



# Coupa NetSuite Integration Guide

**Version 3.3.1**  
**August 18<sup>th</sup>, 2015**



# Table of Content

Coupa NetSuite Integration Guide .....3

Coupa P2P & Expense Bundle .....4

Netsuite Vendor to Coupa Supplier .....7

Netsuite to Coupa Exchange Rate ..... 12

Dynamic - Coupa Chart of Account ..... 15

Coupa Invoice to Netsuite Vendor Bill ..... 21

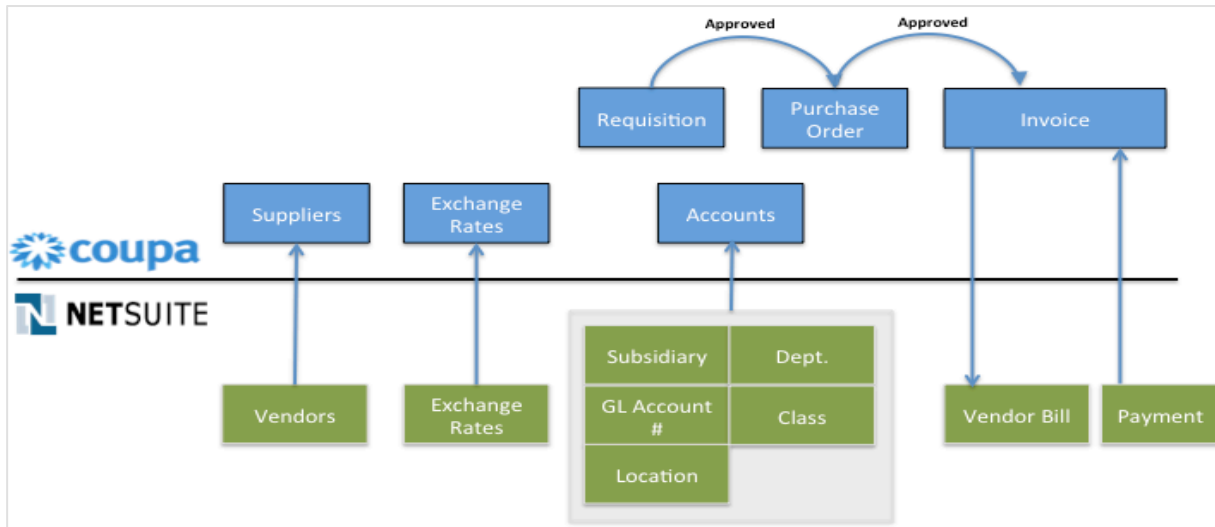
Netsuite to Coupa Invoice Payments ..... 28

# Coupa NetSuite Integration Guide

## P2P Dataflow and Integration points

### Overview

The diagram below indicates the integration points between Netsuite and Coupa. Typically we have master data - suppliers, Netsuite GL Account attributes, exchange rates and transaction data - bill payments coming from Netsuite into Coupa and approved invoices going from Coupa into Netsuite.

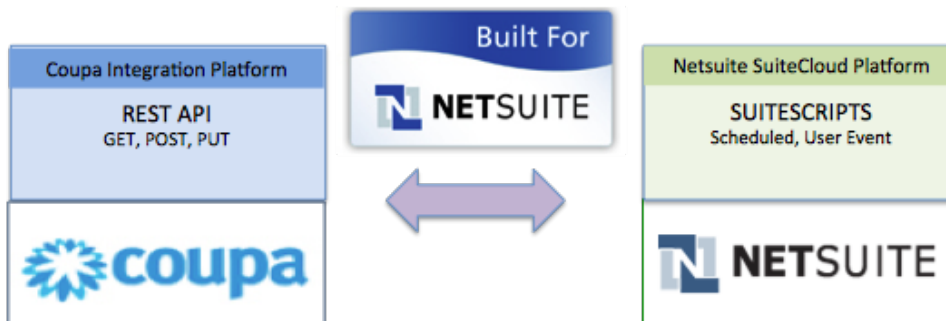


### Integration Method

Coupa integrates seamlessly with Netsuite using the Coupa REST API and Netsuite's SuiteScript. Coupa provides rich, robust access to read, edit, or integrate data via a [RESTful API](#). This UTF-8 XML based interface allows you to create, update, and take action on individual records within Coupa by making an HTTP request call.

Built on industry standard JavaScript that ensures portability and rapid developer productivity, SuiteScript enables full-featured application-level scripting capabilities throughout NetSuite. SuiteScript provides a complete set of flexible scripting models to support customization needs, including user event-based scripts and scheduled scripts.

The Coupa Netsuite Integrations have been built to meet and comply with the documented practices for architecture, development, privacy and security of the Netsuite SuiteCloud platform and is certified and approved by the "[BUILT FOR NETSUITE](#)" program.





# Coupa P2P & Expense Bundle

## Client Installation Overview

Coupa leverages SuiteBundler, which makes it easy to package and deploy customizations and applications, built on the SuiteCloud platform. Whether you are moving customizations from a sandbox environment to production or looking for the latest Coupa to Netsuite integration package, SuiteBundler lets you easily manage groups of customizations, manage versioning and deploy customizations nearly instantaneously.

## Activities

You will need to do the following deploy the Coupa / Netsuite Bundler

- 1 Locate the Coupa Bundle Script**
- 2 Confirm contents of the Bundle**
- 3 Install the Bundle**
- 4 Confirm successful installation of the Coupa Bundle**
- 5 Begin configuration**

## 1 Locate the Coupa Bundle Script

There are 2 steps in this Activity

### Step 1.1

Ensure you have given your Netsuite Account ID to your Coupa Implementation Manager.

