetSuite for Outlook Client for Employees Without Administrator Rights
5. Creating Outlook Sync Configurations

Preparing for Installation

Prior to installing the NetSuite for Outlook SuiteApp, you must ensure that the following features are enabled in your NetSuite account:

- Custom Records
- Client SuiteScript
- Server SuiteScript
- SuiteTalk (Web Services)

Important: If your company uses Single Sign-On (SSO), you cannot use NetSuite for Outlook with a Single Sign-On-only role. If you are not sure if your role is compatible, please contact your account administrator.

NetSuite also strongly recommends that you remove or merge duplicate records in your NetSuite account.

When users open email messages, events, tasks, or contacts in NetSuite, they are presented with lists of matching records in NetSuite. Having duplicate records can make it difficult for users to choose the NetSuite record they want to sync with.

Installing the NetSuite for Outlook SuiteApp

Before users can use NetSuite for Outlook, the NetSuite for Outlook SuiteApp must be installed in your NetSuite account.

The NetSuite for Outlook SuiteApp is a managed SuiteApp. This means that when updates to the SuiteApp are available, they are automatically applied to the SuiteApp. No action is required for these updates.

To install the NetSuite for Outlook SuiteApp:

1. Go to Setup > Company > Enable Features.
2. Click the **SuiteCloud** subtab.
3. Under Integration Add-ons, click the Outlook Integration link.

   The NetSuite for Outlook SuiteApp page opens.
4. Install the SuiteApp.

Installing the SuiteApp adds the ability to create Outlook Sync Configurations. After installing the SuiteApp, you may need to log out of NetSuite and log back in again to see the link to Outlook Sync Configurations.

> **Note:** The link to this page can be seen by anyone with the Outlook Integration 3.0 permission, but only administrators can access the page.

Required Permissions for NetSuite for Outlook

The following permissions are required for each role used to sync with NetSuite for Outlook:

- Outlook Integration 3.0 (Full level)

  This permission is added when the NetSuite for Outlook SuiteApp is installed in your account. By default, only your NetSuite account administrator has this permission.
- Perform Search (View level)
- Web Services (Full level)

  > **Note:** The Web Services permission is **only required if you want to users to be able to enter criteria for the records they sync**.
- Calendar, Events, Phone Calls

  These permissions are required to sync events. Note that the Phone Calls permission is required even if you do not sync phone calls but sync events.
- Tasks

Any other roles, you want to be able to use NetSuite for Outlook, must also be granted Full access to the Outlook Integration 3.0 permission.

Additionally, the Perform Search (View level) permission is required to use the application.

To apply the required permission to a role:

1. Customize the role you want to use NetSuite for Outlook.
2. Under the Permissions subtab, click the Lists subtab.
3. Verify that the role has the **Perform Search** permission set to **View** or **Full** level.
4. Click the Setup subtab.
5. In the Permission column, select **Outlook Integration 3.0**.
6. In the Level column, select **Full**.
7. If you use NetSuite OneWorld, in the Permission column, select **Web Services**, and in the Level column, select **Full**.
8. Click Add.
9. Click Save.

10. Repeat these steps for each role you want to use NetSuite for Outlook.

Installing the NetSuite for Outlook Client for Employees Without Administrator Rights

After you have installed the NetSuite for Outlook SuiteApp, users can install the application on their computers.

If the users do not have administrator rights to their computers, they must be granted temporary administrator rights, or a system administrator must install the application on their computers directly.

Setting Up Token-based Authentication for NetSuite for Outlook

To set up token-based authentication for NetSuite for Outlook, follow these steps, and read the following help topics:

- Step 1: Enable the Token-based Authentication feature in your account. See the help topic Enabling the Token-based Authentication Feature.
- Step 2: Set up roles to use token-based authentication. See the help topic Setting Up Token-based Authentication Roles.
- Step 3: Set the necessary permissions for the role. See the help topic Token-based Authentication Permissions.
  - Make sure that the Access Token Management permission is added only to the administrator role.
  - You must also add the Web Services permission to both the end user and the administrator roles.
- Step 4: Assign token-based authentication roles to users. See the help topic Assigning Users to Token-based Authentication Roles.
- Step 5: Create access tokens for users. See the help topic Access Token Management – Create and Assign a TBA Token.

  When your role already has the necesary permissions, you can also change or create additional tokens for users. For more information, see the help topic Viewing, Editing, Creating, and Revoking TBA Tokens.

