GURUS NETSUITE DATA EXPORTER

Installation Guide Version 4.0

GURUS

Cloud Consulting Pioneers®

August 1st, 2023

Statement of Confidentiality

This document contains proprietary and confidential information regarding GURUS Solutions Inc. (sometimes referred to in this document as "GURUS" or "GURUS Solutions") that is provided for the sole purpose of permitting the recipient to evaluate the information contained herein. In consideration of receipt of this document, the recipient agrees to maintain such information in confidence and is not to reproduce or otherwise disclose or distribute this information to any person outside of the group directly responsible for evaluation of its contents, without the express written permission of GURUS Solutions. Use or disclosure of this document in whole or in part for purposes other than the pursuit of a business relationship with GURUS Solutions is expressly forbidden.

Copyright

Disclaimer

Moreover, while diligent care has been used in preparing this document, GURUS Solutions had to rely on information provided by external sources, including you, the client, as well as third party suppliers over which it has no control. For that reason, GURUS Solutions accepts no responsibility for any omissions, misstatement, modifications or inconsistencies between this document and the third party information that is incorporated into or referenced by this document, including, but not limited to the third party product or service descriptions, features or other specifications.

Revision Summary

Version	Date	Comments
4.2	August 1rst, 2023	Adapting the installation guide for SuiteApp purposes.
4.1	June 15th, 2021	Added section on the embedding of dashboard and licence management
4.0	March 24th, 2021	Improved FAQ Section, updated installation instructions
3.0	April 23, 2018	Updates with instructions for the scheduler version
2.0	June 28th, 2018	Updated screenshots to fit new version of app store
1.0	June 20, 2018	Initial version

Table of Contents

1 Introduction

1.1 Purpose of this Document

The following document contains all the instructions to perform the installation and initial setup of the NetSuite Data Exporter application provided by GURUS Solutions.

The document will guide the user on how to install the Google Sheet Add-on necessary to add the functionality into their Google Sheet, the NetSuite SuiteApp to install on the user's NetSuite account necessary to be able to download data from their NetSuite instance, as well as how to register the application with GURUS Solutions to activate it. The SuiteApp link to our hybrid application is https://www.suiteapp.com/GURUS-Data-Exporter .

To understand how to use the application once installed, please refer to the NetSuite Data Exporter User Guide on our website: https://gurussolutions.com/netsuite-data-exporter/

1.2 Audience

This document is targeted to the Power user and NetSuite Administrator of the user installing the NetSuite Data Exporter for their company.

1.3 Glossary

| Terms	Definition
Google Sheet Add-on	Application installed inside a Google Sheet to offer additional features to the Sheet.
Google Workspace Marketplace	The marketplace where we can find and install add-ons for Google Sheet and other Google products.
Google Workspace	Google productivity environment for companies. Typically includes Gmail, Google Drive, Google Docs and Sheets, etc.
SuiteBundle	Application installed inside a NetSuite Instance to provide extra features.
SuiteApp	SuiteBundle found on the NetSuite SuiteApp marketplace.
Sandbox	Testing environment provided by NetSuite to execute business processes without impacting the production environment.

1.4 Reference Documents

| Ref #	Document Title	Revision
1	FINAL - NetSuite Data Exporter - User Guide - v2.0	2.0

2 Installing the Google Sheet Add-on

Follow the steps below to Install the Google Sheet Add-on for the NetSuite data Exporter. These steps are usually done for each User on your Google Workspace that wants to use the software. It can also be done by your Google Administrator to be done across the whole Workspace.

1. Open a Google Sheet in your Workspace.
2. Navigate to Add-ons -> Get add-ons
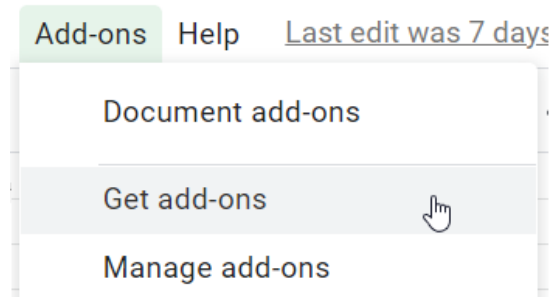
3. Search for the "NetSuite Data Exporter" in the search bar and select the listing. Make sure you select the one with the GURUS logo.
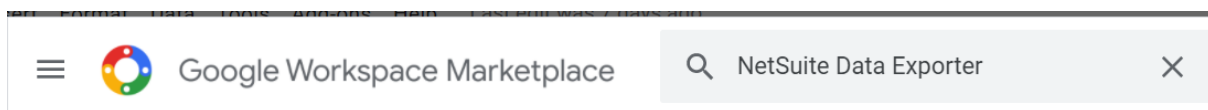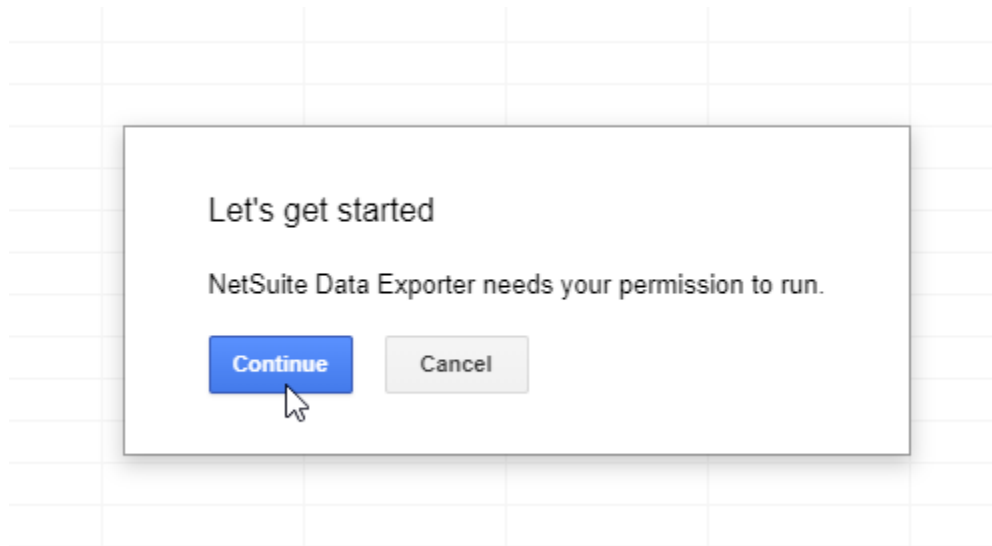

