

# Enabling TBA in NetSuite

## Introduction

This page summarizes how to enable token-based authentication (TBA) in NetSuite and obtain the values needed for configuring Jitterbit Harmony to authenticate with NetSuite using TBA.

**NOTE:** Those using two-factor authentication (2FA or TFA) in NetSuite are required to use TBA with Jitterbit Harmony. Learn more in [NetSuite 2018.2 Token-Based Authentication](#).

After TBA is enabled in NetSuite, refer to these pages for next steps in Harmony:

- [Using NetSuite TBA in the NetSuite Connector](#)
- [Using NetSuite TBA in a Web Service Method](#)
- [Using NetSuite TBA by Calling a RESTlet from an HTTP Source or Target](#)
- [Using NetSuite TBA by Calling a RESTlet from a Local File Source](#)

## Jitterbit Recommendations for Switching to TBA

If you are currently using username/password (SSO) authentication with NetSuite in Jitterbit Harmony, there are several recommended options for the path forward to switching to TBA:

- **Option 1: TBA for Existing Role / Existing User**  
Option 1 involves enabling TBA on the role used by your existing NetSuite user account that you use in Harmony. This is the recommended option, except in cases where your existing NetSuite account in Harmony is assigned to an Administrator role (if you are using an Administrator role, we recommend creating a new role with Options 2 or 3). With Option 1, follow these steps on this page:
  1. [Enable Token-Based Authentication](#)
  2. [Gather Values for Configuring TBA in Jitterbit](#)
- **Option 2: TBA for New Role / Existing User**  
Option 2 involves creating a new TBA-enabled role and assigning it to your existing NetSuite account in Harmony. This is an alternative to Option 1 if you cannot or do not want to enable TBA on an existing role held by the existing NetSuite user account that you use in Harmony. With Option 2, follow these steps on this page:
  1. [Enable Token-Based Authentication](#)
  2. [Create a New Role](#)
  3. [Assign a Role to an Existing User](#)
  4. [Gather Values for Configuring TBA in Jitterbit](#)
- **Option 3: TBA for New Role / New User**  
Option 3 involves creating a new TBA-enabled role and a new NetSuite user account to be used by Harmony. This is an alternative if neither Option 1 nor Option 2 is possible or desired. With Option 3, follow these steps on this page:
  1. [Enable Token-Based Authentication](#)
  2. [Create a New Role](#)
  3. [Add a New User to Role](#)
  4. [Gather Values for Configuring TBA in Jitterbit](#)

**TIP:** For additional information, refer to the following NetSuite documentation (login to NetSuite required):

- [NetSuite – SuiteTalk \(Web Services\) Integration](#)
- [NetSuite – Managing Users & Roles](#)
- [NetSuite – Getting Started with Token-based Authentication](#)

### On This Page

- [Introduction](#)
- [Jitterbit Recommendations for Switching to TBA](#)
- [Enable Token-Based Authentication](#)
- [Create a New Role](#)
  - [Install the Custom Administrator Bundle](#)
  - [Add a New Role](#)
- [Add a New User to Role](#)
- [Assign a Role to an Existing User](#)
- [Gather Values for Configuring TBA in Jitterbit](#)
  - [Consumer Key and Consumer Secret](#)
  - [Token ID and Token Secret](#)
  - [Account ID](#)

### Related Articles

- [NetSuite 2018.2 Token-Based Authentication](#)
- [Using NetSuite TBA by Calling a RESTlet from a Local File Source](#)
- [Using NetSuite TBA by Calling a RESTlet from an HTTP Source or Target](#)
- [Using NetSuite TBA in a Web Service Method](#)
- [Using NetSuite TBA in the NetSuite Connector](#)

### Related Topics

- [Announcements](#)
- [Getting Support](#)
- [NetSuite Connector](#)

Last updated: Oct 26, 2018

## Enable Token-Based Authentication

Enabling TBA for NetSuite is the first step, and is applicable to all options (Options 1, 2, and 3) described under [Jitterbit Recommendations for Switching to TBA](#). This is done at the organization level.