  > **Important:** Make sure to note down the Token ID and Token Secret generated from this step. The values are displayed only on the confirmation page. When you leave the page, the values can no longer be retrieved. You can save the token values in a text file and secure it in the user's computer for reference.

  > **Important:** When using token-based authentication with NetSuite for Outlook, new contacts cannot be created through NetSuite for Outlook message pane. You can, however, create a contact in NetSuite and then use the application to sync the new contact to Outlook.

Outlook Sync Configurations

With NetSuite for Outlook, administrators can create Outlook sync configurations to control how users sync.

Configurations are created for NetSuite roles. The configuration each role is assigned determines how the application is set up by default.

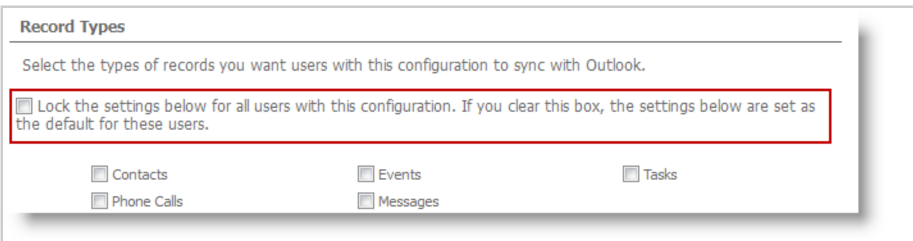
Any preferences you set in a sync configuration are set by default when users install the application, making setup faster for users.

> **Note:** You may need to log out of NetSuite and log back in again to see the Outlook Sync Configurations link.

> **Note:** You cannot create sync configurations in NetSuite for Outlook if you are using Internet Explorer versions 8 and up in compatibility mode.

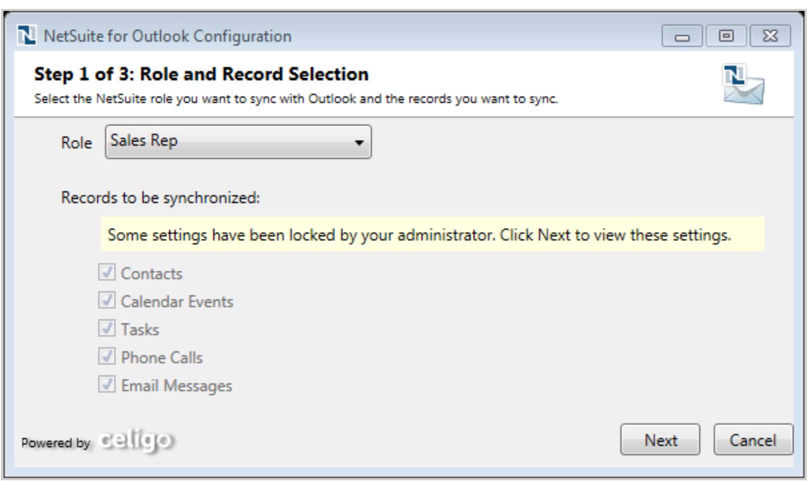
Locked Settings

Besides setting defaults, you can also choose to lock preferences, preventing users from changing them. To lock a group of settings, check the box in that section of the sync configuration setup.



For example, if administrators do not want sales reps to sync contacts out of NetSuite, they can set the configuration to only let contacts be synced from Outlook to NetSuite and then lock the preference.

Users can still view locked settings by their Outlook sync configuration, but they cannot change them.



Making Changes to Sync Configurations

To make changes to a sync configuration, go to Setup > Company > NetSuite Account Information > Outlook Sync Configurations, and click the name of the configuration you want to change.

If administrators make changes to a sync configuration after users have installed and configured the application, those changes are only applied to:

- the end user configuration for preferences that the administrator has locked
- required contact fields and the email attachment folder settings (preferences that only the administrator can set)

Creating an Outlook Sync Configuration

You can create an Outlook sync configuration at Setup > Company > NetSuite Account Information > Outlook Sync Configuration.

> **Note:** This link shows for anyone with the Outlook Integration 3.0 permission, but only administrators can access the page.

