NetSuite Integration

Setup Guide

Document Details

Document #: 160_NSSG_261103

System Requirements

- CES Version 10.30.00.xx or higher
- NetSuite version 2021.2 or higher
- Cloud hosted customer (not currently available for cruise or self-hosted customers)

Download the latest version of this document here:
https://links.crunchtime.com/SG-NetSuiteIntegrationSetup

… or scan the QR code to the left.

Related User Group Permissions

Screen Name	Control Name	Description
Company	Add/Delete/Save	Add information to the Company detail screen, delete non-required information, and make changes to the screen.
Company	Update Secret User Defined Attributes	Edit the Value column for these entries on the User Defined Attributes tab.
Location Details	Add/Delete/Save	Add or delete a location record, make and save changes to location details
Location Details	Update Secret User Defined Attributes	Edit the Value column for these entries on the User Defined Attributes tab.
Vendor Details	Add/Delete/Save	Add information to the Vendor Details screen, delete non-required information, and make changes to the screen.
Vendor Details	Update Secret User Defined Attributes	Edit the Value column for these entries on the User Defined Attributes tab.
General Ledger	Add/Delete/Save	Add or delete General Ledger accounts, make and save changes to the list.

Related Documentation

- NetSuite Integration Reference: https://links.crunchtime.com/RG-NetSuiteIntegrationReference

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SETUP GUIDE

NetSuite Integration

Introduction

Overview

The NetSuite integration allows you to move data between Crunchtime and NetSuite, making it even easier to have one source of the truth for key points of information.

Crunchtime -> NetSuite:	NetSuite -> Crunchtime:
Reconciled Invoices	Purchase By Invoice
Inventory Period Ending Values	** Vendor Sync
Location Transfers	
Daily Sales	
Purchase By Invoice	
** Vendor Sync	

** You have the option to choose which direction vendor information will flow between systems. To use this integration, you will first need to determine the system of record (either Crunchtime or NetSuite). Vendor information will flow from the system of record down to the other system.

Prerequisites

The following information must be configured in the NetSuite and Crunchtime systems before you begin integration setup:

- Accounting periods are created in NetSuite.
- At least one subsidiary exists in NetSuite (for customers using NetSuite Oneworld).
- A CRUNCHTIME_INTEGRATION folder has been created in NetSuite under *Documents > Files > File Cabinet*.

Process

This guide will cover the steps needed to begin using the NetSuite integration.

1. Install the Crunchtime SuiteApp
2. Generate Access Tokens
3. Enter User Defined Attributes
4. Link Vendors
5. Configure General Ledger Accounts
6. Set up the Sales Export Mapping & Preferences
7. Schedule & Verify the Exports
8. Troubleshoot & Undo Failed Files

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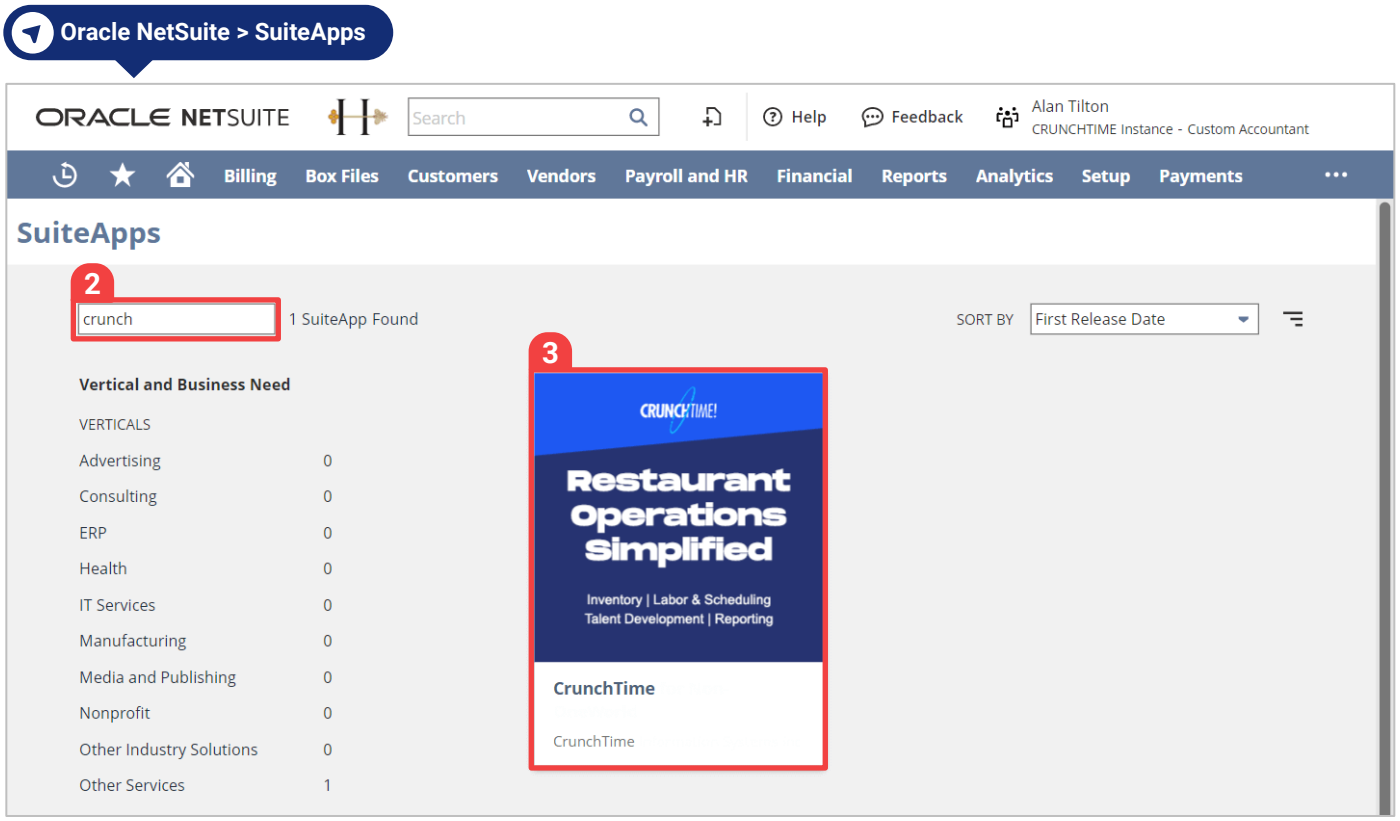
SETUP GUIDE