4. Click the Install button on the top of the page to install it.
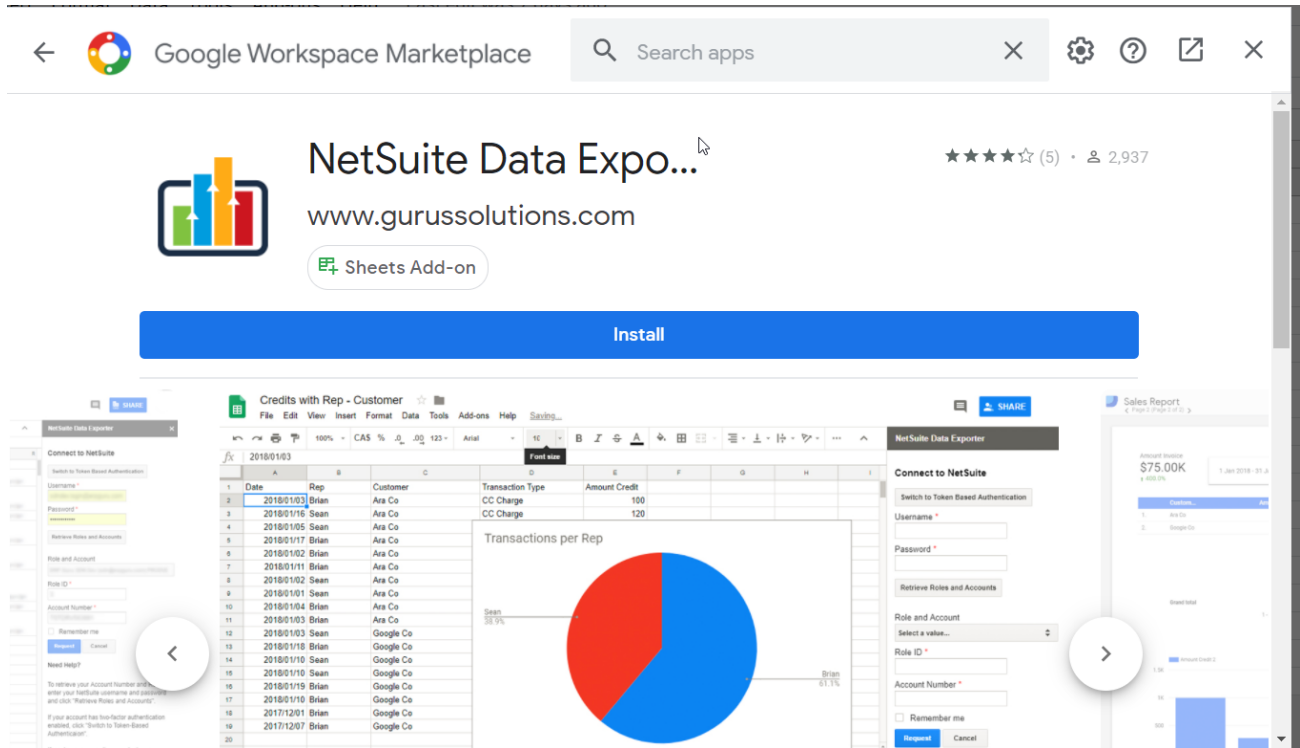
5. Once installed, click Continue on the pop up screen.

6. Sign in with your Google account

G Sign in with Google

Choose an account from gurussolutions.com

to continue to NetSuite Data Exporter

G **GURUS Solutions**
info@gurussolutions.com

Use another account

Afrikaans ▾   Help   Privacy   Terms

7. Click Allow to grant the permissions required by the add-on.

G Sign in with Google

NetSuite Data Exporter wants to access your Google Account

G info@gurussolutions.com

This will allow **NetSuite Data Exporter** to:

● View and manage your spreadsheets in Google Drive   ⓘ

↪ Display and run third-party web content in prompts and sidebars inside Google applications   ⓘ

↪ Connect to an external service   ⓘ

Allow NetSuite Data Exporter to do this?

