Coupa NetSuite Integration Guide

Version 4.1.4

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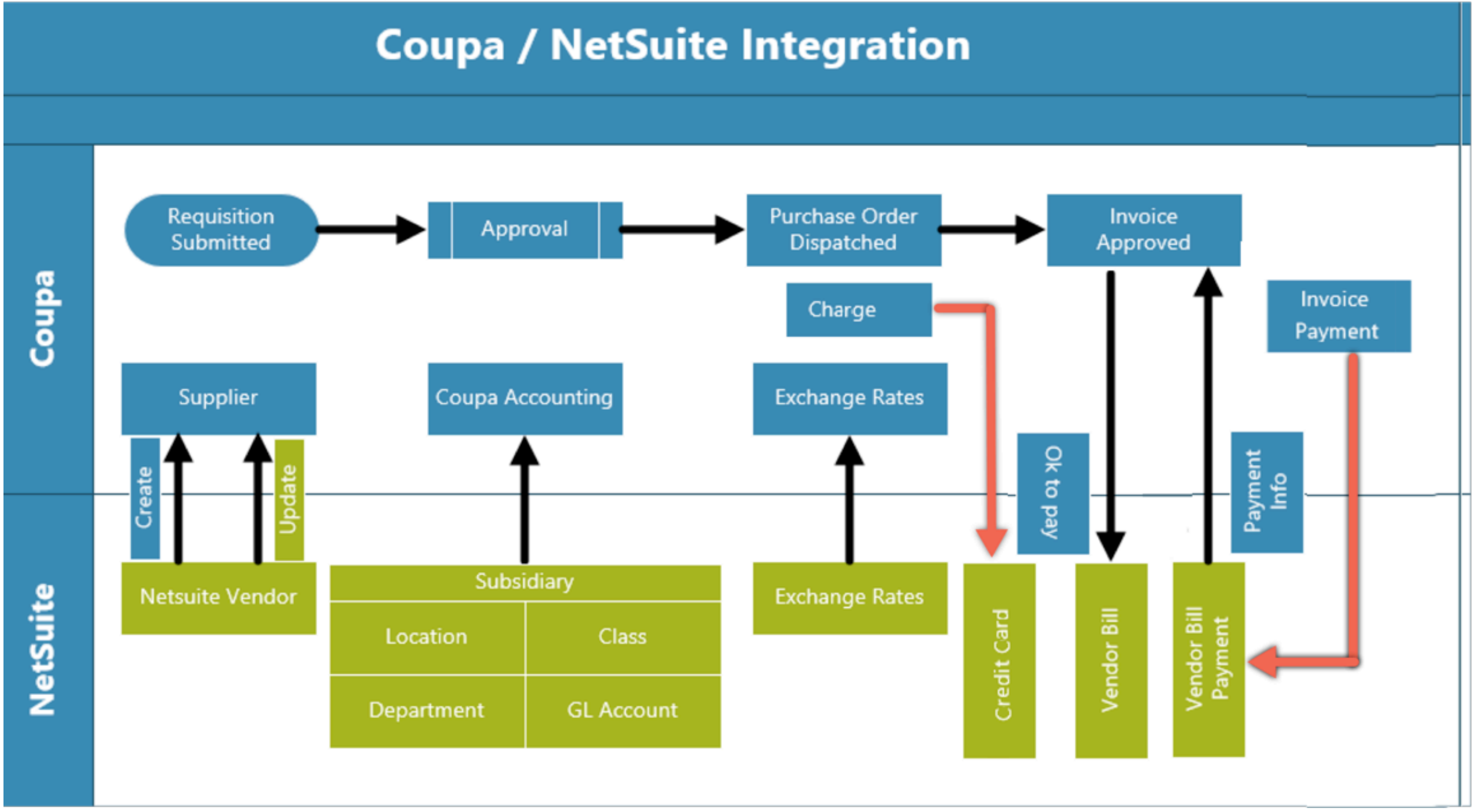
Coupa NetSuite Integration Guide

P2P Dataflow and Integration points

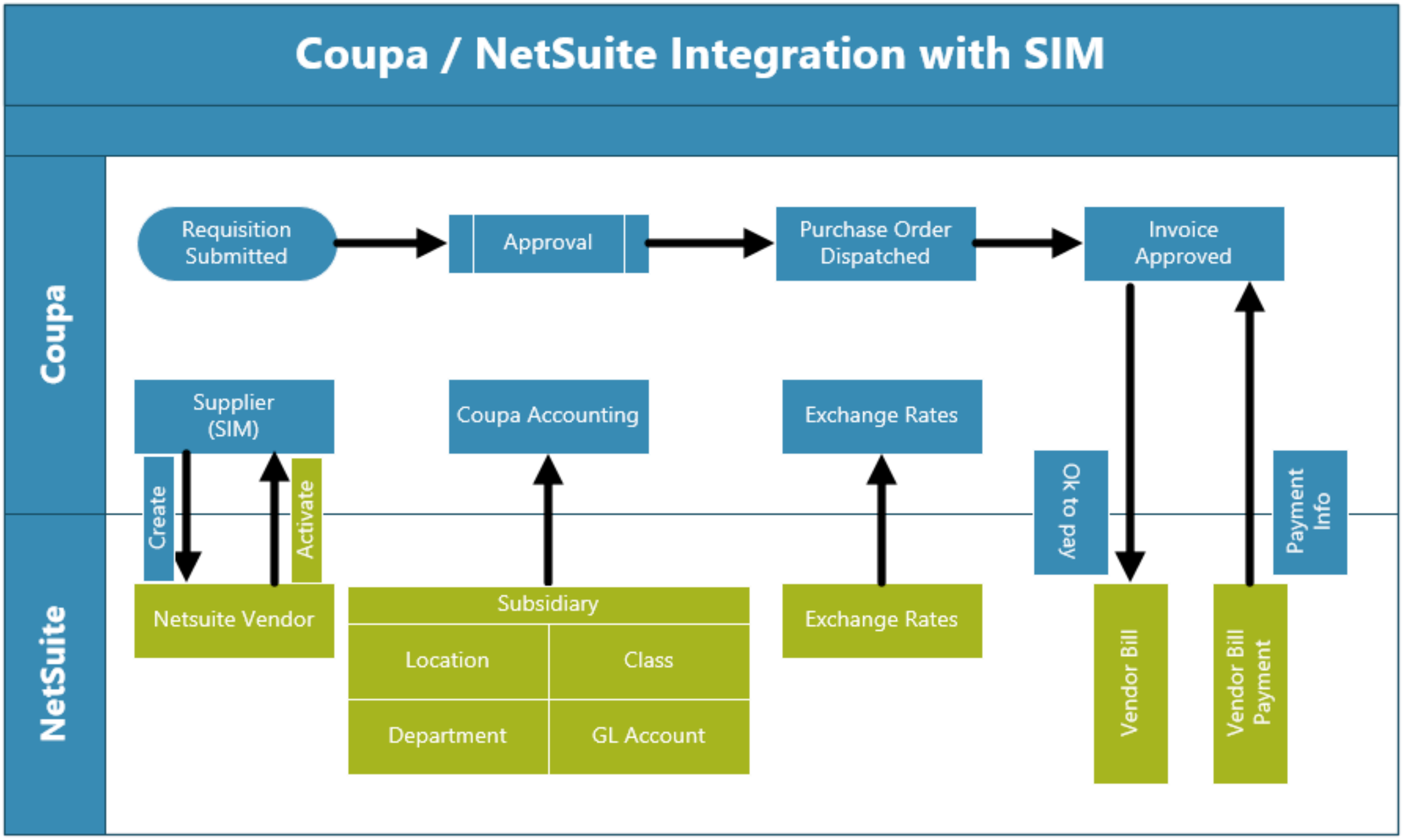
Overview

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. Customers using Coupa Pay may take Virtual Card Charges for PO Payments from Coupa to Netsuite as Credit Card Transactions and Coupa Invoice Payments from Coupa to Netsuite as Vendor Bill Payments. (highlighted red)



Overview with SIM

Now with SIM (Supplier Information Management), new supplier records can be initiated via a supplier information request from within Coupa. Once all the information is populated, the supplier record is created in NetSuite and simultaneously activated in Coupa. The diagram below indicates the additional integration points which include SIM.

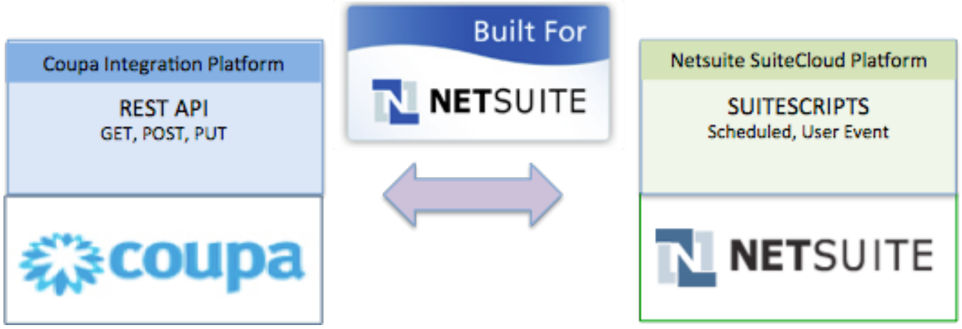


Integration Method

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

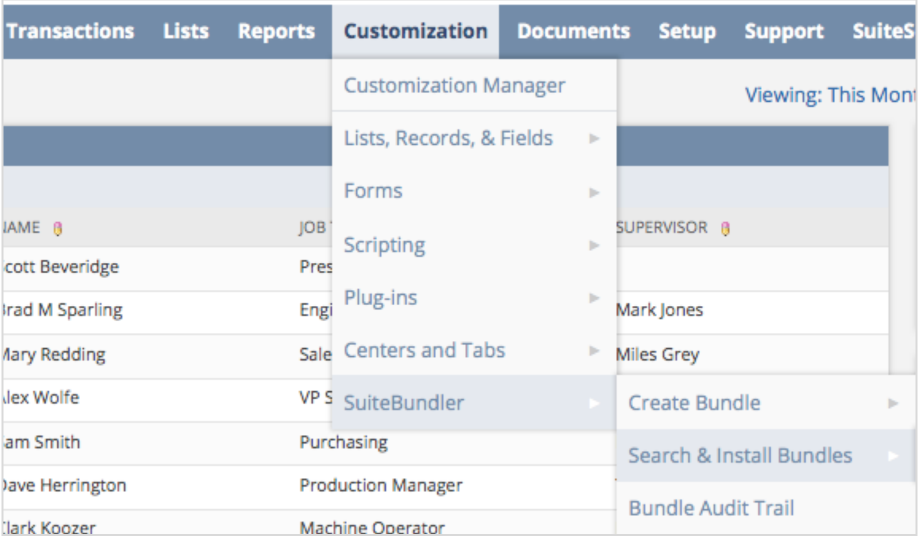
There are 2 steps in this Activity

Step 1.1

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

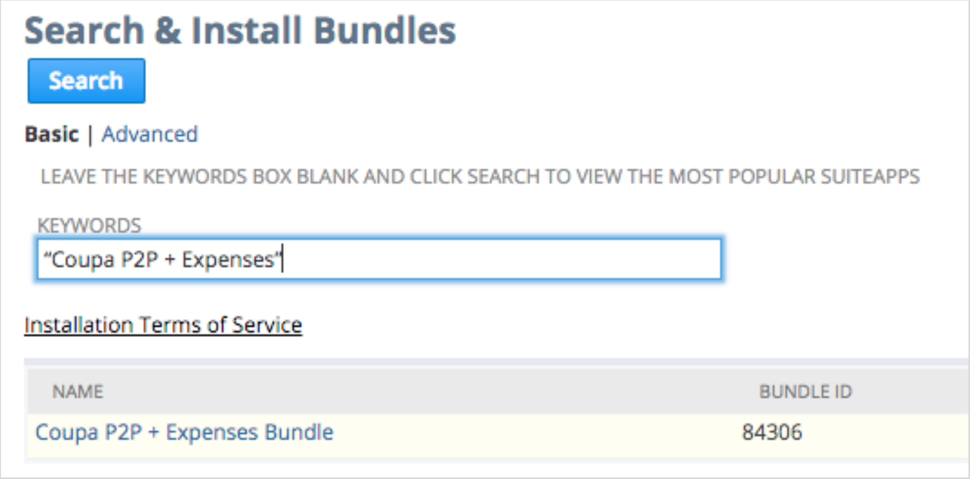
Locate the Bundler

Navigation Path: Customization | SuiteBundler | Search & Install Bundles



Step 1.2

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



Search & Install Bundles

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

KEYWORDS: “Coupa P2P + Expenses”