NetSuite Integration

Install SuiteApp

Install Crunchtime SuiteApp

1. From the Home Page, select *SuiteApps* on the menu bar.



2. On the Suite Apps page, search for “crunch” or “crunchtime”.
3. Select the *Crunchtime* SuiteApp.

Note: You may see SuiteApps for “Crunchtime” and “Crunchtime for Non-OneWorld”. Be sure to select the option that applies to your NetSuite system.

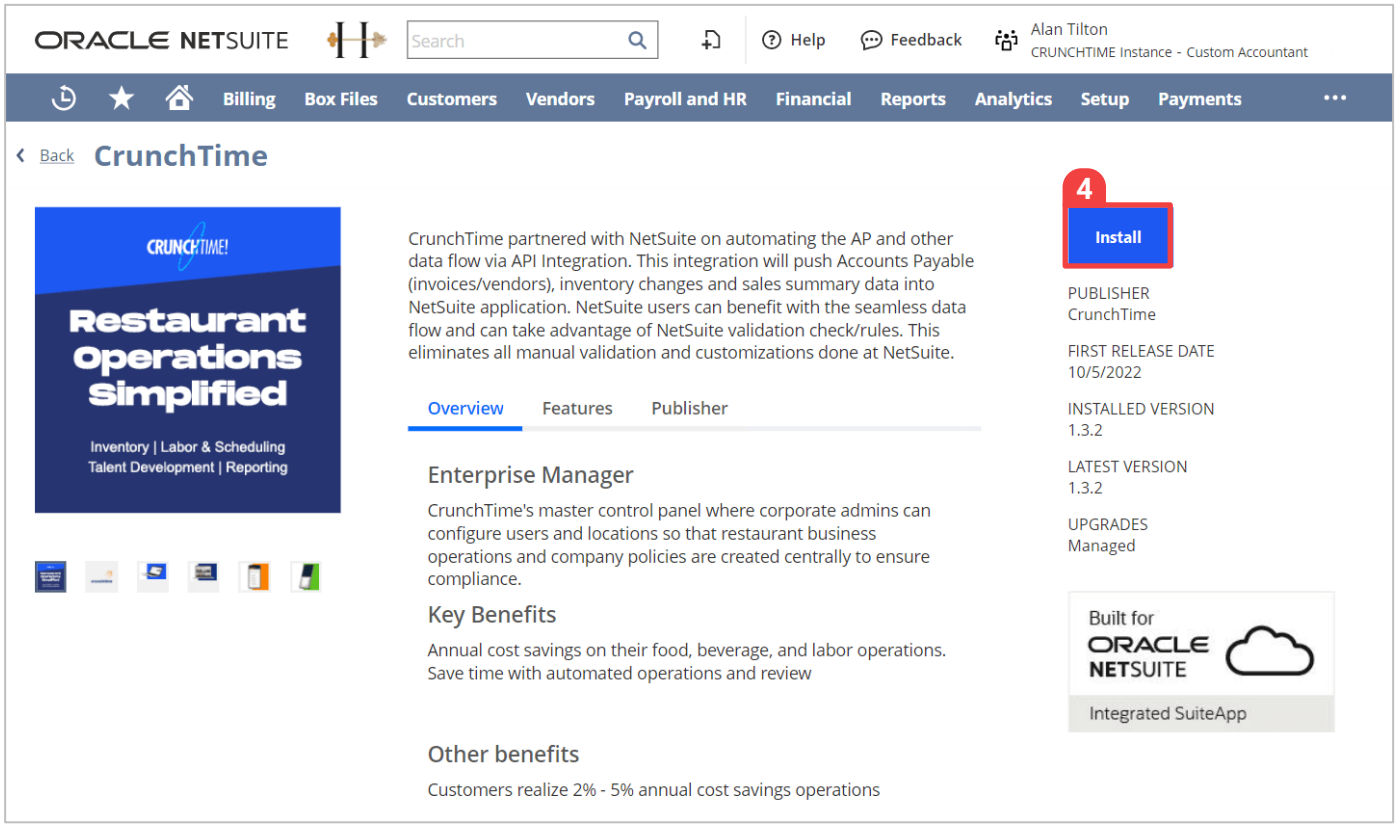
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NetSuite Integration

Install SuiteApp (Continued)

Install Crunchtime SuiteApp (Continued)

Oracle NetSuite > SuiteApps



4 On the Crunchtime page, select *Install*.

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SETUP GUIDE

NetSuite Integration

Generate Access Tokens

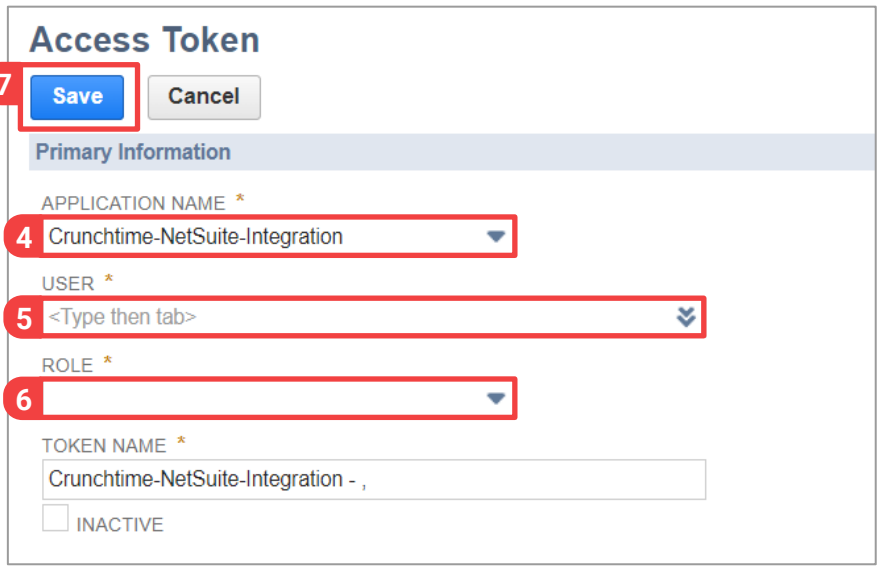
Note: You must have Administrator access in NetSuite to complete this process.