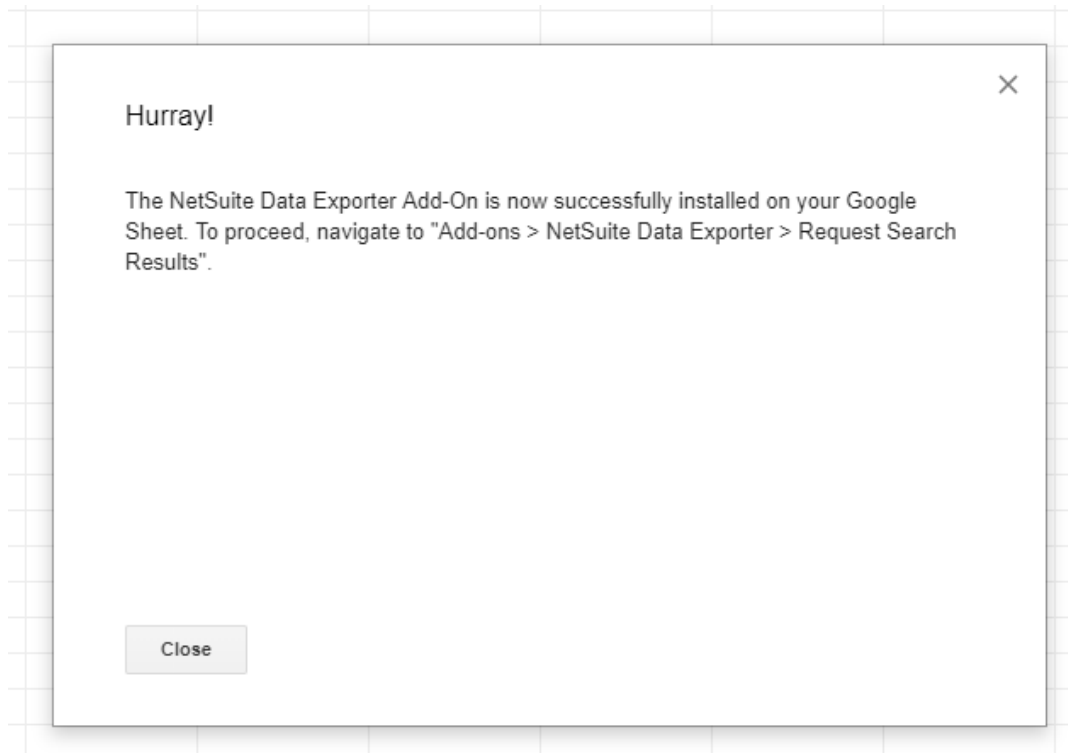By clicking Allow, you allow this app to use your information in accordance with their terms of service and privacy policies. You can view or remove app access in your Google Account

CANCEL   **ALLOW**
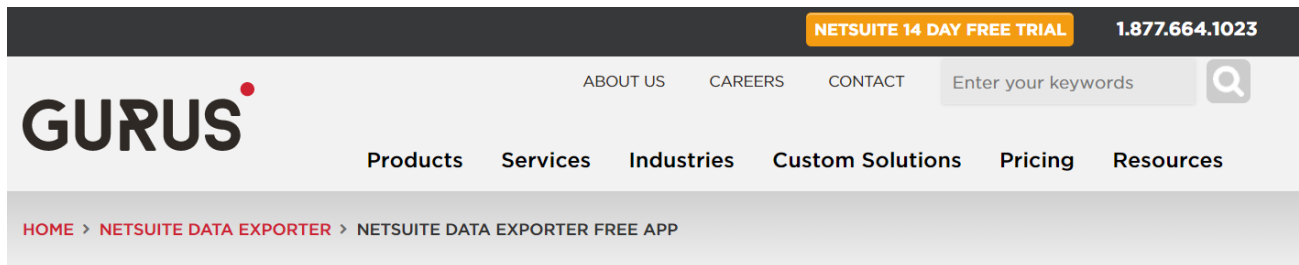
8. The add-on is installed.

Hurray!

The NetSuite Data Exporter Add-On is now successfully installed on your Google Sheet. To proceed, navigate to "Add-ons > NetSuite Data Exporter > Request Search Results".

Close

3 Registering the NetSuite Data Exporter

The following step needs to be done only once per NetSuite Account. The Application must be registered with GURUS Solutions so it can be activated and the SuiteApp to be enabled for your account. To do so, please complete the following steps:

1. Navigate to our website at the following address:
   https://gurussolutions.com/netsuite-data-exporter/

2. Review and agree to our Privacy Policy as well as the End User License Agreement

3. Locate your NetSuite Account Number. (SuiteAnwser: 65470) You will need it to fill the registration. You can find your NetSuite account ID at the beginning of the NetSuite URL. For example, if the URL is https://**1234567**.app.netsuite.com/, your account ID is **1234567**.
   Note: Please mention in the comments if you also want to get access for your sandbox account.

4. Fill out the form and Submit it.

5. Please wait for us to confirm your registration.

4 Installing the SuiteApp

Once your registration is completed and confirmed by your GURUS Representative, you can proceed to the installation of the SuiteApp in NetSuite. You will need to follow this step only once per NetSuite Account.