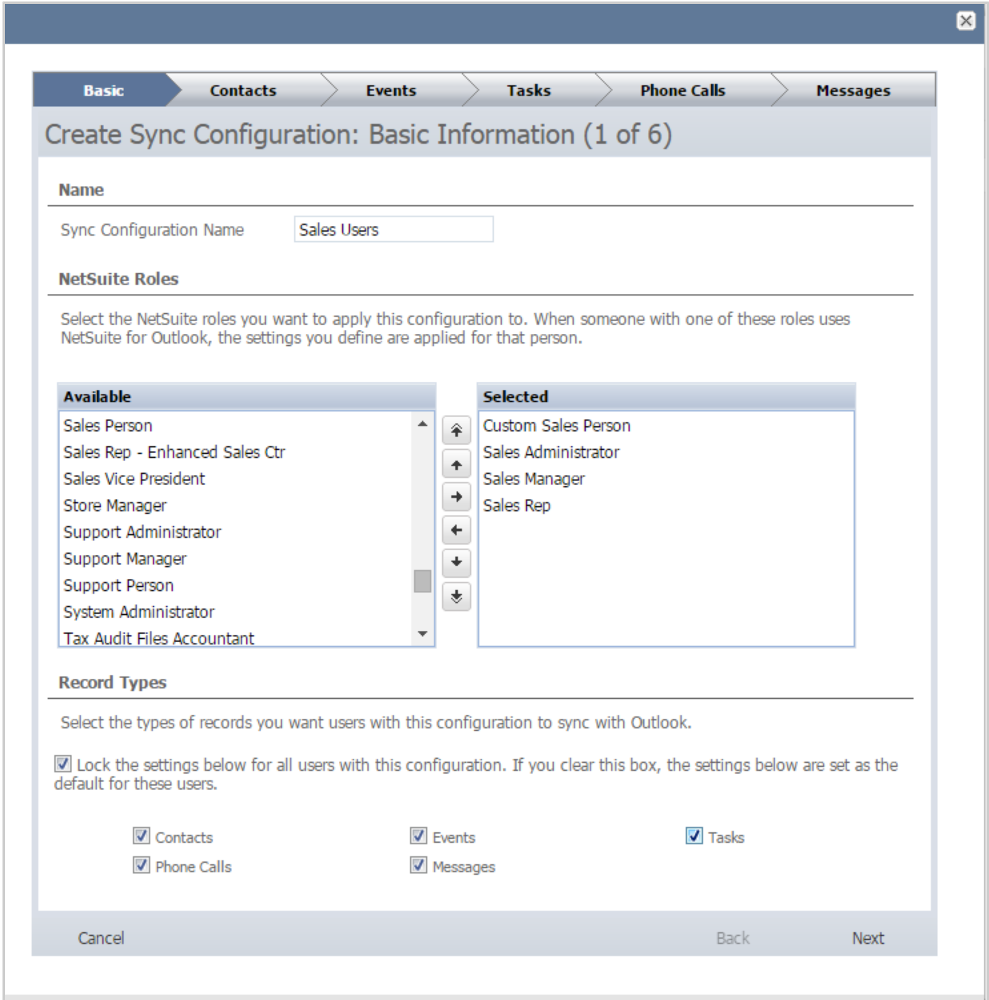
To create an Outlook sync configuration:

1. Go to Setup > Company > NetSuite Account Information > Outlook Sync Configuration.
2. Do one of the following:
   - Click **New** to create an entirely new sync configuration.
   - Click **Copy** next to an existing sync configuration

   A new sync configuration record opens.
3. Complete the following tasks:
   1. Basic Information (1 of 6)
   2. Contact Sync Settings (2 of 6)
   3. Event, Task, and Phone Call Sync Settings (3, 4, and 5 of 6)
   4. Message Sync Settings (6 of 6)
4. After you complete the configuration, click Finish.

Basic Information (1 of 6)

In this step, name the configuration, select the NetSuite roles it is applied to, and choose the type of records users with these roles will sync.



To define basic information:

1. Enter a name for this configuration.
2. Select each role you want to define this configuration for by clicking the name of the role in the **Available** box and clicking the right arrow.

   > **Note:** If you are using Internet Explorer 8 or 9, double-clicking a role moves it to the **Selected** list and highlights all of your other roles in the **Available** list. If you do not click away from the list before clicking the right arrow, all roles will be selected for this sync configuration.

3. Check the **Lock the settings** box under Record Types if you do not want individual users to be able to choose which records to sync.