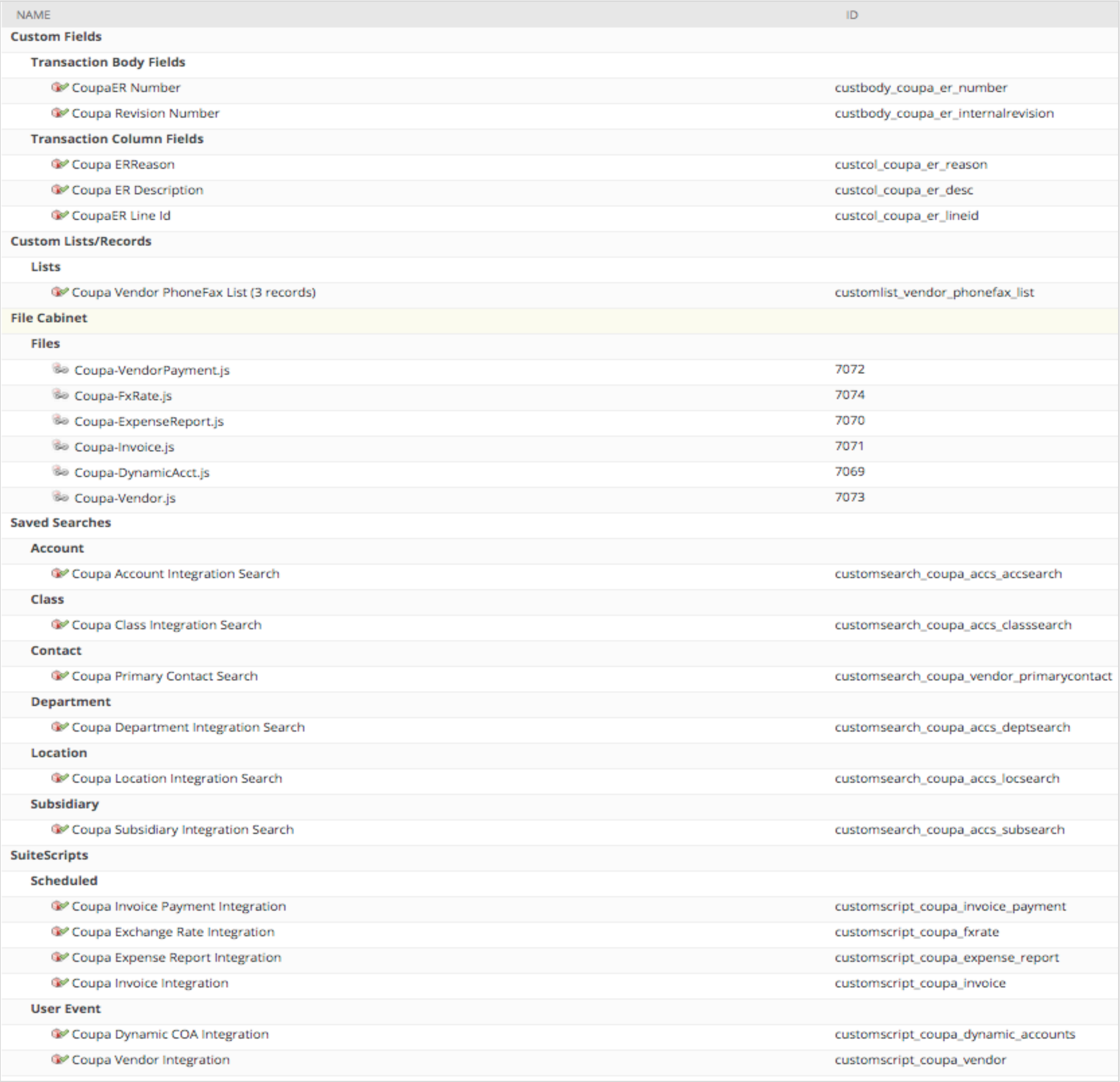
NAME	BUNDLE ID
Coupa P2P + Expenses Bundle	84306

2 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
Custom Fields	
Transaction Body Fields	
CoupaER Number	custbody_coupa_er_number
Coupa Revision Number	custbody_coupa_er_internalrevision
Transaction Column Fields	
Coupa ERReason	custcol_coupa_er_reason
Coupa ER Description	custcol_coupa_er_desc
CoupaER Line Id	custcol_coupa_er_lineid
Custom Lists/Records	
Lists	
Coupa Vendor PhoneFax List (3 records)	customlist_vendor_phonefax_list
File Cabinet	
Files	
Coupa-VendorPayment.js	7072
Coupa-FxRate.js	7074
Coupa-ExpenseReport.js	7070
Coupa-Invoice.js	7071
Coupa-DynamicAcct.js	7069
Coupa-Vendor.js	7073
Saved Searches	
Account	
Coupa Account Integration Search	customsearch_coupa_accs_accsearch
Class	
Coupa Class Integration Search	customsearch_coupa_accs_classsearch
Contact	
Coupa Primary Contact Search	customsearch_coupa_vendor_primarycontact
Department	
Coupa Department Integration Search	customsearch_coupa_accs_deptsearch
Location	
Coupa Location Integration Search	customsearch_coupa_accs_locsearch
Subsidiary	
Coupa Subsidiary Integration Search	customsearch_coupa_accs_subsearch
SuiteScripts	
Scheduled	
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
User Event	
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

- nsure your vendor record in Netsuite is associated with the appropriate subsidiary values and currency association
- nsure 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

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	**Example**	**Id**	**Type**	**Comments**	**Example**	**Your Value**
Coupa URL*	The Coupa instance the integration connects to	_vendor_url	Free-Form Text		https://abc.coupahost.com	
Coupa API Key*	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.coupahost.com/api_keys	4dtyr7657fgfh5757fghhg	
Error Email Notification Address	Email addresses to which exception emails to be sent	_vendor_erroremailnotify	Free-Form Text		abc@abc.com, abcd@abcd.com	
Account Name*	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	
Use Company Name as Display Name?	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**
Phone/Fax Format	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_phonefaxformat	List/Record	customlist should be created as vendor_phonefax_list and below values to be assigned 123 456 7890 123-456-7890 123.456.7890	123.456.7890	
Invoice Matching Level	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	
Payment Method	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_pymtmd	
Invoice Emails	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	
Send Invoice To Approvals	If yes, then invoices will all be sent thru approvals, regardless of total amount.	_vendor_sendinvoices_to_approv	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
Include in Coupa	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	
Allow Invoicing From CSN	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:	
Content Group Field	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	
PO Email Override	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	
Custom Fields Count*	Define the number of custom fields to be integrated.	_vendor_customfieldscount	Integer Number	0,1,2,…	0	
Custom Field x (where x is an integer)	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:NetSuitecustomfield:CoupaFieldType:NetsuiteFieldType:default	eligible-1099:is1099eligible:Boolean:Boolean	

2 Find and Define Deployment Parameter Values

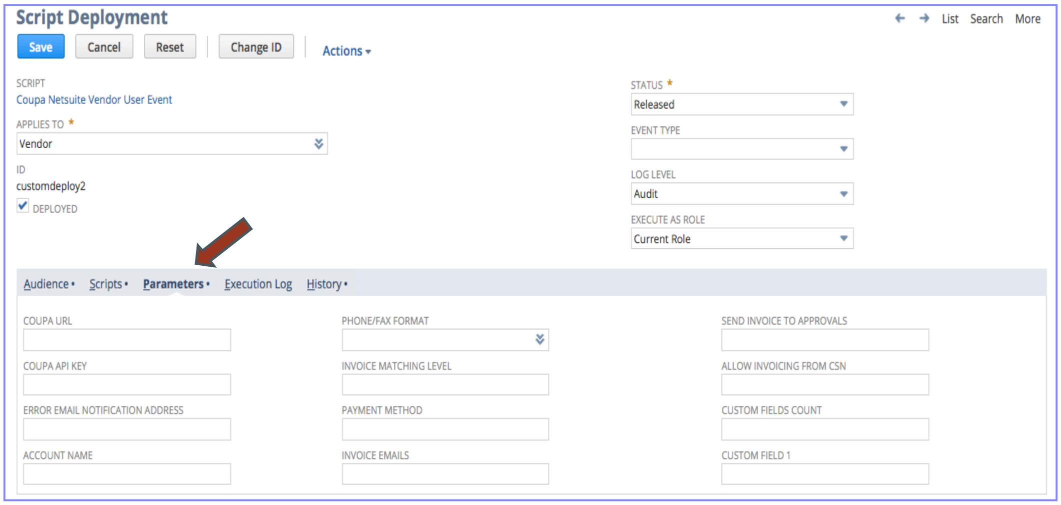
Navigation Path: Customization | Scripting | Scripts

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: Coupa Netsuite Vendor User Event

APPLIES TO *: Vendor

ID: customdeploy2

☑ DEPLOYED

STATUS *: Released

EVENT TYPE:

LOG LEVEL: Audit

EXECUTE AS ROLE: Current Role

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.

Coupa SIM Supplier to NetSuite Vendor

Overview

If you have purchased the SIM module, you will be able to create new suppliers in NetSuite via Coupa SIM integration. You will also be able to update them via integration. This integration allows you to standardize your supplier onboarding and require much of the vendor information to be provided directly by the supplier. Once provided, the information will be able to flow into NetSuite and create a new vendor or update it. Once the vendor is created in NetSuite, the Netsuite Vendor to Coupa Supplier activates the vendor in Coupa and updates the Coupa record with the SIM form information.

Script Sequence Explained

This integration is scheduled as the Coupa SIM request triggers the creation of a pending supplier in Coupa which is only available for transactions after successfully creating a Vendor in Netsuite.

- The SIM request goes to the supplier
- The Supplier fills out the requested information and submits it back to your Coupa system
- The final SIM information is sync'd into Netsuite to create a new Netsuite Vendor record.
- The Coupa API call to update the Coupa supplier record is called as soon as the Netsuite vendor is updated which activates it in Coupa.
- 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 update the supplier record in Coupa.