Configure User

1. From NetSuite, create a new *User* record or edit an existing User record that you wish to use for your Crunchtime integration. We recommend this User record is only used for your Crunchtime integration.
2. Assign the 'CRUNCHTIME _INTEGRATION' *Role* to this User.

Generate Token

3. Next, navigate to *Setup > Users & Roles > Access Tokens > New*.



4. Choose 'Cruchtime-NetSuite-Integration' from the *Application Name* drop-down menu.
5. Select the User from Step 1.
6. Select the CRUNCHTIME_INTEGRATION from the *Role* drop-down menu.
7. Select *Save*.
8. Take note of the *Token ID* and *Token Secret*. These values will be used later to complete the setup.

Alert: This is the only time the tokens will be visible, so you **MUST** take note of them now.

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NetSuite Integration

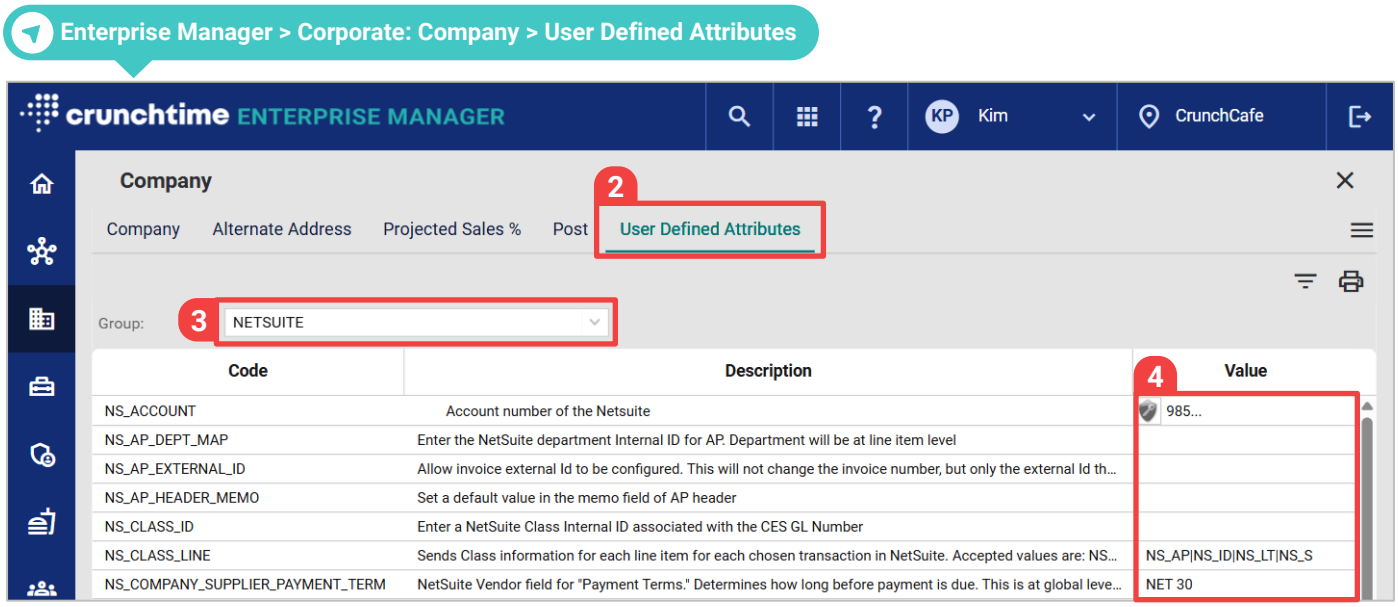
UDA Setup

Overview

A User Defined Attribute (UDA) is a manually entered value used to configure attributes that don't exist natively within the Crunchtime application but may need to be referenced for your integration with the NetSuite application. These settings are first configured at the Company level and then may be further configured at the Vendor and/or Location level if necessary.

Company UDAs

1. Select *Company* from the Corporate menu.



2. Choose the *User Defined Attributes* tab.
3. Select NETSUITE from the *Group* menu. This will filter the list of UDAs to include only attributes related to the NetSuite integration.
4. Update the *Value* column to define attributes relevant for your integration:

Required:

- *NS_INTEGRATION_ENABLED* – This is the "ON" switch – set to 'True' to turn on the integration. Setting this attribute to 'True' also makes all NetSuite UDAs editable.
- *NS_ACCOUNT* – Your NetSuite Account ID (*Example: TSTDRV2449079*).
- *NS_TENANT_URL* – Your NetSuite URL (either Production or Sandbox)
- *NS_TOKEN_ID* – The unique Token ID generated from NetSuite.
- *NS_TOKEN_SECRET* – The unique Token Secret generated from NetSuite.

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NetSuite Integration

UDA Setup (Continued)

Company UDAs (Continued)

Required:

- *NS_SUBSIDIARY_NAME* – The Subsidiary's Internal ID from NetSuite.
- *NS_CREDIT_LOCATION_LINE* – Indicates if the location name should appear only in the line item, or if it should also appear at the header level when Vendor Credits are received into NetSuite. If the location name should appear only in the line item, set to 'True'. If the location name should also appear in the header, set to 'False'.
- *NS_VENDOR_BILL_APPROVAL_STATUS* – Determines if Vendor Invoices come in as auto approved or waiting for manual approval.
- *NS_COMPANY_SUPPLIER_PAYMENT_TERM* – Set this field to 'NET 30'.