   If you do not check this box, the selections you make are used as the default for users who install the application, but the user will be able to add or remove records to sync.
4. Select the types of records you want users to sync.
5. Check the **Messages** box if you want to save email messages from Outlook to NetSuite.
6. Click **Next**.

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Contact Sync Settings (2 of 6)

In this step, you choose how and when contacts are synchronized between NetSuite and Outlook, how conflicting updates to records are resolved, and also enter criteria to define which NetSuite contacts are synced.

Then, you can also choose the fields that must be included in a contact record in NetSuite for it to be synced to NetSuite.

To set contact synchronization preferences:

1. Check the **Lock the settings** box under Synchronization Settings if you do not want individual users to be able to be able to configure contact sync settings.

   If you do not check this box, the selections you make are used as the default for users who install the application, but users will be able to adjust their sync settings.
2. In the **Synchronize** fields, choose which direction sync occurs and how often records are synced between Outlook and NetSuite.

   Users can choose to sync from Outlook to NetSuite, from NetSuite to Outlook, or in both directions.
3. In the **Conflict Resolution** field, choose how NetSuite for Outlook resolves situations where information on records in NetSuite differs from the information in Outlook. You can choose the following:
   - **Ask the User** – Users are prompted by the client when there is a conflict and must choose which data is used.
   - **NetSuite Always Wins** – NetSuite for Outlook syncs the data from NetSuite.
   - **Outlook Always Wins** – NetSuite for Outlook syncs the data from Outlook.
4. For contacts, in the **Restrict contacts to** field, choose which contacts you want users to sync. You can choose any of the following:
   - **My contacts** – If users are syncing with a sales rep role, only contacts associated with that user's customers and contacts created by the user are synced. If you are not a sales rep, this selection syncs only contact records you created.
   - **My and my team's contacts** – If you are syncing with a sales rep role, you only sync contacts associated with your customers and associated with your subordinates' customers. If you are not a sales rep, this selection syncs only contact records created by you or your subordinates.
   - **Do not restrict** – All contacts are synced.

   > **Note:** This restriction is applied along with any other additional contact criteria you define below.
5. Check the **Save as Private** box if you want records created in Outlook and then synced into NetSuite to be marked as private. Private contacts cannot be viewed by other NetSuite users.
6. Click **Edit Sync Criteria** to define which records you want to sync between NetSuite and Outlook. This enables you to control which records are synced into your NetSuite account.
7. To set a filter:
   1. In the filters dialog that opens, select a field, and set the criterion for those records in NetSuite that you want to sync to Outlook.
   2. Repeat this for each criterion you want to use to define which records you sync.
   3. When you finish defining criteria, click **Save**.

      The criteria are now listed under Contacts Filter Criteria.

8. Click **Next**.

   To remove criteria later, click **Modify Criteria**, and then click the X next to the criterion you want to remove. Then, click **Save**.

Next, you can choose the fields that must have data to be synced to NetSuite.

On the Required Outlook Contact Fields page, choose the fields that must have data in the Outlook contact record to be synced to NetSuite. If a contact does not include information in one of these fields, it cannot be synced to NetSuite.

Event, Task, and Phone Call Sync Settings (3, 4, and 5 of 6)

For each of these records, you can choose how often records are synced, which Outlook folder you want to sync with, and whether records are marked as private in NetSuite. You can also set criteria to determine which NetSuite records will sync with Outlook.

To set activity record synchronization preferences:

1. Check the **Lock the settings** box under Synchronization Settings if you do not want individual users to be able to be able to configure these settings.

   If you do not check this box, the selections you make are used as the default for those who install the application. Users can still change these default settings.
2. In the **Synchronize** fields, choose which direction sync occurs and how often records are synced between Outlook and NetSuite.

   Users can choose to sync from Outlook to NetSuite, from NetSuite to Outlook, or in both directions.
3. In the **Conflict Resolution** field, choose how NetSuite for Outlook resolves situations where information on records in NetSuite differs from the information in Outlook. You can choose the following:
   - **Ask the User** – Users are prompted by the client when there is a conflict and must choose which data is used.
   - **NetSuite Always Wins** – NetSuite for Outlook syncs the data from NetSuite.
   - **Outlook Always Wins** – NetSuite for Outlook syncs the data from Outlook.
4. For events and phone calls, check the **Sync Reminders** box if you want to sync reminder settings. With this preference enabled, you will receive reminders from both NetSuite and Outlook if you have set up reminders in either application.

