

Guide: Setup Service Accounts for Adaly

Step 1: Enable OAuth 2.0 and TBA Feature

1. Go to Setup > Company > Enable Features.
2. Click the **SuiteCloud** subtab.
3. In the **SuiteScript** section, check the following boxes:
 - **Client SuiteScript**. Click **I Agree** on the SuiteCloud Terms of Service page.
 - **Server SuiteScript**. Click **I Agree** on the SuiteCloud Terms of Service page.
4. In the **Manage Authentication** section, check the following boxes:
 - a. **OAuth 2.0** box. Click **I Agree** on the SuiteCloud Terms of Service page.
 - b. **Token-Based Authentication**. Click **I Agree** on the SuiteCloud Terms of Service page.
5. Click **Save**.

Step 2: Create an Integration Record

1. Go to Setup > Integration > Manage Integrations > New.
2. Enter a name for your application in the **Name** field.
3. Enter a description in the **Description** field, if preferred.
4. Select Enabled in the **State** field.
5. Enter a note in the **Note** field, if preferred.
6. Under **Authentication**, enable the following:

The screenshot shows the 'Authentication' configuration page. It has two tabs: 'Authentication' and 'Execution Log'. Under 'Authentication', there are three main sections: 'Token-based Authentication', 'OAuth 2.0', and 'User Credentials'. In 'Token-based Authentication', 'Token Based Authentication' is checked. In 'OAuth 2.0', 'Authorization Code Grant' is checked, and 'Public Client' is also checked. The 'Redirect URI' is set to 'https://new.adaly.ai'. The 'Refresh Token Validity (in hours)' is set to '168'. The 'Maximum Time for Token Rotation (in hours)' is set to '168'. The 'Client Credentials (Machine to Machine) Grant' is checked. In the 'Scope' section, 'RESTLETS', 'REST WEB SERVICES', and 'SUITEANALYTICS CONNECT' are checked. In the 'Application' section, 'Application Logo' is set to 'Type then tab', 'Application Terms of Use' is set to 'Type then tab', 'Application Privacy Policy' is set to 'Type then tab', and 'OAuth 2.0 Consent Policy' is set to 'Always Ask'.

7. Click **Save**
8. **IMPORTANT:** On confirmation, scroll to the bottom of the page and copy the **Client ID** and **Client Secret**. (This will only be displayed once)

Step 3: Create the Service Account

1. Go to Setup > Users/Roles > Manage Roles > new
2. Create a custom integration management role (E.g. Adaly Integration Management) with the following **Setup** permissions:

Permissions	Restrictions	Forms	Searches	Users	Preferences	Dashboard	Translation	History
Transactions	Reports	Lists	Setup	Custom Record				
Integration Application								
Access Token Management								
Log in using Access Tokens								
Log in using OAuth 2.0 Access Tokens								
Manage Custom Permissions								
OAuth 2.0 Authorized Applications Management								
REST Web Services								
Records Catalog								
SOAP Web Services								
Set Up SOAP Web Services								
User Access Tokens								

3. Create a new Employee for the Adaly Representative with the following roles:
 - a. The new integration management role created in Step 2.
 - b. Accountant (Reviewer)

- i** Pass the following back to Adaly Representatives:
- Service account details
 - Integration Application Client ID and Client Secret