Tips to help you succeed

- Esure you have purchased SIM
- Ensure you have created your SIM Forms for New Supplier, External Supplier and Internal Supplier updates.
- Create your SIM Sequential Form Mappings or your previously created NetSuite suppliers, trigger the information request using the Supplier list in Coupa.

Pre-Requisites

- Coupa P2P & Expenses Bundle deployed
- Coupa API key created with custom permissions

1

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 SIM Integration Script

1 **Review Parameter List**

2 **Find and Define Deployment Parameter Values**

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

Label	Description	Id	Type	Example
Coupa URL*	The Coupa instance the integration connects to	_coupa_sim_url	Free-	https://abc.coupahost.com
Coupa API Key*	The API key for Coupa's REST based API	_coupa_sim_apikey	Free-Form Text	4dtyr7657fgfh5757fghhg Note: Don't forget to edit the permissions of the key, because the default API Key permissions did not yet include SIM as of R20
Vendor Mapping	Defines the mappings between coupa SIM custom fields and netsuite custom fields for Vendor. In the example to the right, we want to make sure every new vendor is setup as "email" po method, so instead of using the default SIM PO Method, we create a custom field lookup, and only include email as the default lookup choice. Note with this example we are also mapping the supplier's default commodity to ensure that new requisitions will default the commodity code for us based on the supplier.	_coupa_sim_vendor_mapping	Free-Form Text	po-transmission-method/external-ref-num==custentity_coupa_po_method_rec;default-commodity/id==custentity_coupa_default_commodity
Address Mapping	Defines the mappings between coupa SIM custom fields and netsuite custom fields for Addresses	_coupa_sim_address_mapping	Free-Form Text	Coupacustomfield1==NScustomfield1;Coupacustomfield2/id==NScustomfield2
Bank Rec Mapping	Defines the mappings between coupa SIM custom fields and netsuite Bank record fields fields	_coupa_sim_bank_mapping	Free-Form Text	Coupacustomfield1==NScustomfield1;Coupacustomfield2/id==NScustomfield2
Contact Rec	Defines the mappings between coupa SIM custom	_coupa_sim_contact_	Free-	Coupacustomfield1==N

Label	Description	Id	Type	Example
Mapping	fields and netsuite contact fields	mapping	Form Text	Scustomfield1;Coupacustomfield2/id==NScustomfield2
Default Subsidiary ID	Defines the default subsidiary ID if subsidiary is not mapped using custom below	_coupa_sim_default_sub	Free-Form Text	i.e. 5
Custom Subsidiary Coupa ID	Defines Coupa SIM custom field which houses the NetSuite Subsidiary. Create a lookup in Coupa, load the subsidiaries and their Netsuite IDs, and then create a custom field on the SIM record. This will define the primary subsidiary in the netsuite vendor record.	_coupa_sim_custom_sub	Free-Form Text	subsidiary/external-ref-num
"TO" Email Addresses for errors	Where to email errors in this integration	_coupa_sim_error_to	Free-Form Text	tim@gogogo.com
"FROM" Email address for errors	Who will be displayed as the sender in those error emails	_coupa_sim_error_from	Free-Form Text	tim@gogogo.com
Vendor "INCLUDE IN COUPA" Parameter ID	This allows the SIM interface to check the box on the new Netsuite Vendor record which causes the vendor integration to include this new vendor in future inteegrations.	_coupa_sim_vendor_include	Free-Form Text	custentity_vend_include_in_coupa
Payment File Format ID	This is the coupa custom field which houses the custrecord_2663_entity_file_format for future payments to this vendor. Newly created bank details will be marked as Primary, and the existing primary record will be demoted.	_coupa_sim_payment_format	Free-Form Text	netsuite-payment-file-format/external-ref-num
Vendor Integration PO METHOD Parameter	This is where to store the PO Method.	_coupa_po_method_parameter	Free-Form Text	Netsuitecustomfield1
Use Display Name as Company Name	This will override the Supplier Name with the whatever was specified in the "Display Name"	_coupa_sim_display_name	Free-Form Text	<Checkbox>

2 Find and Define Deployment Parameter Values

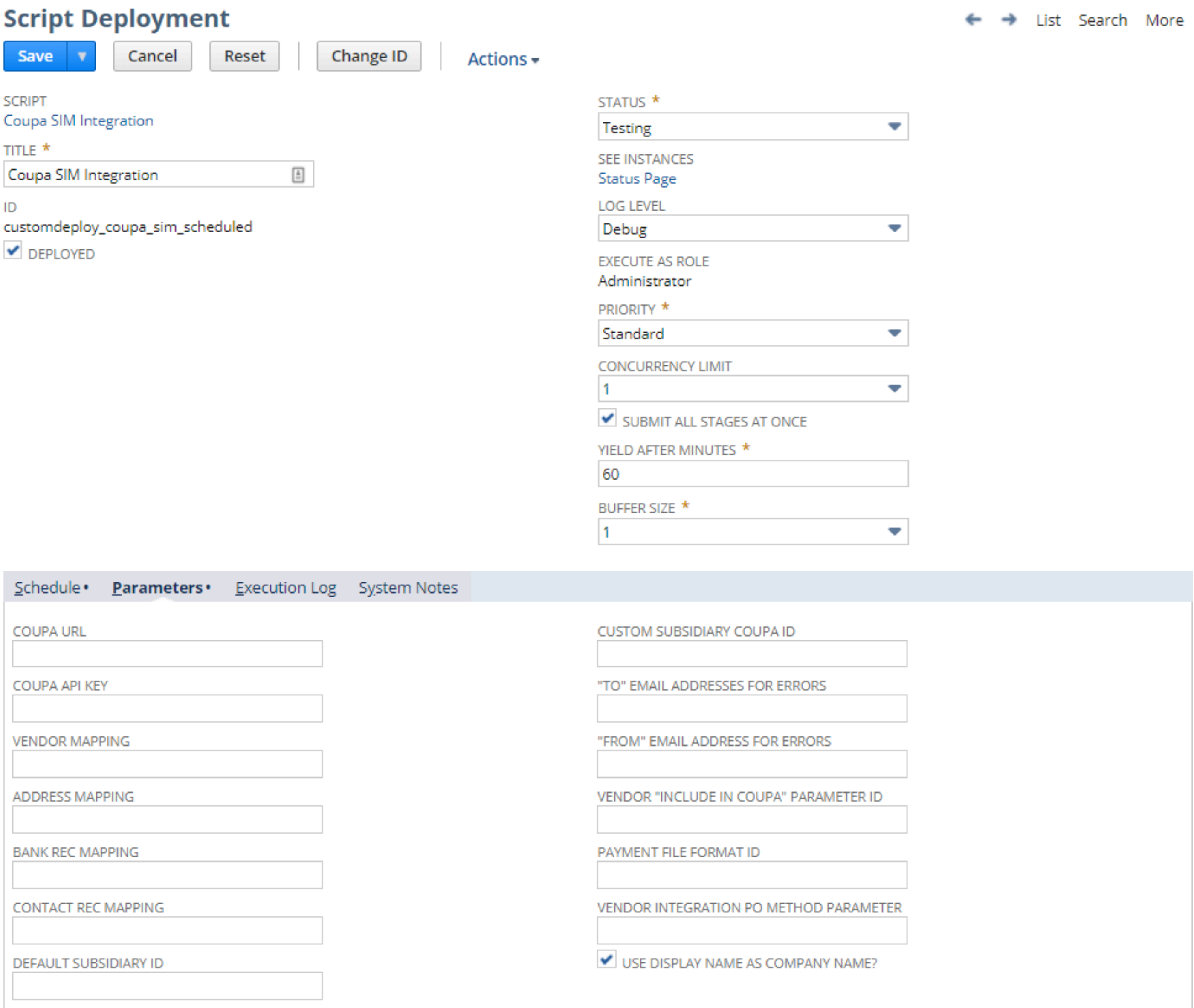
Navigation Path: Customization | Scripting | Scripts

Find the "Coupa SIM Integration" script deployment

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
Coupa SIM Integration

TITLE *
Coupa SIM Integration

ID
customdeploy_coupa_sim_scheduled

☑ DEPLOYED

STATUS *
Testing

SEE INSTANCES
Status Page

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

CONCURRENCY LIMIT
1

☑ SUBMIT ALL STAGES AT ONCE

YIELD AFTER MINUTES *
60

BUFFER SIZE *
1

COUPA URL

COUPA API KEY

VENDOR MAPPING

ADDRESS MAPPING

BANK REC MAPPING

CONTACT REC MAPPING

DEFAULT SUBSIDIARY ID

CUSTOM SUBSIDIARY COUPA ID

"TO" EMAIL ADDRESSES FOR ERRORS

"FROM" EMAIL ADDRESS FOR ERRORS

VENDOR "INCLUDE IN COUPA" PARAMETER ID

PAYMENT FILE FORMAT ID

VENDOR INTEGRATION PO METHOD PARAMETER

☑ USE DISPLAY NAME AS COMPANY NAME?

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

Special Considerations with the SIM Bundle

- You must have a Primary Contact with a First Name, Last Name, and Email address, in the NetSuite Vendor or you will not be able to trigger an external SIM update form from the Coupa supplier record. This is especially applicable for initial production cutover when you integrate all of your Netsuite Vendors into Coupa expecting to phase them into SIM over time.

- If you allow a supplier or internal user to set the default Commodity Code in SIM, it will integrate over to Netsuite, but it will not integrate back into Coupa from the Netsuite Vendor record without modifying the Vendor Suite Script.

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

Activities

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

Pre-Requisites

- 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**
Coupa URL*	The Coupa instance the integration connects to	_coupa_fxrates_url	Free-Form Text		https://abc.coupahost.com	
Coupa API Key*	The API key for Coupa's REST based API	_coupa_fxrates_apikey	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fghhg	
Error Email Notification Address	Email addresses to which exception emails to be sent	_coupa_fxrates_erroremailnotify	Free-Form Text		abc@abc.com, abcd@abcd.com	
Account Name*	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	
UTC Offset	The *UTC offset* is the difference in hours and minutes from Coordinated Universal Time	_coupa_fxrates_utcoffset	Integer Number		10	

2 Find and Define Deployment Parameter Values

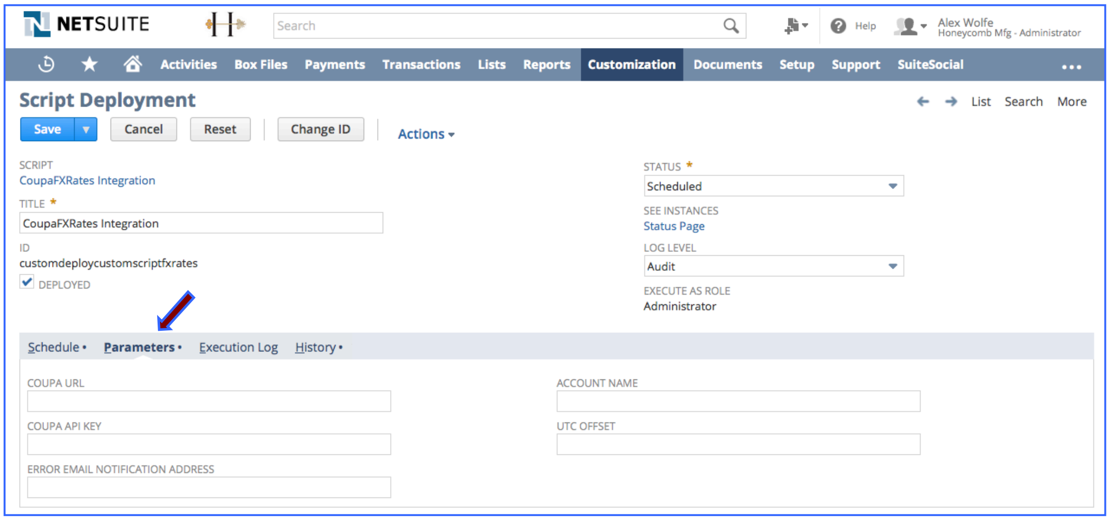
Navigation Path: Customization | Scripting | Scripts