This step must be performed by your NetSuite Administrator or anyone with suffisant permission to install a SuiteApp. The goal is to find the following SuiteApp in your NetSuite instance : https://www.suiteapp.com/GURUS-Data-Exporter

1. Log in into your NetSuite account as an administrator
2. Navigate to SuiteApps
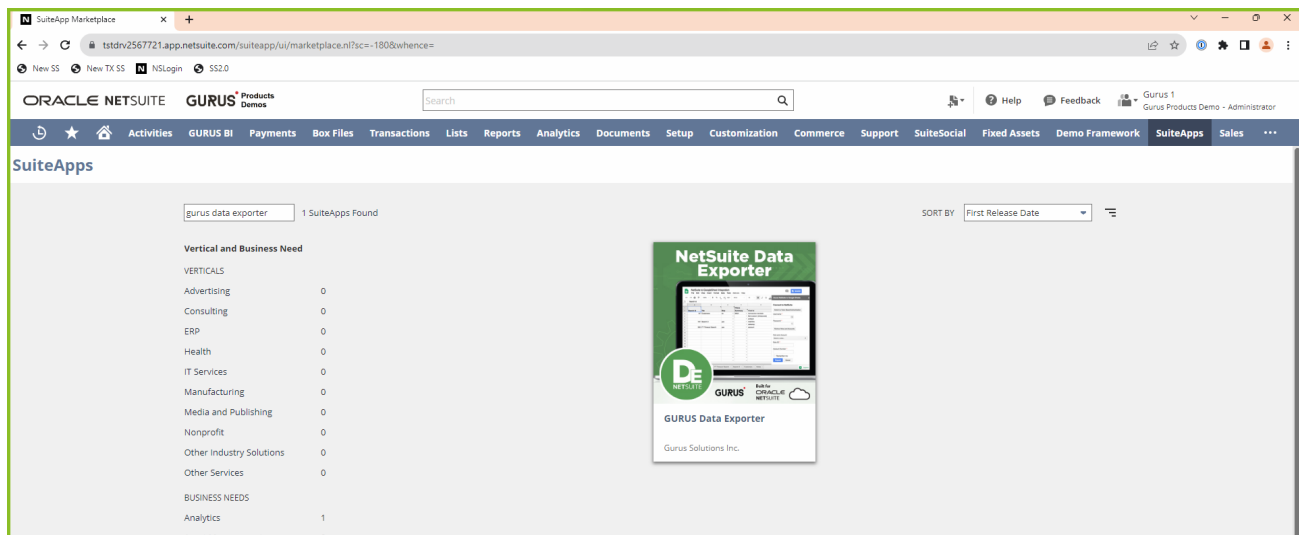
3. In the keywords field type in **GURUS Data Exporter**
4. Click on the application
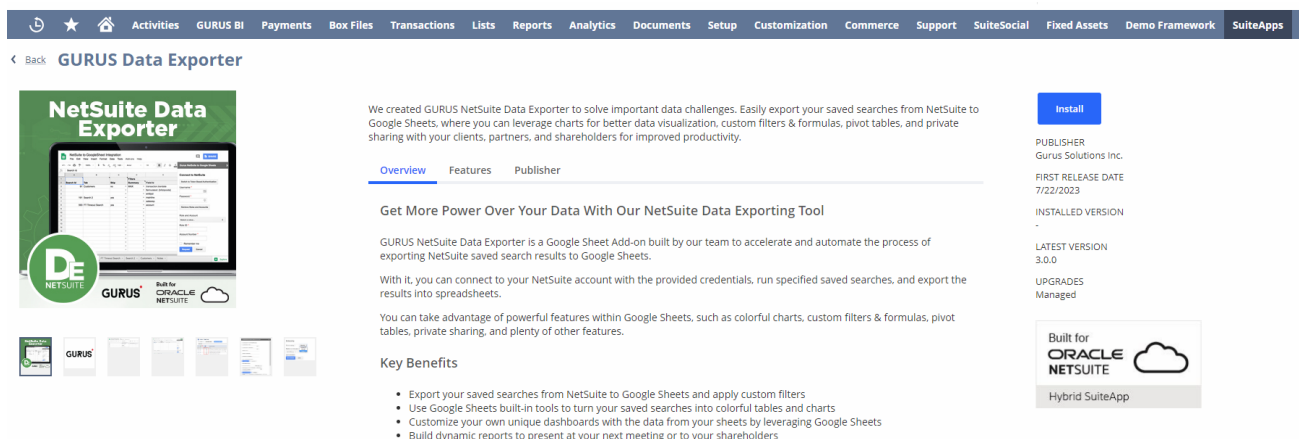
5. Click on the Install button
6. Read and accept the the permissions required

Data Exporter is a Google Sheet Add-on built by our team to accelerate and automate the process of
te save

