Mitel NetSuite CAS Client User Guide

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Description: This Application Note describes about the Mitel NetSuite Client application which provides integration between calls made and received on a user's Mitel phone with records containing the same phone numbers stored in the user's NetSuite database.

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Introduction

The Mitel NetSuite Client application provides integration between calls made and received on a user's Mitel phone with records containing the same phone numbers stored in the user's NetSuite database.

With any Telephony CRM integration including NetSuite, there are two aspects:

- Screen pop based automatic lookup of the call's caller or called ID.
- Click to call for outbound calling.

This integration supports the screen pop integration. For click to call support, the user should use the Mitel's WebDialer application which creates click to call links on any phone numbers on any web page including NetSuite pages.

This is detailed below in the section on Click To Call support.

The integration is provided in the form of a Windows setup program which when run, installs the application on the user's PC.

Requirements

- **A Web Browser**
  We use the user's default Web Browser when displaying NetSuite pages.
- **Microsoft .NET Runtime Framework**
  The Mitel NetSuite Client application uses the .NET framework. This may already be installed on the user's machine but if not, the user will be prompted at the time of the install to go to the Microsoft Web site to first install the .NET runtime before continuing.
- **Mitel's Connect Telephony Interface available to client PC running either with MiVoice Connect or MiCloud Connect**
  The Mitel NetSuite Client application uses the services of the Mitel telephony interface to monitor and control calls. MiVoice Connect users will be prompted to supply their Mitel client login credentials and can choose to have the client save their credentials to avoid needing to supply them each time the client is run. MiCloud Connect users must have logged into the Mitel Connect Client and in the login dialog checked the Remember settings checkbox prior to attempting to use this client with their Mitel phone.

- **Mitel Professional Services Licensing Server**
  For MiVoice Connect users, the Mitel Advanced Application's licensing server must be installed and running on the customer Mitel Headquarters server and either a trial or permanent NetSuite client license installed on the licensing server and assigned or available for each user who wants to use the NetSuite client. Licensing for MiCloud Connect users is handled centrally.
- **A NetSuite Account**
  By definition, the Mitel NetSuite Client application requires the user to provide login credentials to their NetSuite account.

Overview

The Mitel NetSuite Client application runs on each user's desktop. It appears as a tray icon application.

Because NetSuite is a web based client, the integration is handled externally to the user's Internet Explorer web browser. Specifically, this integration uses the NetSuite Web Services Interface. This is used to search for related records when a new call is detected.

When the application detects a call and the call's phone number information is available, it will, depending on configuration, either automatically take the user to the associated record or provide a "toaster" pop up window from the tray area. This pop up will contain one or more links based on any corresponding record(s) found in the user's NetSuite database. The user can then click on a desired link and the application will navigate the user's Internet Explorer web browser to the associated page.

Based on the lookup result, there are three possible results:

- No records found: The default pop up will allow the user to click to create a new NetSuite Contact or new NetSuite Customer record and navigate the browser to the new record. However, with configuration the popup can be configured to only provide the New Customer link.
- One record found: The pop up will allow the user to click view the record, create a new associated Phone Log, Case or User Note. Again, with configuration it is possible to hide all of the options except to open the record and optionally create a phone call log without opening a web form.
- Multiple records found: The pop up will allow the user to click to display the results of searching in NetSuite for the call's phone number.

Installation

The application is provided in a zip file in the form of an install file and associated support file. To install the application, follow these steps:

1. Install the Mitel Call Manager if not already installed.
2. Unzip the setup files into a directory.

Note! Do not run the install directly from the zip file. While this will appear to work, this can cause problems, especially if installed for all users.

3. Run the included setup.exe application.
4. Follow the prompts to verify or select the install directory and complete the install.
5. If you have not yet installed the Mitel Professional Services licensing server on the Mitel Headquarters server then you'll need to do so now.
6. In addition to the software and documentation, you should also have received either a trial or permanent license for the NetSuite client for some number of users. You must install the Mitel NetSuite Client license string into the licensing server using the Licensing Server's

web-based administration.

Note! After the installation of Mitel NetSuite Client application version 19.2, you must navigate to the *C:\Program Files (x86)\Mitel\Mitel NetSuite Client* folder, open the *STNetSuiteClient.exe.config* file, replace the value of "**appId**" with the actual Application ID for the customer's Net suite account, and then log in.

7. You can now run the application and follow the instructions in the next section, running for the First Time.

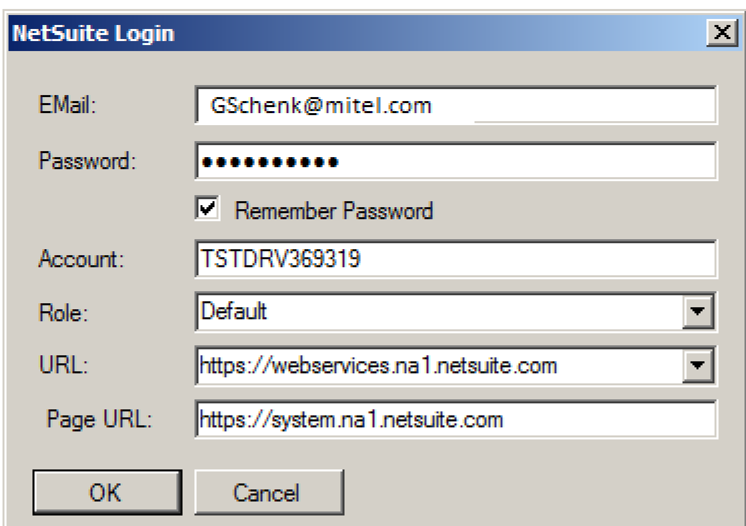
8. If you also wish to enable outbound click-to-call dialing from NetSuite then see the section below, Outbound Click to Call Support.

Running for the First Time

Once installed, you can run the application. After the application starts, it should show up on the tray icon. Note that it will usually take at least 5 second after starting before you see any icon show up on the tray. This is normal and is due to the time required to load the NetSuite web services interface. Typically its initial state is the "Do-Not-Enter" sign indicating that it is currently not logged into NetSuite:

Logging into NetSuite

The first time you run it you will need to login to NetSuite. If you want to avoid the login dialog when starting the application in the future, you will want to check the "Remember Password" checkbox.:



EMail: The user's email address used to login to NetSuite.

Password: The user's NetSuite Password.

Remember Password: Check this to save your password. Note that if saved, the password is stored using the Data Protection APIs built into Windows. These provide very secure encryption.

Account: The user's NetSuite Account ID. You will need to ask your NetSuite administrator for this Account ID. This can be retrieved from the NetSuite web interface by an administrator by going to

Setup > Integration > Web Services.'

Role: The role to use. Select "Default" to use the user's default role or select one of the predefined roles from the drop down list. You can also enter the ID of a role if it isn't listed in the list.

NOTE: The role id that you provide must have Web Services permissions. Please check with your administrator to ensure that the role you use does have Web Services permissions.

URL: This is the base of URLs formed to actually access the customer's NetSuite web pages. Standard URLs can be selected from the list and nonstandard URLs can be entered. Most customers will want to use **https://webservices.na1.netsuite.com**.