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
CoupaFXRates Integration

TITLE *
CoupaFXRates Integration

ID
customdeploycustomscriptfxrates

☑ DEPLOYED

STATUS *
Scheduled

SEE INSTANCES
Status Page

LOG LEVEL
Audit

EXECUTE AS ROLE
Administrator

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

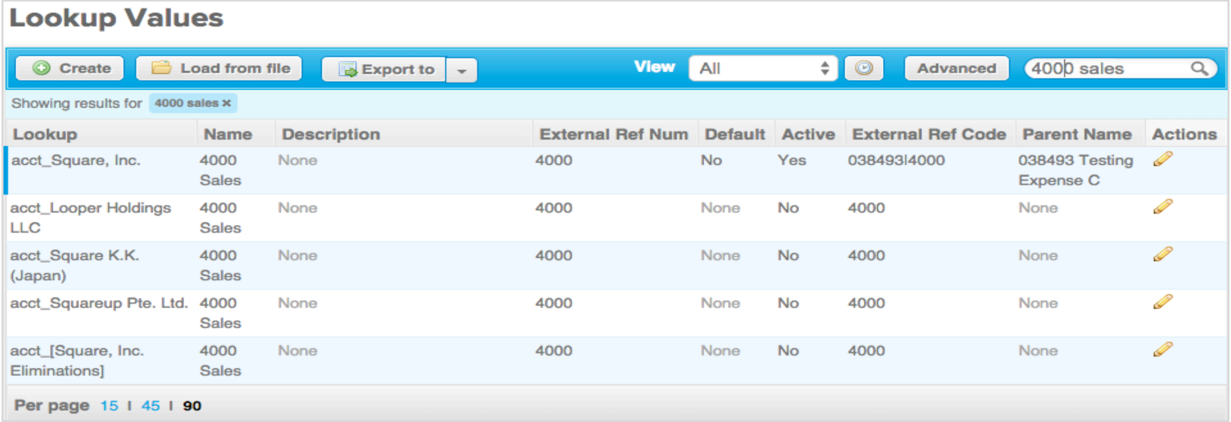
Naming / Formatting Conventions:

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:



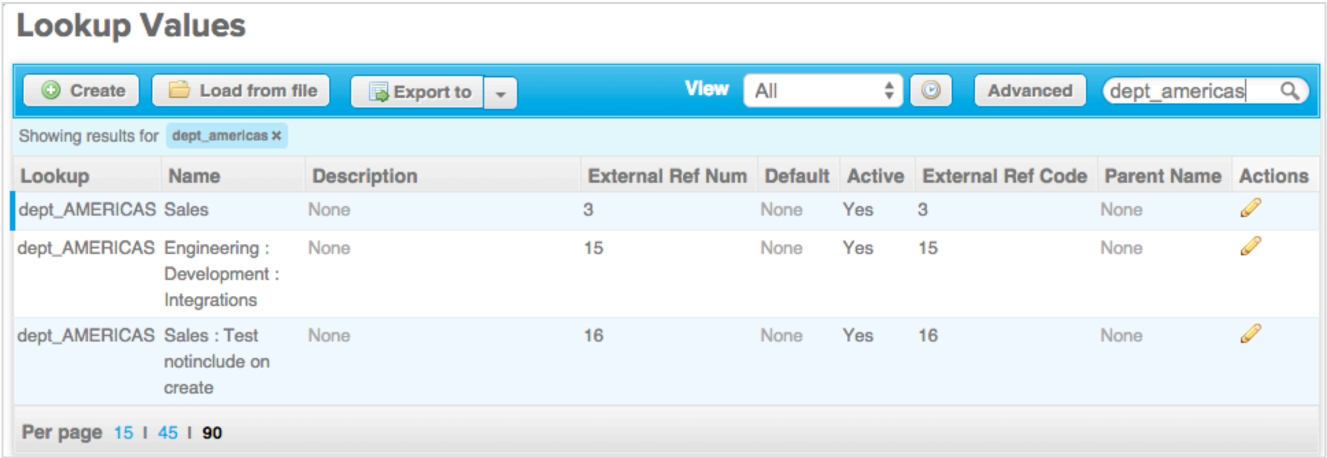
Lookup Values

Showing results for 4000 sales ×

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

Showing results for dept_americas ×

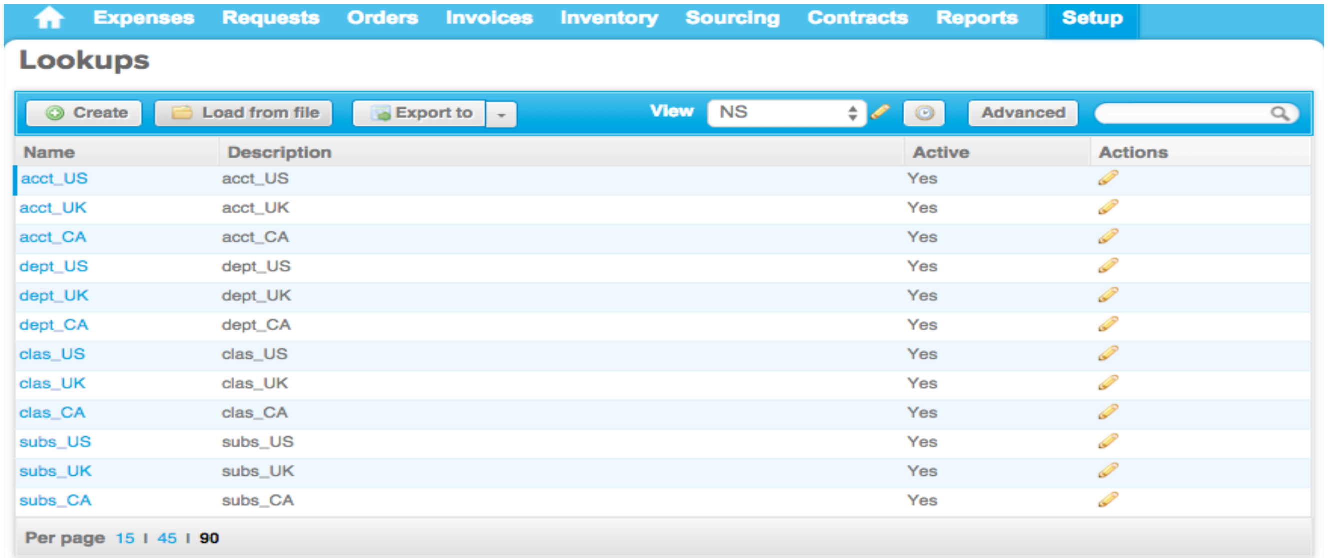
Lookup	Name	Description	External Ref Num	Default	Active	External Ref Code	Parent Name	Actions
dept_AMERICAS	Sales	None	3	None	Yes	3	None	✎
dept_AMERICAS	Engineering : Development : Integrations	None	15	None	Yes	15	None	✎
dept_AMERICAS	Sales : Test notinclude on create	None	16	None	Yes	16	None	✎

Per page 15 I 45 I 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

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 I 45 I 90

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

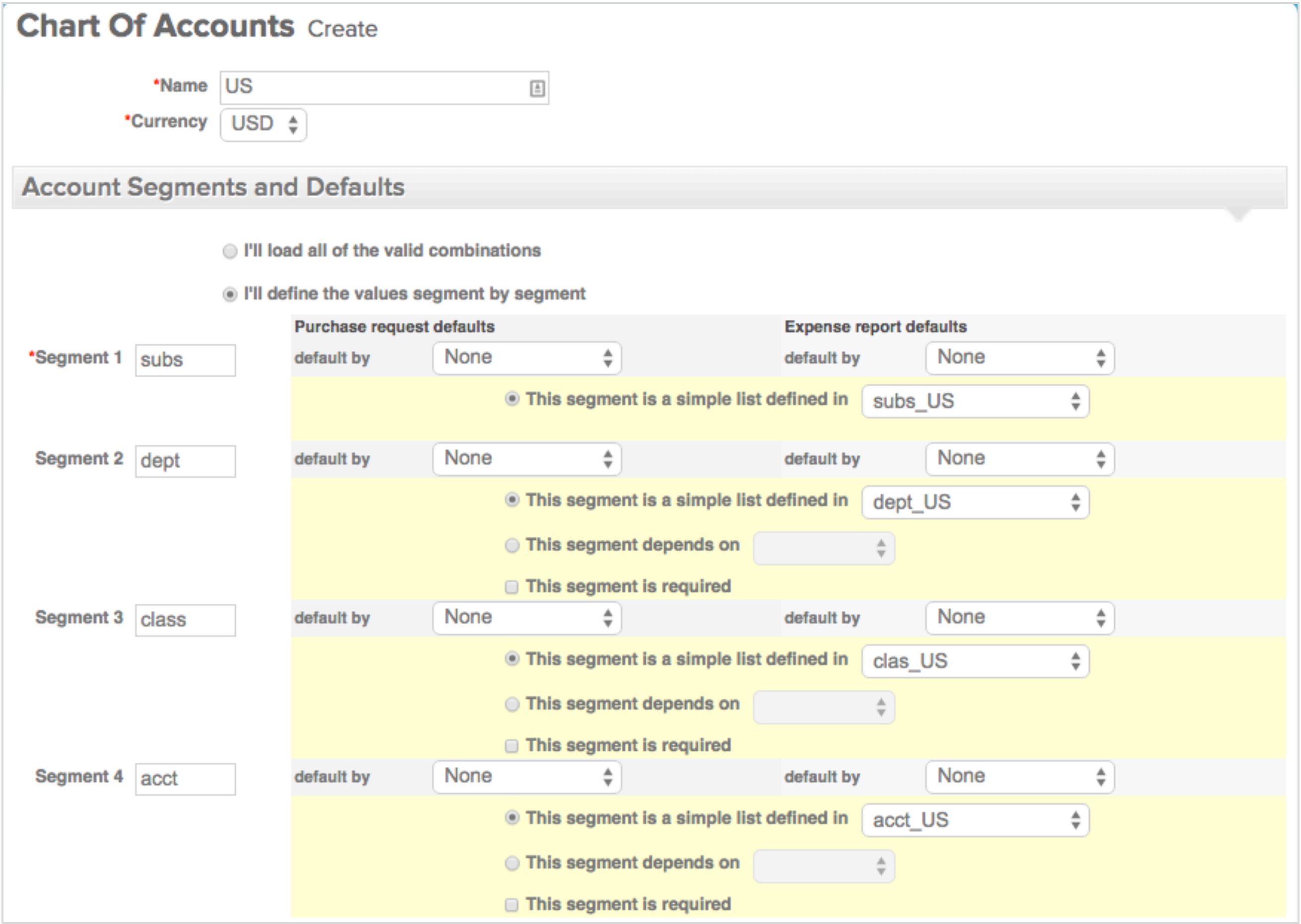


Chart Of Accounts Create

*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	
*Segment 1	subs	default by	None	default by	None
		● This segment is a simple list defined in	subs_US		
Segment 2	dept	default by	None	default by	None
		● This segment is a simple list defined in	dept_US		
		○ This segment depends on			
		□ This segment is required			
Segment 3	class	default by	None	default by	None
		● This segment is a simple list defined in	clas_US		
		○ This segment depends on			
		□ This segment is required			
Segment 4	acct	default by	None	default by	None
		● This segment is a simple list defined in	acct_US		
		○ This segment depends on			
		□ This segment is required			