This action will install GURUS Data Exporter. By installing this SuiteApp, you are
giving the publisher permission to install future upgrades in your NetSuite
account at any time. Do you want to proceed?
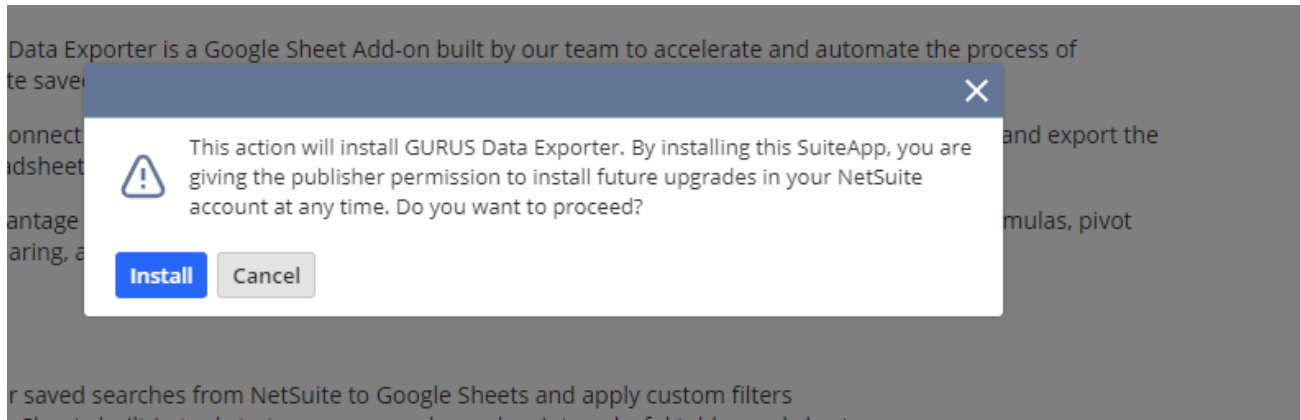
Install Cancel

r saved searches from NetSuite to Google Sheets and apply custom filters

7. Wait for the SuiteApp to be installed. Once installed you should see the following when going on the listing of the GURUS Data Exporter where the "Install" button will now be in a different color and say "Installed" along with the version that your NetSuite instance now has.

   a. At this step, you may receive an error during the installation indicating some NetSuite features are required to continue with the SuiteApp Installation. The message will indicate what features you are missing. You will be able to find those features under Setup -> Company -> Enable Features.

Installed

PUBLISHER
Gurus Solutions Inc.

FIRST RELEASE DATE
7/22/2023

INSTALLED VERSION
3.0.0

LATEST VERSION
3.0.0

UPGRADES
Managed

5 Configuring Access

This section will describe the steps required to generate credentials that are required to use the Data Exporter.

You may need to get the assistance of your NetSuite Administrator to perform the following steps.

Some of these steps will need to be done at least once per instance, and some of these steps will need to be done at least once per user you want to give access to the Data Exporter.

5.1 Configure an Integration Application

This step needs to be done only once for the whole instance. You may require your NetSuite Administrator to perform these tasks.

Refer to the following SuiteAnswers article on how to create an Integration Application for Token Based Authentication: https://netsuite.custhelp.com/app/answers/detail/a_id/82077/

1. Log into NetSuite as Administrator (or with a role with Permission to create an Integration Application)
2. Navigate to Setup -> Integration -> Manage Integrations -> New
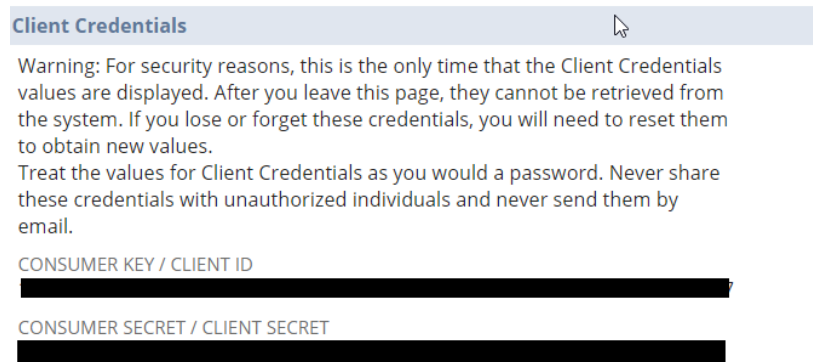

3. Give a name to the integration (ex: NetSuite Data Exporter).

4. Set the status to Enabled.
5. Check the box for Token-Based Authentication
6. Uncheck every other checkbox.
7. Save the Record
8. Right after the page is saved, navigate to the bottom of the page and take note of the Consumer Key/Client ID and Consumer Secret/Client Secret.
9. Keep these credentials securely. They will be required for all your users that will use the Data Exporter.
   IMPORTANT: It is the only time you can take note of those credentials, they will not be displayed again.
   ALSO IMPORTANT: Manipulate these credentials with the same care you would for your username and passwords. It is recommended that you do not save them in plain text, nor send them over email. Make sure they are shared securely.

Client Credentials

Warning: For security reasons, this is the only time that the Client Credentials values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values.
Treat the values for Client Credentials as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

CONSUMER KEY / CLIENT ID

CONSUMER SECRET / CLIENT SECRET

5.2 Configuring a NetSuite Role

This step needs to be done at least once for the whole instance. You may want to create different roles depending on which user extracts data through the Data Exporter. You may require your NetSuite Administrator to perform these tasks.

We strongly recommend that you prepare a role that is read only and only provide access to the records and data that your user needs. We will leave to your discretion to decide the exact set of permissions to set.

