

Solution 7 Software Documentation Disclaimer and Copyright

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Solution 7 Configuration Guide

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Introduction

This document explains how to configure Solution 7 to connect to NetSuite.

Solution 7 stores all the information needed to connect to NetSuite, including Account ID and NetSuite data center URLs, in a Solution 7 Configuration File. The Solution 7 Configuration File is an XML file with a .CON file extension.

The configuration file can be created for each user and copied to each user's computer or shared centrally between users by storing it on a network server location or by using a cloud-based file sharing service such as Box, Drop Box or Microsoft OneDrive.

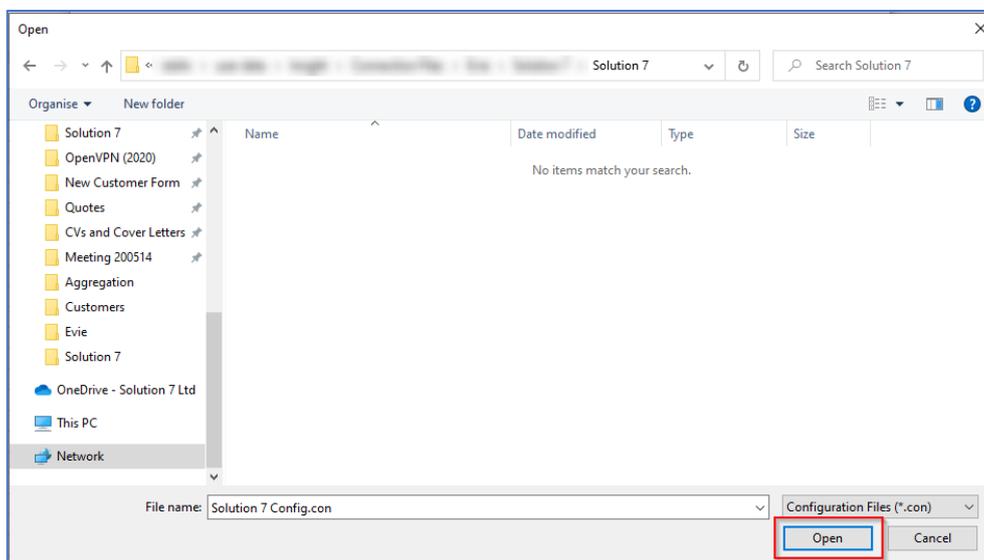
Where possible, it is recommended that configuration files are stored on a shared network and shared between users.

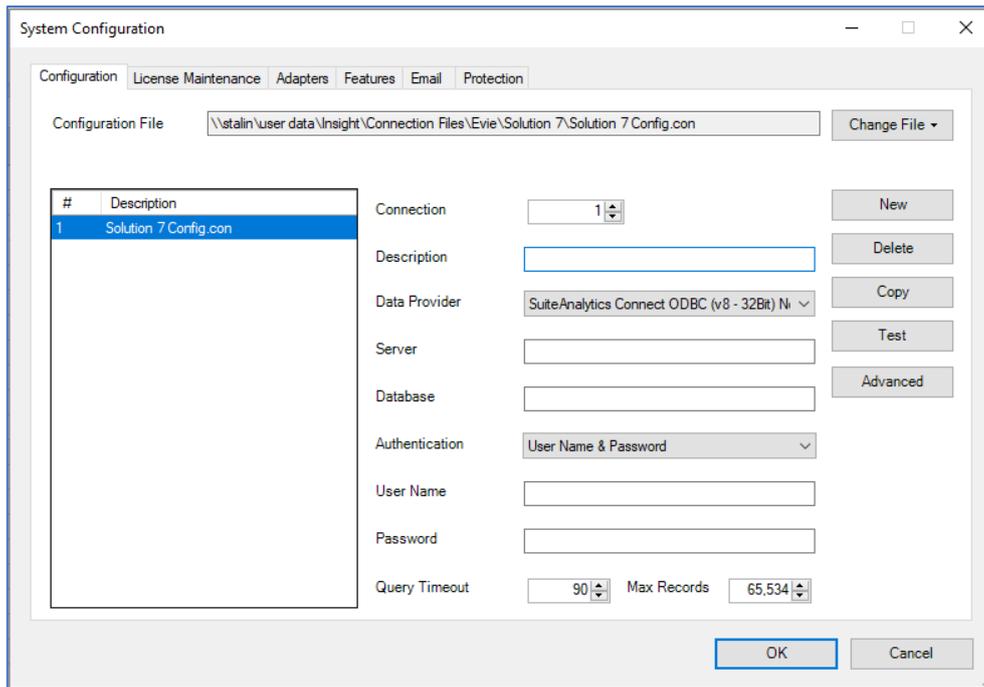
The Solution 7 Configuration File

Create a new Configuration File

When installing Solution 7 for the first time, a new configuration file must be created. To create a new configuration file:

1. Go to Solution 7 > Configure.
2. On the 'System Configuration' screen, click Change File > Change for me only.
3. Create/select a shared network folder or a local folder as the location to store the configuration file.
4. Enter a file name (E.g. "Solution 7 Config.con").
5. Click Open.



