



ERP Connector

Coupa provides a set of applications that strategically extend spend management functions to your ERP, bringing agility, real results, and business stakeholder satisfaction. You can integrate Coupa with one or more ERP systems using Coupa's open API platform. Having a pre-built integration solution between their ERP systems and Coupa will enable your customer to jump-start their Coupa implementation and shorten its duration. It will empower your customer's IT team to be more agile and focus on core initiatives. The CoupaLink certified and tested ERP connector will lower the total cost of implementation for your customer and make the implementation easier for them to support.

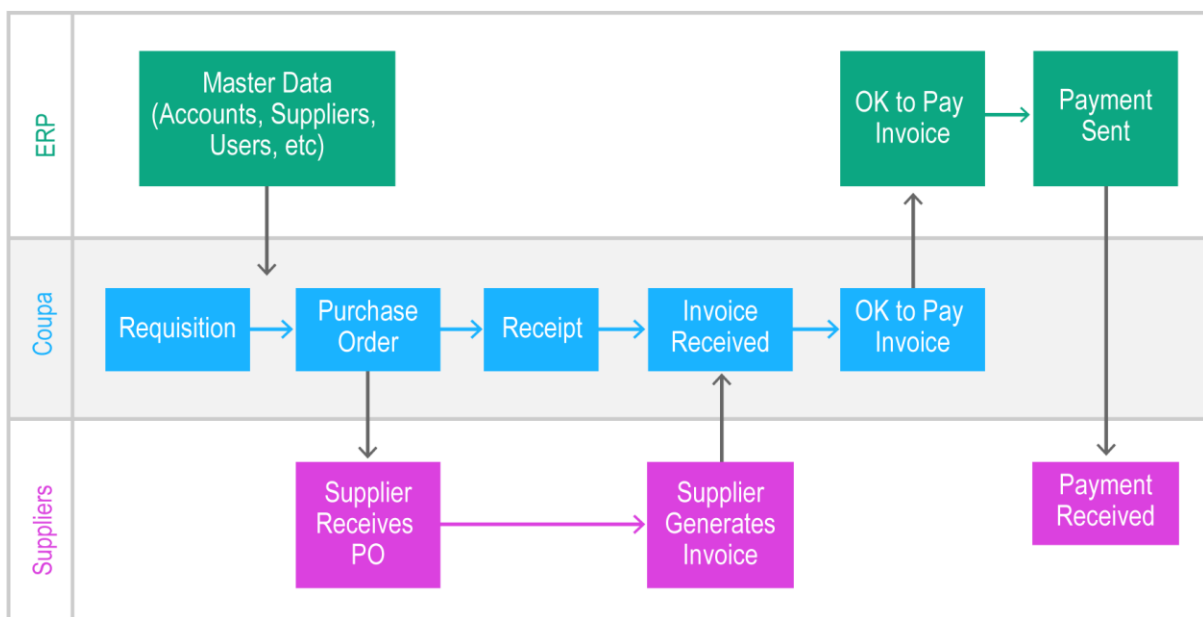
Business Process Overview

Having a pre-built integration solution between their ERP systems and Coupa will enable your customer to jump-start their Coupa implementation and shorten its duration. It will empower your customer's IT team to be more agile and focus on core initiatives. The CoupaLink certified and tested ERP connector will lower the total cost of implementation for your customer and make the implementation easier for them to support.