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**
Coupa URL*	The Coupa instance the integration connects to	_coupa_accs_url	Free-Form Text		https://abc.coupahost.com	
Coupa API Key*	The API key for Coupa's REST based API	_coupa_accs_apikey	Free-Form Text	A Coupa Admin can generate the Coupa API Key in Coupa https://xxxx.coupahost.com/api_keys	4dtyr7657fgfh5757fghhg	

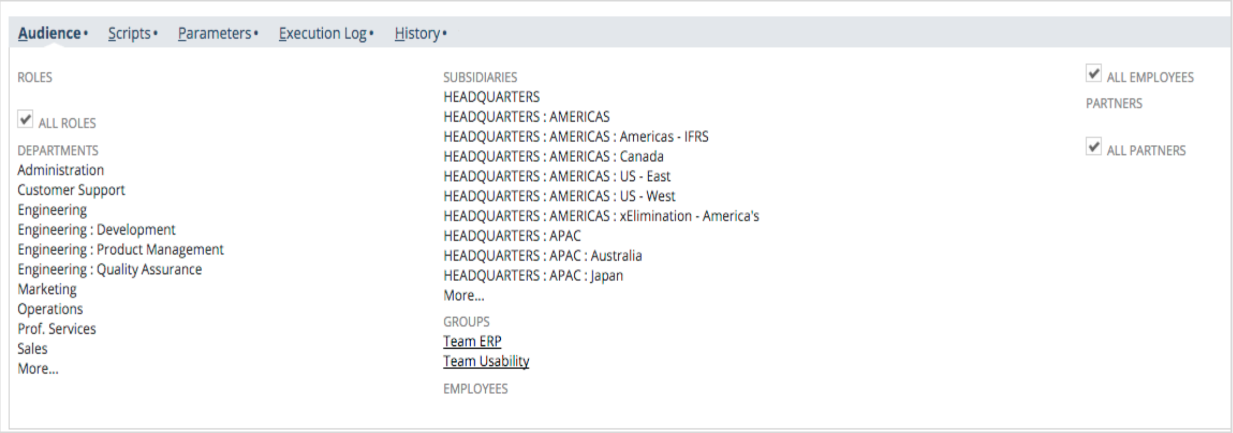
Script Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your Value**
Email Addresses for Notif	Email addresses to which exception emails to be sent	_coupa_accs_notify_email	Free-Form Text		abc@abc.com, abcd@abcd.com	
Include in Coupa	Id of the custom 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	
Subsid Include in Coupa	Id of the custom field (on SUBSIDIARY records) to allow/disallow the transmission of the subsidiary to Coupa	_coupa_accs_dynamic_sub_includ	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



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

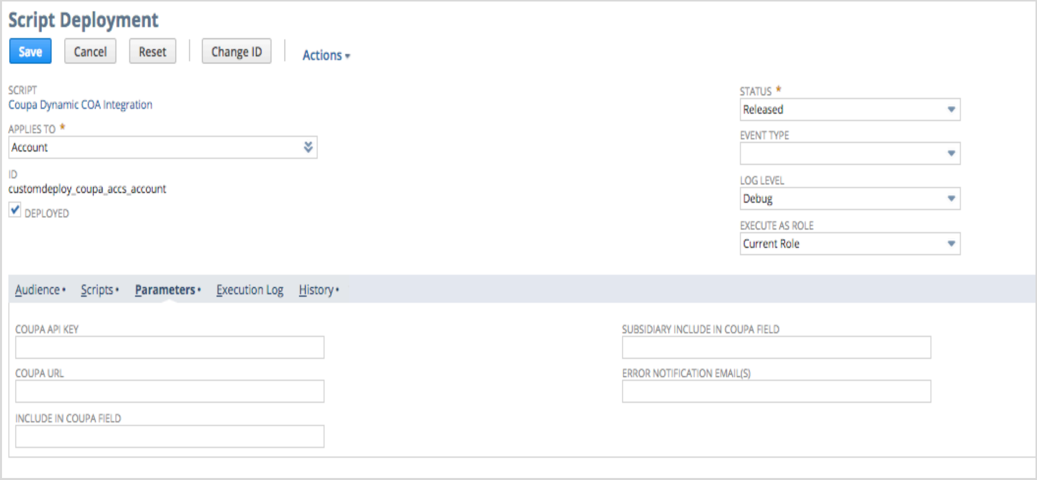
Find and Define Deployment Parameter Values

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

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

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 SetupCoupa Suppliers with Netsuite Vendor ID

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**
Coupa URL*	The Coupa instance the integration connects to	_coupa_inv_url	Free-Form Text		https://abc.coupahost.com	
Coupa API Key*	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	4dtyr7657fgfh5757fghhg	
GL Account Segment	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:NetsuiteGLAccount Name	segment-2	
Department Segment	The accounting segment in Coupa that holds the Netsuite department account information	_coupa_inv_deptseg	Free-Form Text		segment-3	
Subsidiary Account segment	The accounting segment in Coupa that holds the Netsuite subsidiary account information	_coupa_inv_subsseg	Free-Form Text		segment-1	
Class Segment	The accounting segment in Coupa that holds the Netsuite classification account information	_coupa_inv_classseg	Free-Form Text		segment-4	
Location Segment	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**
Export From Invoice date	Add filter criteria to pull invoices from Coupa with Invoice date >= to this date	_coupa_inv_frominvdate	Date		12/14/2013	
Export To Invoice date	Add filter criteria to pull invoices from Coupa with Invoice date <= to this date	_coupa_inv_toinvdate	Date		12/27/2013	
Use Updated at date	This will override the filter criteria of ‘Invoice date’ and use the ‘Updated at’ date filter criteria	_coupa_inv_use_updatedat_date	Check box		‘T’ i.e. checked	
Export From ‘Updated at’ date	Add filter criteria to pull invoices from Coupa with ‘Updated at’ date >= to this date	_coupa_inv_from_updatedat_date	Date		12/14/2013	
Export To ‘Updated at’ date	Add filter criteria to pull invoices from Coupa with ‘Updated at’ date <= to this date	_coupa_inv_to_updatedat_date	Date		12/27/2013	
Accounts Payable account number	The Netsuite AP account number	_coupa_inv_actpayablenum	Free-Form Text		210000	
notify this email address	email addresses alerts to be sent to	_coupa_inv_email_notifications	Free-Form Text	multiple addresses can be separated by comma ‘,’	xyz1@abc.com,xyz2@abc.com	
Account Name	Used in the alert/notification email subject to identify which Netsuite instance the alerts are coming from.	_coupa_inv_acccountname	Free-Form Text		ABC Production	

Script Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your Value**
Send Tax Code	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: netsuitename: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 Additionally, this will not support Multiple Tax Lines in Coupa as there is only one place to set a Tax Code in NetSuite. Tax codes are also only applicable for NON-US Subsidiaries	T' i.e. checked	
Invoice URL link	URL to Invoice	_coupa_inv_link_field	Free-Form Text		http://<invoiceURL>.com	
Invoice Image URL Link	URL to invoice image	_coupa_inv_image_link_field	Free-Form Text		http://<invoiceImage>.com	
Coupa Version 12.06+?	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	
Dynamic Accounting?	Allows for billing strings to be created dynamically.	_coupa_inv_dynamicaccts	checkbox		T' i.e. checked	
Limit exported records to	Configuration to limit the invoices per invoice run	_coupa_inv_limit	Integer Number		5	
Posting period cutoff	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	

Script Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your Value**
Custom Field (header) 1	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (header) 2	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (header) 3	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (header) 4	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (header) 5	Header level custom fields	_coupa_inv_custfieldheader1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (line) 1	Line level custom fields	_coupa_inv_custfieldline1	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (line) 2	Line level custom fields	_coupa_inv_custfieldline2	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (line) 3	Line level custom fields	_coupa_inv_custfieldline3	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (line) 4	Line level custom fields	_coupa_inv_custfieldline4	Free-Form Text		See "Common Custom Field Examples" below	
Custom Field (line) 5	Line level custom fields	_coupa_inv_custfieldline5	Free-Form Text		See "Common Custom Field Examples" below	
Credit Custom Field 1 (Header)	Header level custom field for credit notes	_custfield_crdt_header1	Free-Form Text		See "Common Custom Field Examples" below	
Credit Custom Field 1 (Line)	Line level custom field for credit notes	_custfield_crdt_line1	Free-Form Text		See "Common Custom Field Examples" below	
CustomField(header) count	Count of the number of header level custom fields configured	_coupa_inv_custfield_header_ct	Integer Number		5	
Custom field (line) count :	Count of the number of line level custom fields configured	_coupa_inv_custfield_line_cnt	Integer Number		3	
Credit Custom Field Count (Header)	Count of the number of header level custom fields configured for Credit Notes	_customfield_crdt_header_count	Integer Number		1	
Credit Custom Field Count (Line)	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**
Support Void	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	
Coupa Pay Enabled?	Enables Payment hold for coupa pay invoices	_coupa_inv_coupa_pay_enabled	checkbox	Puts Coupa Pay invoice on Payment hold in Netsuite if set to true		

Common Custom Field Examples

Script Definition					Script Deployment
Label	**Description**	**Type**	**Comments**	**Example**	**Your Value**
Amortization Schedule	Pass the amortization schedule defined on the Coupa Invoice	Lookup		amort-schedule:amortizationschedule:Lookup:Value	
Amortization Start Date	The date when the amortization should start	Date		amort-start:amortizstartdate:Date:Value	
Amortization End Date	The date when the amortization should end	Date		amort-end:amortizationenddate:Date:Value	
isBillable	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	
Coupa Pay Enabled?	Sets the script behavior for Invoice Paid in Coupa via Coupa Pay	checkbox	If set to True, Invoice paid in coupa via Coupa Pay will be put on “Payment Hold” to avoid double payments.		2.2.4

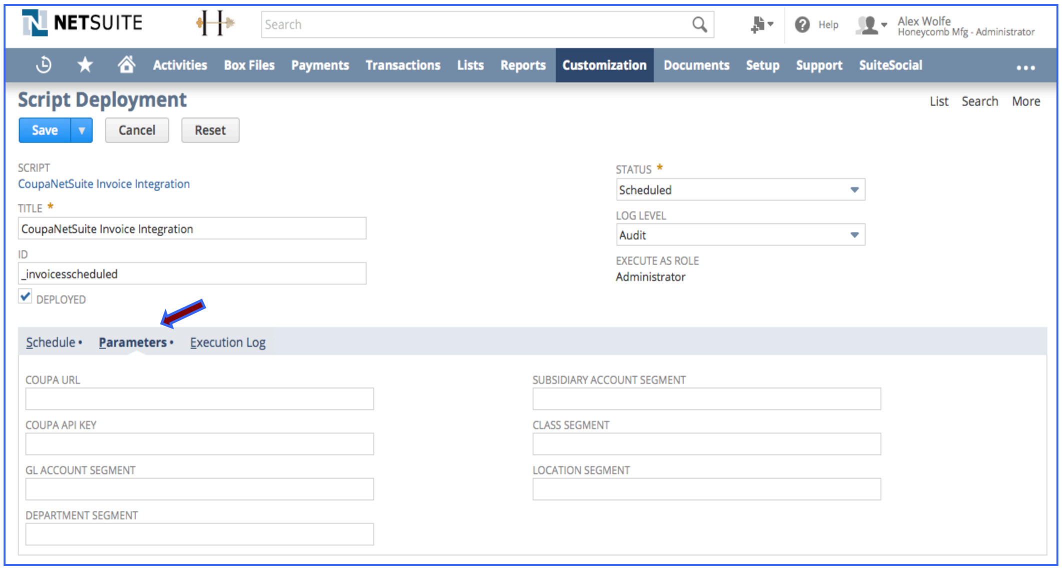
2 Find and Define Deployment Parameter Values

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.