Locate the Bundler

**Navigation Path:** Customization | SuiteBundler | Search & Install Bundles

Transactions	Lists	Reports	Customization	Documents	Setup	Support	SuiteS
			Customization Manager				Viewing: This Mon
			Lists, Records, & Fields				
			Forms				
			Scripting				
			Plug-ins				
			Centers and Tabs				
			SuiteBundler		Create Bundle		
					Search & Install Bundles		
					Bundle Audit Trail		

### Step 1.2

Search for “Coupa P2P + Expenses” and click on Bundle

## Search & Install Bundles

Search

Basic | Advanced

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS

[Installation Terms of Service](#)

NAME	BUNDLE ID
Coupa P2P + Expenses Bundle	84306

























### 3

## Confirm contents of the Bundle

There is 1 step in this Activity

### Step 1.3

Switch to the Components View and verify the contents match below:

NAME	ID
<b>Custom Fields</b>	
<b>Transaction Body Fields</b>	
 CoupaER Number	custbody_coupa_er_number
 Coupa Revision Number	custbody_coupa_er_internalrevision
<b>Transaction Column Fields</b>	
 Coupa ERReason	custcol_coupa_er_reason
 Coupa ER Description	custcol_coupa_er_desc
 CoupaER Line Id	custcol_coupa_er_lineid
<b>Custom Lists/Records</b>	
<b>Lists</b>	
 Coupa Vendor PhoneFax List (3 records)	customlist_vendor_phonifax_list
<b>File Cabinet</b>	
<b>Files</b>	
 Coupa-VendorPayment.js	7072
 Coupa-FxRate.js	7074
 Coupa-ExpenseReport.js	7070
 Coupa-Invoice.js	7071
 Coupa-DynamicAcct.js	7069
 Coupa-Vendor.js	7073
<b>Saved Searches</b>	
<b>Account</b>	
 Coupa Account Integration Search	customsearch_coupa_accs_accsearch
<b>Class</b>	
 Coupa Class Integration Search	customsearch_coupa_accs_classearch
<b>Contact</b>	
 Coupa Primary Contact Search	customsearch_coupa_vendor_primarycontact
<b>Department</b>	
 Coupa Department Integration Search	customsearch_coupa_accs_deptsearch
<b>Location</b>	
 Coupa Location Integration Search	customsearch_coupa_accs_locsearch
<b>Subsidiary</b>	
 Coupa Subsidiary Integration Search	customsearch_coupa_accs_subsearch
<b>SuiteScripts</b>	
<b>Scheduled</b>	
 Coupa Invoice Payment Integration	customscript_coupa_invoice_payment
 Coupa Exchange Rate Integration	customscript_coupa_fxrate
 Coupa Expense Report Integration	customscript_coupa_expense_report
 Coupa Invoice Integration	customscript_coupa_invoice
<b>User Event</b>	
 Coupa Dynamic COA Integration	customscript_coupa_dynamic_accounts
 Coupa Vendor Integration	customscript_coupa_vendor

# Netsuite Vendor to Coupa Supplier

## Overview

This integration syncs up Vendor records between Netsuite and the Supplier record in Coupa. Netsuite is the vendor master and the records flow from Netsuite into Coupa. The User Event Suitescript is used to capture the “create” and “update” events. Based on the event type either a new Supplier is created in Coupa or an existing Supplier in Coupa is updated.

## Script Sequence Explained

This integration is real time as the Vendor record is created/updated in Netsuite

- The Coupa API call to create/update the supplier record is called as soon as the Netsuite user event is captured
- The `nlapiLoadRecord('vendor', recordid)` function is used to read the Netsuite vendor record
- The `nlapiRequestURL` function is used to do a HTTP POST/PUT to create/update the supplier record in Coupa.

## Deployment Parameter Setup

Now that you have successfully installed the bundle, you will need to decide which parameters are relevant for your Coupa implementation.

## Activities

You will need to do the following to ensure a successful deployment of the Coupa Vendor Integration Script

- 1 Review Parameter List**
- 2 Find and Define Deployment Parameter Values**

## Tips to help you succeed

- Ensure your vendor record in Netsuite is associated with the appropriate subsidiary values and currency association
- Ensure the supplier name is unique in Coupa
- Only load NetSuite vendors in Coupa that you will create transactions for in Coupa
- Once vendor records are created in Coupa ensure supplier record has appropriate Coupa configuration based on your business process

## Pre-Requisites

- Coupa P2P & Expenses Bundle deployed
- Coupa API key created
- You will need to baseline the Coupa Suppliers via the CSV UI Loader

Review parameter list and decide which ones are relevant to your company's implementation of Coupa.  
Please note the fields that are mandatory are noted with an asterisk \*

## Script parameters

Script Definition					Script Deployment	
Label	Example	Id	Type	Comments	Example	Your Value
<b>Coupa URL*</b>	The Coupa instance the integration connects to	_vendor_url	Free-Form Text		https://abc.coupa-host.com	
<b>Coupa API Key*</b>	The API key for Coupa's REST based API	_vendor_apikey	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupa-host.com/api_keys	4dtyr7657fgfh5757fghhg	
<b>Error Email Notification Address</b>	Email addresses to which exception emails to be sent	_vendor_erroremailnotify	Free-Form Text		abc@abc.com, abcd@abcd.com	
<b>Account Name*</b>	As per standard, it will be company name with which environment its been setup (Test or Prod)	_vendor_accountname	Free-Form Text	<Test/Prod>	Coupa Test	
<b>Use Company Name as Display Name?</b>	Use Company Name as "Display name". Send's the Vendor's "Company Name" into Coupa. Coupa sets this to the "Display Name" of new Supplier.	_vendor_use_display_name	Free-Form Text	<Company Name>	custentity_use_company_name	



Script Definition					Script Deployment	
Label	Example	Id	Type	Comments	Example	Your Value
<b>Phone/Fax Format</b>	In General Preferences under NetSuite Setup, Phone Number format should be selected. Same format should be selected for the script to process any phone number fields with respect to the format.	_vendor_phonelfaxformat	List/Record	customlist should be created as vendor_phonelfax_list and below values to be assigned  123 456 7890 123-456-7890 123.456.7890	123.456.7890	
<b>Invoice Matching Level</b>	Invoice matching level that is defined for this supplier.	_vendor_invoicematchlevel	Free-Form Text	If no parameter is defined 2-way match will default for all records.  If you want to deliberately default all records please use the following: none:custom_invoicelevel 2-way:custom_invoicelevel 3-way:custom_invoicelevel	customfield: custom_invoicelevel	
<b>Payment Method</b>	Payment method	_vendor_paymentmethod	Free-Form Text	if there's no default value, please set it as :customfield or :existingfieldname from where the script will get the value. if there's only default, enter only default value	invoice:custom_paymentmd	
<b>Invoice Emails</b>	Registered email addresses allowed to send invoices	_vendor_invoice_emails	Free-Form Text	existing field or customfield. Multiple email addresses in this existing field or customfield should be delimited by , (comma)	_invoice_emails	
<b>Send Invoice To Approvals</b>	If yes, then invoices will all be sent thru approvals, regardless of total amount.	_vendor_sendinvoices_to_approval	Free-Form Text	the value could be default:customfield  if there's no default value, please set it as :customfield or :existingfieldname from where the script will get the value. if there's only default, enter only default value	Yes	