1. Log in to your NetSuite organization.
2. From the top menu bar, navigate to **Setup > Company > Enable Features**.
3. On the **Enable Features** screen, go to the **SuiteCloud** tab.
  - a. Under the **SuiteScript** section, select **Client SuiteScript** and **Server SuiteScript**.
  - b. Under the **Manage Authentication** section, select **Token-Based Authentication**.
  - c. Click **Save**.

## Create a New Role

This step is applicable only for Options 2 and 3 described under [Jitterbit Recommendations for Switching to TBA](#). If you are using Option 1, you can skip this step, as you will be using your existing role assigned to the Jitterbit Harmony NetSuite user.

## Install the Custom Administrator Bundle

We recommend using NetSuite's Administrator-like role that is available as a customization bundle. This will help in making sure that Jitterbit Harmony has the most elevated access to items that were formerly accessed through a highly privileged role such as Administrator.

If you do not want to use this bundle and instead add permissions individually, you can skip this part. Keep in mind that you must know which record types you are using in your Harmony integration, including any custom records, fields, or lists, so that you are able to add the appropriate permissions.

To install the customization bundle and add the role:

1. From the NetSuite's top menu bar, navigate to **Customization > SuiteBundler > Search & Install Bundles**. (Do not click on **List**.)
2. On the **Search & Install Bundles** page, in the **Keywords** search box, enter "1251" and click **Search**.
3. From the search results, select the bundle **Administrator Role - Customizable**.
4. On the **Bundle Details** page, click **Install**. Then from the next page, **Preview Bundle Install**, click **Install Bundle**.
5. On the **Installed Bundles** page, the **Status** will show "Pending..." Installation may take awhile. You can click **Refresh** to see the progress.
6. When installation is successful, the **Status** will show a green checkmark:

ACTION	NAME	BUNDLE ID	VERSION	MANAGED	ABSTRACT	ADMIN DOCUMENTATION	STATUS	OWNER
	Administrator Role - Customizable	1251		No	Includes a custom role that has all permissions.		Completed	Chris Vendemore, Demonstration, Inc. (TSTDIV328910)

7. After installation is successful, from NetSuite's top menu bar, navigate to **Setup > Users/Roles > Manage Roles**. (Do not click **New** or **Search**).
8. On the **Manage Roles** page, on the row for the **Custom Administrator** role, click **Edit**.
9. Navigate to the **Permissions** tab > **Setup** subtab to review the permissions granted for the role and make any edits if necessary. At a minimum, add permissions for **Access Token Management**, **User Access Tokens**, and **Web Services**.

## Add a New Role

An alternative to using the customization bundle is to add a new role and permissions individually. Before doing this, you should know which record types you are using in your Harmony integration, including any custom records, fields, or lists, so that you are able to add the appropriate permissions.

To add a new role:

1. From NetSuite's top menu bar, navigate to **Setup > Users/Roles > Manage Roles > New**.
2. On the **Role** screen, fill out these fields:
  - a. Enter a **Name**, such as "Jitterbit TBA."
  - b. Select the desired **Center Type**. This selection depends on what actions you will be taking. If you don't know which one to select, you can keep the default selection as **Accounting Center**.
  - c. Near the bottom of the **Role** screen, navigate to the **Permissions** tab > **Setup** subtab. Use the **Permission** dropdown to select each type of record that you will need access to in Jitterbit Harmony and click **Add** one at a time. At a minimum, add permissions for:
    - **Access Token Management**
    - **User Access Tokens**
    - **Web Services**

You may also want to add custom fields. For example:

- **Custom Body Fields**
  - **Custom Column Fields**
  - **Custom Entity Fields**
  - **Custom Event Fields**
  - **Custom Fields**
  - **Custom Item Fields**
  - **Custom Item Number Fields**
  - **Custom Lists**
  - **Custom Record Types**
  - **Custom Transaction Fields**
  - **Other Custom Fields**
  - **Other Lists**
- d. Navigate to the **Permissions** tab > **Lists** subtab. Use the **Permission** dropdown to select each type of custom list that you will need access to in Jitterbit Harmony. Use the **Level** dropdown to select **Full** for each and click **Add** one at a time. For example:

- **Employees**
  - **Customers**
- e. Click **Save**.