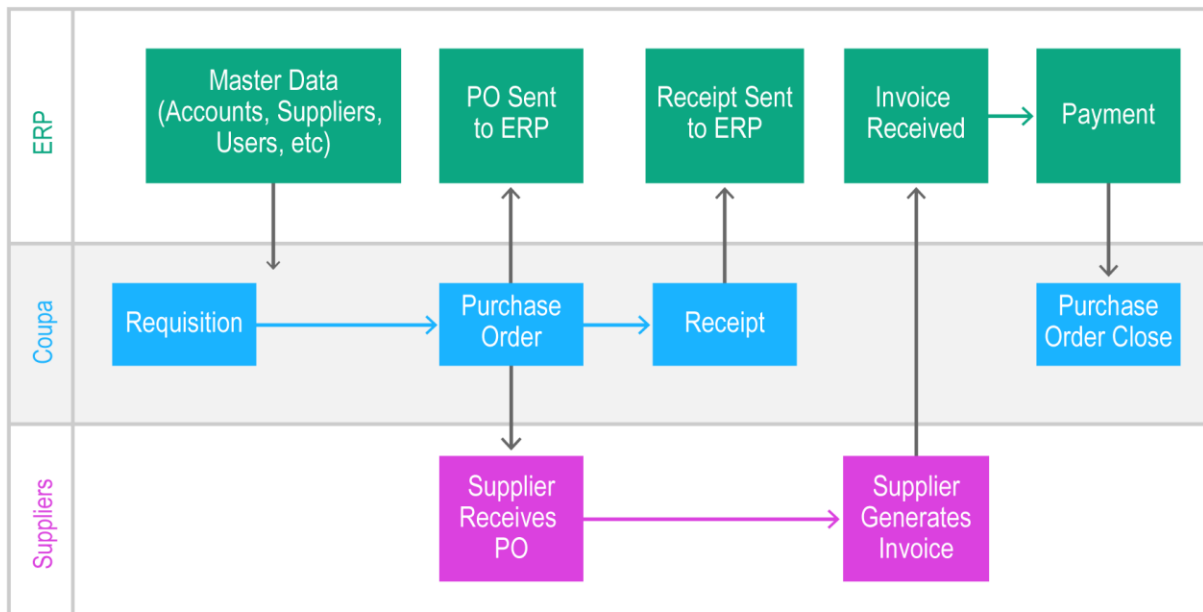
Below are the business processes you should consider for your solution:

- Procure to Pay
- Procure to Order
- Expenses

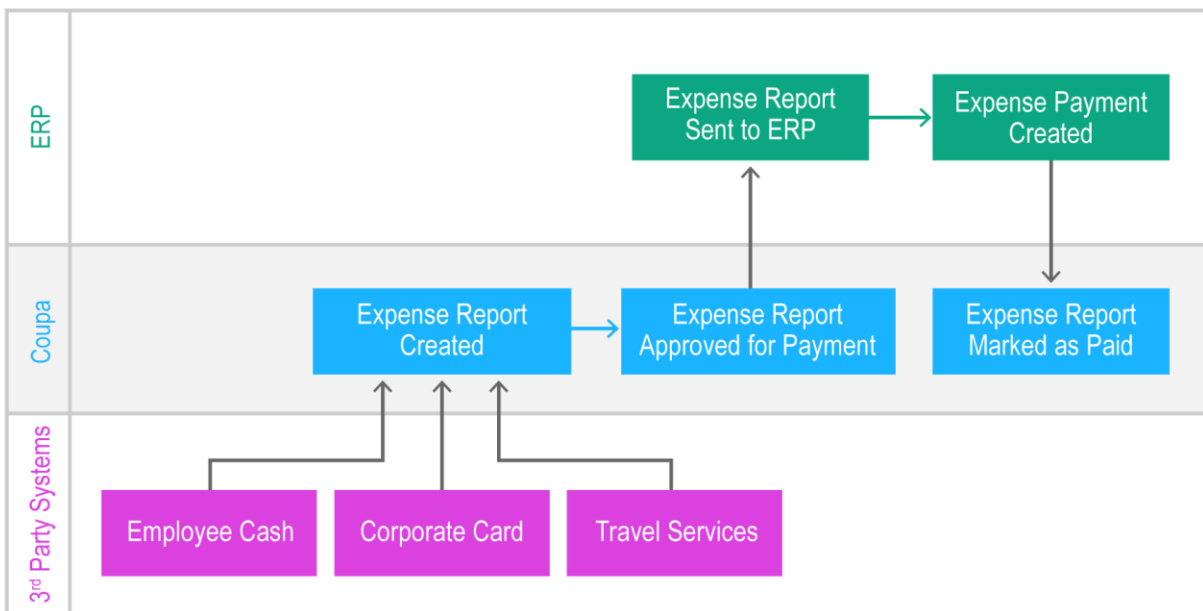
Procure To Pay



Procure To Order



Expenses





Designing the Solution

Coupa's platform makes it easy for you to integrate both master data and transactional data between Coupa and your customer's ERP system(s). You can use either Coupa REST API or Coupa flat file integrations for exchanging data.

Integration Points & Certification Models

Object	Source	Target	Certification Model
User (Optional)	HR System	Coupa	P2P
Suppliers	ERP	Coupa	P2P
CoA - Accounts/Lookup Values	ERP	Coupa	P2P
Approved Invoices	Coupa	ERP	P2P
Invoice Payment	ERP	Coupa	P2P
Approved Expense Reports	Coupa	ERP	P2P + Expenses
Expense Payment	ERP	Coupa	P2P + Expenses
Purchase Order	Coupa	ER	P2P + PO/GR/Budgets
Receipts	Coupa	ERP	P2P + PO/GR/Budgets
Budgets	ERP	Coupa	P2P + PO/GR/Budgets

Chart of Accounts (CoA)

In Coupa, the Static Accounting Model and Dynamic Accounting Models can be used. We expect the ERP Connector to work with both models.