Script Definition					Script Deployment	
Label	Example	Id	Type	Comments	Example	Your Value
<b>Include in Coupa</b>	Configuration that allows/disallows a supplier record to be sent to Coupa	_vendor_customfieldincludeonly	Free-Form Text	Internal id of an existing field or custom field.  The custom field on the vendor record should be a checkbox	custentity_coupa_include	
<b>Allow Invoicing From CSN</b>	If yes, then the supplier can create invoices against their POs or Contracts in CSN	_vendor_allowinvoicing_frm_csn	Free-Form Text	the value could be default:customfield  if there's no default value, please set it as :customfield or :existingfieldname from where the script will get the value. if there's only default, enter only default value	Yes:	
<b>Content Group Field</b>	Allows the supplier record in Coupa to be associated with content group(s)	_vendor_contentgroup_field	Free-Form Text	the value should be the internal id of the field that holds the name of the content field. Multiple content groups are delimited by , (comma)	_coupa_content_group	
<b>PO Email Override</b>	Allows overriding the standard mapping for the PO Email field	_vendor_poemailoverride	Free-Form Text	the value should be the internal id of the field that holds the PO emails. Multiple POs can be delimited by , (comma)	_coupa_poemail	
<b>Custom Fields Count*</b>	Define the number of custom fields to be integrated.	_vendor_customfieldscount	Integer Number	0,1,2,...	0	
<b>Custom Field x (where x is an integer)</b>	custom field of coupa gets syncup with custom field of netsuite. Note that no data transformation allowed	_vendor_customfieldx (where x is an integer)	Free-Form Text	CoupacustomfieldId:N etSuitecustomfield:CoupaFieldType:Netsuite FieldType:default	eligible-1099:is1099eligible:Boolean:Boolean	

## 2

## Find and Define Deployment Parameter Values

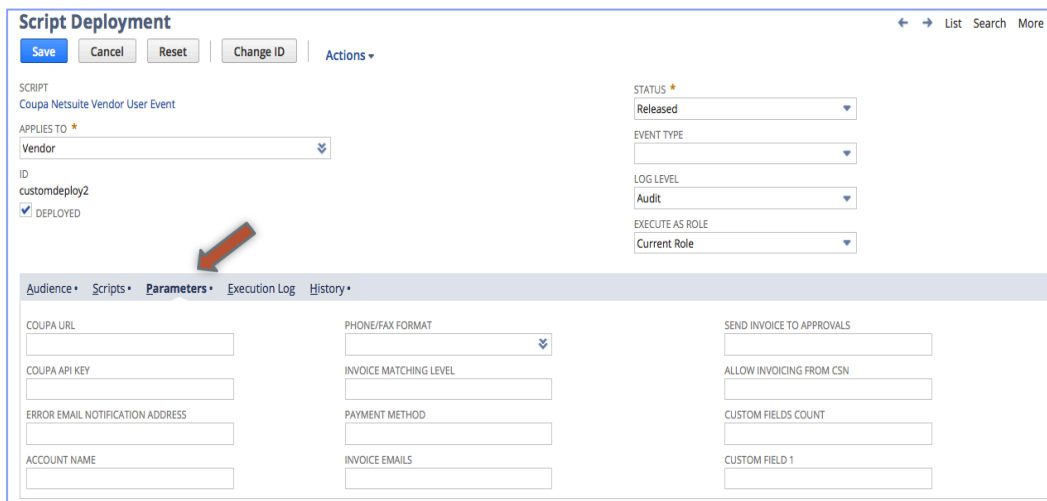
**Navigation Path:** Customization | Scripting | Scripts

Find the “Coupa Vendor Integration” script

Now you can click the Parameter menu item and start entering your specific values, please note your specific parameter values may vary based on your Coupa implementation.

Please refer back to the parameters table for guidance.

### Script Deployment



**Script Deployment**

Save Cancel Reset Change ID Actions

SCRIPT  
Coupa Netsuite Vendor User Event

APPLIES TO  
Vendor

ID  
customdeploy2

☒ DEPLOYED

STATUS  
Released

EVENT TYPE

LOG LEVEL  
Audit

EXECUTE AS ROLE  
Current Role

**Parameters**

COUPA URL	PHONE/FAX FORMAT	SEND INVOICE TO APPROVALS
COUPA API KEY	INVOICE MATCHING LEVEL	ALLOW INVOICING FROM CSN
ERROR EMAIL NOTIFICATION ADDRESS	PAYMENT METHOD	CUSTOM FIELDS COUNT
ACCOUNT NAME	INVOICE EMAILS	CUSTOM FIELD 1

After you are done you can click the Save button and now the Script is successfully deployed.



# Netsuite to Coupa Exchange Rate

## Overview

This integration syncs up Currency Exchange Rates between Netsuite and Coupa. NetSuite is the Exchange Rates master and the records flow from Netsuite into Coupa. The Scheduled SuiteScript is used to capture the “create” events and that will call the Coupa POST API to create the new entry. It will also create the inverse entry in Coupa.

## Script Sequence Explained

This integration is scheduled per your requirements to support the **Currency Exchange Rates** record in Netsuite

- The Coupa API call to create the **Currency Exchange Rates** record is called on a predefined schedule
- The `nlapiLoadRecord(currency)` function is used to read the Netsuite currency record
- The `nlapiRequestURL` function is used to do a HTTP PUT to create the corresponding Exchange Rate records in Coupa

You will need to do the following to ensure a successful deployment of the Coupa Vendor Integration Script

### 1 Review Parameters

### 2 Find and Define Deployment Parameter Values

## Tips to help you succeed

- Ensure your currency codes in Coupa are enabled
- Only load exchange rates in Coupa that you will create transactions for
- Coupa P2P & Expenses Bundle scheduled
- Coupa API key created

# 1

## Review Parameter List

Review parameter list and decide which ones are relevant to your company's implementation of Coupa. Please note the fields that are mandatory are noted with an asterisk \*

### Script parameters

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Coupa URL*</b>	The Coupa instance the integration connects to	_coupa_fxrates_url	Free-Form Text		https://abc.coupahost.com	
<b>Coupa API Key*</b>	The API key for Coupa's REST based API	_coupa_fxrates_api_key	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fg hhg	
<b>Error Email Notification Address</b>	Email addresses to which exception emails to be sent	_coupa_fxrates_err_emailnotify	Free-Form Text		abc@abc.com, abcd@abcd.com	
<b>Account Name*</b>	As per standard, it will be company name with which environment its been setup (Test or Prod)	_coupa_fxrates_accountname	Free-Form Text	<Company Name> <Test/Prod>	Coupa Test	
<b>UTC Offset</b>	The <i>UTC offset</i> is the difference in hours and minutes from Coordinated Universal Time	_coupa_fxrates_utc_offset	Integer Number		10	