   If you clear this box, users will only receive reminders from the application that the event or call was created in.
5. For tasks, check the **Save as Private** box if you want records created in NetSuite through synchronization to be marked as private.

   > **Note:** Tasks marked as private in NetSuite can only be viewed by the creator of the record.
6. Check the box in the Filter Criteria section if you want to lock criteria for events, tasks, and phone calls that users can sync.
7. Click **Edit Sync Criteria** to define which records you want to sync between NetSuite and Outlook. This enables you to control which records are synced into your NetSuite account.

   To set a filter:

   1. In the filters dialog that opens, select a field, and set the criterion for those records in NetSuite that you want to sync to Outlook.

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2. Repeat this for each criterion you want to use to define which records you sync.
3. When you finish defining criteria, click **Save**.

   The criteria are now listed under Filter Criteria.

> **Note:** By default, events are filtered to only synchronize those events that take place today or in the future. Recurring events created in the past that have future occurrences are synced with this filter.

To remove criteria later, click **Modify Criteria**, and then click the **X** next to the criterion you want to remove. Then, click **Save**.

8. Click **Next**.

Message Sync Settings (6 of 6)

After you have configured contacts, events, tasks, and phone calls, you can choose which records in NetSuite users can save Outlook email to.

Your selections here determine the types of records that are presented to users in the message pane when they are writing or viewing email. You can choose to let users save email to contacts, customers, jobs and projects, opportunities, estimates, sales orders, invoices, and support cases.

To set email message sync preferences:

1. Check the box under Synchronization Settings if you do not want individual users to be able to be able to configure these settings.

   If you do not check this box, the selections you make are used as the default for users who install the application but can be changed.
2. Select the NetSuite record types users can save Outlook email messages to.
3. Check the box if you want to automatically save new email messages to NetSuite when there is only one record in NetSuite with an email address that matches.
4. Under Saving Email Attachments, select the folders in the NetSuite file cabinet you want to save email attachments to.

   Two folders are created when you install the NetSuite for Outlook SuiteApp: Outlook Attachments Received and Outlook Attachments Sent. These folders are used as the defaults.

> **Note:** You cannot use the **Attachments Received** or **Attachments Sent** folders or their subfolders for Outlook attachments.

5. Click **Finish**.

Now, users can configure and begin using NetSuite for Outlook.

Troubleshooting NetSuite for Outlook

Sync Issues with NetSuite for Outlook

My contacts, events, tasks, or phone calls are not syncing with Outlook.

If you encounter problems syncing contacts, events, tasks, or phone call with Outlook, try any of the following solutions.

Check permissions for your role

Contact your NetSuite account administrator and make sure that your role has the following required permissions:

- Perform Search - View
- Outlook Integration 3.0
- Web Services - View (for NetSuite OneWorld)

Check your configuration settings

- If changes were made to your Exchange server recently, you may need to reset the sync folder in your configuration.
- Make sure the records meet the criteria you have defined in your configuration settings.
- Make sure the records are in the sync folder that you selected in your configuration settings.
- Make sure your contacts match the mine/my and my subordinates setting.

Check the error logs

Check for errors in the error log for the record. You can check this by clicking the NetSuite for Outlook button in Outlook and selecting **View Errors**.

Check your time zone

Make sure the time zone in NetSuite is the same as the time zone setting on your computer. This setting is required for events to sync.

Make sure you are not using a roaming user profile

NetSuite for Outlook requires a local user profile. To determine if you have a roaming profile:

1. From the Windows start menu, right-click **Computer**, and select **Properties**.
2. Click **Advanced Settings**, and in the System Properties dialog, click the Advanced tab.
3. Under User Profiles, click **Settings**.
4. Find your user profile in the list, and make sure it is of type **Local**. You can change the profile back to type Roaming after installing NetSuite for Outlook.

Make sure you are not syncing more than 3000 records at a time

NetSuite can sync a maximum of 3000 event records only. Update the filter criteria to lessen the records that need to be synced and try again. For example, setting the Start Date to using the current month may lower the number of records being synced.

Update your data if you recently switched between 32-bit and 64-bit version of Microsoft Outlook

You must edit the registry to update the data. Click here for a guide to update the data on your computer. When the data has been updated, uninstall and reinstall NetSuite for Outlook to resolve the error.