Refer to the following article to understand how to create a NetSuite Role:
https://netsuite.custhelp.com/app/answers/detail/a_id/9896
https://netsuite.custhelp.com/app/answers/detail/a_id/9921
https://netsuite.custhelp.com/app/answers/detail/a_id/82075

Make sure your role contain the following permission:
● Setup -> Log in Using Access Token

Assign this role to any users for which you will give access to the NetSuite Data Exporter on their Employee Record.
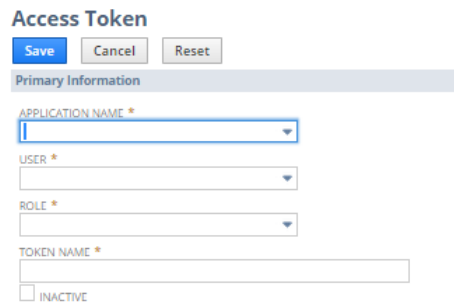
5.3 Configure an Access Token

This step needs to be done for each users that will have access to the NetSuite Data Exporter.

You can share tokens across multiple Google User, but keep in mind they will have access based on the context of the user and role attached to the Token.

An Access Token is a set of credentials combining a specific user and a specific Role. For information on how to create an access token, please refer to the following SuiteAnswers article :
https://netsuite.custhelp.com/app/answers/detail/a_id/82313/

1. Log in as a user with the Access Token Management permission (This can be your Administrator).
2. Go to Setup > Users/Roles > User Management > Access Tokens (Administrator).
3. On the Access Tokens page, click New Access Token.
   The Access token page displays.

4. On the Access Token page:
   1. Select the Application created in section 5.1.
   2. Select the User you gave the role as defined in section 5.2.
   3. Select the Role created in section 5.2.
   4. The Token Name is already populated by default with a concatenation of Application Name, User, and Role. Enter your own name for this token, if desired.
5. Click Save.
6. Right after the page is saved, navigate to the bottom of the page and take note of the Token ID and Token Secret.
7. Keep these credentials securely. They will be needed to be set in the Data Exporter for the selected user.
   IMPORTANT: It is the only time you can take note of those credentials, they will not be displayed again.
   ALSO IMPORTANT: Manipulate these credentials with the same care you would for your username and passwords. It is recommended that you do not save them in plain text, nor send them over email. Make sure they are shared securely.
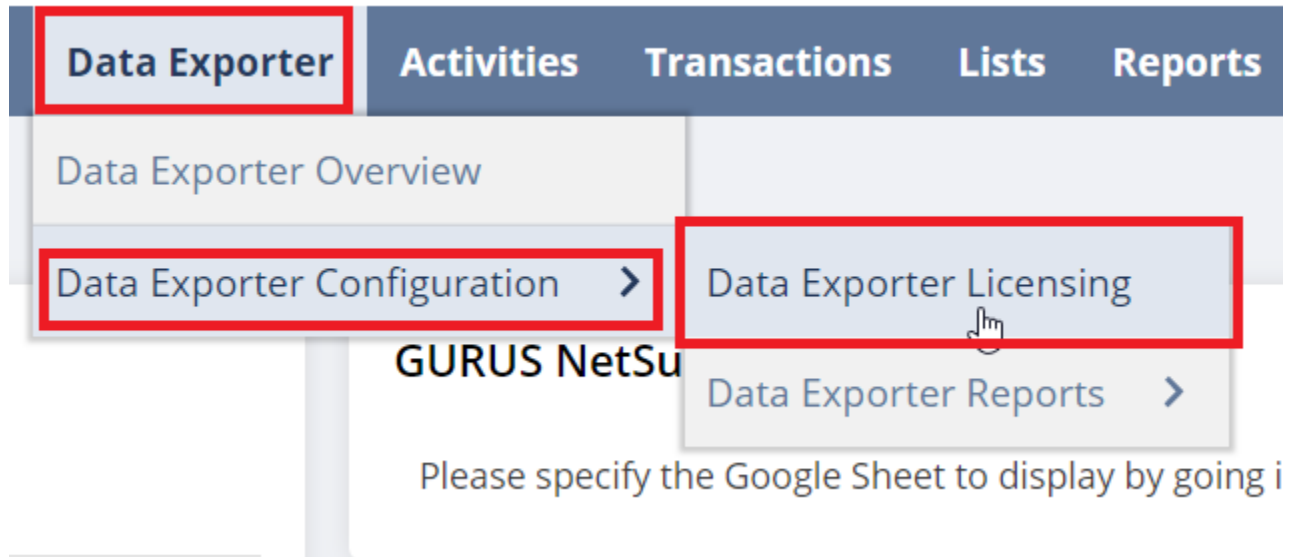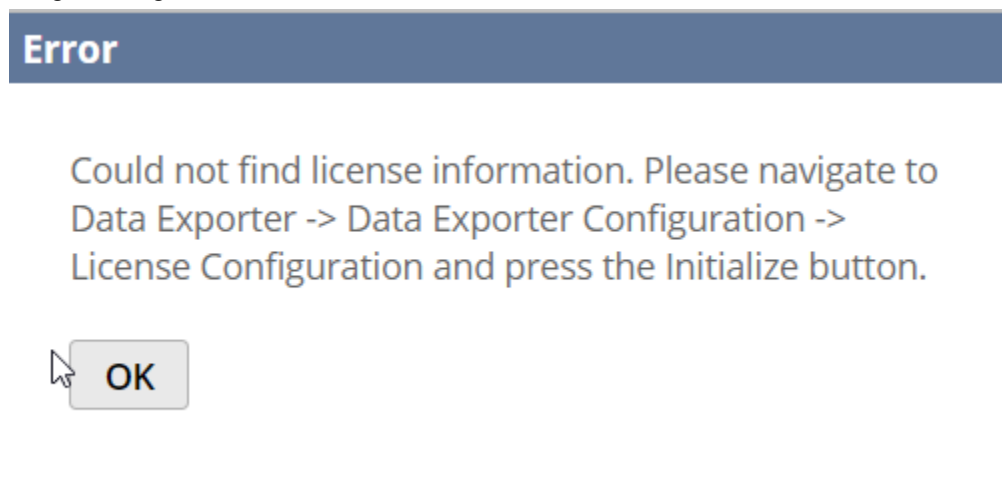
6 Activating and viewing your License