Script Deployment

SCRIPT
CoupaNetSuite Invoice Integration

TITLE *
CoupaNetSuite Invoice Integration

ID
_invoicesscheduled

☑ DEPLOYED

STATUS *
Scheduled

LOG LEVEL
Audit

EXECUTE AS ROLE
Administrator

COUPA URL

COUPA API KEY

GL ACCOUNT SEGMENT

DEPARTMENT SEGMENT

SUBSIDIARY ACCOUNT SEGMENT

CLASS SEGMENT

LOCATION SEGMENT

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 created in Netsuite and sends it to 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
- The scipt will explude invoice Payment created by Coupa in Netsuite for Coupa Pay Invoice.

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**
Coupa URL*	The Coupa instance the integration connects to	_coupa_pay_url	Free-Form Text		https://abc.coupahost.com	
Coupa API Key*	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	
Export From Payment Date	Add filter criteria to pull payments from Netsuite created >= to this date	_coupa_pay_frompaydate	Date		12/14/2013	
Export To Payment Date	Add filter criteria to pull payments from Netsuite created <= to this date	_coupa_pay_topaydate	Date		12/27/2013	
Error Email Notification Address	Email addresses to which exception emails to be sent	_coupa_pay_email_notifications	Free-Form Text		abc@abc.com, abcd@abcd.com	
Account Name*	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	
Process Records From #	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
Process Records To #	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	

Find and Define Deployment Parameter Values

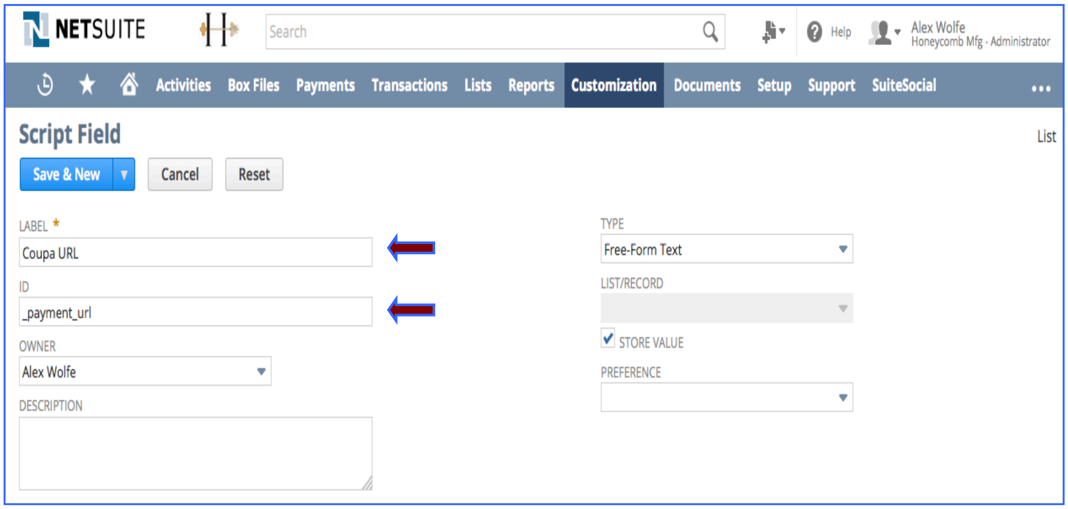
2

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.



Script Field

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

.

Coupa Expense Report to Netsuite Expense Report

Overview

The integration syncs up Coupa Expense Reports and NetSuite Expense Reports via a scheduled ScuiteScript. The Coupa Expense Report once “approved for payment” and not exported are ready to be imported into NetSuite. When a new Expense Report is created with status=approved for payment, the NetSuite scheduled script will call the Coupa API and will create new Expense Report. After the pull the integration will set the exported flag to true

Script Sequence Explained

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

- The Coupa API call to create the Expense report is called on a predefined schedule.
- The nlapiRequestURL function is used to perform a HTTP GET to retrieve the Coupa Expense that is fully approved and not exported.

The nlapiCreateRecord(expensereport) function is used to generate the Netsuite expense report.

Activities

You will need to do the following to ensure a successful deployment of the Expense script.

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

Tips to help you succeed

- When an existing Expense Report that was already exported to NetSuite is updated then Coupa will set the exported flag to false.
- The NetSuite scheduled script will call the Coupa API and update the Expense Report where the “exported” flag is false and “status” is approved for payment.
- The match record in NetSuite will be done on ‘Coupa ER Number’ and ‘External Id’ field. After the pull the exported flag will be set to true. .
- NetSuite Users should not update the ER in NetSuite as this could result in the updates being lost if the Coupa ER is updated after the fact.
- NetSuite Users should clear the Coupa ER Number field if they copy an existing ER that was brought in from Coupa. Subsequent updates to original ER may have an issue as it will find 2 ERs in NetSuite with same Coupa Number
- Once the ER is ‘Paid’ in NetSuite subsequent changes to Coupa ER may fail to be brought over to NetSuite. Received ER will not allow the expense category to be reduced or cancel a line.
- NetSuite should not have any workflow or script preventing the integration to create or update ER

Pre-Requisites

1. Coupa P2P + Expenses bundle deployed
2. Coupa API key created.
3. Coupa Chart of Account setup
4. Setup coupa Users with Netsuite employee id
5. Coupa Expense Category Setup
6. NetSuite Expense Category Setup (names must match identically)
7. Coupa commodity and NetSuite mapping (names must match identically)
8. If NetSuite Expense Category name that maps to Coupa Expense Category is changed, the integration will fail to find the Expense Category. The change should be made in both Coupa and NetSuite at the same time.

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**
Coupa URL *	The Coupa instance the integration will connect to	_coupa_er_url	freeform text		2e528d48825a8fe5a6a2a67972a2d8d21f5j3sdf4 8	
Coupa API Key*	The API Key for Coupa's REST based API	_coupa_er_apikey	freeform text		http://netsuiteintegration-demo.coupacloud.com/	
Error email notification address	List of emails to receive errors generated by the script execution	_coupa_er_email_addr_notify	freeform text	Separate the emails with a comma and no space	abc1@xyz.com, abc2@xyz.com	
Account Name*	As per standard, it will be company name with which environment its been setup (Test or Prod)	coupa_er_acccountname	freeform text	<company-name> <Test/Prod>		
Don't Import credit card expenses?	Checkbox that when enabled will force the script to skip expenses in Coupa that were created by the credit card integration.	_coupa_er_creditcardskip	checkbox	This will NOT mark them as exported currently, to allow them to be integrated through another point.		
Accounting Approval?	If true, then the expense report will have accounting approval set to true	_coupa_er_creditcardskip	checkbox			
Location Segment	The accounting segment in Coupa that holds the Netsuite location information	_coupa_er_classseg	freeform text		segment-4	
Class Segment	The accounting segment in Coupa that holds the Netsuite classification account information	_coupa_er_locseg	freeform text		segment-3	
Subsidiary Segment	The accounting segment in Coupa that holds the Netsuite subsidiary account information	_coupa_er_subsseg	freeform text		segment-1	

Employee Number Field	Field on the NetSuite Employee record which holds the value matching the Coupa Employee Number field on the User record.	_coupa_er_employee_num	freeform text	By default, the script will compare the Coupa employee number to the NetSuite Employee internalid. You usually would override this if the two do not correlate, or you require the internalID to be a specific format. This is used to match Expense reports to the correct employee.	custentity_coupa_employee_number	
Custom Body fields for expense report	Header custom field of coupa gets syncup with body custom field of netsuite. Note that no data transformation allowed.	_coupa_er_body	text area	Each custom field combination should be separated by a semicolon. The left side of the == is the field in the API response, and the right the internal id of the field in NetSuite that it maps to	requestedby ==custbody_ couparequester;requested by-email==custbody_couparequestere mail	
Custom columns Fields	Line custom field of coupa gets syncup with column custom field of netsuite. Note that no data transformation allowed.	_coupa_er_column	text area	Each custom field combination should be separated by a semicolon. The left side of the == is the field in the API response, and the right the internal id of the field in NetSuite that it maps to	sectionname==custcol_section_name	
Send Tax code	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_er_send_taxcode	checkbox	When using this option, the taxcodes in Coupa need to be stored in the following format: netsuitename: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 Additionally, this will not support Multiple Tax Lines in Coupa as there is only one place to set a Tax Code in NetSuite. Tax codes are also only applicable for NON-US Subsidiaries		

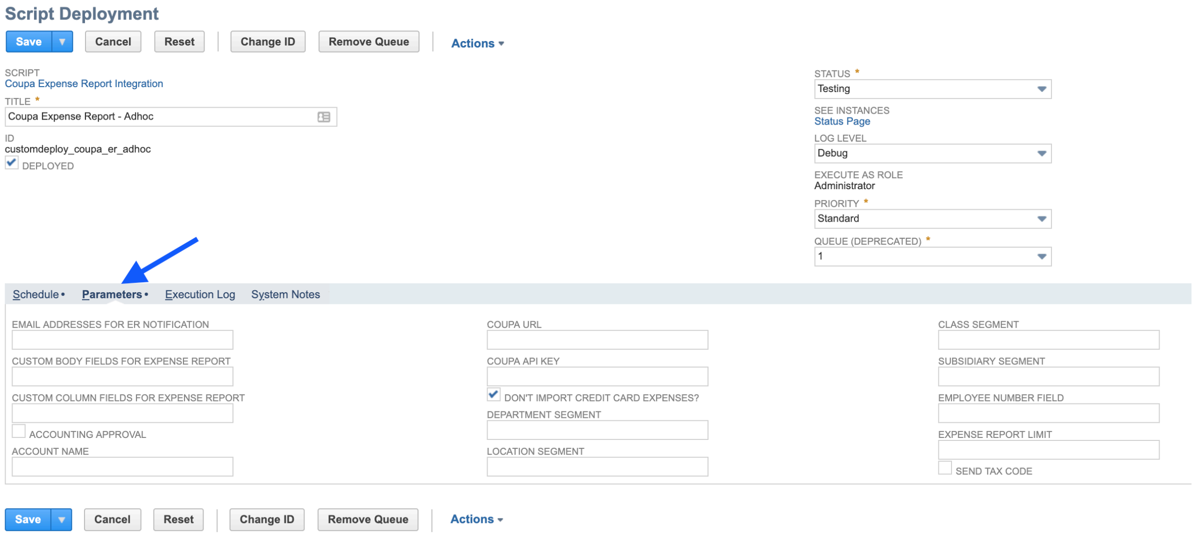
2 Find and Define Deployment Parameter Values

Navigation Path: Customization | Scripting | Scripts

Find the “Coupa Expense 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
Coupa Expense Report Integration

TITLE *
Coupa Expense Report - Adhoc

ID
customdeploy_coupa_er_adhoc

☑ DEPLOYED

STATUS *
Testing

SEE INSTANCES
Status Page

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

QUEUE (DEPRECATED) *
1

Schedule • Parameters • Execution Log System Notes

EMAIL ADDRESSES FOR ER NOTIFICATION

CUSTOM BODY FIELDS FOR EXPENSE REPORT

CUSTOM COLUMN FIELDS FOR EXPENSE REPORT

□ ACCOUNTING APPROVAL

ACCOUNT NAME

COUPA URL

COUPA API KEY

☑ DON'T IMPORT CREDIT CARD EXPENSES?