## 2 Find and Define Deployment Parameter Values

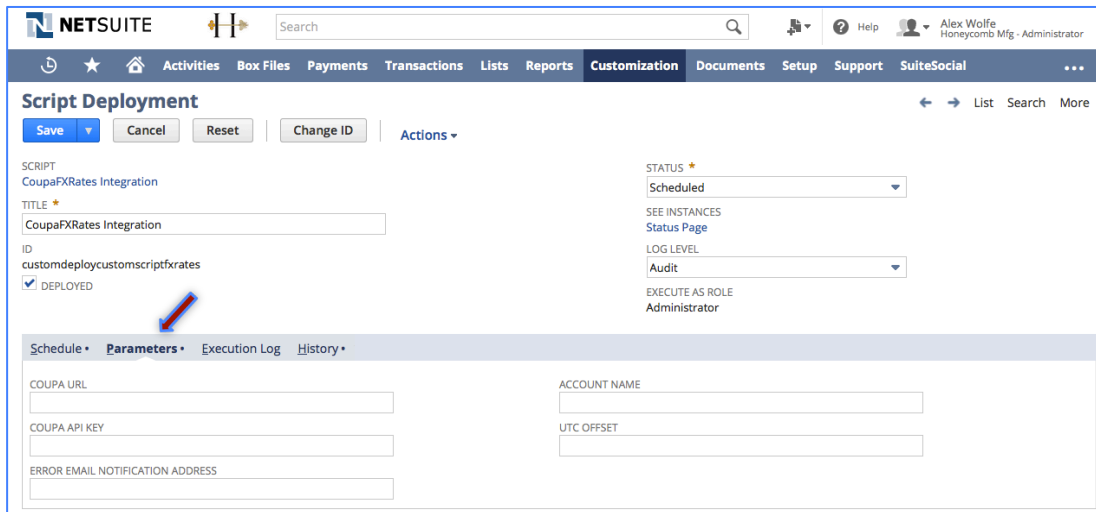
**Navigation Path:** Customization | Scripting | Scripts

Find the “Coupa Exchange Rate Integration” script

Now you can click the Parameter menu item and start entering your specific values, please note your specific parameter values may vary based on your Coupa implementation.

Please refer back to the parameters table for guidance.

### Script Deployment



**Script Deployment**

Save Cancel Reset Change ID Actions

SCRIPT  
CoupaFXRates Integration

TITLE  
CoupaFXRates Integration

ID  
customdeploycustomscriptfxrates

DEPLOYED

STATUS  
Scheduled

SEE INSTANCES  
Status Page

LOG LEVEL  
Audit

EXECUTE AS ROLE  
Administrator

Schedule Parameters Execution Log History

COUPA URL

COUPA API KEY

ERROR EMAIL NOTIFICATION ADDRESS

ACCOUNT NAME

UTC OFFSET

After you are done you can click the Save button and now the Script is successfully deployed



# Dynamic - Coupa Chart of Account

## Overview

This integration syncs up key parts of your Netsuite Chart of Account (COA) definition between Netsuite and the Chart of Accounts in Coupa. Netsuite is the COA master and the valid values for each segment flow from Netsuite into Coupa. The User Event Suitescript is used to capture the “create” and “update” events. Based on the event type either a new value is created in Coupa or an existing entry in Coupa is updated.

## Script Sequence Explained

This integration is real time as the Netsuite Chart of Account record is created/updated it will then be reflected in Coupa

- The Coupa API calls to create/update the LookUp Values in Coupa as soon as the Netsuite user event is captured
- The `nlapiLoadRecord('vendor', recordid)` function is used to read the Netsuite vendor record
- The `nlapiRequestURL` function is used to do a HTTP POST/PUT to create/update the supplier record in Coupa.

## Activities

You will need to do the following to ensure a successful deployment of the Coupa Vendor Integration Script

- 1 Define Coupa Lookups and Coupa Chart of Accounts**
- 2 Review Parameters**
- 3 Review Scripts**
- 4 Find and Define Deployment Parameter Values**

## Tips to help you succeed

- Each Subsidiary can be a separate Chart of Account in Coupa if you require granularity based on your Netsuite COA setup
- The delivered script will create Lookup Values in Coupa for the following:
  - Subsidiary
  - Class
  - Account
  - Department
  - Location
- If you need segments based on other values than above, Coupa can support that with integration via our lookup tables. Please ask your implementation consultant.

## Pre-Requisites

- Coupa P2P & Expenses Bundle deployed
- Coupa API key created
- Lookups objects & COA defined in Coupa
- You will need to baseline the Coupa Lookup Values via the CSV UI Loader
- Add “Include in Coupa” Checkbox custom field in Netsuite, on the appropriate objects you are using as part of your Netsuite COA

## 1 Define Coupa Lookups and Coupa Chart of Accounts

### Summary:

The dynamic accounting script, transforms creates, and edits on departments, classes, locations, accounts and subsidiaries into Lookup Values in Coupa. Marking a record in Netsuite as inactive, or deselecting the Include In Coupa checkbox will mark the Lookup Value in Coupa as inactive. Name and hierarchical changes to all records (except Subsidiary) will be reflected in Coupa by a name change to the Lookup Value.