You can activate and manage your product license through a simple screen.

1. Locate the "Data Exporter" center tab and navigate to "Data Exporter > Data Exporter Configuration > Data Exporter Licensing

2. If this is your first time using GURUS NetSuite Data Exporter tool, you will be greeted by the following message:

3. Press the initialize button

4. The page will fetch your license if you have one and display it like in the following example:

5. If you need to update your license, simply press the "Update License" button.
6. You can also click the Reinitialize button to force a reset of the license in case you get errors and start again at Step 1.

7 Frequently Asked Questions

Q:The Install button is greyed out and I get this message when trying to install the SuiteApp
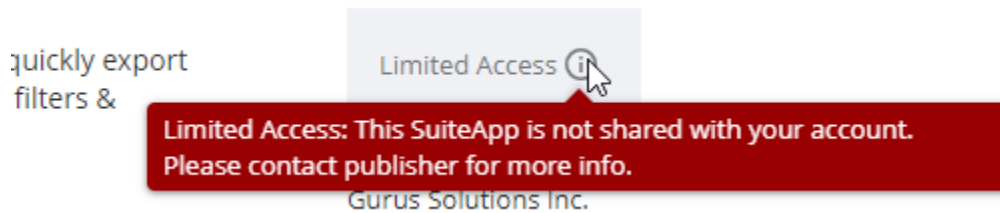

What can I do?
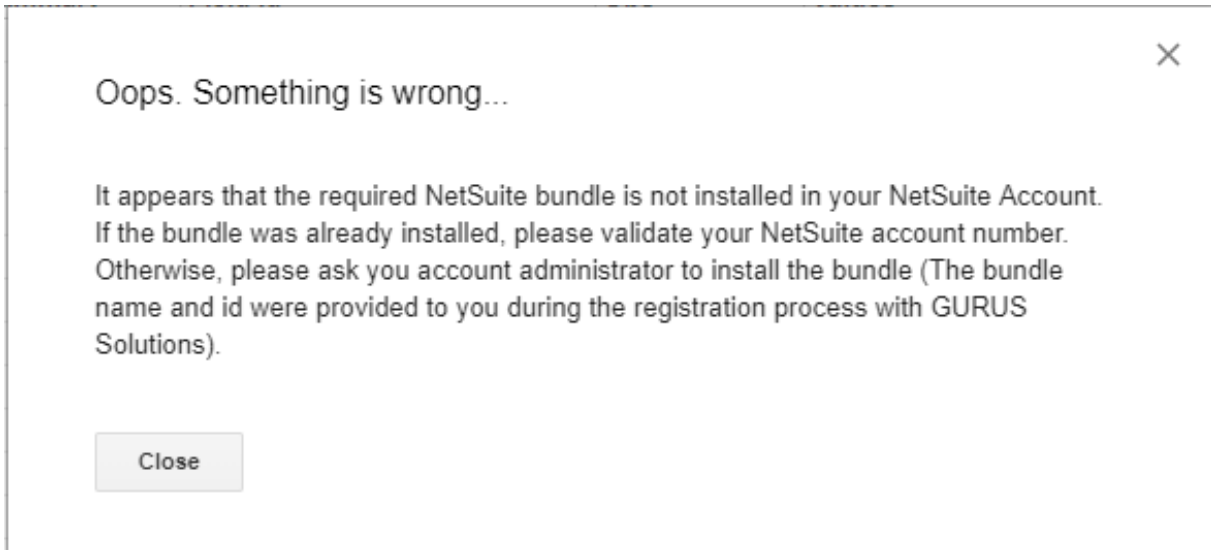
A: This can mean the following:
1. You have not completed the registration with GURUS solutions. Please follow the instructions in [section 3](#) of this document.
2. The provisioning is not yet completed by the GURUS team. You can wait and try again later, or contact your representative to get a status on the progress.