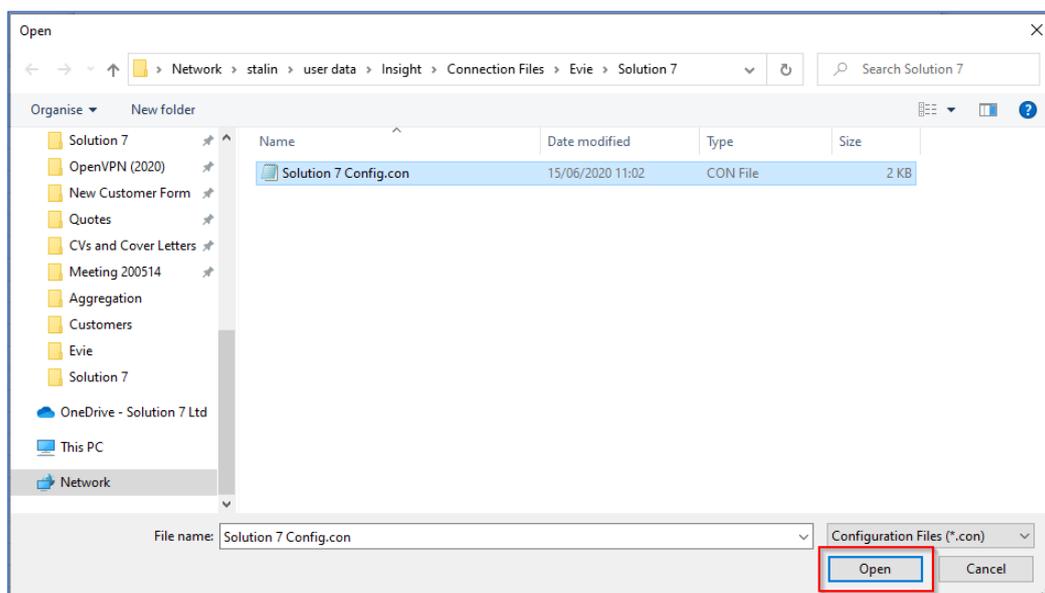


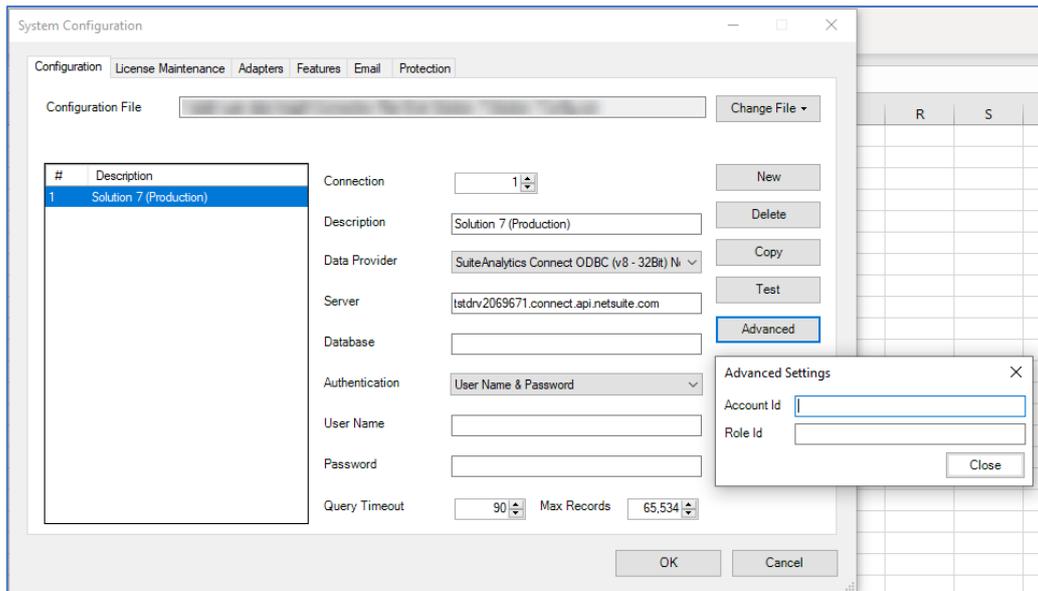
Select an existing Configuration File

When installing Solution 7 on multiple machines, the configuration file can be shared between users by copying to each machine, storing on a shared network drive or by using a cloud storage service.