Static Accounting Model

Each accounting string is a simple combination of all accounting segments. It requires no validation in Coupa, and provides a very lean integration to Coupa via standard Accounts integration. Key Objects: Chart of Accounts and Accounts.

Dynamic Accounting Model

Account strings are not created until they are used and only valid combination are integrated and presented to the Users. It allows controlled relation between segments and allows Coupa to use Dynamic Approvers. ERP to Coupa CoA mapping is required and Integration



design/complexity is higher via Lookup Values integration. Key Objects: Chart of Accounts, Lookup and Lookup Values.

ERP Integration Playbook

Coupa has developed Playbooks explaining CoA design considerations for NetSuite, Oracle, SAP ERP systems. See [ERP Integration Playbooks](#) for full details.

Architectural Considerations

Coupa Common CSV Flat File templates are designed to import many records from a single file sent to Coupa - not designed to process a high volume of files containing a single record each. For integrations where a single record needs to be processed at a time, the Coupa API provides a RESTful interface to facilitate this type of workflow.

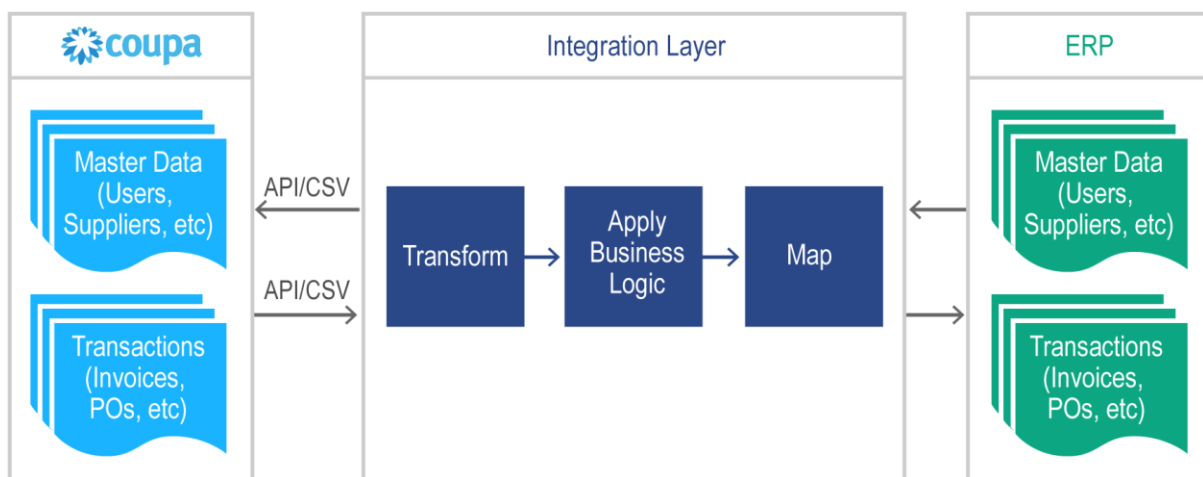
For Coupa Common CSV Flat File integration, true CSV parser should be used to parse the data. Parser should be able to handle line breaks, special characters or delimiter in the values. File should be parsed by mapping column header names to values as opposed to using a position based parser to avoid issue with new release additional fields.

Coupa requires delta records, or files containing only records which have been created, changed or require updating since the last time the integration was run. Coupa does not support the concept of full data loads.

With Coupa releases, as we introduce new objects or new attributes it is possible that we will add new fields to our flat file formats and our object available via API. Hence, you need to take this into consideration while designing the integration routines on your side.

Build your integration

Integration can be completed via the standard CSV flat file format or the Coupa REST-based API.





Flat File Documentation

https://success.coupa.com/Integrate/Technical_Documentation/CSV

API Documentation

https://success.coupa.com/Integrate/Technical_Documentation/API

Test Scenarios

User Integration Scenarios (Optional)

- 1.1 Create a User
- 1.2 Modify a User
- 1.3 Update a Custom Field on a User
- 1.4 Deactivate a User
- 1.5 Reactivate a User
- 1.6 Add a Role to a User
- 1.7 Remove a Role from a User
- 1.8 Check Error Handling on Users - Update a user that does not exist in Coupa. Confirm error handling capabilities.