### Configuration Decisions:

- Define your Coupa Chart of Accounts based on the number of Netsuite subsidiaries that you have.
- Your Chart of Account name must equal the NetSuite Subsidiary name
- In Netsuite Dynamic Accounting Checkbox turned on in the deployment parameters of this script
- Delete the COA related deployment objects that are not relevant for your implementation.
- You will need to have the “Include In Coupa” checkbox created for each COA related object
- Subsidiary Account Segment Parameter will be Segment-1, Segment-2, etc...based on your Coupa COA definition

### Naming / Formatting Conventions:

Based on your implementation define the Coupa Lookups with the following naming convention, where XYZ is the name of your Coupa Chart of Account

- acct\_XYZ
- dept\_XYZ
- clas\_XYZ
- locn\_XYZ
- subs\_XYZ

On the Coupa Lookup Object the following must be adhered to ensure referential integrity between Coupa and Netsuite:

- Accounts, the account number must be the leading part of the name and the external reference number. Please see below for example:

Lookup Values								
<div> <span>Create</span> <span>Load from file</span> <span>Export to</span> <span>View All</span> <span>Advanced</span> <span>4000 sales</span> </div>								
Showing results for 4000 sales x								
Lookup	Name	Description	External Ref Num	Default	Active	External Ref Code	Parent Name	Actions
acct_Square, Inc.	4000 Sales	None	4000	No	Yes	038493 4000	038493 Testing Expense C	
acct_Looper Holdings LLC	4000 Sales	None	4000	None	No	4000	None	
acct_Square K.K. (Japan)	4000 Sales	None	4000	None	No	4000	None	
acct_Squareup Pte. Ltd.	4000 Sales	None	4000	None	No	4000	None	
acct_[Square, Inc. Eliminations]	4000 Sales	None	4000	None	No	4000	None	
Per page 15   45   90								



- For all other look up values, the name can be anything but the Netsuite Internal ID must be in the external reference number. Please see below for example:

### Lookup Values

[Create](#)
[Load from file](#)
[Export to](#)
View: All
[Advanced](#)

Showing results for dept\_americas x

Lookup	Name	Description	External Ref Num	Default	Active	External Ref Code	Parent Name	Actions
dept_AMERICAS	Sales	None	3	None	Yes	3	None	
dept_AMERICAS	Engineering : Development : Integrations	None	15	None	Yes	15	None	
dept_AMERICAS	Sales : Test notinclude on create	None	16	None	Yes	16	None	

Per page 15 | 45 | 90

### Examples:

[Multiple Coupa Chart of Accounts](#): that has 3 Netsuite subsidiaries named US, UK and CA; all utilizing account, department and class.

Lookups defined in Coupa:

### Lookups

[Create](#)
[Load from file](#)
[Export to](#)
View: NS
[Advanced](#)

Name	Description	Active	Actions
acct_US	acct_US	Yes	
acct_UK	acct_UK	Yes	
acct_CA	acct_CA	Yes	
dept_US	dept_US	Yes	
dept_UK	dept_UK	Yes	
dept_CA	dept_CA	Yes	
clas_US	clas_US	Yes	
clas_UK	clas_UK	Yes	
clas_CA	clas_CA	Yes	
subs_US	subs_US	Yes	
subs_UK	subs_UK	Yes	
subs_CA	subs_CA	Yes	

Per page 15 | 45 | 90

Three Chart of Accounts would be created in Coupa. Here is the US example:

## Chart Of Accounts Create

Name

US

Currency

USD

### Account Segments and Defaults

☐ I'll load all of the valid combinations

☒ I'll define the values segment by segment

	Purchase request defaults	Expense report defaults
<div>Segment 1</div> <div>subs</div>	<div>default by</div> <div>None</div>	<div>default by</div> <div>None</div>
	<div> <input checked="" type="radio"/> This segment is a simple list defined in           <div>subs_US</div> </div>	
<div>Segment 2</div> <div>dept</div>	<div>default by</div> <div>None</div>	<div>default by</div> <div>None</div>
	<div> <input checked="" type="radio"/> This segment is a simple list defined in           <div>dept_US</div> </div> <div> <input type="radio"/> This segment depends on           <div></div> </div> <div> <input type="checkbox"/> This segment is required           <div></div> </div>	
<div>Segment 3</div> <div>class</div>	<div>default by</div> <div>None</div>	<div>default by</div> <div>None</div>
	<div> <input checked="" type="radio"/> This segment is a simple list defined in           <div>clas_US</div> </div> <div> <input type="radio"/> This segment depends on           <div></div> </div> <div> <input type="checkbox"/> This segment is required           <div></div> </div>	
<div>Segment 4</div> <div>acct</div>	<div>default by</div> <div>None</div>	<div>default by</div> <div>None</div>
	<div> <input checked="" type="radio"/> This segment is a simple list defined in           <div>acct_US</div> </div> <div> <input type="radio"/> This segment depends on           <div></div> </div> <div> <input type="checkbox"/> This segment is required           <div></div> </div>	

## 2

## Review Parameter List

Review parameter list and decide which ones are relevant to your company's implementation of Coupa. Please note the fields that are mandatory are noted with an asterisk \*

### Script parameters

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Coupa URL*</b>	The Coupa instance the integration connects to	_coupa_accs_url	Free-Form Text		https://abc.coupahost.com	
<b>Coupa API Key*</b>	The API key for Coupa's REST based API	_coupa_accs_apike y	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fg hhg	

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Email Addresses for Notif</b>	Email addresses to which exception emails to be sent	_coupa_accs_notify_email	Free-Form Text		<a href="mailto:abc@abc.com">abc@abc.com</a> , <a href="mailto:abcd@abcd.com">abcd@abcd.com</a>	
<b>Include in Coupa</b>	Id of the custom field (on the record this deployment applies to) to allow/disallow the transmission of the record to Coupa	_coupa_accs_cstmfldincludeonly	Free-Form Text	The Internal ID of an existing field or custom field.  This field should be a checkbox, and True if you wish the record to integrate	custrecord_include_loc_coupa	
<b>Subsid Include in Coupa</b>	Id of the custom field (on SUBSIDIARY records) to allow/disallow the transmission of the subsidiary to Coupa	_coupa_accs_dynamic_sub_include	Free-Form Text	The internal ID of an existing field or custom field on the subsidiary record.  This field should be a checkbox and set to True if the subsidiary should be/is included in coupa	custrecord_include_subs_coupa	

### 3

## Review Scripts

1. The bundle creates deployments for each possible segment. You need to delete/remove deployments for records you do not want to integrate
2. Make sure they deployments are enabled for all of the employees and subsidiaries

Audience • Scripts • Parameters • Execution Log • History •

**ROLES**  
☒ ALL ROLES  
DEPARTMENTS  
Administration  
Customer Support  
Engineering  
Engineering : Development  
Engineering : Product Management  
Engineering : Quality Assurance  
Marketing  
Operations  
Prof. Services  
Sales  
More...