To select a shared configuration file:

1. Go to Solution 7 > Configure.
2. On the configuration screen, click Change File > Change for me only.
3. Browse to the folder that contains the configuration and select the .CON file.
4. Click Open.




Note:

When selecting an existing configuration file only the User Name, Password and Advanced Settings need to be configured by the user.

Switching between Production, Sandbox and Release Preview Accounts

To easily switch between Production, Sandbox and Release Preview Account, we recommend you create a Solution 7 configuration file per account. We suggest the following naming convention to easily identify each file:

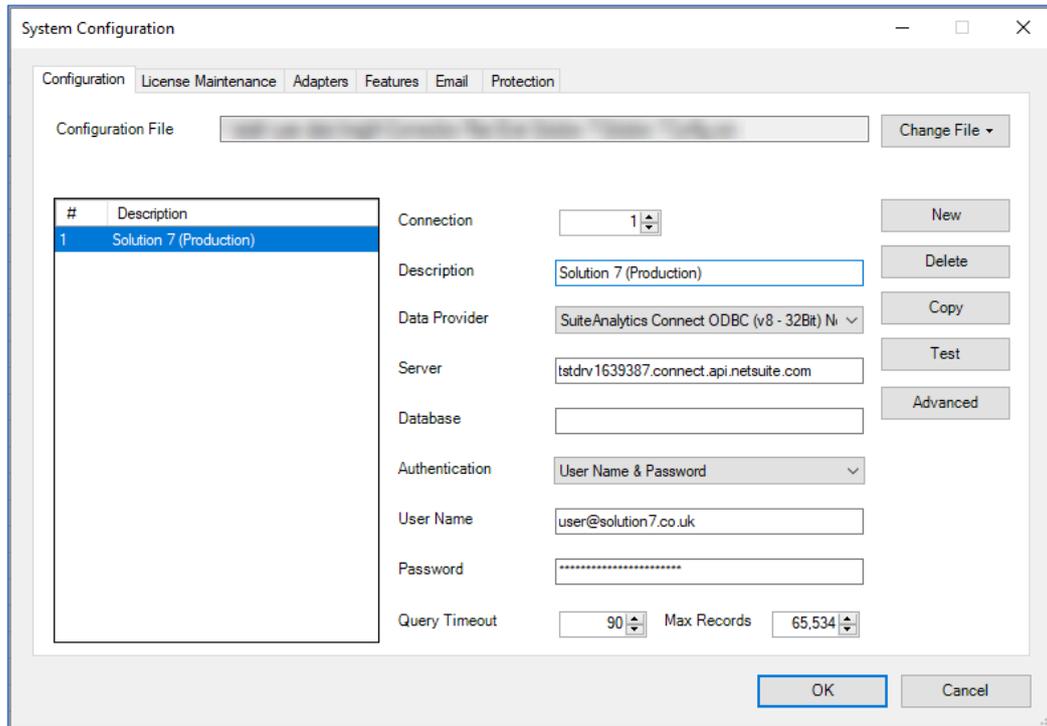
- NetSuite (Production).con
- NetSuite (Sandbox).con
- NetSuite (Release Preview).con

For multiple Sandbox accounts:

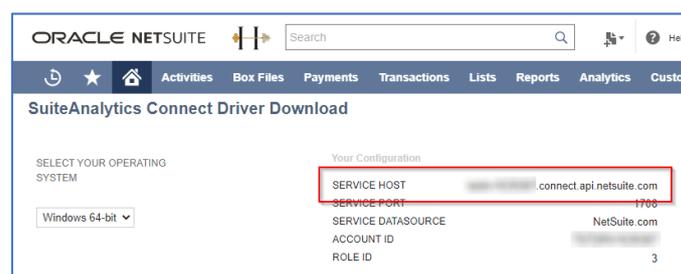
- NetSuite (SB1).con
- NetSuite (SB2).con

Configuration Settings

After creating a configuration file, set the following values:



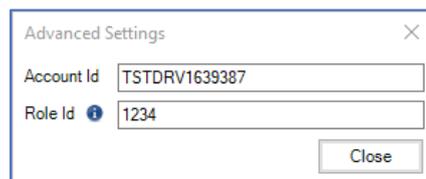
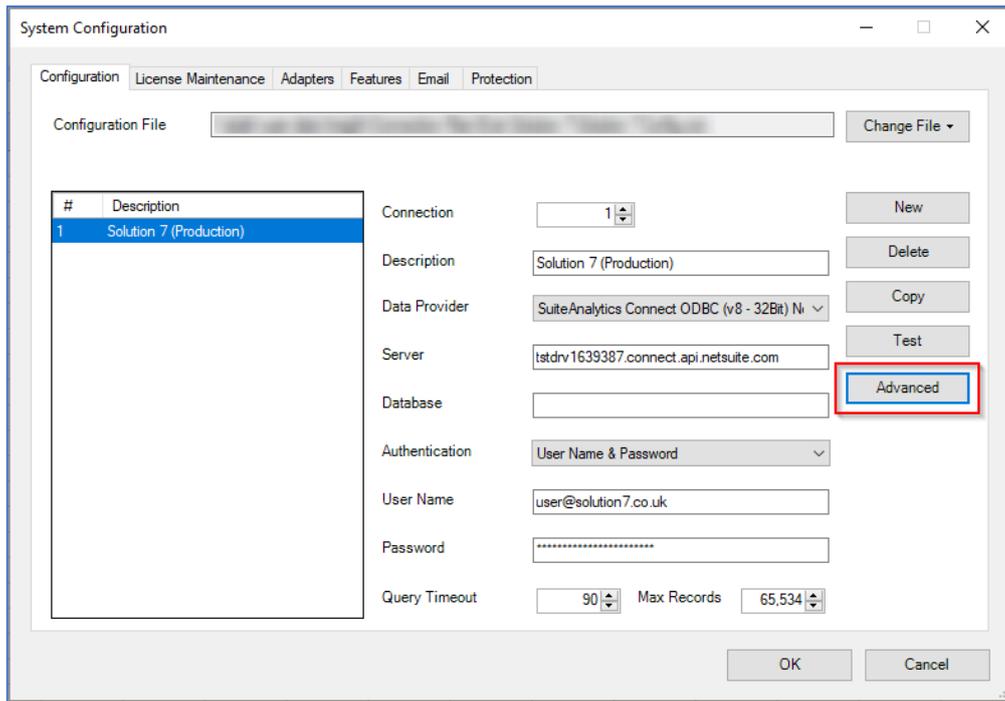
1. **Connection** – Must be set to 1.
2. **Description** – This can be any description. We recommend using your company name followed by (Production), (Sandbox), (SB1), (SB2), (Release Preview) as appropriate.
3. **Data Provider** – Select 'SuiteAnalytics Connect ODBC (v8)'.
4. **Server** – The URL of the NetSuite ODBC service. The Server URL can be found by navigating to 'Setup SuiteAnalytics Connect' from the Settings portlet on the NetSuite Home page and must be in the format: ACCOUNTID.connect.api.netsuite.com.



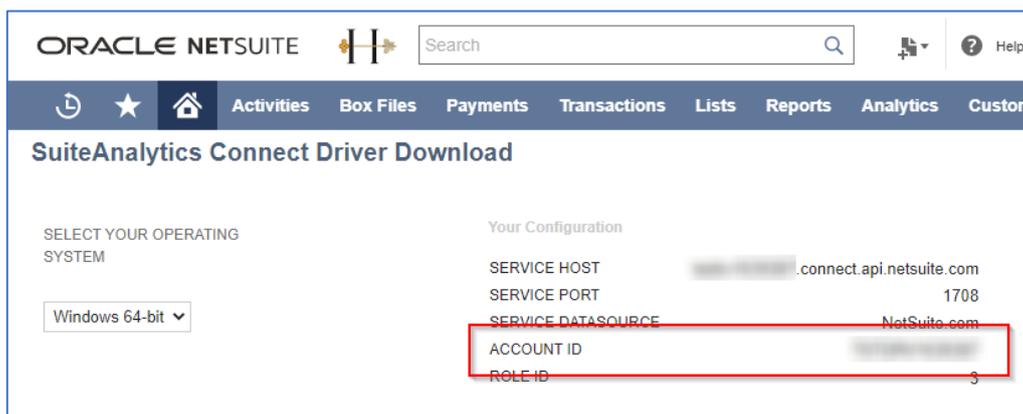
5. **Database** – This is not required.
6. **Authentication** – Select 'User Name & Password'.
7. **User Name** – Enter your NetSuite login name.
8. **Password** – Enter your NetSuite password.

Advanced Settings

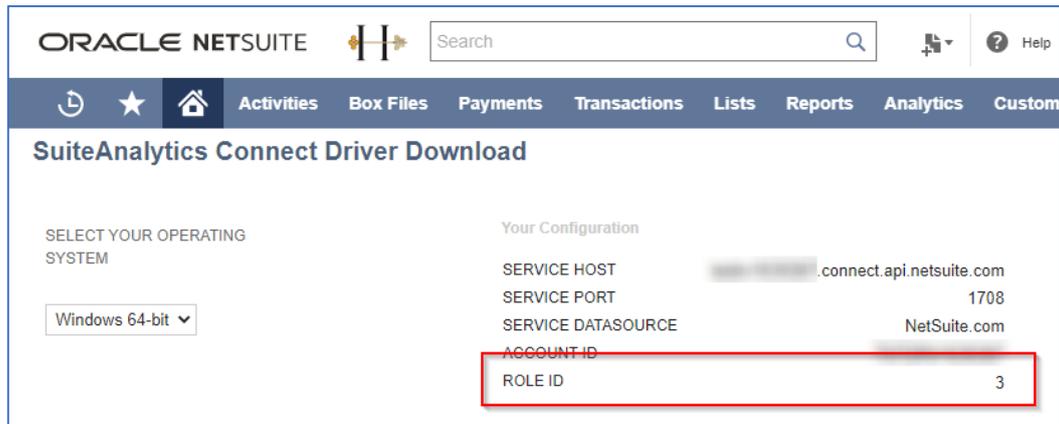
Go to Solution 7 > Configure > Advanced and set the following values:



1. **Account ID** - The Account ID can be found on the 'SuiteAnalytics Connect Driver Download' page.

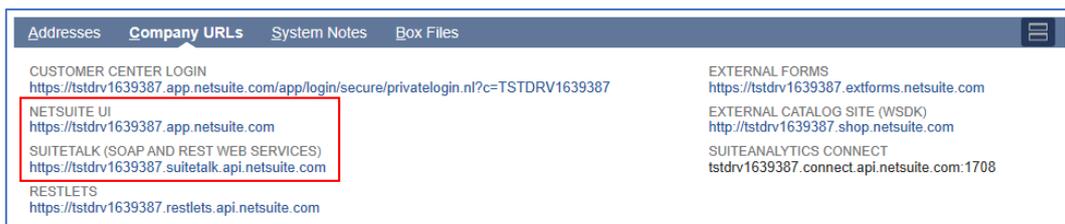


2. **Role ID** - The user's Role ID can be found on the 'SuiteAnalytics Connect Driver Download' page.



Company URLs

The NetSuite and Web Services URL can be found within NetSuite by navigating to Setup > Company Information > Company URLs.



Important - Configuring Sandbox Accounts

When connecting to Sandbox accounts, the Account ID will be in the format **123456_SB1**. When setting the NetSuite URL and Webservices URL, replace the underscore (_) character with a dash (-). For example, if your Sandbox Account Id is 1234567_SB1, the URL must be 1234567-SB1.

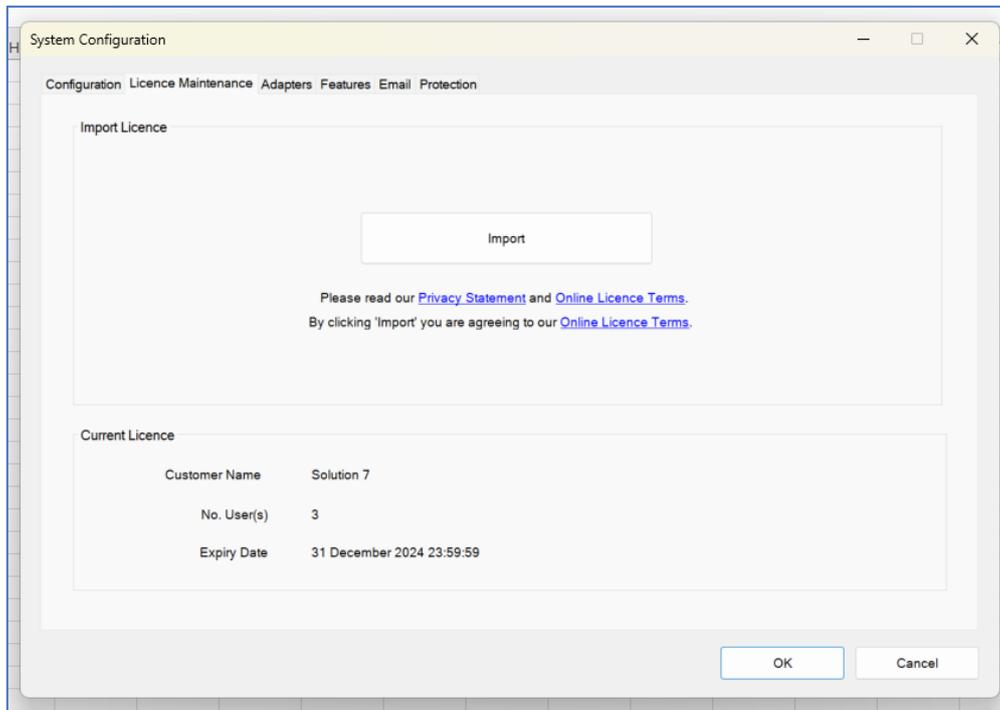
Managing the Configuration File Location via Group Policy (IT Admins Only)

To configure Solution 7 via group policy objects, you can install the Solution 7 administrative template and configure the specific policies you wish to set. For a copy of the Solution 7 Administrative Template file, please contact support@solution7.co.uk.