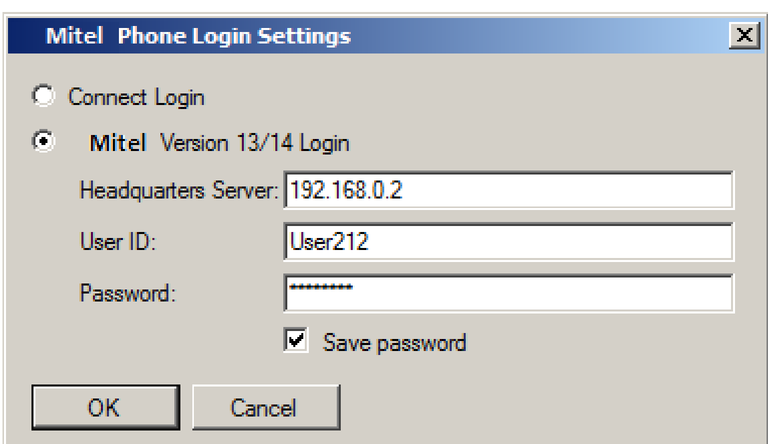
Page URL: Most users should not change this. This will change to match the URL selected. For testing, some international users and other special situations, some users will need to change this from the default value of: **https://system.na1.netsuite.com**.

Logging into Mitel

MiCloud Connect users who have previously successfully logged into their Mitel MiCloud Connect client application and checked the checkbox to remember their credentials shouldn't have to login to Mitel. It should happen automatically.

MiVoice Connect users will need to provide details to login to their company's Mitel Phone server the first time they run the client. In addition, if they don't check the checkbox to remember their password then they'll need to supply it each time they run.

This shows the Mitel login dialog:



Connect Login: Select this choice if you are logging into Mitel MiVoice Connect or MiCloud Connect.

Mitel Version 13/14 Login: Select this choice if you are logging into an on premise Mitel version 13 or 14 phone system.

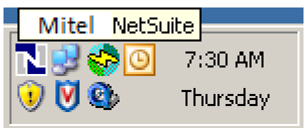
Headquarters Server:	The network name or IP address of the user's Mitel Headquarters ONSITE server.

User ID: The ONSITE user's Mitel User ID.

Password: The ONSITE user's Mitel password.

Save Password: Check this to save your ONSITE User’s password. Note that if saved, the password is stored using the Data Protection APIs built into Windows. These provide very secure encryption.

Once the user has successfully logged into NetSuite and Mitel the icon will change to indicate that the application is fully operational.



If for some reason the application is unable to connect to the underlying phone system, the icon will change to a caution sign to reflect the problem:

The possible extension status include:

- User Logged Out
  This indicates that there is no Mitel extension found. It could be caused by either that the user is running on a Server PC and has requested a specific extension which does not exist or the application is running on a Client PC where the Mitel Call Manager has not been installed and therefore there is no interface to the user's extension.
- Out of service
  This usually indicates that the IP phone is off line or powered off.

After logging in, the user will want to review their settings. See below in the section on the Tray Icon Menu Settings choice for details.

Usage

By default, the application will react to new inbound and, depending on the settings, outbound calls with a popup from the tray icon area of the user's Windows taskbar. However, for the case of a single record found, the user can configure their settings to cause the application to automatically navigate to an associated form.

No NetSuite Records Matching a Call Party ID

If there are no record found with a matching phone number then the following pop up will show:

If the setting “Remove New Contact from Toaster” is checked then the popup will instead show:

Lastly, if in addition the setting “Open New Customer without creating record first” is also enabled then the popup will show:

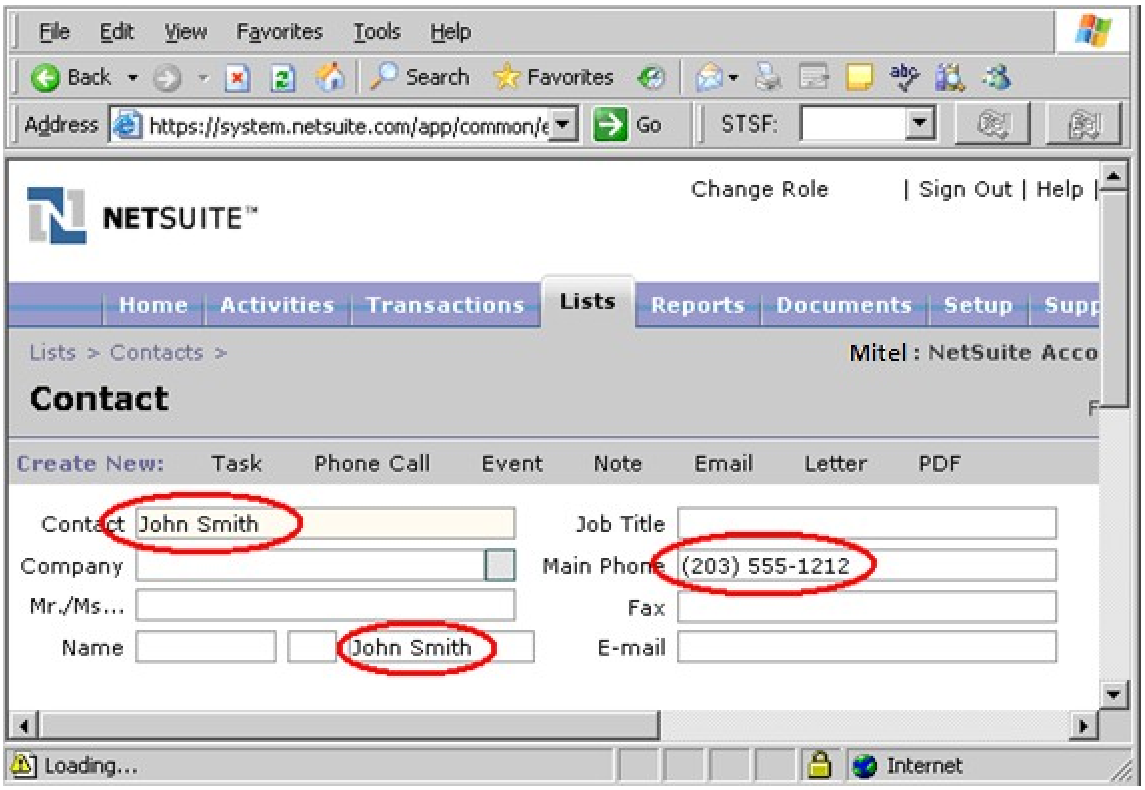
The Re-Query button is used after the new customer record is saved to allow the creation of a Phone Call record automatically or in response to responding to the popup.