  Note: This attribute is required but the entered value will not impact the NetSuite integration.
- *NS_IS_SUPPLIER_SOR* – (**Required only when using Vendor Sync**) This will determine if Crunchtime or NetSuite is the System of Record (SOR) for your vendors. We recommend setting NetSuite as the SOR as a best practice.

Recommended:

- *NS_INVOICE_SUCCESS_EMAIL* – An email will be sent to this address each time an invoice is successfully sent.
- *NS_INVOICE_FAILURE_EMAIL* – An email will be sent to this address each time an invoice fails to send.
- *NS_INVENTORY_DELTA_SUCCESS_EMAIL* – An email is sent to this address each time inventory deltas are successfully sent.
- *NS_INVENTORY_DELTA_FAILURE_EMAIL* – An email is sent to this address each time inventory deltas fail to send.
- *NS_LOCATION_TRANSFER_SUCCESS* – An email is sent to this address each time location transfer details are successfully sent.
- *NS_LOCATION_TRANSFER_FAILURE* – An email is sent to this address each time location transfer details fail to send.
- *NS_SALES_SUCCESS_EMAIL* – An email is sent to this address each time sales are successfully sent.
- *NS_SALES_FAILURE_EMAIL* – An email is sent to this address each time sales fail to send.
- *NS_VENDOR_SYNC_EMAILS* – An email is sent to this address indicating the status of the Vendor Sync process, regardless of success or failure.
- *NS_VENDOR_SYNC_SUCCESS*_EMAILS – An email is sent to this address each time vendors are synced successfully.
- *NS_VENDOR_SYNC_FAILURE_EMAILS* – An email is sent to this address each time vendors fail to sync.



Tip: We recommend receiving email for all NetSuite integration transactions to ensure you have an audit record. This will also be useful if you need assistance troubleshooting an issue.

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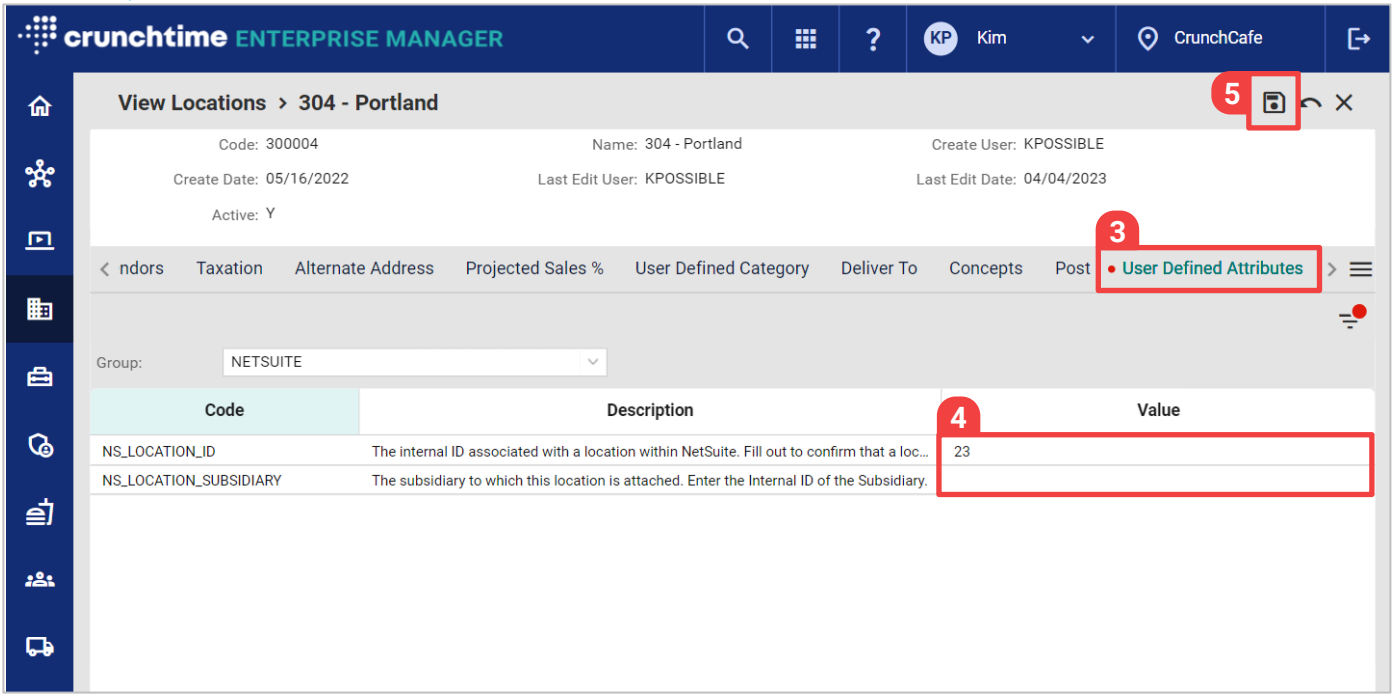
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NetSuite Integration

UDA Setup (Continued)

Location UDAs

Enterprise Manager > Corporate: Locations > {Edit} > User Defined Attributes



Repeat the following steps for all Locations as necessary:

1. Choose *Locations* from the Company menu.
2. Select a *Location*.
3. Open the *User Defined Attributes* tab.
4. Configure the following attributes. These values will apply to this location only.
   - *NS_LOCATION_ID* - Add the NetSuite *Location Internal ID* for all instances where the Crunchtime Location Code does NOT match the NetSuite Location Name.
   - *NS_LOCATION_SUBSIDIARY* - If necessary, add the Subsidiary's Internal ID. This is only necessary if this differs from the Internal ID defined by the NS_SUBSIDIARY attribute on the Company User Defined Attributes page.
5. Select the *Disk* (Save) icon when you're done.