**SUBSIDIARIES**  
HEADQUARTERS  
HEADQUARTERS : AMERICAS  
HEADQUARTERS : AMERICAS : Americas - IFRS  
HEADQUARTERS : AMERICAS : Canada  
HEADQUARTERS : AMERICAS : US - East  
HEADQUARTERS : AMERICAS : US - West  
HEADQUARTERS : AMERICAS : xElimination - America's  
HEADQUARTERS : APAC  
HEADQUARTERS : APAC : Australia  
HEADQUARTERS : APAC : Japan  
More...  
GROUPS  
Team ERP  
Team Usability  
EMPLOYEES

☒ ALL EMPLOYEES  
PARTNERS  
☒ ALL PARTNERS

3. The bundle creates deployments for each possible segment. You need to delete/remove deployments for records you do not want to integrate

## 4

## Find and Define Deployment Parameter Values

**Navigation Path:** Customization | Scripting | Scripts

Find the “Coupa Dynamic COA Integration” script

Now you can click the Parameter menu item and start entering your specific values, please note your specific parameter values may vary based on your Coupa implementation.

Please refer back to the parameters table for guidance.

### Script Deployment

Save
Cancel
Reset
Change ID
Actions

SCRIPT  
Coupa Dynamic COA Integration

APPLIES TO \*  
Account

ID  
customdeploy\_coupa\_accs\_account

☒ DEPLOYED

STATUS \*  
Released

EVENT TYPE

LOG LEVEL  
Debug

EXECUTE AS ROLE  
Current Role

Audience • Scripts • **Parameters** • Execution Log • History •

COUPA API KEY

COUPA URL

INCLUDE IN COUPA FIELD

SUBSIDIARY INCLUDE IN COUPA FIELD

ERROR NOTIFICATION EMAIL(S)

After you are done you can click the Save button and now the Script is successfully deployed

# Coupa Invoice to Netsuite Vendor Bill

## Overview

This integration syncs up Coupa Invoices and Netsuite Vendor Bill via a scheduled SuiteScript. The Coupa Invoice once approved is set for export and now is ready to be imported into NetSuite as the Vendor Bill. The Scheduled SuiteScript is used to “create” the Vendor Bill which will call the Coupa HTTP GET API to retrieve the Coupa Invoice to generate the Vendor Bill in NetSuite

## Script Sequence Explained

This integration is on a schedule that you can set to meet your frequency and volume as Coupa Invoices are approved.

- The Coupa API call to create the Vendor Bill record is called on a predefined schedule
- The `nlapiRequestURL` function is used to perform a HTTP GET to retrieve the Coupa Invoice that is fully approved and not exported
- The `nlapiCreateRecord (vendorbill)` function is used to generate the NetSuite Vendor Bill

## Activities

You will need to do the following to ensure a successful deployment of the Vendor Script

- 1 Review Parameter List**
- 2 Find and Define Deployment Parameter Values**

## Tips to help you succeed

- Ensure your NetSuite Vendors are assigned appropriate Subsidiaries in NetSuite
- This integration requires the Netsuite internal id for the Vendor Record to be stored in the “Supplier Number” field in Coupa
- Validate the Vendor Bill “isBillable” field is populating as expected
- If you need to pass Amortization Schedules please see parameter definition
- Voids are supported from Coupa to Netsuite assuming the Vendor Bill is not yet paid in Netsuite. Change the status of the invoice from "Approved" to "Rejected". See parameter definition for more details.

## Pre-Requisites

- Coupa P2P & Expenses Bundle deployed
- Coupa API key created
- Coupa Chart of Account Setup

## Review Parameter List

Review parameter list and decide which ones are relevant to your company's implementation of Coupa. Please note the fields that are mandatory are noted with an asterisk \*

### Script parameters

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Coupa URL*</b>	The Coupa instance the integration connects to	_coupa_inv_url	Free-Form Text		https://abc.coupahost.com	
<b>Coupa API Key*</b>	The API key for Coupa's REST based API	_coupa_inv_apikey	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fghg	
<b>GL Account Segment</b>	The accounting segment in Coupa that holds the Netsuite GL account information	_coupa_inv_glactseg	Free-Form Text	Ensure that your GL Account # uses this format in your Coupa Chart of Accounts: NetsuiteGLAccountNumber:NetsuiteGLAccountName	segment-2	
<b>Department Segment</b>	The accounting segment in Coupa that holds the Netsuite department account information	_coupa_inv_deptseg	Free-Form Text		segment-3	
<b>Subsidiary Account segment</b>	The accounting segment in Coupa that holds the Netsuite subsidiary account information	_coupa_inv_subsseg	Free-Form Text		segment-1	
<b>Class Segment</b>	The accounting segment in Coupa that holds the Netsuite classification account information	_coupa_inv_classseg	Free-Form Text		segment-4	
<b>Location Segment</b>	The accounting segment in Coupa that holds the Netsuite location information	_coupa_inv_locseg	Free-Form Text		segment-5	

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Export From Invoice date</b>	Add filter criteria to pull invoices from Coupa with Invoice date >= to this date	_coupa_inv_frominvdate	Date		12/14/2013	
<b>Export To Invoice date</b>	Add filter criteria to pull invoices from Coupa with Invoice date <= to this date	_coupa_inv_toinvdate	Date		12/27/2013	
<b>Use Updated at date</b>	This will override the filter criteria of 'Invoice date' and use the 'Updated at' date filter criteria	_coupa_inv_use_updat edat_date	Check box		'T' i.e. checked	
<b>Export From 'Updated at' date</b>	Add filter criteria to pull invoices from Coupa with 'Updated at' date >= to this date	_coupa_inv_from_updat edat_date	Date		12/14/2013	
<b>Export To 'Updated at' date</b>	Add filter criteria to pull invoices from Coupa with 'Updated at' date <= to this date	_coupa_inv_to_updated at_date	Date		12/27/2013	
<b>Accounts Payable account number</b>	The Netsuite AP account number	_coupa_inv_actpayable num	Free- Form Text		210000	
<b>notify this email address</b>	email addresses alerts to be sent to	_coupa_inv_email_notifi cations	Free- Form Text	multiple addresses can be separated by comma ' , '	xyz1@abc.com,xyz2@ abc.com	
<b>Account Name</b>	Used in the alert/notification email subject to identify which Netsuite instance the alerts are coming from.	_coupa_inv_acccountna me	Free- Form Text		ABC Production	