DEPARTMENT SEGMENT

LOCATION SEGMENT

CLASS SEGMENT

SUBSIDIARY SEGMENT

EMPLOYEE NUMBER FIELD

EXPENSE REPORT LIMIT

□ SEND TAX CODE

After you are done you can click the Save button and now the script is successfully deployed. Once testing is complete, schedule the deployment called “Coupa Expense Report Scheduled”. The Adhoc deployment should be used for testing and one-off executions. The log level of the Scheduled deployment should be set to Audit.

Coupa to Netsuite Expense Report to Vendor Bill

Overview

The integration takes a Coupa Expense Report and turns it into a NetSuite Vendor bill. When a new Expense Report is created with status=approved for payment, the NetSuite scheduled script will call the Coupa API and will create Vendor Bill. After the pull the integration will set the exported flag to true.

when clients want to pay their employees in a currency other than the “functional currency” of their subsidiary. For example, if an employee resides in the Japan, and the functional subsidiary currency is set to Yen, the employee can only be reimbursed in Yen.

Script Sequence Explained

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

- The Coupa API call to create the Vendor Bill is called on a predefined schedule.
- The HTTP GET function is used to retrieve the Coupa Expense that is fully approved and not exported.
- The createVendorBill(expenseReport, vendorId, reportId) is used to generate the Netsuite Vendor Bill.

Activities

You will need to do the following to ensure a successful deployment of the Expense script.

□ **Review Parameter List**

□ **Find and Define Deployment Parameter Values**

Tips to help you succeed

- When an existing Expense Report that was already exported to NetSuite is updated then Coupa will set the exported flag to false.
- The NetSuite scheduled script will call the Coupa API and update the Expense Report where the “exported” flag is false and “status” is approved for payment.
- *Note: Editing the Expense Report in NetSuite is restricted. Any changes will be overridden by Coupa ER data*ER

Pre-Requisites

1. Coupa P2P + Expenses bundle deployed
2. Coupa API key created.
3. Coupa Chart of Account setup
4. Setup coupa Users with Netsuite vendor id
5. Coupa Expense Category Setup
6. NetSuite Expense Category Setup (names must match identically)
7. Coupa commodity and NetSuite mapping (names must match identically)
8. If NetSuite Expense Category name that maps to Coupa Expense Category is changed, the integration will fail to find the Expense Category. The change should be made in both Coupa and NetSuite at the same time

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 Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your values**
Coupa URL *	The Coupa instance the integration will connect to	custscript_coupa_er2vb_url	freeform text		https://abc-demo.coupadev.com	
Coupa API Key*	The API Key for Coupa's REST based API	custscript_coupa_er2vb_apikey	Freefrom text		j3jn1j3bmmdloq212313m1b1b231m1k23	
Custom Export Field	Used to denote a custom export field, rather than last_exported_at	custscript_coupa_er2vb_export	Freeform text		exported-to-netsuite	
Custom Status Field	Used to set a status other than approved_for_payment to query by	custscript_coupa_er2vb_status	Freeform text		accounting_review	
Report Execution Limit	In some cases, the Coupa API may take too long to return expense reports. So this can be used to limit the number of records returned	custscript_coupa_er2vb_limit	Freeform text		10	
Query by Updated Date?	If true, then the two updated fields will be checked and used to filter expense reports	custscript_coupa_er2vb_updatedate	checkbox		True	
Updated After	If Query by Updated Date is set, and this populated, then a parameter will be added to only retrieve reports updated after the provided date	custscript_coupa_er2vb_fm_updated	date		2020-1-30	
Updated Before	If Query by Updated Date is set, and this populated, then a parameter will be added to only retrieve reports updated before the provided date	custscript_coupa_er2vb_to_updated	Date		2020-1-15	
External	Used to skip	custscript_coupa_er2vb_extsrcf	Freefor		corporate_credit_car	

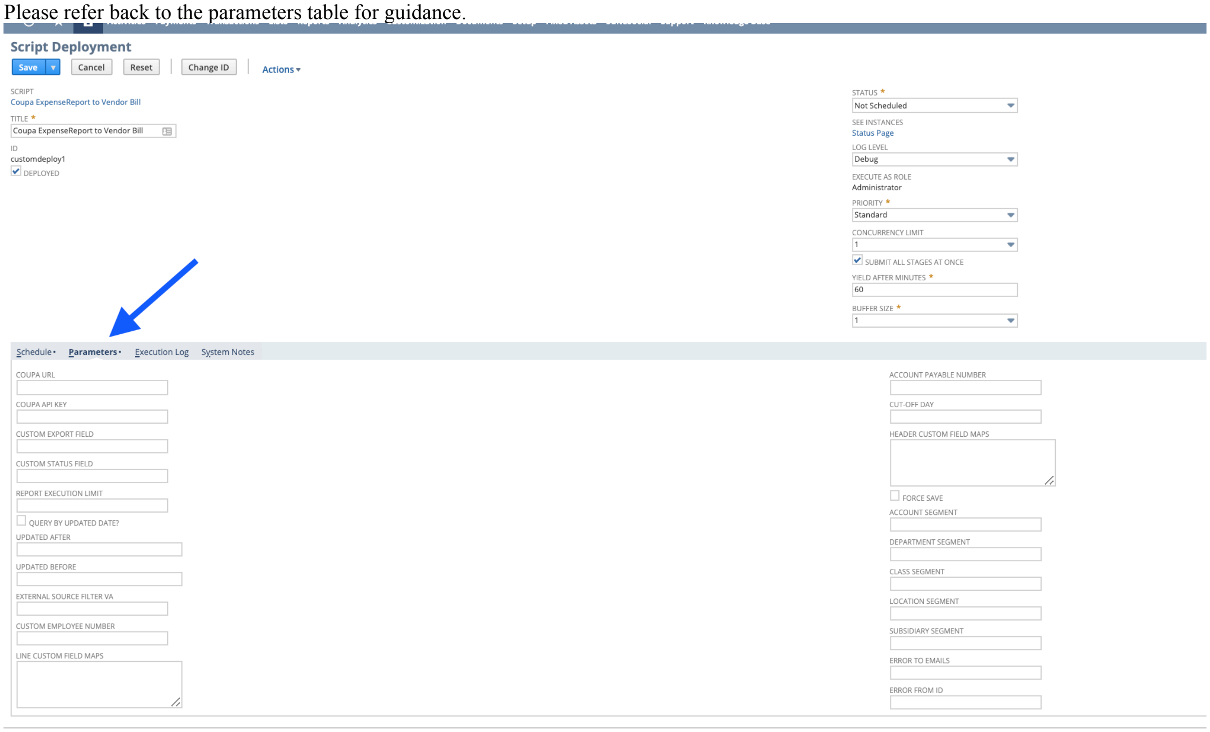
Source Filter Value	Corporate card files	ilter	m-text		d_amex	
Custom Employee Number	Used to denote a custom field on the Expensed By user in Coupa that should be used instead of employee number to match entityid (Vendor ID)	custscript_coupa_er2vb_employee_field	Freeform-text		netsuite-vendor-id	
Account Segment	Xml tag for the GL Account segment	custscript_coupa_er2vb_glacceg	Freeform-text		segment-2	
Line Custom Field Mappings	Line level custom field mappings in the format: coupa-xml-tag==netsuitefield;	custscript_coupa_er2vb_lnfields	Text-area		coupa-xml-tag==netsuitetag1;coupa-xml-tag2==netsuitetag2;	
Header Custom Field Mappings	Header level custom field mappings in the format: coupa-xml-tag==netsuitefield;	custscript_coupa_er2vb_hdrfields	Text-area		coupa-xml-tag==netsuitetag1;coupa-xml-tag2==netsuitetag2;	
Account Payable number	The GL number for the account payable you wish to use	custscript_coupa_er2vb_payacc	Freeform-text		20001	
Cut-off Date	The calendar date after which you do not want to allow reports to post in the previous period	custscript_coupa_er2vb_cutoff			7	
Force Saving	If true, then save will ignore Mandatory fields	custscript_coupa_er2vb_forcesave	checkbox			
Department Segment	Xml tag for the department segment	custscript_coupa_er2vb_deptseg			Segment-3	
Class Segment	Xml tag for the class segment	custscript_coupa_er2vb_classseg			Segment-4	
Location Segment	Xml tag for the location segment	custscript_coupa_er2vb_locseg			Segment-5	
Subsidiary Segment	Xml tag for the subsidiary segment	custscript_coupa_er2vb_subsseg			Segment-1	
Error To Emails	List of emails that should receive the alerts	custscript_coupa_er2vb_errorto			abc@example.com, xyz@example.com	
Error From ID	Internal ID of the netsuite Employee that the emails should be from	custscript_coupa_er2vb_errorfrm			1	

Find and Define Deployment Parameter Values

Navigation Path: Customization | Scripting | Scripts
Find the "Coupa ExpenseReport to Vendor Bill " 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: Coupa ExpenseReport to Vendor Bill
TITLE *: Coupa ExpenseReport to Vendor Bill
ID: customdeploy1
☑ DEPLOYED

STATUS *: Not Scheduled
SEE INSTANCES: Status Page
LOG LEVEL: Debug
EXECUTE AS ROLE: Administrator
PRIORITY *: Standard
CONCURRENCY LIMIT: 1
☑ SUBMIT ALL STAGES AT ONCE
YIELD AFTER MINUTES *: 60
BUFFER SIZE *: 1

After you are done you can click the Save button and now the script is successfully deployed. Once testing is complete, schedule the deployment called "Coupa Expense Report Scheduled". The Adhoc deployment should be used for testing and one-off executions. The log level of the Scheduled deployment should be set to Audit.

Coupa to Netsuite Charge to Credit Card transaction

Overview

Customers with Coupa Pay PO Payments may use this integration. The integration takes a Coupa Charges for Purchase Orders and turns it into a NetSuite Credit Card Transactions. When a new Charge is created the NetSuite scheduled script will call the Coupa API and will create a Credit Card transaction. After the pull the integration will set the exported flag to true.

Script Sequence Explained

This integration is on a schedule that you can set to meet your Charge data load to Coupa.

- The Coupa API call to create the Vendor Bill is called on a predefined schedule.
- The HTTP GET function is used to retrieve the new Coupa Charges for Purchase Orders.
- Script is used to generate the Netsuite credit Card Transactions.

Activities

You will need to do the following to ensure a successful deployment of the Expense script.