Note: Location UDAs can only be updated manually at this time.

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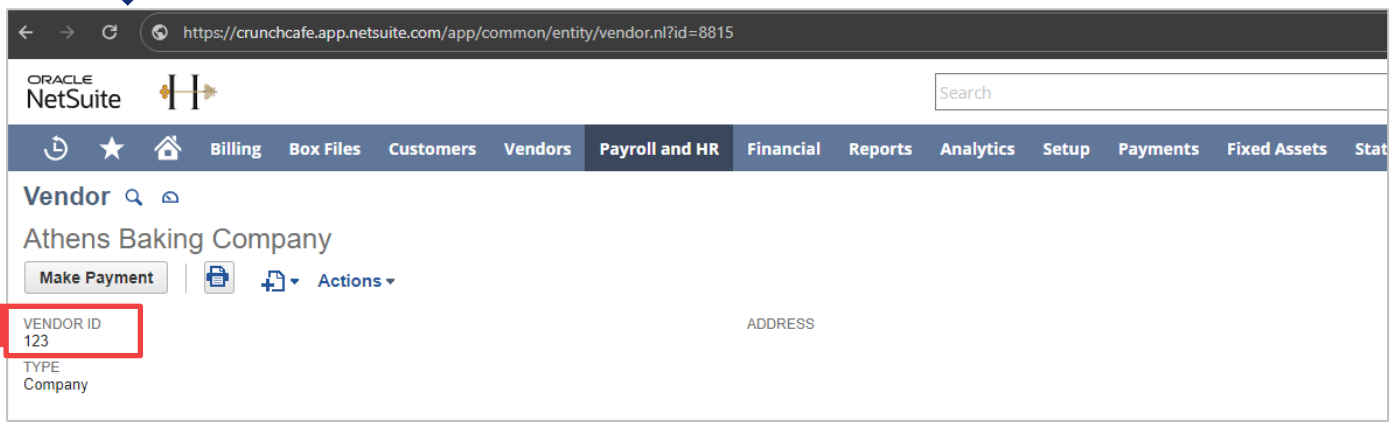
NetSuite Integration

Link Vendors

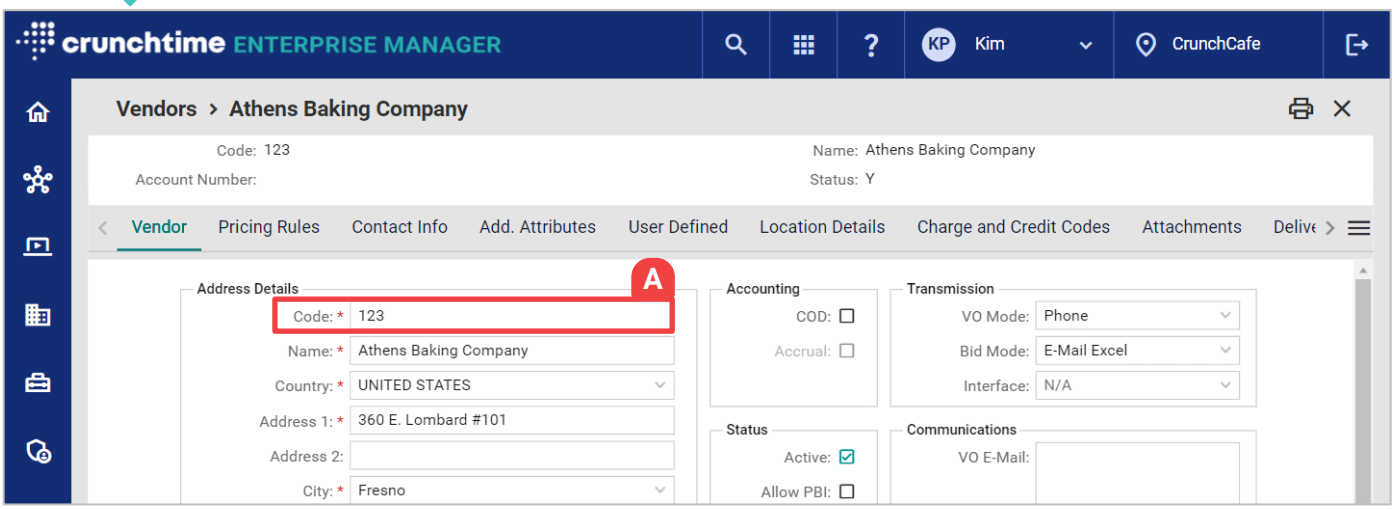
Standard Configuration

The vendors in NetSuite and Crunchtime must be aligned to ensure successful transfer of data. The standard configuration assumes the NetSuite *Vendor ID* and Crunchtime *Vendor Code* are the same value. This applies to all vendors with a NetSuite Vendor ID that is **6 characters or less**.

NetSuite > Vendors > Lists > Search > {Vendor Name}



Enterprise Manager > Purchasing: Vendors > {Vendor Name}



A Ensure the Crunchtime *Vendor Code* matches the NetSuite *Vendor ID*.