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Send Tax Code</b>	Option to enable tax code being sent from Coupa to Netsuite so that Netsuite calculates tax. When this option is selected tax amount will NOT be added to the vendor bill expense line amount. Also when this option is selected, there will be an additional line per expense line for header level charges.	_coupa_inv_send_taxcode	checkbox	When using this option, the taxcodes in Coupa need to be stored in the following format: netsuiteinternalid. E.g. if you have a taxcode in Netsuite VAT21 with internal id of 46 then in Coupa the taxcode should be created as VAT21:46	T' i.e. checked	
<b>Invoice URL link</b>	URL to Invoice	_coupa_inv_link_field	Free-Form Text		http://<invoiceURL>.com	
<b>Invoice Image URL Link</b>	URL to invoice image	_coupa_inv_image_link_field	Free-Form Text		http://<invoiceImage>.com	
<b>Coupa Version 12.06+?</b>	Version 12.06 introduces credit memos. Enable this checkbox if instance is on a release above 12.06	_coupa_inv_documenttype	checkbox		T' i.e. checked	
<b>Dynamic Accounting?</b>	Allows for billing strings to be created dynamically.	_coupa_inv_dynamicaccounts	checkbox		T' i.e. checked	
<b>Limit exported records to</b>	Configuration to limit the invoices per invoice run	_coupa_inv_limit	Integer Number		5	
<b>Posting period cutoff</b>	Configuration for posting period.	_coupa_inv_cutoffdate	Integer Number	If the integration routine date >= cutoff day then posting period is the month of the routine date. If the integration routine date < cutoff day then If invoice date is current month, posting period is current month and if invoice date is the prior month or earlier, posting period is the prior month.	5	
<b>Custom Field (header) 1</b>	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	



Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Custom Field (header) 2</b>	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (header) 3</b>	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (header) 4</b>	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (header) 5</b>	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (line) 1</b>	Line level custom fields	_coupa_inv_custfieldline1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (line) 2</b>	Line level custom fields	_coupa_inv_custfieldline2	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (line) 3</b>	Line level custom fields	_coupa_inv_custfieldline3	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (line) 4</b>	Line level custom fields	_coupa_inv_custfieldline4	Free-Form Text		See “Common Custom Field Examples” below	
<b>Custom Field (line) 5</b>	Line level custom fields	_coupa_inv_custfieldline5	Free-Form Text		See “Common Custom Field Examples” below	
<b>Credit Custom Field 1 (Header)</b>	Header level custom field for credit notes	_custfield_crdt_header1	Free-Form Text		See “Common Custom Field Examples” below	
<b>Credit Custom Field 1 (Line)</b>	Line level custom field for credit notes	_custfield_crdt_line1	Free-Form Text		See “Common Custom Field Examples” below	
<b>CustomField( header) count</b>	Count of the number of header level custom fields configured	_coupa_inv_custfield_header_ct	Integer Number		5	
<b>Custom field (line) count :</b>	Count of the number of line level custom fields configured	_coupa_inv_custfield_line_cnt	Integer Number		3	
<b>Credit Custom Field Count (Header)</b>	Count of the number of header level custom fields configured for Credit Notes	_customfield_crdt_header_count	Integer Number		1	
<b>Credit Custom Field Count (Line)</b>	Count of the number of line level custom fields configured for Credit Notes	_customfield_crdt_line_count	Integer Number		1	

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Value
<b>Support Void</b>	Sets the Vendor Bill to void	_supportvoid	Integer Number	Set the value of the parameter to 1 to enable this feature  Also in Coupa, when you void the invoice, mark the previously exported invoice as "not exported"	1	

## Common Custom Field Examples

Script Definition				Script Deployment	
Label	Description	Type	Comments	Example	Your Value
<b>Amortization Schedule</b>	Pass the amortization schedule defined on the Coupa Invoice	Lookup		amort-schedule:amortizationsched:Lookup:Value	
<b>Amortization Start Date</b>	The date when the amortization should start	Date		amort-start:amortizstartdate:Date:Value	
<b>Amortization End Date</b>	The date when the amortization should end	Date		amort-end:amortizationenddate:Date:Value	
<b>isBillable</b>	Sets the Billable field on the NS Vendor Bill	Text	In Coupa, you would need to create a custom field isbillable on the Requisition Line Item level of type Dropdown . Note that the values have to be 'T' (True) and 'F' (False)	isBillable:isBillable:Text:Value	

## 2

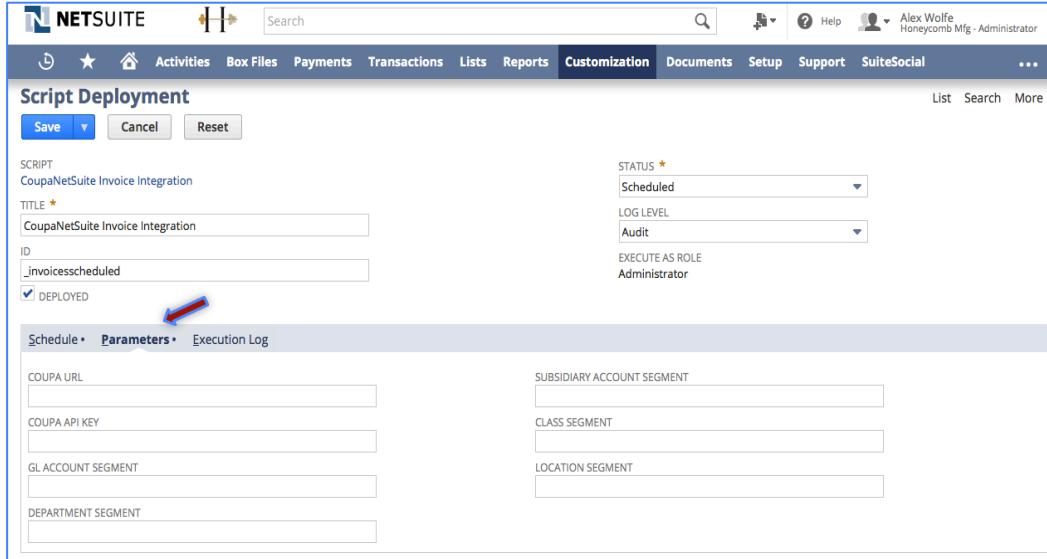
## Find and Define Deployment Parameter Values

**Navigation Path:** Customization | Scripting | Scripts

Find the “Coupa invoice Integration” script

Now you can click the Parameter menu item and start entering your specific values, please note your specific parameter values may vary based on your Coupa implementation.

Please refer back to the parameters table for guidance.