## Add a New User to Role

This step is applicable only for Option 3 described under [Jitterbit Recommendations for Switching to TBA](#). If you are using Options 1 or 2, you can skip this step, as you will be using your existing NetSuite user that you are currently using in Jitterbit Harmony.

To add a new user:

1. From NetSuite's top menu bar, navigate to **Lists > Employees > Employees > New**.
2. On the **Employee** screen, fill out these fields:
  - a. Under **Primary Information**, enter a **Name**, such as "Jitterbit" for the first name and "TBA" for the last name.
  - b. Under **Email | Phone | Address**, provide an **Email**.
  - c. In the **Access** section, select **Give Access** and set the **Password** and **Confirm Password**.
  - d. In the **Access** section under **Roles**, use the **Role** dropdown to select the role you created above. Then click **Add**.
  - e. Click **Save**.

## Assign a Role to an Existing User

This step is applicable only for Option 2 described under [Jitterbit Recommendations for Switching to TBA](#). If you are using Option 1, you can skip this step, as you will be using your existing role assigned to the Jitterbit Harmony NetSuite user. If you are using Option 3, you should have already assigned the role when you created the new user, as described above.

To assign a role to an existing user:

1. From NetSuite's top menu bar, navigate to **Lists > Employees > Employees**.
2. On the **Employees** page, on the row for the user you are currently using for your Harmony integration, click **Edit**.
3. On the **Employee** page, in the **Access** section under **Roles**, use the **Role** dropdown to select the role you created above. Then click **Add**.
4. Click **Save**.

## Gather Values for Configuring TBA in Jitterbit

After TBA is enabled and you know which role and user you are using in Jitterbit Harmony, you can gather the values needed for configuring TBA in Harmony. This is required for all options (Options 1, 2, and 3) described under [Jitterbit Recommendations for Switching to TBA](#).

### Consumer Key and Consumer Secret

1. From the top menu bar, navigate to **Setup > Integration > Manage Integrations > New**.
2. On the **Integration** screen, fill out these fields:
  - a. Enter a **Name**, such as "Jitterbit TBA."
  - b. From the **State** dropdown, select **Enabled**.
  - c. Under the **Authentication** tab, select **Token-Based Authentication**.



**NOTE:** The selection for **User Credentials** is used only if you want the user to also be able to log in with standard username/password authentication.

- d. Click **Save**.
3. A confirmation message will be displayed, along with values for the following fields that you will need later when configuring TBA in Jitterbit Harmony.



**CAUTION:** Be sure to copy or save these values, as you will not be able to return to this screen.

- **Application ID:** Save this value.
- **Consumer Key:** Save this value. It will not be displayed again.
- **Consumer Secret:** Save this value. It will not be displayed again.

### Token ID and Token Secret

1. Search for "tokens" using the search bar at the top. You should arrive at the page **Access Tokens**.
2. Click the button **New Access Token**.
3. On the **Access Token** screen, fill out these fields:
  - a. Enter an **Application Name** such as "Jitterbit TBA."
  - b. From the **User** dropdown, select the user you created above.
  - c. From the **Role** dropdown, select the role you created above.
  - d. Make any edits to the **Token Name** as desired.
  - e. Click **Save**.
4. A confirmation message will be displayed, along with the values for the following fields that you will need later when configuring TBA in Jitterbit Harmony.



**CAUTION:** Be sure to copy or save these values, as you will not be able to return to this screen.

- **Token ID:** Save this value.
- **Token Secret:** Save this value.

## Account ID

1. From the top menu bar, navigate to **Setup > Integration > Web Services Preferences**.
2. On the **Web Services Preferences** screen, save the value of the **Account ID** to use later when configuring TBA in Jitterbit Harmony.