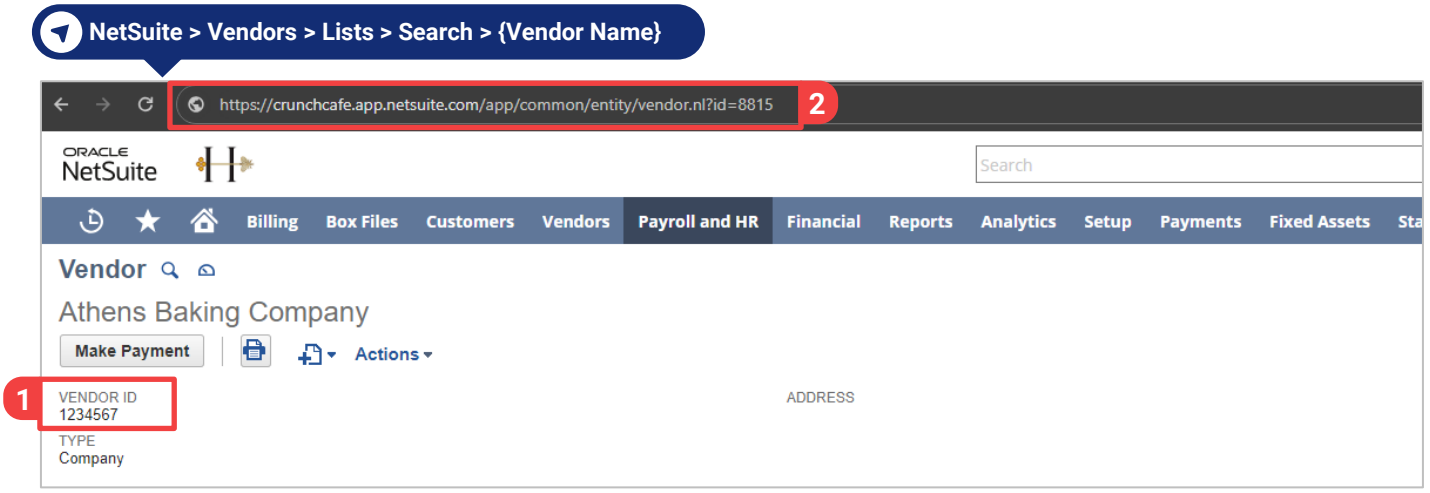
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NetSuite Integration

Link Vendors (Continued)

Add an Export Code

In any case where the NetSuite Vendor ID is **longer** than 6 characters, an Export Code must be added to the Vendor's profile in Crunchtime.



1. Check the length of the NetSuite *Vendor ID*. If the ID is longer than 6 characters (i.e. 7 or more characters), continue following these steps.
2. Take note of the NetSuite ***Internal*** *Vendor ID*.

Tip: The Internal Vendor ID is listed at the end of the NetSuite URL while viewing the vendor profile (*Example: crunchcafe.app.netsuite.com/app/common/entity/vendor.nl?id=**8815***)

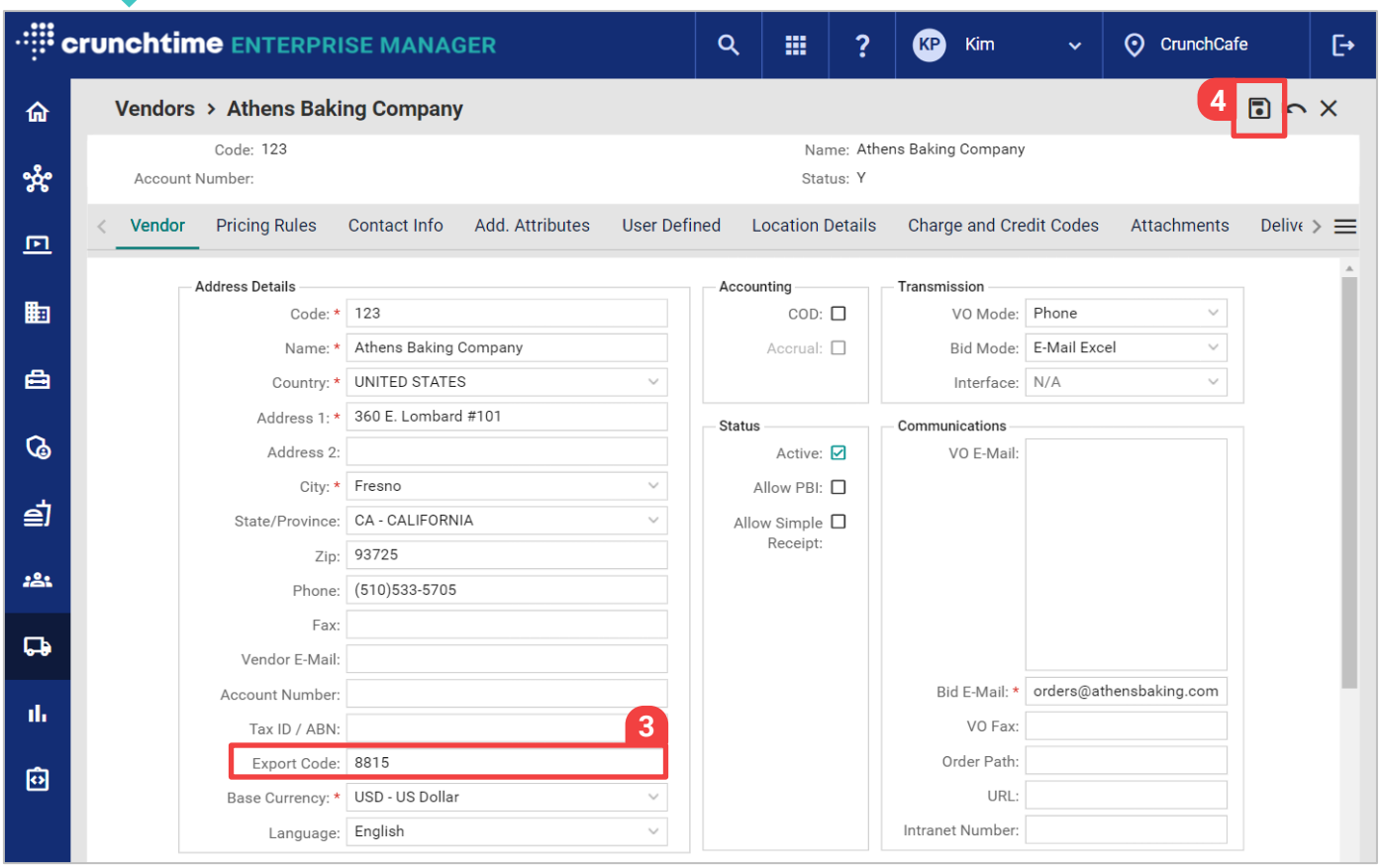
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NetSuite Integration

Link Vendors (Continued)

Add an Export Code

Enterprise Manager > Purchasing: Vendors > {Vendor Name}



3. From Crunchtime, add the NetSuite **Vendor ID** in the *Export Code* field.
4. Select the *Disc* (Save) icon.
5. Repeat these steps for all impacted Vendors.