License Maintenance

Solution 7 issue license keys as part of the support and maintenance contract. License keys can only be obtained from Solution 7 and are not valid if received from a third party.

License (.lic) file cannot be opened directly but must be saved to your computer then imported into the **License Maintenance** tab of the 'System Configuration' dialog.



Importing the Solution 7 license

To import your license key:

1. Save your license key to your computer.
2. Select Solution 7 > Configure.
3. Select the License Maintenance tab.
4. Click Import License.
5. Browse to the license file sent to you by Solution 7 and click Open.
6. Click OK.
7. Click Activate.

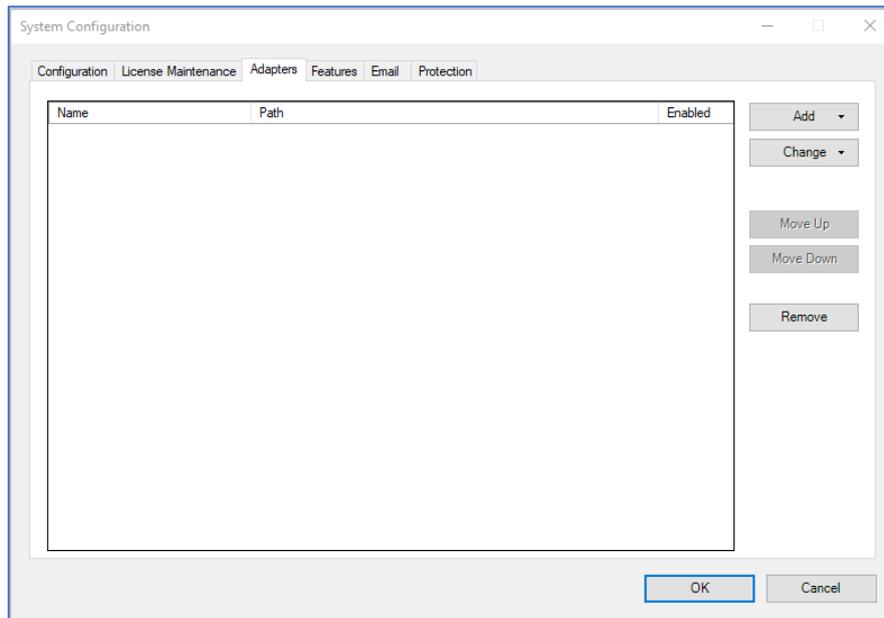
Note:

Your license (.lic) file cannot be opened directly but must be saved to your computer before importing into Solution 7.

Adapters

Adapters are files or groups of files that can be used to extend Solution 7's core functionality with new objects including:

- Lists.
- Functions.
- Drill down columns.
- PivotTables.



Adapters can be added by either referencing an adapter file with a .XDFX extension or by referencing a set of adapter files in a local or shared folder.

Managing Adapters

To add an adapter:

1. From the Configuration screen, select the Adapters tab and click Add.
2. Select Add File or Add Folder.
3. Locate the file or folder and then click Open or Select Folder.
4. Click OK.
5. Restart Microsoft Excel.

To change the location of an adapter file or folder:

1. From the Adapters tab, click Change.
2. Select Change File Path or Change Folder Path.
3. Locate the file or folder and then click Open or Select Folder.
4. Click OK.
5. Restart Microsoft Excel.

To remove an adapter, click Remove.

Relative File Paths

Often it is necessary to reference an adapter in a location that differs from each machine. A good example of this is when an adapter is stored in a user's profile. To reference an adapter by its relative path to the configuration file's path:

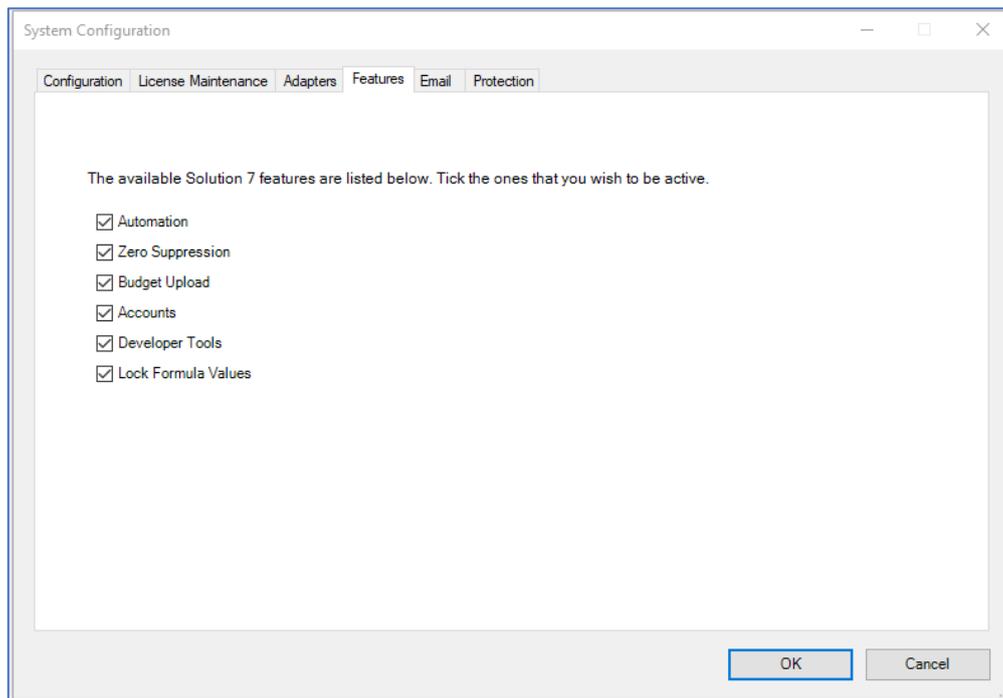
1. From the Configuration screen, select the Adapters tab and click Change.
2. Select Set as Relative Path.

Adapter Load Sequence

To change the sequence of the loaded adapters, use the Move Up and Move Down buttons.

Features

Features can be optionally enabled and disabled for users on a configuration file basis.

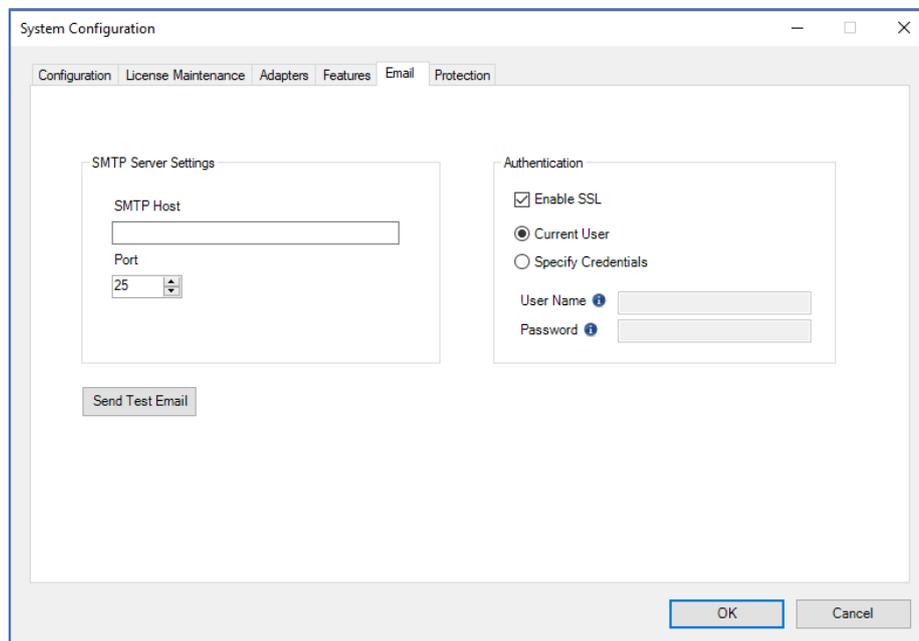


The following features can be enabled or disabled:

- Automation.
- Zero Suppression.
- Budget Upload.
- Accounts.
- Developer Tools.
- Lock Formula Values.

Email

To distribute workbooks by Email using Solution 7 Automation feature, the SMTP server setting must be configured.



The configuration of this page will depend on which email client you use:

- **SMTP Host** – This is the URL of the email provider.
- **Port** – The port number used by the email provider.
- **Enable SSL** – If the email provider requires an encrypted connection.
- **Current User or Specify Credentials** – Use the current user's Windows credentials or specify the user credentials in **User Name** and **Password**.
- **User Name** – Your User Name
- **Password** – Your Password

SMTP Providers

SMTP configurations for common email clients can be found in the tables below. If your email provider is not included, you will need to speak with your IT team or refer to the documentation for your email provider.