In the case of no matching records, the pop up contains three "active" areas:

- The Phone Number
  Hovering the mouse over the red phone number changes the number to the name provided by the underlying phone system. This will only show if a name was provided by the phone system:

- The New Contact link:

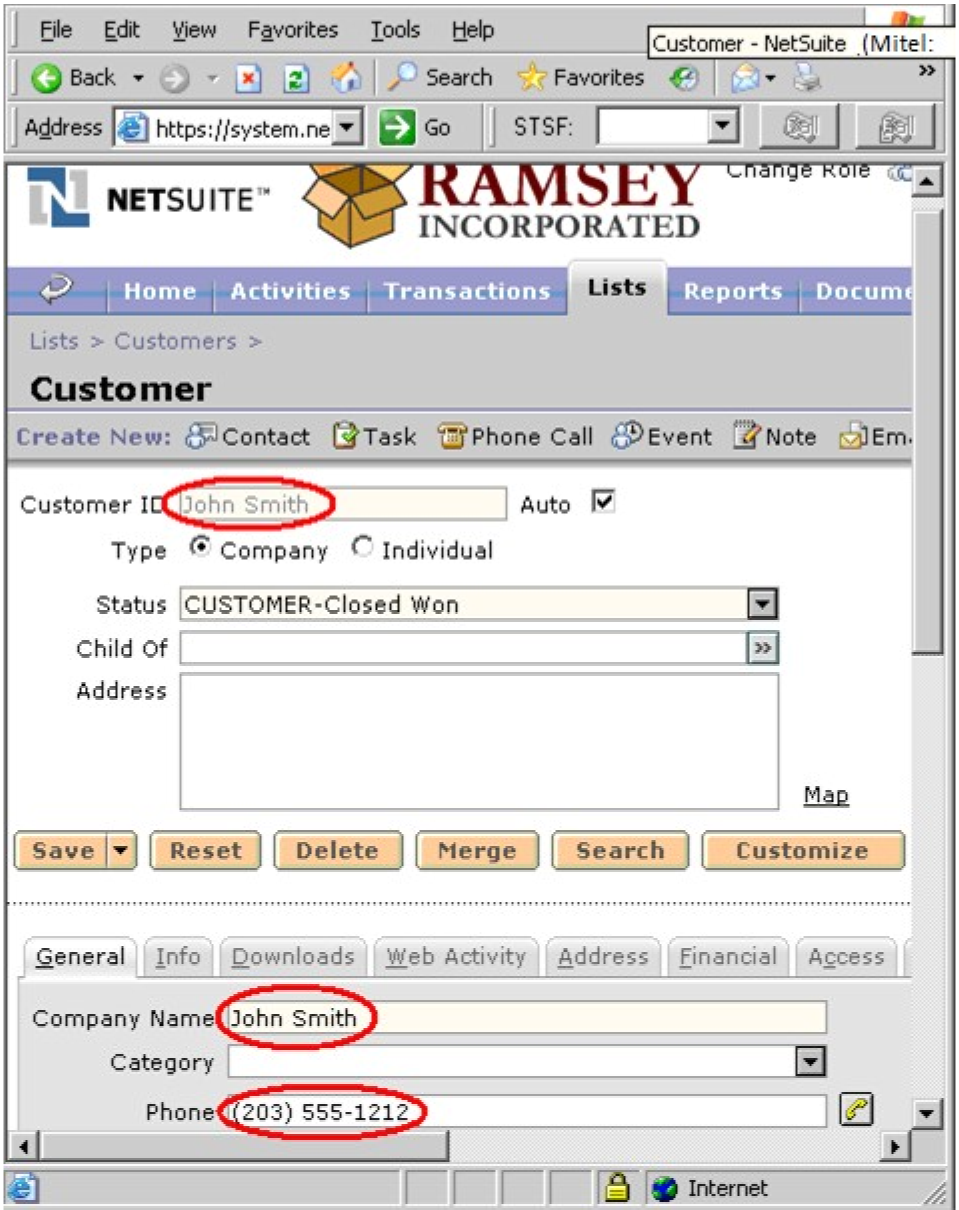
If showing, clicking the New Contact link results in a new contact record being created in NetSuite using the phone number as the contact's phone field. If a name was provided by the phone system then this is used as the name and the last name of the new contact record. Note that if a name is not available or conflicts with another record then a system generated number is used and should be changed. After the record is created "under the covers", the application then navigates the user to the record in the browser:



Note that if the user changes their mind, they should delete the record (which they can do easily from the form contact form displayed).

- The New Customer Link:

Clicking the New Customer link results in a new customer record being created in NetSuite using the phone number as the customer's phone field. If a name was provided by the phone system then this is used as Customer ID and Company Name of the new customer record. Note that if a name is not available or conflicts with another record then the system generated number is used and should be changed. After the record is created "under the covers", the application then navigates the user to the record in the browser:



One NetSuite Record Matching a Call Party ID

If the search of NetSuite yields a single record then, assuming the above settings are set to display a pop up (the default) then when a call is detected with caller or called ID, the application will show a popup from the tray:

If the result is a customer and the setting “Remove options from Toaster on customer match” is enabled then the popup looks like this:

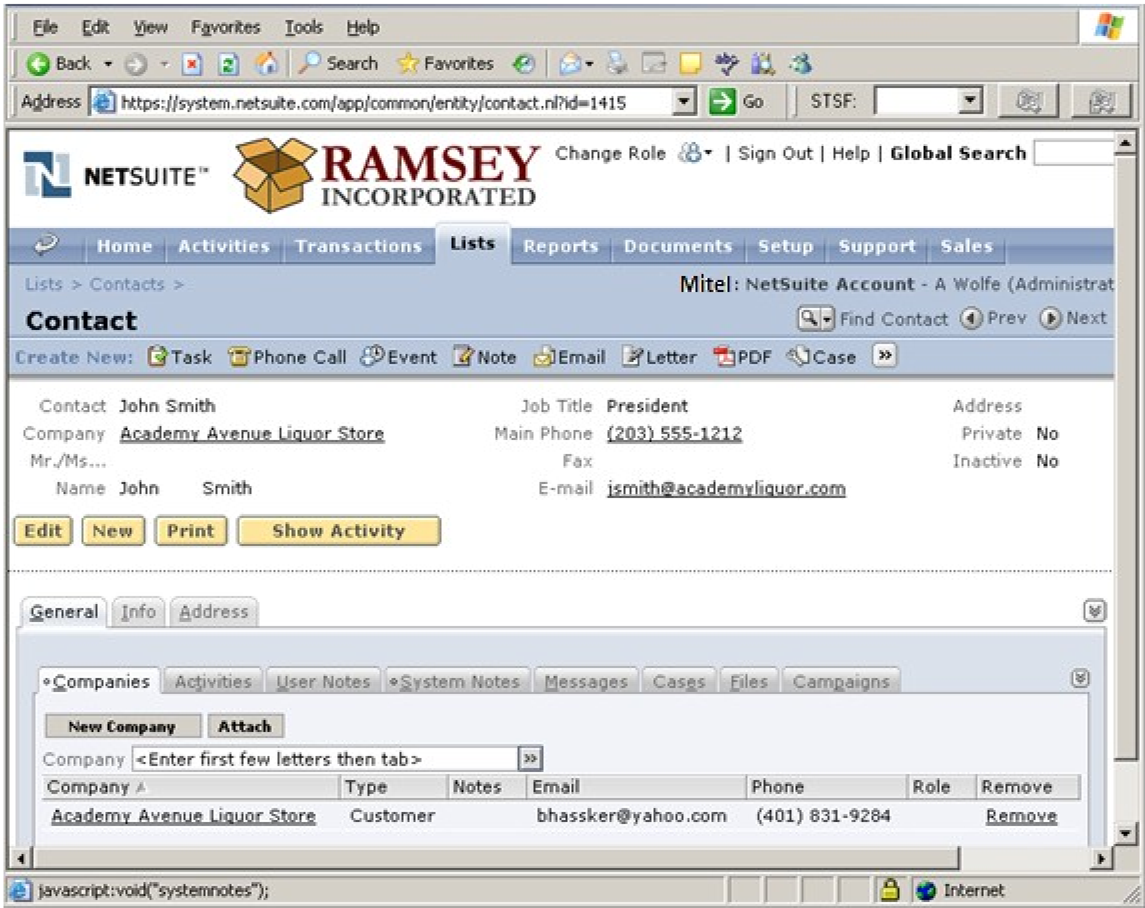
Again, in the case of a customer, if the options are hidden and the “Create New Phone Call without opening a form” option is enabled then clicking the Customer link will have the side effect of also creating a related Phone Call record.