The screenshot shows the Netsuite Script Deployment interface. The top navigation bar includes the Netsuite logo, a search bar, and user information (Alex Wolfe, Honeycomb Mfg - Administrator). The main menu includes Activities, Box Files, Payments, Transactions, Lists, Reports, Customization, Documents, Setup, Support, and SuiteSocial. The Customization menu is selected, and the Script Deployment page is displayed. The page title is 'Script Deployment'. Below the title are buttons for Save, Cancel, and Reset. The script name is 'CoupaNetSuite Invoice Integration'. The title field contains 'CoupaNetSuite Invoice Integration'. The ID field contains '\_invoicesscheduled'. The DEPLOYED checkbox is checked. The STATUS dropdown is set to 'Scheduled'. The LOG LEVEL dropdown is set to 'Audit'. The EXECUTE AS ROLE is set to 'Administrator'. The Parameters tab is selected, and the following fields are visible: COUPA URL, COUPA API KEY, GL ACCOUNT SEGMENT, DEPARTMENT SEGMENT, SUBSIDIARY ACCOUNT SEGMENT, CLASS SEGMENT, and LOCATION SEGMENT. A red arrow points to the DEPLOYED checkbox.

After you are done you can click the Save button and now the Script is successfully deployed



# Netsuite to Coupa Invoice Payments

## Overview

This integration syncs up Vendor Payment data between Netsuite and Coupa. Netsuite is the Payment of record and creates payment information on the Coupa Invoice. The Scheduled SuiteScript is used to capture the “create” events that will call the Coupa POST API to create the new entry

## Script Sequence Explained

This integration is on a schedule that you can set to meet your frequency and volume requirements as Payments are made in NetSuite.

- The Coupa API call to create the **payment** record is on a predefined schedule
- The `nlapiLoadRecord(vendorpayment)` function is used to read the NetSuite vendor payment record
- The `nlapiRequestURL` function is used to do a HTTP PUT to create the corresponding payment records in Coupa

## Activities

You will need to do the following to ensure a successful deployment of the Vendor Script

- 1 Review Parameter List**
- 2 Find and Define Deployment Parameter Values**

## Tips to help you succeed

- Ensure your currency codes in Coupa are enabled
- Understand volume and frequency of the schedule needed ahead of time to meet your business process

## Pre-Requisites

- Coupa P2P & Expenses Bundle deployed
- Coupa API key created

# 1

## Review Parameter List

Review parameter list and decide which ones are relevant to your company's implementation of Coupa. Please note the fields that are mandatory are noted with an asterisk \*

### Script parameters

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Values
<b>Coupa URL*</b>	The Coupa instance the integration connects to	_coupa_pay_url	Free-Form Text		https://abc.coupahost.com	
<b>Coupa API Key*</b>	The API key for Coupa's REST based API	_coupa_pay_apikey	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fghhg	
<b>Export From Payment Date</b>	Add filter criteria to pull payments from Netsuite created >= to this date	_coupa_pay_frompaydate	Date		12/14/2013	
<b>Export To Payment Date</b>	Add filter criteria to pull payments from Netsuite created <= to this date	_coupa_pay_topaydate	Date		12/27/2013	
<b>Error Email Notification Address</b>	Email addresses to which exception emails to be sent	_coupa_pay_email_notifications	Free-Form Text		<a href="mailto:abc@abc.com">abc@abc.com</a> , <a href="mailto:abcd@abcd.com">abcd@abcd.com</a>	
<b>Account Name*</b>	As per standard, it will be company name with which environment its been setup (Test or Prod)	_coupa_pay_accountname	Free-Form Text	<Company Name> <Test/Prod>	Coupa Test	
<b>Process Records From #</b>	Starting record to process. Passed as a parameter to a new scheduled script when usage limit reached or records to process more than "Process Records To #"	_coupa_pay_fromrecords	Integer Number	Default is 0	0	

Script Definition					Script Deployment	
Label	Description	Id	Type	Comments	Example	Your Values
<b>Process Records To #</b>	Ending record to process. Passed as a parameter to a new scheduled script when usage limit reached or records to process more than "Process Records To #"	_coupa_pay_torecords	Integer Number	Default is 250	250	

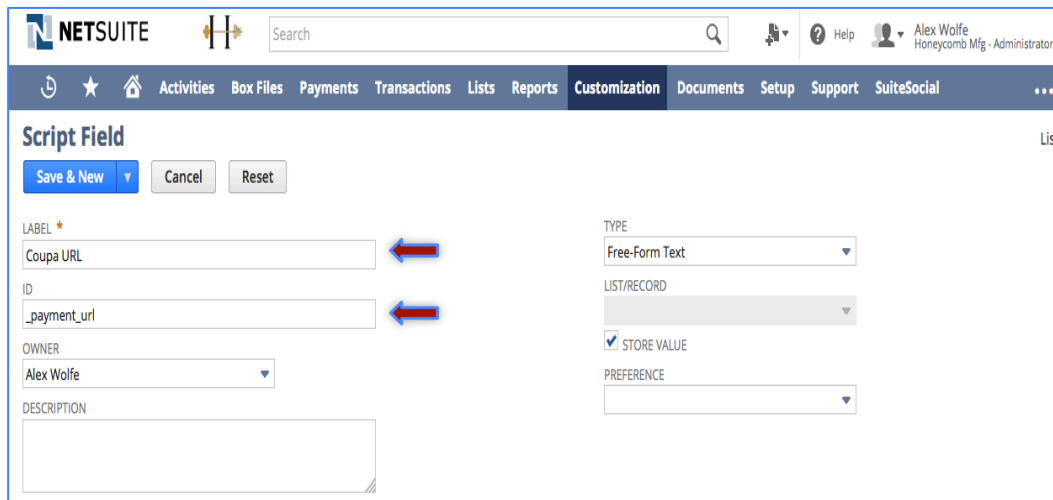
## 2 Find and Define Deployment Parameter Values

**Navigation Path:** Customization | Scripting | Scripts

Find the "Coupa invoice Payment Integration" script

Now you can click the Parameter menu item and start entering your specific values, please note your specific parameter values may vary based on your Coupa implementation.

Please refer back to the parameters table for guidance.



**NETSUITE** Search [ ] Help Alex Wolfe Honeycomb Mfg - Administrator

Activities Box Files Payments Transactions Lists Reports **Customization** Documents Setup Support SuiteSocial

**Script Field** List

Save & New Cancel Reset

LABEL \* Coupa URL

ID \_payment\_url

OWNER Alex Wolfe

DESCRIPTION

TYPE Free-Form Text

LIST/RECORD STORE VALUE

PREFERENCE

After you are done you can click the Save button and now the Script is successfully deployed