□ **Review Parameter List**

□ **Find and Define Deployment Parameter Values**

Tips to help you succeed

- Charges will be loaded to Coupa on a daily basis, so schedule your integration daily. Align timing at implementation

Pre-Requisites

- Coupa P2P + Coupa Pay
- Coupa API key created.
- Coupa Chart of Account setup
- Coupa Payment Partner Setup
- Coupa Supplier Payment Method setup
- Account for credit card charges in Netsuite
- Issuer Bank as Supplier in Netsuite
- Budget Periods(this is used to find Accounting Periods in NS) have to be created for that COA in Coupa

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 *

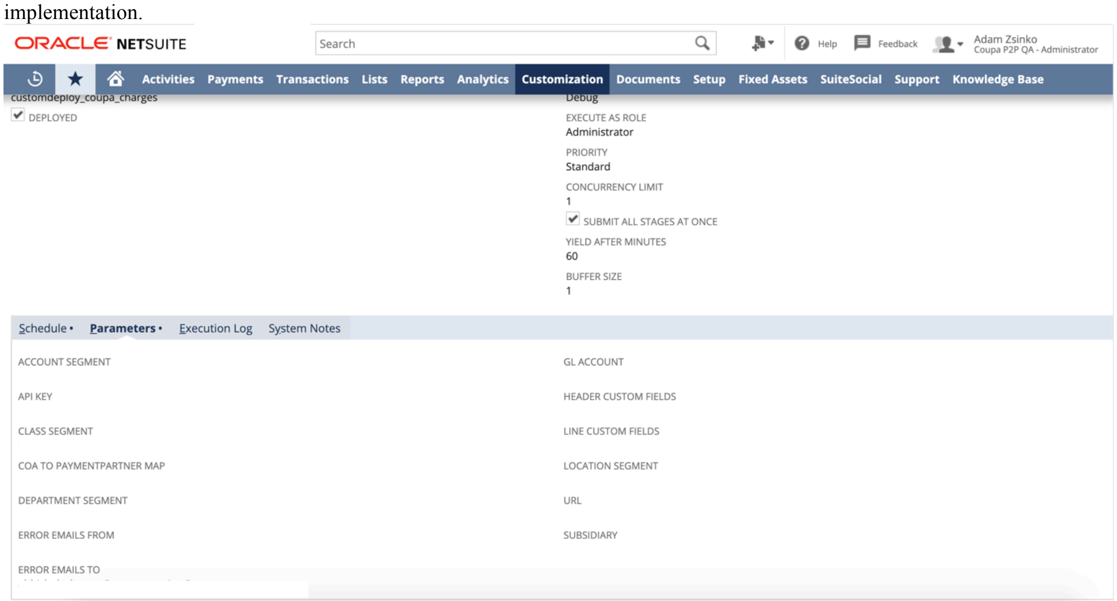
Script Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your values**
Email Errors To	Comma separated list of emails to receive error notifications	custscript_coupa_chrg_errorto	freeform text		test@coupa.com	
Email Errors From	NS Internal ID of the user the emails should be from	custscript_coupa_chrg_errorfrom	Freefrom text		test@coupa.com	
Coupa URL	URL of your coupa instance	custscript_coupa_chrg_url	Freeform text		https://netsuite-integrations.coupahost.com	
Coupa API Key	custscript_coupa_chrg_apikey	API key from your Coupa instance	Freeform text		102983oiIJ092831237772310	
Subsidiary Segment	XML tag for the subsidiary segment	custscript_coupa_chrg_subsseg	Freeform text		segment-1	
Account Segment	XML tag for the gl account segmen	custscript_coupa_chrg_acct	checkbox		segment-2	
Department Segment	custscript_coupa_chrg_dept	XML tag for the department segment	date		segment-3	
Class Segment	XML tax for the Class segment	custscript_coupa_chrg_class	Date		segment-4	
Location Segment	custscript_coupa_chrg_locn	custscript_coupa_chrg_locn	Freeform-text		segment-5	
Charge Custom Fields	Custom field mapping for extra fields	custscript_coupa_chrg_linecf	Freeform-text		coupa-xml-path==netsuite_field_id	
Charge Custom Fields	Custom field mapping for extra fields	custscript_coupa_chrg_headcf	Freeform-text		coupa-xml-path==netsuite_field_id	
Force Save?	If true, will pass a parameter when saving to skip validations	customscript_coupa_chrg_forcesave	Check Box			
CoA ID to Vendor ID	This is a mapping from the Coupa Chart of Accounts ID to the NetSuite Vendor ID representing the Payment Partner or Credit Card Vendor that these charges should be tied to. In Coupa, one CoA is tied to one Payment Partner, so the same applies here, one CoA ties to one	custscript_coupa_chrg_coatopp	Text-area		1==3412;2==4812;3==452	

	Vendor					
Account Payable Number	The number for the Account Payable that should be set on the transaction linked to the Coupa COA	custscript_coupa_chrg_glacc	Freeform-text		1==245	

Find and Define Deployment Parameter Values

Navigation Path: Customization | Scripting | Scripts
Find the "Coupa Charges 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.



customdeploy_coupa_charges

☑ DEPLOYED

Debug

EXECUTE AS ROLE
Administrator

PRIORITY
Standard

CONCURRENCY LIMIT
1

☑ SUBMIT ALL STAGES AT ONCE

YIELD AFTER MINUTES
60

BUFFER SIZE
1

ACCOUNT SEGMENT

API KEY

CLASS SEGMENT

COA TO PAYMENTPARTNER MAP

DEPARTMENT SEGMENT

ERROR EMAILS FROM

ERROR EMAILS TO

GL ACCOUNT

HEADER CUSTOM FIELDS

LINE CUSTOM FIELDS

LOCATION SEGMENT

URL

SUBSIDIARY

Please refer back to the parameters table for guidance.

After you are done you can click the Save button and now the script is successfully deployed. Once testing is complete, schedule the deployment called "Coupa Charges Integration Scheduled". The Adhoc deployment should be used for testing and one-off executions. The log level of the Scheduled deployment should be set to Audit.

Coupa to Netsuite Invoice Payment to Vendor Bill Payment

Overview

Customers with Coupa Pay PO Payments may use this integration. The integration takes a Coupa Invoice Payments and turns it into a NetSuite Vendor Bill Payments. When a new Invoice Payment is initiated or completed in Coupa the NetSuite scheduled script will call the Coupa API and will create a Bill Payment.The script will reverse Vendor Bill Payment and reset Payment Hold falg on invoice if the Payment status in Coupa changes to Completed with Error. After the pull the integration will set the exported flag to true on the Coupa Payment.

Script Sequence Explained

This integration is on a schedule that you can set to meet your Charge data load to Coupa.

- The Coupa API call to create the Vendor Bill is called on a predefined schedule.
- The HTTP GET function is used to retrieve the new Coupa Invoice Payments at “completed_successfully” status
- Script is used to generate the Netsuite Vendor Bill Payment

Activities

You will need to do the following to ensure a successful deployment of the Expense script.

□ **Review Parameter List**

□ **Find and Define Deployment Parameter Values**

Tips to help you succeed

- Payments will be pulled when moves to completed_successfully status. Do not populate “status” parameter

Pre-Requisites

- Coupa P2P + Coupa Pay
- Coupa API key created.
- Coupa Chart of Account setup
- Coupa Payment Partner (if Virtual Card on Invoice Payment used)
- Coupa Company Payment Account(s)
- Coupa Supplier Payment Method setup
- Coupa Supplier Payment Account(s)

1 Review Parameter List

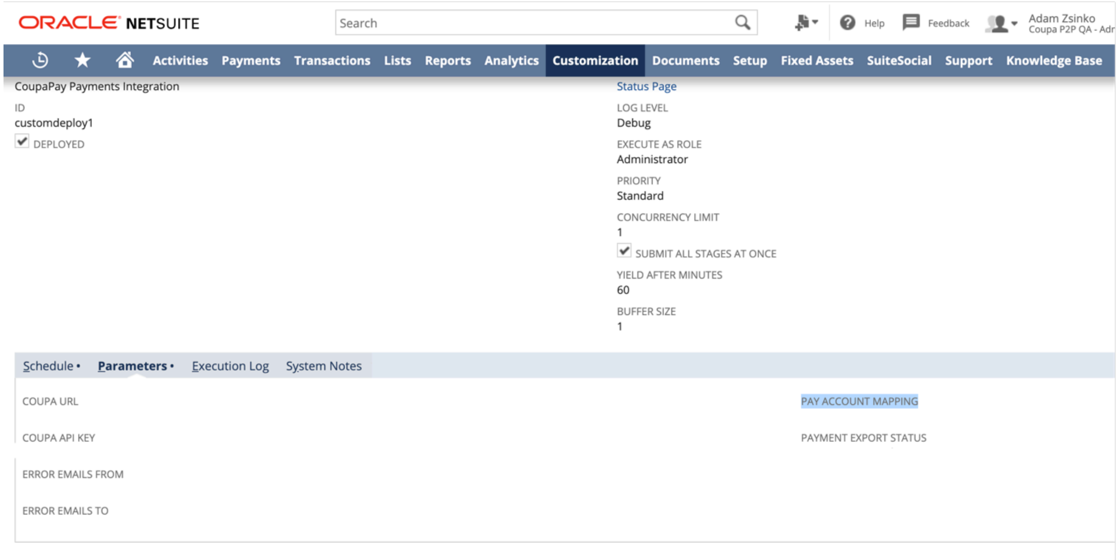
Review parameter list and decide which ones are relevant to your company’s implementation of Coupa. Please note the fields that are mandatory are noted with an asterisk *

Script Definition					Script Deployment	
Label	**Description**	**Id**	**Type**	**Comments**	**Example**	**Your values**
Email Errors To	Comma separated list of emails to receive error notifications	custscript_coupa_chrg_errorto	freeform text		test@coupa.com	
Email Errors From	NS Internal ID of the user the emails should be from	custscript_coupa_chrg_errorfrom	Freefrom text		test@coupa.com	
Coupa URL	URL of your coupa instance	custscript_coupa_chrg_url	Freeform text		https://netsuite-integrations.coupahost.com	
Coupa API Key	custscript_coupa_chrg_apikey	API key from your Coupa instance	Freeform text		102983oiIJ092831237772310	
Custom Payment Status	Custom status to export CoupaPay Payments. If blank, defaults to completed_successfully	custscript_coupa_pymt_status	Freeform text	DO NOT populate, it will be set completed_successfully by default		
Force Save?	If true, will pass a parameter when saving to skip validations	customscript_coupa_pymt_forcesave	checkbox			
Coupa Account to NS Account	This is a mapping from the Coupa Pay From (Company) Account to the NetSuite Pay From account representing the bank account that these payments should be tied to.	custscript_coupa_pymt_accmap			1==3412;2==4812;3==452	

Find and Define Deployment Parameter Values

Navigation Path: Customization | Scripting | Scripts
Find the “CoupaPay 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.



CoupaPay Payments Integration

ID
customdeploy1

☑ DEPLOYED

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY
Standard

CONCURRENCY LIMIT
1

☑ SUBMIT ALL STAGES AT ONCE

YIELD AFTER MINUTES
60

BUFFER SIZE
1

COUPA URL

COUPA API KEY

ERROR EMAILS FROM

ERROR EMAILS TO

PAY ACCOUNT MAPPING

PAYMENT EXPORT STATUS

Please refer back to the parameters table for guidance.

After you are done you can click the Save button and now the script is successfully deployed. Once testing is complete, schedule the deployment called “CoupaPay Payment Integration Scheduled”. The Adhoc deployment should be used for testing and one-off executions. The log level of the Scheduled deployment should be set to Audit.