The pop up can contains six "active" areas:

- The Phone Number
  Hovering the mouse over the red phone number changes the number to the name provided by the underlying phone system. This will only show if a name was provided by the phone system.

- The Found Record showing the type (Contact) and name (John Smith) of the matching party. In addition, if the party is a contact and is associated with a company then the company name (Academy Avenue Liquor Store) is shown in parenthesis:

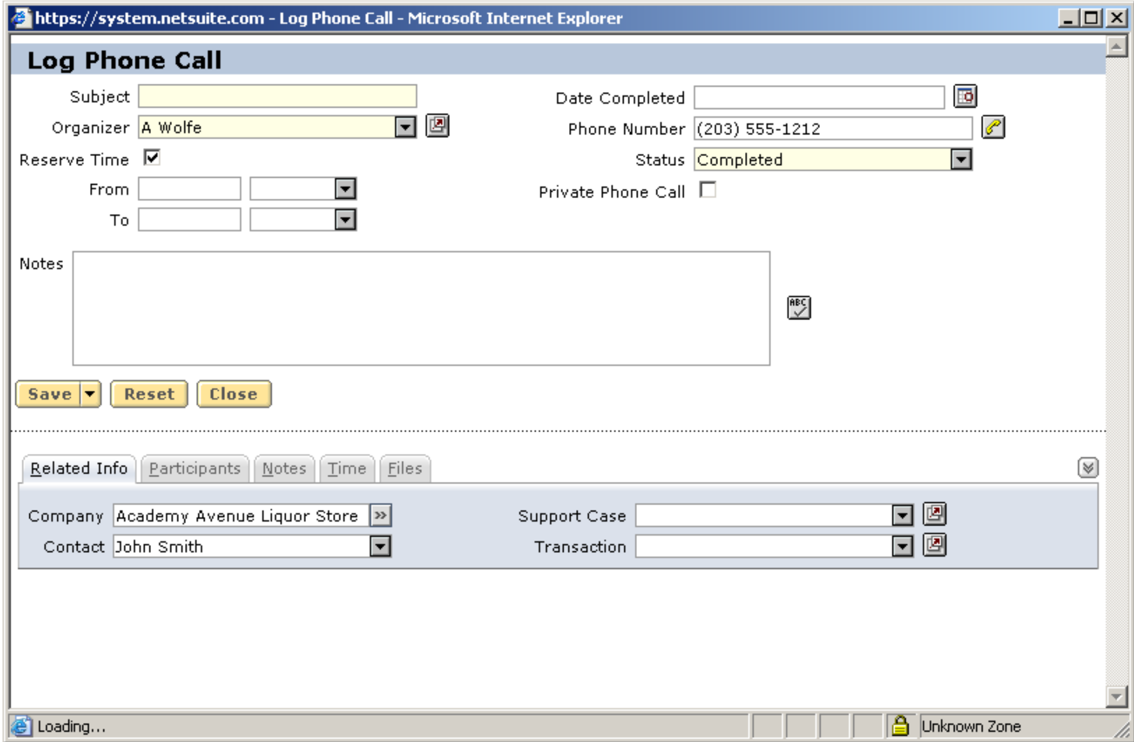
Clicking the central link shows the corresponding contact or customer record in the browser:



Except for search, all of the remaining links display the customer record page and then popup a second browser window on top.

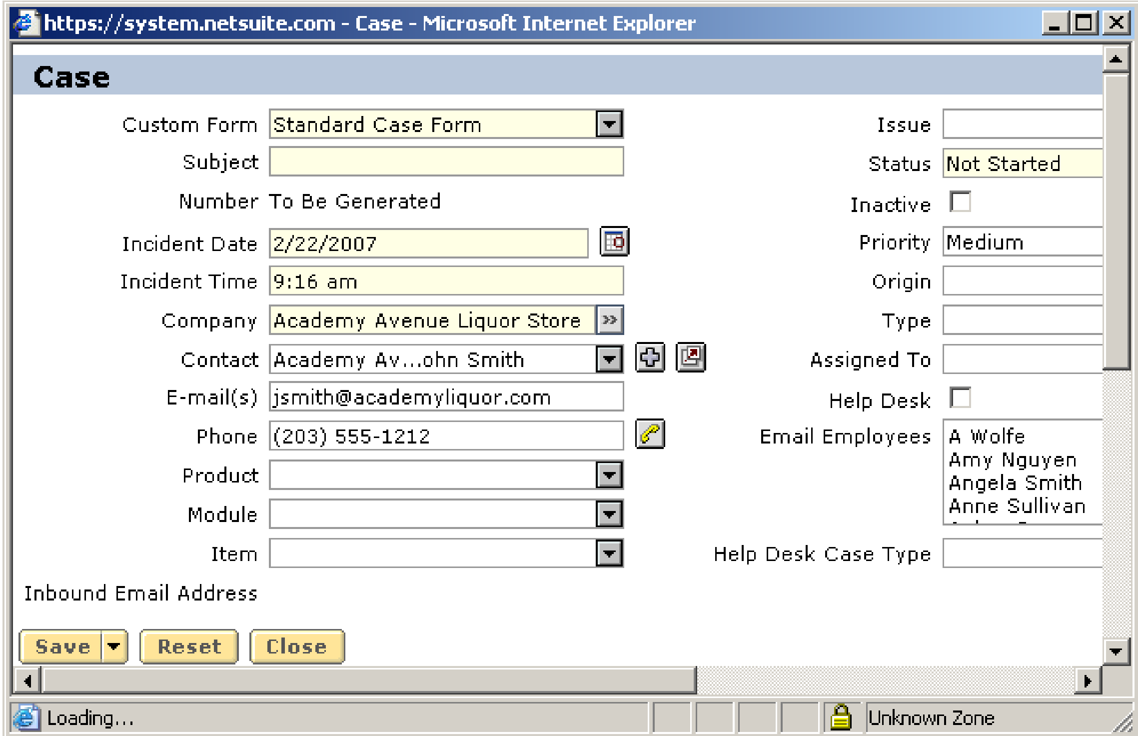
- Log Phone Call:

Clicking this link causes the main record page to display followed by the Log Phone Call form opened in a separate window. This is equivalent to a user creating a new Log Phone Call activity from the web interface. That is, a record is not created in NetSuite until the users saves the form:



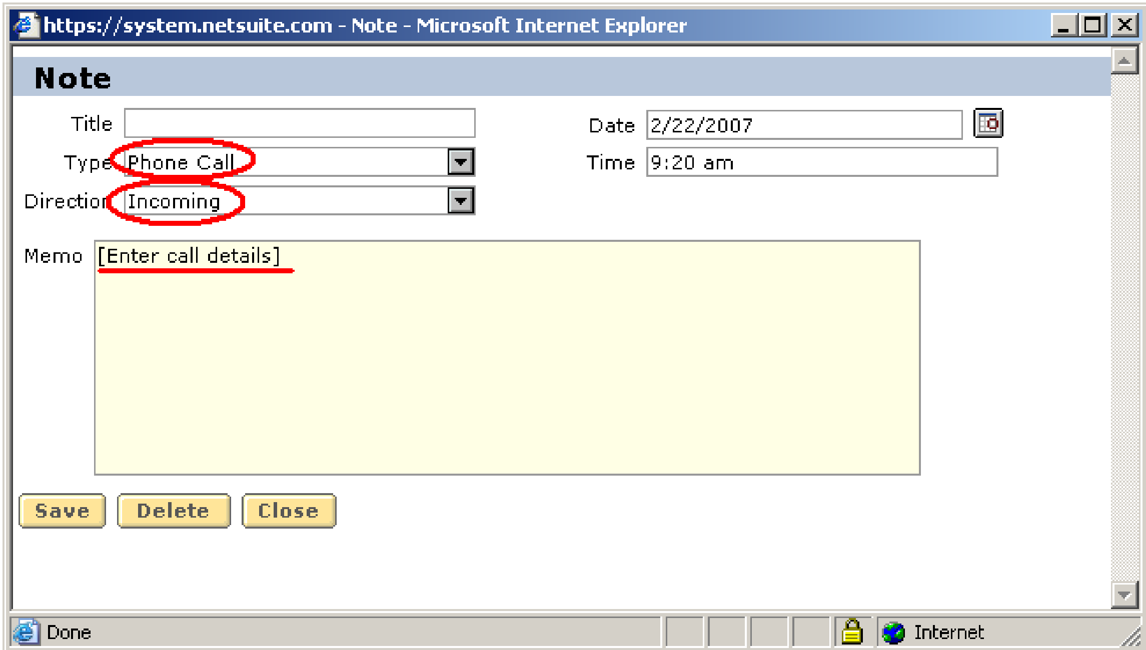
- New Case:

Clicking this link causes the main record page to display followed by the Log New Case form opened in a separate window. This is equivalent to a user creating a New Case from the web interface. That is, a record is not created in NetSuite until the users saves the form:



- Create User Note

Clicking this link causes the main record page to display followed by the User Note form opened in a separate window. Unlike the Log Phone Call and New Case links, the Create a User Note link actually creates a record first in NetSuite and then displays it in the browser. It does this so that it can set several of the call note fields, specifically, the note type to "Phone Call" and the Direction to indicate if the call was Incoming or Outgoing. Note that in order to create the record, we need to set some value for the memo field Therefore we set "[Enter call details]" as the memo with the expectation that the user will replace it will the actual call details:



- Search

Clicking this link takes the browser to the main NetSuite search page showing the results of searching for the number across all NetSuite records. This useful if all of the tables are not enabled for searching in setup and the user wants to verify that the caller is not associated with any entity.

Multiple NetSuite Records Matching a Call Party ID

If the search of NetSuite yields multiple matching records then the following pop presents:

In the case of multiple matching records, the pop up contains two "active" areas:

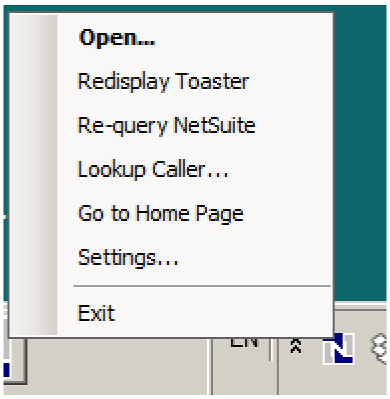
- The Phone Number
  Hovering the mouse over the red phone number changes the number to the name provided by the underlying phone system. This will only show if a name was provided by the phone

system.

- Search Multiple Records link
  Clicking this link takes the browser to the main NetSuite search page showing the results of searching for the number across all NetSuite records.

Tray Icon Menu

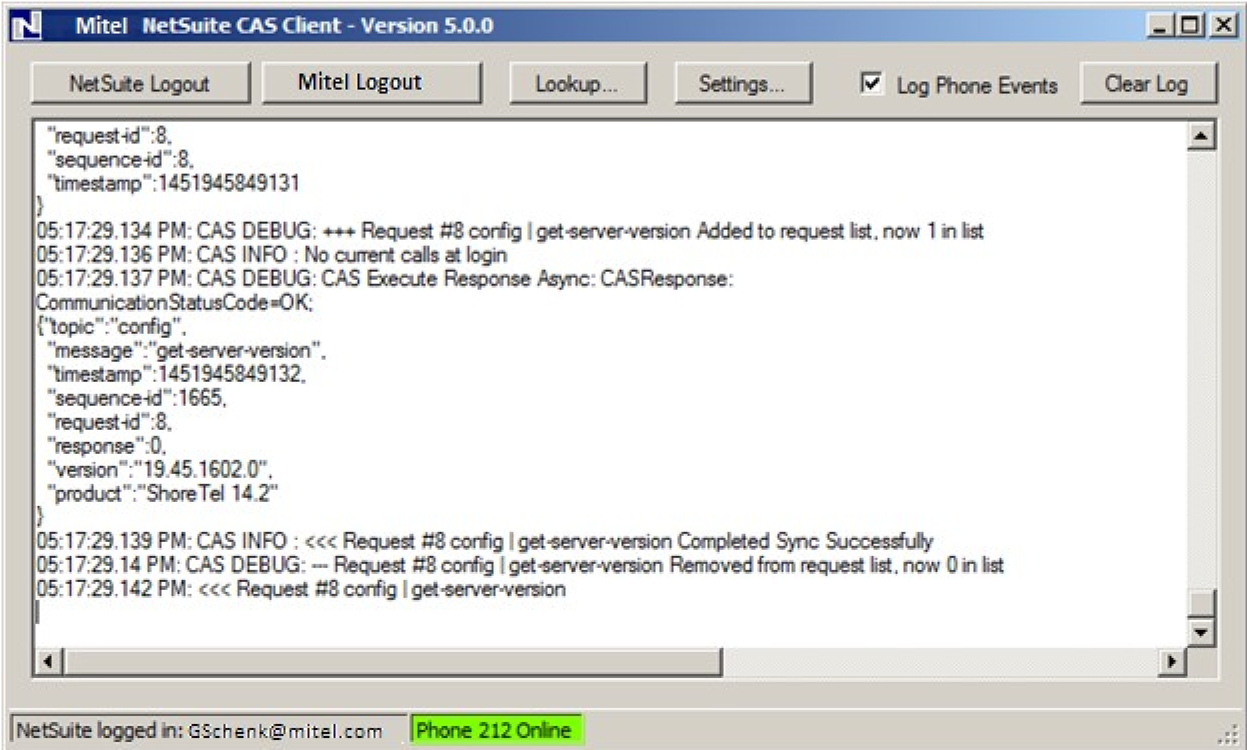
Right clicking the application's tray icon displays the application's menu.



The menu options are as follows:

Open (or double clicking the tray icon

Display the application's main window. This consists mainly of a log view showing past lookup results as well as any errors or problems. If the tray icon indicates a problem, viewing this log will help to understand and resolve the issue.



The buttons on the main window provide access to some of the same choices as the tray icon's menu as well as a few additional options:

- NetSuite Logout (or Login) allows the user to selectively log out or, if currently logged out, to login to the user's NetSuite account.
- Mitel Logout (or Login) allows the user to selectively log out or, if currently logged out, to login to the user's Mitel Phone.
- Clear Log clears the contents of the log window. Note that the log is also cleared whenever the application is restarted.