If you changed the sync folder in your configuration, reset the sync

When you change the sync folder in your configuration, you must reset the sync so that NetSuite for Outlook syncs properly.

To reset the sync, right-click the NetSuite for Outlook icon in the system tray, and select View Sync Log. Click the **Reset this sync** link for the record type you changed the folder for. For more information, see Resetting Your Sync.

If your Outlook event is not showing in your NetSuite calendar, check the following:

- Make sure the event is created in the same Outlook calendar that you chose in the configuration.
- Make sure the event takes place within the work day hours you have set up in your NetSuite calendar preferences or in Outlook.

If you are syncing multi-day events, contact the event organizer

Multi-day events can be synced to NetSuite only by the event organizer. If you are the event organizer, check your Outlook sync configuration to make sure that events are synced in both directions (Outlook to NetSuite and NetSuite to Outlook). For more information, see Event, Task, and Phone Call Sync Settings (3, 4, and 5 of 6).

When I sync events on my mobile device, I get an error saying synchronization failed for one or more items.

This error occurs due to a limitation on the Microsoft Exchange server that prevents events from being synced properly on mobile devices. It may be caused by Accepted or Declined responses to events that are unread. Events that are not marked as standard events, such as private events or those with a "Working Elsewhere" status, may also cause this error.

To remove the error, change the status of your event. Right-click on the event, set the status to a different option, and try the sync again. You can also access Outlook or the Outlook Web App to mark all items as read and then retry the sync.

Changes to event details (such as subject, location, and time) on a single occurrence of a recurring event may also cause this error. When a single occurrence is modified, it is removed from the recurring event series, and recreated as a standalone event. In this case, you can try syncing the event to your calendar again.

Note: NetSuite for Outlook currently does not support syncing to mobile devices.

Attendees' responses are not synced to NetSuite.

If responses to Outlook events are not being synced to NetSuite, try closing and reopening Outlook.

When I try to sync an event, the NetSuite Attendees pane in Outlook becomes unresponsive.

NetSuite for Outlook can sync a maximum of 500 attendees for a single event or 1000 attendees across several events at one time. If you sync more attendees, the Attendees pane will become unresponsive.

To prevent this error from occurring, disable Event Sync before viewing or editing a single event with more than 500 attendees. When you have viewed or edited it, enable Event Sync again.

If you are syncing several events with a total of more than 1000 attendees, set a date filter to minimize the number of events (and thus, attendees) being synced at one time.

When I try to sync a contact, it does not sync because the company cannot be identified.

You may have an existing contact with a company name that does not match any NetSuite contact records. The company name may be misspelled, or you need to select whether to link the contact to a NetSuite company or not. For more information, go to Linking Outlook Contacts to NetSuite Companies.

When I sync an event, the formatting of the message is lost.

The message field in NetSuite has a 4000-character limit. If you enter more than 4000 characters, or use applications like Webex, that insert information in the message field, your message may be truncated. The resulting message can have a different format or information may be left out of the synced event

When I sync an event, I get an error saying an inactive attendee was detected in the Recipient fields.

When you sync an event record, it will be unsuccessful if there are inactive attendees in the **To** and **Cc** fields. Inactive attendees refer to contact and customer records that have been marked as Inactive. You need to remove these inactive records and sync again.

To prevent this error from occurring, set your preferences to let NetSuite for Outlook to search for inactive records and automatically remove them from the recipient fields.

To enable search for inactive records:

1. Go to Home > Set Preferences.
2. In the **Analytics** subtab, check the **INCLUDE INACTIVES IN GLOBAL & QUICK SEARCH** box.
3. Click **Save**.

Changes to events or other records are not visible in Outlook.

This problem sometimes happens when you open a record in a new window in Outlook.

If you are not seeing changes to event or other records in Outlook, close the folder or calendar you are viewing. Open a different folder or calendar, and then re-open the sync folder.

- Installation and Setup Issues with NetSuite for Outlook
- Outlook Sync Configuration and Login Issues with NetSuite for Outlook
- Miscellaneous Issues with NetSuite for Outlook
- NetSuite for Outlook: Quick Start Guide for Users
- NetSuite for Outlook User Guide
- NetSuite for Outlook: Quick Start for Administrators

Installation and Setup Issues with NetSuite for Outlook

When installing NetSuite for Outlook, the installer tells me to close Outlook, but I have already closed it.