Office 365

Office 365 SMTP Settings	
SMTP Host	smtp.office365.com
Port Number	587 (recommended) or 25
Enable SSL	Checked
Specify Credentials	Checked
User Name	Your Office 365 email address
Password	Your Office 365 Password

Outlook

Outlook SMTP Settings	
SMTP Host	smtp-mail.outlook.com
Port Number	587
Enable SSL	Checked
Specify Credentials	Checked
User Name	Your Outlook email address
Password	Your Outlook Password

If you have Two-Factor Authentication enabled on your Outlook account, you will need to create an app password to use in Solution 7. To create an app password on your Outlook account visit: <https://support.microsoft.com/en-us/account-billing/using-app-passwords-with-apps-that-don-t-support-two-step-verification-5896ed9b-4263-e681-128a-a6f2979a7944>

Hotmail / Live Account

Hotmail/ Live SMTP Settings	
SMTP Host	smtp.live.com
Port Number	25 or 465
Enable SSL	Checked
Specify Credentials	Checked
User Name	Your Hotmail / Live email address
Password	Your Hotmail / Live Password

Gmail / G Suite

Gmail SMTP Settings	
SMTP Host	smtp.gmail.com
Port Number	25, 465 or 587
Enable SSL	Checked
Specify Credentials	Checked
User Name	Your Gmail address
Password	Your Gmail Password

If you have Two-Factor Authentication enabled on your Gmail account, you will need to create an app password to use in Solution 7. To create an app password on your Gmail account visit: <https://support.google.com/accounts/answer/185833?hl=en>

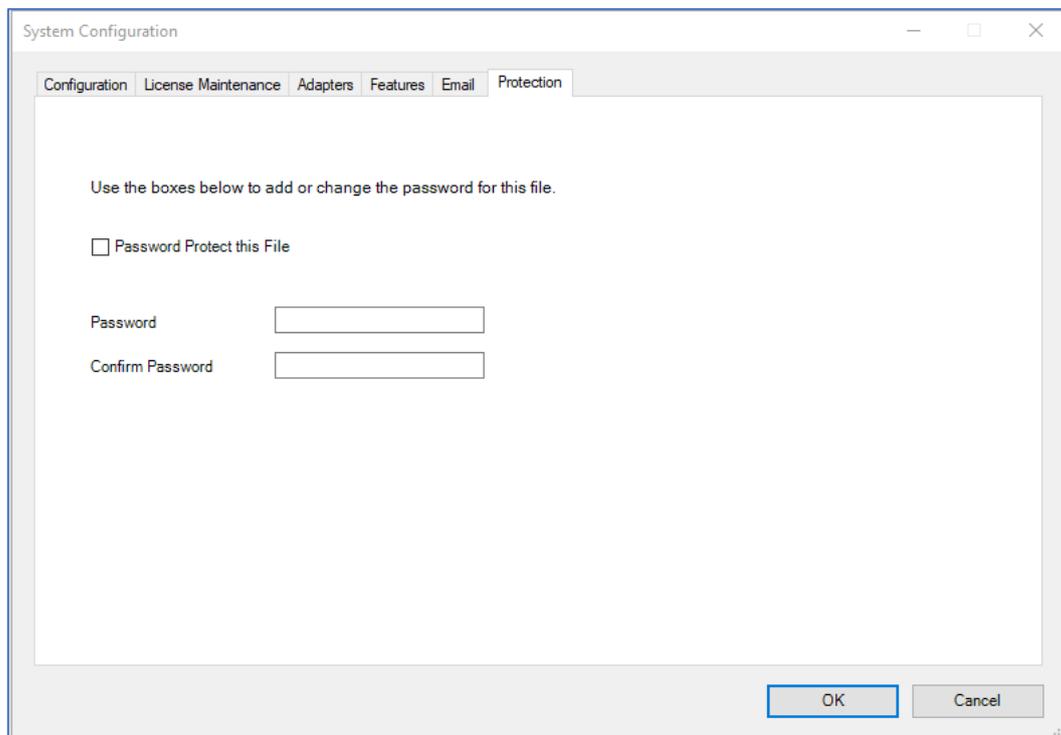
Yahoo

Yahoo SMTP Settings	
SMTP Host	smtp.mail.yahoo.com
Port Number	465 or 587
Enable SSL	Checked
Specify Credentials	Checked
User Name	Your Yahoo email address
Password	Your Yahoo Password

If you have Two-Factor Authentication enabled on your Yahoo account, you will need to create an app password to use in Solution 7. To create an app password on your Yahoo account visit: <https://help.yahoo.com/kb/access-yahoo-mail-third-party-apps-sln15241.html>

Protection

Applying a password prevents end users from switching to a different configuration file or editing an existing configuration file.



The screenshot shows a 'System Configuration' dialog box with the 'Protection' tab selected. The dialog has a title bar with standard window controls. Below the title bar, there are tabs for 'Configuration', 'License Maintenance', 'Adapters', 'Features', 'Email', and 'Protection'. The main area contains the following text and controls:

Use the boxes below to add or change the password for this file.

Password Protect this File

Password

Confirm Password

At the bottom right, there are 'OK' and 'Cancel' buttons.

To apply password protection to the configuration file:

1. From the Protection tab of the Configuration screen, tick Password Protect this File.
2. Enter and confirm the password.
3. Click OK.
4. Restart Microsoft Excel.