Redisplay Toaster

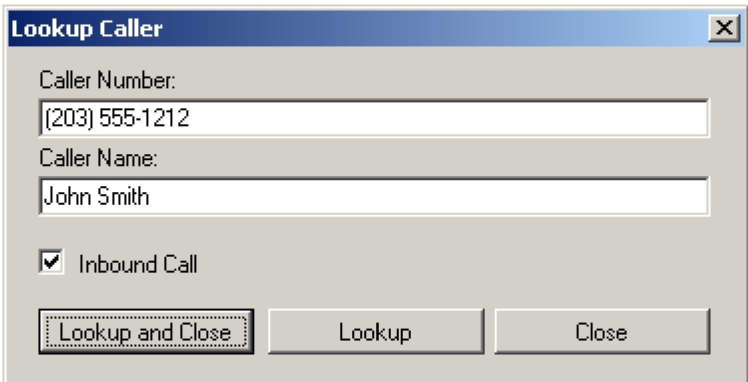
Selecting this item will cause the last toaster displayed to be re-displayed. Any change to the client’s configuration will be reflected in the redisplayed toaster. This can be used to work on the client configuration as well as by users if they don’t respond fast enough to the toaster.

Re-Query NetSuite

Selecting this option will re-query NetSuite using the last call’s information. This can be useful for working out the best configuration for the client. It can also be used by users to force the client to find a newly added Customer Record and create a related phone call activity the same way the client would have if the customer record already existed prior to the call being received.

Lookup Caller

Displays a dialog to allow testing the lookup of a specific caller ID without actually having to place or receive a call from the party. This is mainly provided to test numbers and insure proper operation of the program.



- Caller Number
  For any action to occur, you must supply a caller number. In general, this should be a 10 digit number. Any formatting characters are ignored.
- Caller Name
  If set, this name is used like the ANI name potentially passed by the phone company. It will be used if a new record is created as the name of the record.
- Inbound Call
  If checked then the call is treated as an inbound call. If not checked then the call is treated like an outbound call. This can be used to test the settings related handling outbound as well as inbound calls.

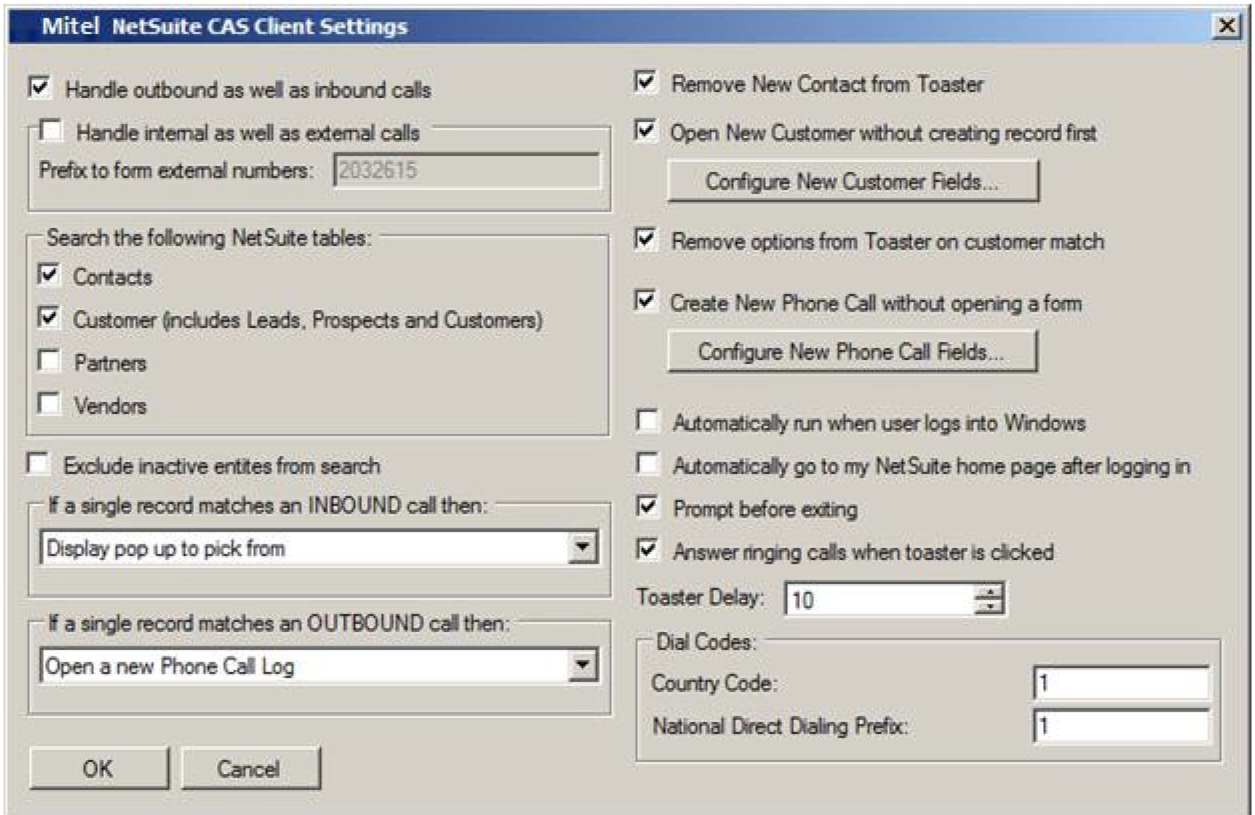
Once you have set the field, you can either click Lookup and Close to trigger a look up and close this dialog or Lookup to cause a lookup while leaving the dialog open. If you wish to close without simulating a call then just click Close.

Go To Home Page

This opens or reuses the last opened main Internet Explorer Web Browser window to show the user's home page:

Settings

This displays the settings dialog. This provides control over the types of calls handled by the application, the NetSuite tables searched when looking up a call ID, how the application reacts when it finds a matching record and other features:



- **Handle outbound as well as inbound calls**
  The Mitel NetSuite Client application will take action for all inbound calls which have a caller ID. If this is checked then it will also act on outbound calls which have a called party set.

- **Handle internal as well as external calls**
  Normally, the Mitel NetSuite Client application will only act on external calls. However, for testing purposes, it can be enabled to act on internal calls.
  - Prefix to form external numbers
    If the application is enabled to handle internal call as well as external calls then this prefix is used to form a valid 10 digit phone number. In general, NetSuite only handles external numbers so using this prefix values allows the application to simulate 10 digit numbers.

- **Search the following NetSuite tables**
  In order to speed up the lookup, users may not want to search all of the tables. This can lead to a call party not being found when, for example, they are a vendor or partner. In general, most users will, at a minimum, want to search Contacts and Customers. See the section below on NetSuite Searches.
  - Contacts
  - Customer (includes Leads, Prospects and Customers)
  - Partners
  - Vendors

- **Exclude inactive entities from search**
  By default, NetSuite entities marked as inactive are included when searching for a record

matching a phone number. If this setting is checked then inactive entities are ignored. This setting also applies to the results if the user selects a Search link from the pop up.

- **If a single record matches an INBOUND call then**
  This provides several options as to how the application will respond in the case of an inbound call with a valid caller ID. The choices are:
  - Display pop up to pick from
  - View the record
  - Open a new phone call log
  - Open a new case
  - Create and open a new user note

- **If a single record matches an OUTBOUND call then**
  This is the same as the previous option but is used when handling outbound calls. Note that this can only be set if the "Handle outbound as well as inbound option" is enabled.