Tip: You can also choose to use the Vendor Sync transaction to align key vendor information between Crunchtime and NetSuite after completing the integration setup. If your company frequently adds new vendors (25+ new vendors per year) then this feature is for you!

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SETUP GUIDE

NetSuite Integration

GL Configuration

Overview

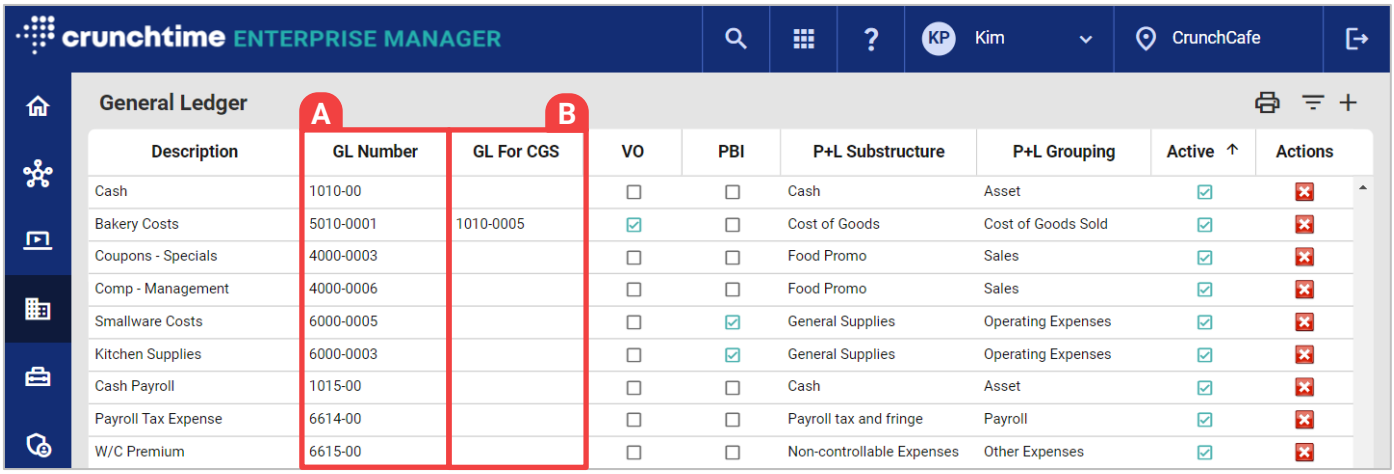
The General Ledger (GL) accounts must be aligned between Crunchtime and NetSuite to ensure successful transfer of data between the two systems. The required setup in Crunchtime will depend on how the GL accounts are configured in NetSuite.

Note: All setups require referenced GL accounts to be active in both NetSuite and Crunchtime.

GL Setup

The default integration setup assumes the GL accounts between Crunchtime and NetSuite will be the same.

Enterprise Manager > Corporate: General Ledger



Description	GL Number	GL For CGS	VO	PBI	P+L Substructure	P+L Grouping	Active	Actions
Cash	1010-00		☐	☐	Cash	Asset	☑	✖
Bakery Costs	5010-0001	1010-0005	☑	☐	Cost of Goods	Cost of Goods Sold	☑	✖
Coupons - Specials	4000-0003		☐	☐	Food Promo	Sales	☑	✖
Comp - Management	4000-0006		☐	☐	Food Promo	Sales	☑	✖
Smallware Costs	6000-0005		☐	☑	General Supplies	Operating Expenses	☑	✖
Kitchen Supplies	6000-0003		☐	☑	General Supplies	Operating Expenses	☑	✖
Cash Payroll	1015-00		☐	☐	Cash	Asset	☑	✖
Payroll Tax Expense	6614-00		☐	☐	Payroll tax and fringe	Payroll	☑	✖
W/C Premium	6615-00		☐	☐	Non-controllable Expenses	Other Expenses	☑	✖

The following should be verified to ensure the necessary GL accounts are aligned between systems:

A *GL Number* (Crunchtime) – This is the primary GL number that will be used for the account. This must be defined for all accounts that will be used when transfering data between NetSuite and Crunchtime.

B *GL for CGS* (Crunchtime) – This is the offsetting GL account for Cost of Goods Sold accounts. This GL will be used as the debit account in the Inventory Delta export to push and create GL Journal entries in NetSuite.

- *GL Codes* in NetSuite used for vendor bills are classified as 'Expenses'. This enables the transfer of vendor invoice information between the two systems.

Alert: If non-expense GL codes are referenced from NetSuite, you will receive an "Invalid Account Classification" error when sending data to NetSuite.

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NetSuite Integration

GL Configuration (Continued)