Supplier Integration Scenarios

The Supplier object is a flat structure in Coupa as opposed to other ERP systems with parent-child relationships. This flattening task needs to be supported in the ERP Connector product.

Relevant associated data objects (Enterprise, Content Group, Commodity, Payment Term, Shipping Term, Tax Code) must exist as a prerequisite in Coupa to allow a successful automated integration.

- 2.1 Create a Supplier
- 2.2 Modify a Supplier
- 2.3 Create a Supplier with Multiple Locations/Purchase Org in ERP
- 2.4 Update a Custom Field on a Supplier
- 2.5 Deactivate a Supplier
- 2.6 Reactivate a Supplier
- 2.7 Change the Content Group on a Supplier
- 2.8 Change the Enterprise on a Supplier
- 2.9 Change the PO Method, PO Email on a Supplier
- 2.10 Check Error Handling on Suppliers



COA - Accounts / Lookup Integration Scenarios

Accounts

- 3.1 Create an Account
- 3.2 Modify an Account
- 3.3 Deactivate an Account
- 3.4 Reactivate an Account
- 3.5 Check Error Handling on Accounts

Lookup Values

- 3.6 Create a Lookup Value
- 3.7 Modify a Lookup Value
- 3.8 Deactivate a Lookup Value
- 3.9 Reactivate a Lookup Value
- 3.10 Check Error Handling on Lookup Values

Approved Invoices Integration Scenarios

- 4.1 Single-Line PO-Backed Invoice Approved and Ready to Pay in ERP
- 4.2 PO-Unbacked Invoice to ERP
- 4.3 PO-Backed Invoice with Custom Field to ERP
- 4.4 PO-Unbacked Invoice with Service Lines to ERP
- 4.5 PO-Backed Invoice with Multiple Tax Lines to ERP
- 4.6 PO-Unbacked Invoice with Attachments to ERP
- 4.7 PO-Backed Invoice/Credit Memo to ERP
- 4.8 Void an Invoice to ERP
- 4.9 50+ Approved Invoice and Ready to Pay in ERP (API Only)

Payment (Invoice) Integration Scenarios

- 5.1 Create Payment in ERP and Update Coupa
- 5.2 Void Payment in ERP

Approved Expense Report Integration Scenarios

- 6.1 Single-Line Expense Report Outbound
- 6.2 Split-Line Expense Report Outbound

Expense Payment Integration Scenarios

- 7.1 Create an Expense Payment



Purchase Order Integration Scenarios

- 8.1 Outbound PO - Single-Line PO
- 8.2 Outbound PO - PO with Multiple Line Items
- 8.3 Outbound PO - PO with Multiple Line Items and Split-Line Accounting
- 8.4 Outbound PO - PO Revision
- 8.5 Outbound PO - Single-Line PO with Service Item

Goods Receipt Integration Scenarios

- 9.1 Send Created Goods Receipt to ERP
- 9.2 Send Void Goods Receipt to ERP

Budget Integration Scenarios

- 10.1 Create a Budget Line
- 10.2 Adjust a Budget Amount
- 10.3 Update a Budget Line
- 10.4 Fetch Budget Line Query Options - Not applicable to CSV

Flat File CSV Parser Scenario

11.1 Validate that you are parsing the CSV using column header and not column position. You can do this by opening a CSV and then swapping the first 2 header columns and associated values.

End-to-End Business Scenario

At Coupa we would like to validate that each Integration Object also works in an automated full end-to-end manner. We expect our partners to perform an end-to-end testing for the process they certify for.

P2P Scenario

1. Create User
2. Create Supplier
3. Create CoA segments
4. Create Requisition (Do this manually in Coupa) using the newly created User/Supplier/CoA Segments
5. Flip requisition to PO and generate Invoice against it
6. Send invoice to ERP
7. Generate payment in ERP and send payment to Coupa

Expense Scenario

1. Create expense report in Coupa
2. Send expense report to ERP
3. Generate payment in ERP and send payment to Coupa



Purchase Order, Goods Receipt, Budget Scenario

1. Create a requisition using the User/Supplier/CoA above
2. Flip requisition to PO
3. Send PO to ERP
4. Change PO in Coupa (change quantity)
5. Send PO change to ERP
6. Do a partial receipt against the PO
7. Send Receipt to ERP
8. Create budget line in ERP and send to Coupa