Even though you have closed Outlook, it might still be running in the background. Open the Task Manager, and end any running Outlook processes.

If I uninstall NetSuite for Outlook, are the records I've synced removed from Outlook as they were in older versions of NetSuite for Outlook?

No. Records synced to Outlook will remain after uninstalling NetSuite for Outlook.

If I uninstall, and later reinstall NetSuite for Outlook, are duplicate records created when I sync?

No. When you perform the initial sync for an installation, NetSuite for Outlook compares the email addresses for any existing contacts and the title, date, and time for existing events. If there are existing records that match these criteria, a new (duplicate) record is not created.

How do I uninstall and reinstall NetSuite for Outlook?

To uninstall NetSuite for Outlook:

1. Exit Microsoft Outlook and NetSuite for Outlook.
2. Go to Control Panel > Programs and Features > Uninstall or change a program.
3. Locate NetSuite for Outlook on the list.
4. Click **Uninstall**.
5. Delete the Metadata file located at C:\Users\<Username>\AppData\Roaming\Celigo\NetSuite for Outlook.
6. Go to C:\Users\<username>\AppData\Roaming\NetSuite\NetSuite for Outlook and create a backup of the logs.
7. Rename the Logs folder and save it on your Desktop.
8. Go to C:\Users\<username>\AppData\Local\Microsoft\Outlook and delete the NetSuite for Outlook 3.0 backup folder.
9. Sync Microsoft Outlook to make sure the folder is deleted.
10. Exit Microsoft Outlook and NetSuite for Outlook.
11. Run the NetSuite for Outlook installer and complete the installation steps.

When installing the NetSuite for Outlook SuiteApp, I get an installation error saying that it was unable to create the Outlook External Organizer.

When you install the NetSuite for Outlook SuiteApp, a placeholder employee record is created. This placeholder is used for the Organizer field on events when you sync an event from Outlook that is organized by a non-employee.

This error can occur if you have scripts on the employee record that prevent the SuiteApp from creating the record. To install the SuiteApp, do the following:

1. Create an employee record. For more information, see the help topic Adding an Employee.
2. Go to Setup > Company > Preferences > General Preferences (Administrator).
3. On the **Custom Preferences** subtab under NetSuite for Outlook, select the employee record in the **Outlook External Organizer** field.

This error can also occur because the Outlook External Organizer may be set as an inactive record on your account. It must be active to install or update NetSuite for Outlook.

To determine the status of the record and resolve the error, do the following:

1. Type “Outlook External Organizer” in the search bar.
2. If no record appears, it is inactive. Inactive records do not show up in the global search results.
3. To view the inactive record, type “Outlook External Organizer+” in the search bar.
4. Click **Edit**.
5. On the **System Information** subtab, clear the **Inactive** box.
6. Click **Save**.

When setting preferences for NetSuite for Outlook, I am asked to run ScheduledTasksCleanup.exe.

For security reasons, some Windows networks need additional privileges to work with the Windows Task Scheduler used by NetSuite for Outlook. If you see this message when setting up NetSuite for Outlook, contact your administrator.

After installing NetSuite for Outlook, when trying to complete the configuration, I get an error saying there were problems connecting with Outlook or Microsoft Exchange.

A problem has been encountered with selecting the synchronization folder, because the Microsoft Outlook configuration on your computer is incorrect. The data for Outlook on your computer must be updated to prevent this error from occurring even for other Outlook add-ons. You must edit the registry to update the data. Click here for a guide to resolve this error.

> **Note:** You must have administrator rights to update the registry.

- Sync Issues with NetSuite for Outlook
- Outlook Sync Configuration and Login Issues with NetSuite for Outlook
- Miscellaneous Issues with NetSuite for Outlook
- NetSuite for Outlook: Quick Start Guide for Users
- NetSuite for Outlook User Guide
- NetSuite for Outlook: Quick Start for Administrators

Outlook Sync Configuration and Login Issues with NetSuite for Outlook

I installed the NetSuite for Outlook SuiteApp, but I do not see the link to Outlook Sync Configurations.

Make sure you have enabled the other required features. For more information, see NetSuite for Outlook: Quick Start for Administrators.

The Outlook Sync Configuration popup is blank or is not loading.

Clear your browser cache. If the NetSuite for Outlook SuiteApp has been upgraded, it is possible that your browser has cached an older version of the page.