- **Remove New Contact from Toaster**
  Normally, if the client shows a pop up for a call from an unknown phone number it provides two links, one to create a new Contact and one to create a new Customer. If this option is enabled then only the New Customer link is shown.

- **Open New Customer without creating record first**
  Normally, the client creates a new customer record in NetSuite and then opens the web form so the user can view and modify the data. If this option is enabled then the client will instead just open a web form with initial data set. This option is useful for several reasons. First, because the record hasn't been created, the user can cancel out of the New Customer form and no record will be created. Secondly, if the user has additional required data they want to set when creating a new Customer record, using this option allows them to provide it before the record is saved. Lastly, when this option is enabled, users can configure additional fields to be automatically populated with call data and properties using the Configure New Customer Fields… button.

- **Configure New Customer Fields…**
  If the Open New Customer without creating record first option is enable then clicking this button will provide access to a the Contact Fields to Set dialog. That dialog is used to set additional NetSuite customer record fields that should be set using call field and property values. See the section below on Configuring Fields.

- **Remove options from Toaster on customer match**
  Normally if the toaster shows for a single match, in addition to a link to open the matching record, the user also has several options to create call logs, cases and so on. If this option is enabled and the record matched a single customer then the only option provided is to open the matching customer's record. Assuming the next option Create New Phone Call without opening a form is enabled then clicking the link will also create a new phone call record related

to the matching customer.

- **Create New Phone Call without opening a form**
  Normally we don’t create phone call records directly. Instead we open a form with some details set but the user is expected to complete any data entry and then save the record (or not.) If this option is enabled then the client will instead create the phone call record directly in NetSuite without opening a web form. This option is useful for several reasons. First, because the record is created the user can’t decide to not create a record. Secondly, when this option is enabled, users can configure additional fields to be automatically populated with call data and properties using the Configure New Phone Call Fields… button.

- **Configure New Phone Call Fields…**
  If the Open New Phone Call without opening a form option is enable then clicking this button will provide access to a the Phone Call Fields to Set dialog. That dialog is used to set additional NetSuite phone call record fields that should be set using call field and property values. See the section below on Configuring Fields.

- **Automatically run when users logs into Windows**
  Checking this causes the application to be added to the user's RUN registry key with the result that it will be automatically be started by Windows whenever the user logs in. Generally, the users will want to have checked the "Remember Password" setting in the login dialog.

- **Automatically go to my NetSuite home page after logging in**
  Checking this causes the application to automatically open a browser on the user's home page following automatic login at startup.

- **Prompt before exiting**
  If checked, the application will prompt the user when attempting to exit via the tray icon menu option.

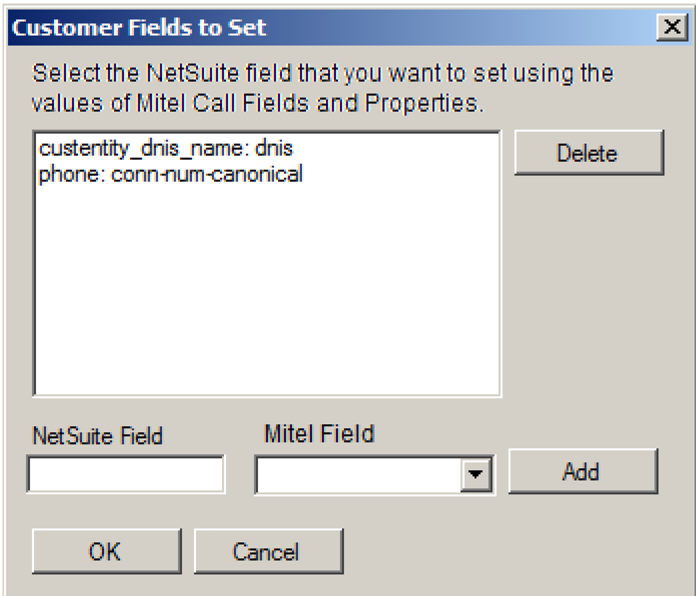
- **Answer ringing calls when toaster is clicked**
  If checked, the application will automatically answer the ringing call when the toaster popup is clicked in response to a ringing call.

- **Toaster Delay**
  Normally the toaster shows for 10 seconds before it starts to slide away. This setting allows that time to be changed.

- **Dial Codes**
  This sets Country Code and National Direct Dialing prefix for the country where the NetSuite client is running. Both values default to 1 which are the Country Code and National Direct Dialing prefix for the North American dialing plan.

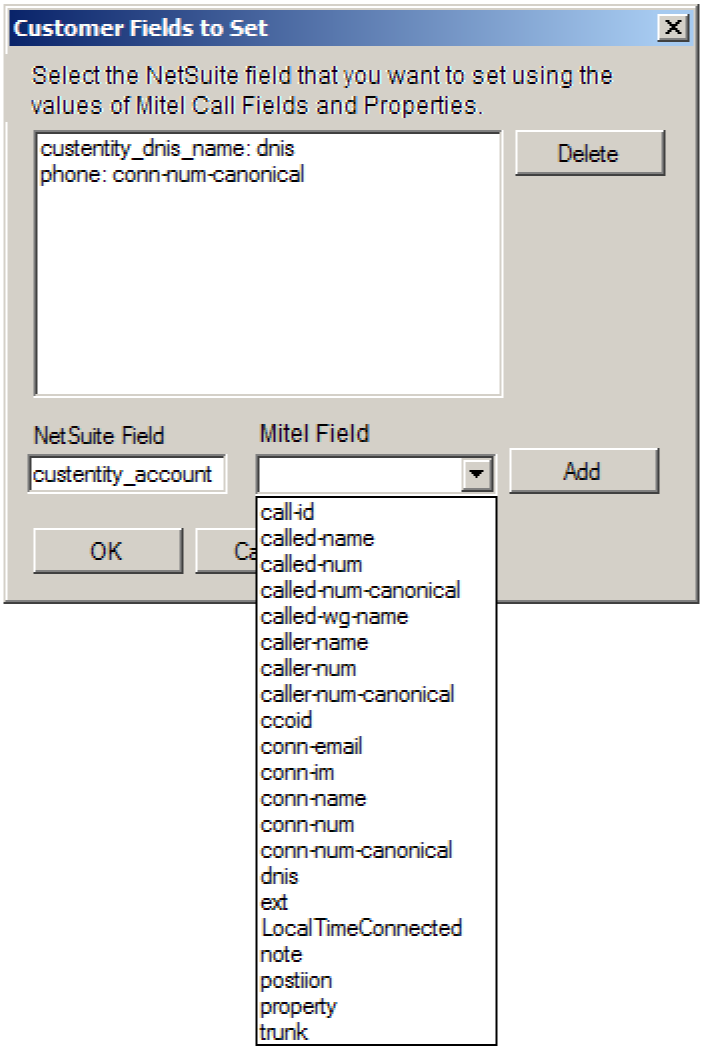
Settings - Configuring Fields

If the Configure New Customer Fields… or the Configure New Phone Call Fields… button is clicked the appropriately titled dialog will appear. The dialog is used to tell the application what extra data should be set when creating a Customer record or opening a Phone Call form. For example, clicking the Configure new Customer Fields… button shows this dialog:



The dialog lists each of the current NetSuite fields (either Customer or Phone Call depending on which setting is being configured) followed by a colon and the name of the Mitel call field or property. For example, this dialog shows that two additional Customer fields, custentity_dnis_name and phone will be set using the value of the call fields named dnis and conn-num-canonical respectively.