Q: I received a message indicating that the app is not available in my country when installing the Data Exporter Add-on
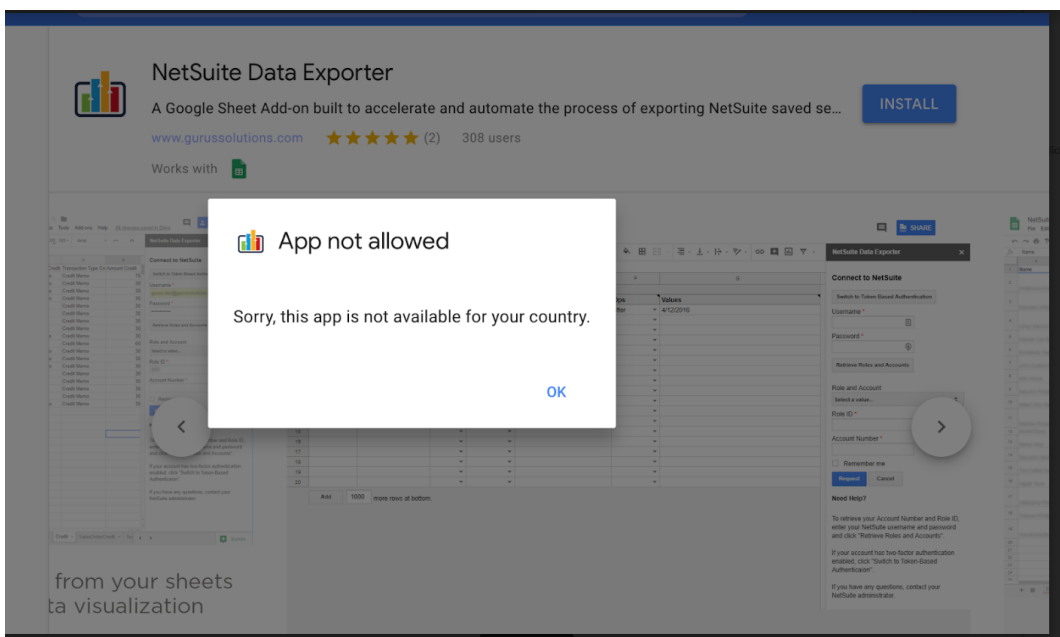

A: The Data Exporter is currently available in most countries, but some limitations may apply. Please contact info@gurussolutions.com for more information if you received this error.
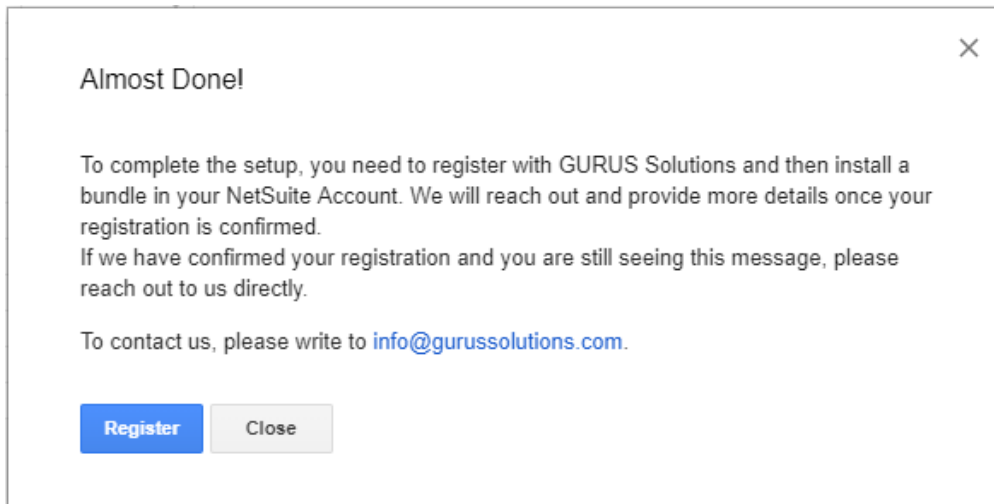
Q: I get the following error message. Why?

A: This can mean the following things:

1. The required SuiteApp has not been installed in the NetSuite instance. See section 4 in the Installation Guide for guidance.
2. If you are trying to run the Data Exporter with your Sandbox, it could mean the SuiteApp is not installed in the sandbox account. Please follow the instructions in section 4 on your Sandbox account.
3. If you cannot install the bundle (you cannot find it or the Install button is not enabled or get the error message below), please contact GURUS Solution and ask that the bundle be shared with you. Make sure you have your NetSuite Account number as it will be necessary for this step.
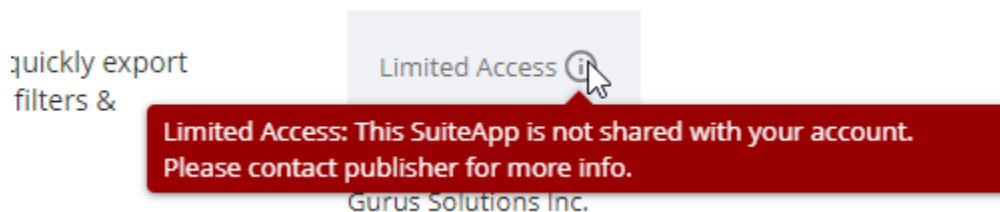
Q: I receive the following error message when I try to run the Data Exporter. What does it mean?

A: This can mean the following:
1. You have not completed the registration with GURUS solutions. Please follow the instructions in section 3 of this document.
2. The provisioning is not yet completed by the GURUS team. You can wait and try again later, or contact your representative to get a status on the progress.