If the problem still persists, contact NetSuite technical support.

I made changes to my sync configuration, but NetSuite for Outlook is not respecting these changes.

Open the NetSuite for Outlook Configuration, click through your settings, and save them again.

The NetSuite for Outlook configuration does not open or shows a blank page.

Some applications and services can prevent NetSuite for Outlook from loading properly. For example:

- With some graphics processors (cards), you must first disable hardware acceleration before configuring NetSuite for Outlook. For more information, click here.
- In some cases, you may need to delete the Windows Presentation Foundation (WPF) font cache. For more information, click here.

When I try to login, I get an error saying two-factor authentication is not supported.

This error occurs if you use an email address that requires two-factor authentication, which is currently not supported by NetSuite for Outlook. NetSuite has provided a custom role, **NSC Calendar Access w/ Outlook**, which has similar data access but does not require two-factor authentication to proceed with login.

To use this role, do the following:

1. In your NetSuite account, point to your role on the top right corner.
2. Click **View all Roles**.
3. On the Choose Role page, select the **NSC Calendar Access w/ Outlook** role.

   > **Note:** If you check the box next to this role, it will become the default role. The page for this role will automatically display every time you log in.

4. On Outlook, click the **NetSuite for Outlook** icon.
5. Click **Configuration**.
6. Enter your NetSuite login credentials and account information.
7. Select the role and complete the configuration process.

When I try to login, I get an error saying my role does not give me access to NetSuite for Outlook.

This error occurs if your role has not been granted access. Contact your administrator to request for access.

- Sync Issues with NetSuite for Outlook
- Installation and Setup Issues with NetSuite for Outlook
- Miscellaneous Issues with NetSuite for Outlook
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Miscellaneous Issues with NetSuite for Outlook

How do I find my NetSuite account number?

Log in to your NetSuite account. In the Settings portlet, go to Home > Setting Up Synchronization. Your account number is shown in the middle of the page.

The message pane is not showing on email messages.

In your configuration, make sure you have done both of the following:

- Check **Email Messages** under the types of records to sync, and
- Select at least one type of record you want to save messages to.

When I'm writing an email message, NetSuite for Outlook does not search for NetSuite records that match the email addresses I've entered on the message.

The first time you use an email address in an email message, there can be a delay between the time you enter the address and the time Outlook resolves the address. NetSuite for Outlook does not search for a matching record until the address is resolved.

To force Outlook to resolve an email address, click **Check Names**, or press Ctrl+K.

Can I save more than one message at a time?

No. You can only save a single message at a time. Additionally, you must open a message to save it.

My attendees' responses are not showing on events in Outlook.

Outlook only tracks responses for events in the top level default calendar. If you create a separate calendar folder for NetSuite events, responses for those events are not tracked by Outlook.

The NetSuite for Outlook icon is not showing in my system tray, and the options on the NetSuite for Outlook button in Outlook are not working.

Try ending the Celigo.SyncManager.exe process in your task manager, and then restarting NetSuite for Outlook through your Start menu. If the problem still persists, reboot your computer.

My events, tasks, and phone calls have been deleted from NetSuite and Outlook.

You can retrieve and restore the deleted items to the original Outlook folder by navigating to Folder > Recover Deleted Items.

All retrieved items will automatically be treated as new items to sync with NetSuite for Outlook.

> **Note:** If the sync settings are locked or you are unable to sync records, contact your administrator to resolve these issues.

> **Note:** You should retrieve any deleted items as soon as possible. Deleted items are retained for a certain time before they are deleted from the Outlook server and become completely irretrievable. For example, Office 365 keeps deleted items for 14 days only before they are removed from the server permanently.

My new sync folder is not appearing in Outlook.

With Outlook 2013, you may need to restart Outlook to make your new folders show if you create new sync folders through the NetSuite for Outlook user configuration.

One of my Outlook add-ons is gone or is not loading after I installed NetSuite for Outlook.

Occasionally, when you open NetSuite for Outlook for the first time, an Outlook add-on is disabled. To fix the problem, try to re-enable the add-on. If the problem continues, uninstall and reinstall the add-on.

If your add-on supports the Repair function, go to Control Panel > Programs and Features (or Add or Remove Programs in Windows XP and earlier versions) and try to repair the add-on. If the problem still persists, or the function is not supported, try uninstalling and re-installing the add-on.