To add a new field to be set, enter the NetSuite field's internal name in the NetSuite Field entry and select the name of the Mitel field you wish to use to provide the data:

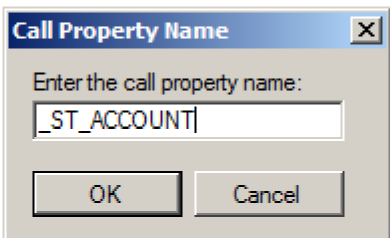


This lists the fields and what they contain. Note that all fields are not populated for all calls.

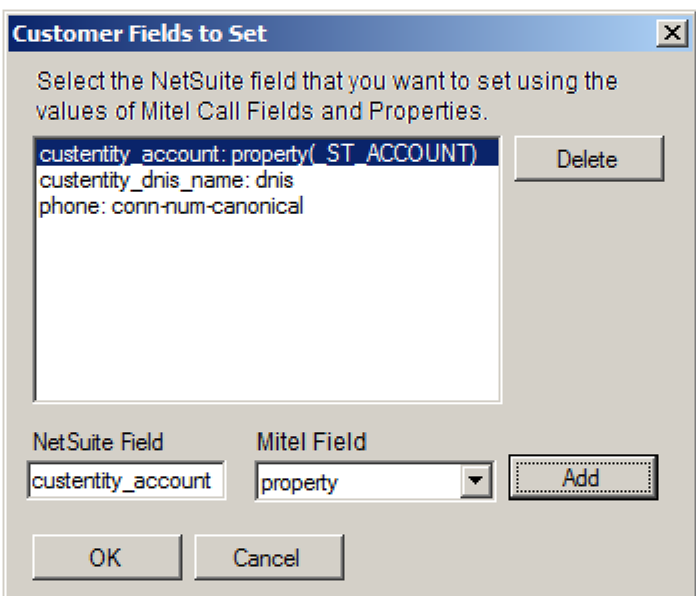
Mitel Field	Contents
call-id	The unique GUID of the call.
called-name	The name associated with the called party.
called-num	For inbound calls, number called. For outbound calls, number dialed.
called-num-canonical	The called number but formatted as a canonical formatted number.
called-wg-name	If the call arrived via WG, the name of the original WG that was called.
caller-name	The name associated with the caller party.
caller-num	For inbound calls, the caller (ANI). For outbound calls, the calling party.
caller-num-canonical	The caller number but formatted as a canonical formatted number.
ccoid	The unique integer number of the user’s phone.
conn-email	Email address of connected party.
conn-im	Instant Message address of connected party.
conn-name	The name associated with the connected party.
conn-num	The number of the party that the call is connected to or, for unconnected calls, the called party for outbound calls and the caller for inbound calls.
conn-num-canonical	The connected number but formatted as a canonical formatted number.

Mitel Field	Contents
dnis	DNIS friendly name supplied on the call.
ext	The user's extension.
LocalTimeConnected	The date and time the call connected.
note	Call note.
position	The call slot the call is assigned to on the user's phone.
trunk	Trunk information string.
property(name)	pecial "field" that allows access to call's property (named-values). For example, the value of a call property named "_ST_QUEUE" could be displayed using a Mitel field name of "property(_ST_QUEUE)".

If property is selected then when the user clicks the **Add** button a small dialog will present for them to enter the name of the call property. Typically call properties start with "_ST" or, in the case of Contact Center, _STCC. This shows the dialog:



If a property of _ST_ACCOUNT is used then the Field to Set dialog will show it like this:



To delete a field being set, select the item and click the **Delete** button.

To close the dialog and save your changes click **OK**. To close and abandon any changes click **Cancel**.

Exit

To shut down and exit the application, select this menu choice. Depending on the value of the "Prompt before exiting" setting, the application may prompt the user to ensure they want to exit. This is the only way to exit the application. Closing the application's main window just hides the application. It continues to run and show on the user's tray.

NetSuite Searches

It is important that users understand the logic which the Mitel NetSuite Client application follows when performing a lookup of a call's phone number.

It searches the enabled tables in the order given in the Settings dialog for the phone number:

1. Contacts
2. Customer (includes Leads, Prospects and Customers)
3. Partners
4. Vendors

> ***Note:*** *The initial defaults are set to not search the Partners and Vendors. If you wish to include Partners or Vendors you'll need to change your settings*.

It searches in such a way as to ignore any punctuation which may be stored as part of the number in the user's NetSuite data. When searching, the Contacts table is given special treatment.

The application starts by searching the contacts table. If a single entry is found then no additional searches take place and this is the record provided in the pop up or automatically opened.

If no records or multiple records are found then the additional enabled tables are searched in order. If no records are found in a given table then the next table is searched. However, if one record is found then the search stops and this is the record provided in the pop up or automatically opened. If multiple records are found then the search stops and the Search link is provided in the pop up. If all enabled tables are searched and no matching records are found then the create New Contact or New Customer pop up is shown.

Outbound Click To Call Support

As mentioned in the introduction, the Mitel NetSuite Client application only supports screen pop based automatic lookup of the call's caller or called ID. Click to call for outbound calling is supported via the Mitel Professional Services WebDialer application.

Mitel Professional Services WebDialer

The Mitel WebDialer application is an add on to Microsoft's Internet Explorer. It recognizes phone numbers on most web pages and creates hyperlinks on the fly. The user can then click these links to place an outbound call to the number. This allows click to call dialing from any web based application including NetSuite.

If a user is using WebDialer, they may find it easier to use that exclusively rather than enabling NetSuite's dialing support.

FAQs

- Why do I sometimes see a contact search page briefly when I select Go to Home Page or any of the Search links?
  In order to avoid the user having to login to NetSuite separately from our application we use a secure login mechanism provided by NetSuite. This is discussed in the *Overview* section above. However, there are limitations on what pages we can display using this mechanism. Specifically, there isn't any mechanism to either go to the user's home page or invoke the global search page with a specific phone number. So, for these pages, we arbitrarily access the contact search page using the secure mechanism and then use a normal web request to access the home or search page. Because we have just logged in, NetSuite accepts our request.

- Why do I sometimes get left at the contact search page when I select Go to Home Page or any of the Search links?
  If the NetSuite servers our very bogged down or the user's internet or LAN connection is experiencing significant slowdown it is possible that these operations may not result in the page every showing. As discussed in the last question, we have to make two back to back web requests. We wait up to 10 seconds for the first request to complete. However, in case of failure, we don't want to wait forever. So, if the first request takes more than 10 seconds then the result is that we give up on the home page or search page request. Normally, requests take a second or less so this should not be a problem.

- Why is it that some of the time the response to a call takes longer than normal and the tray icon briefly changes to the Do Not Enter sign and then back to normal and the log has messages about session timed out followed by messages about logging into NetSuite?
  NetSuite logs any application out of the Web Services interface automatically after 15 minutes of inactivity. Therefore, if the application makes a request and detect the error related to this logout, it will automatically re-login the user to NetSuite. This is true even if the user didn't check the Remember Password setting when they logged in. This activity is normal and should not be a cause for concern.

- Why do I get a failure when my client tries to log into NetSuite?
  Assuming that you can login to the NetSuite web interface with the same user ID and password then check that the account is correct and the role is valid. In addition, the role id that you provide must have Web Services permissions.