GL Setup – Sales Pre-requisites

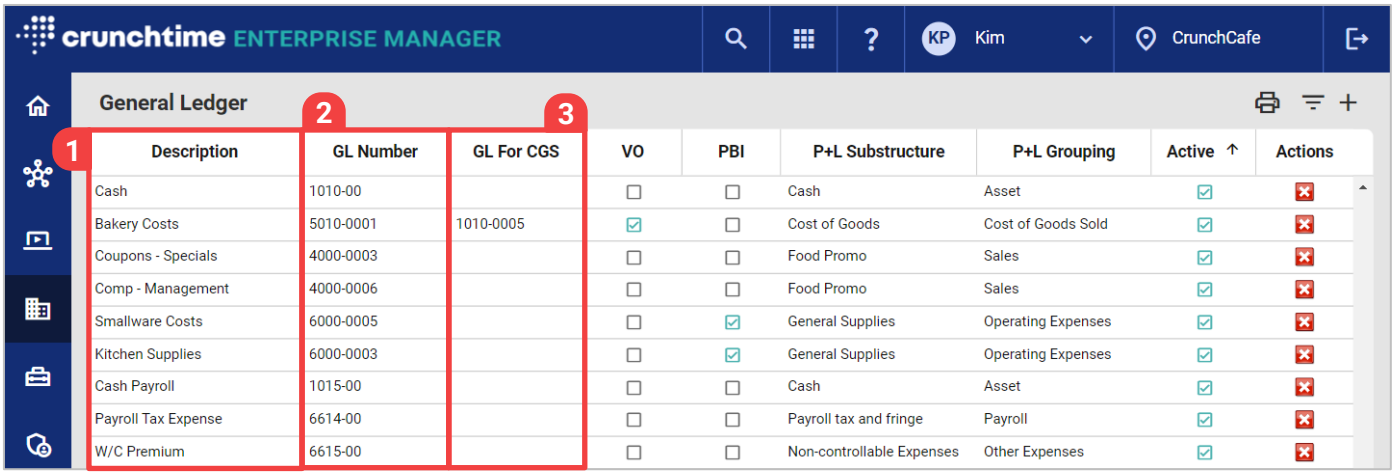
There are two fundamental pre-requisites for Sales exports:

- If exporting Bank Deposits, a GL account with the description “Cash” must be defined.
- If exporting Over/Short values, a GL account linked to the “Cash Over/Short” P&L Substructure must be defined.

NetSuite Classes

Classes are NetSuite categories used to track financial, inventory, and employee records. If your business uses Classes (instead of GL codes), they must be linked to the appropriate general ledger within Crunchtime.

Enterprise Manager > Corporate: General Ledger



Description	GL Number	GL For CGS	VO	PBI	P+L Substructure	P+L Grouping	Active	Actions
Cash	1010-00		☐	☐	Cash	Asset	☑	✖
Bakery Costs	5010-0001	1010-0005	☑	☐	Cost of Goods	Cost of Goods Sold	☑	✖
Coupons - Specials	4000-0003		☐	☐	Food Promo	Sales	☑	✖
Comp - Management	4000-0006		☐	☐	Food Promo	Sales	☑	✖
Smallware Costs	6000-0005		☐	☑	General Supplies	Operating Expenses	☑	✖
Kitchen Supplies	6000-0003		☐	☑	General Supplies	Operating Expenses	☑	✖
Cash Payroll	1015-00		☐	☐	Cash	Asset	☑	✖
Payroll Tax Expense	6614-00		☐	☐	Payroll tax and fringe	Payroll	☑	✖
W/C Premium	6615-00		☐	☐	Non-controllable Expenses	Other Expenses	☑	✖

Repeat Step 1-3 for all desired Classes in NetSuite:

1. Enter the NetSuite Class as the *Description*.
2. Add the *GL Number* that corresponds with this Class.
3. For Cost of Goods Sold accounts, include a *GL for CGS* number to serve as the debit account.

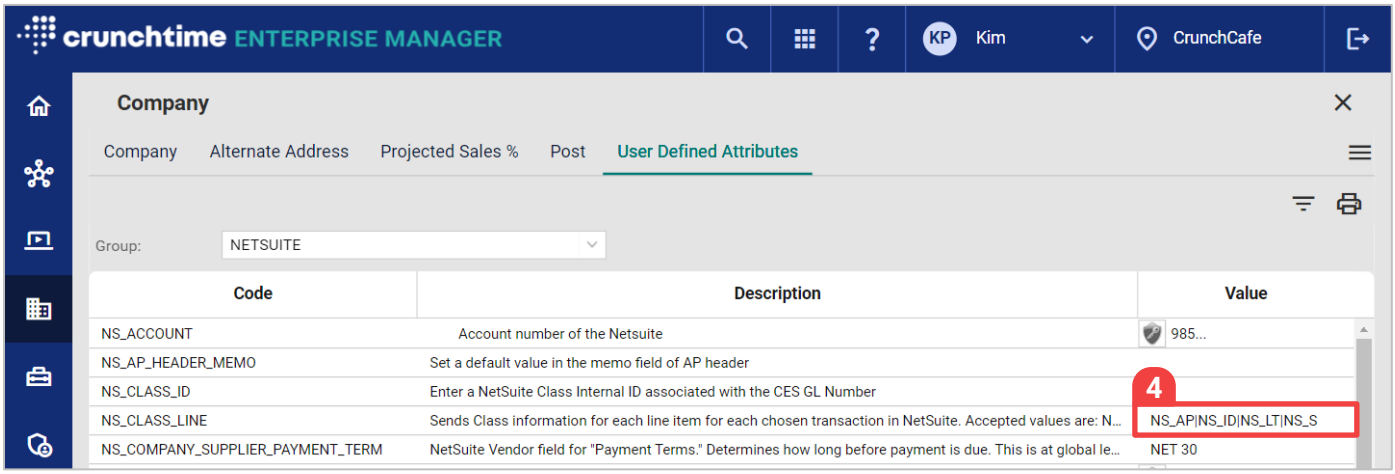
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NetSuite Integration

GL Configuration (Continued)

NetSuite Classes (Continued)

Enterprise Manager > Corporate: Company > User Defined Attributes



4 From the Company UDA screen, update the *NS_CLASS_LINE* attribute to indicate which transaction(s) should use the GL Description as the Class. The allowed transactions and corresponding UDA values are listed below:

- Accounts Payable = NS_AP
- Inventory Delta = NS_ID
- Location Transfer = NS_LT
- Sales = NS_S

Note: Multiple values can be entered with a pipe delimiter. (ex: NS_ID|NS_S)

Tip: The *NS_CLASS_ID* Company UDA can be used to apply one Class to multiple GL accounts. Enter the NetSuite Class Internal ID for this attribute, and the associated Class description will be applied to all transactions when data is exported.

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NetSite Integration

Sales Export Setup

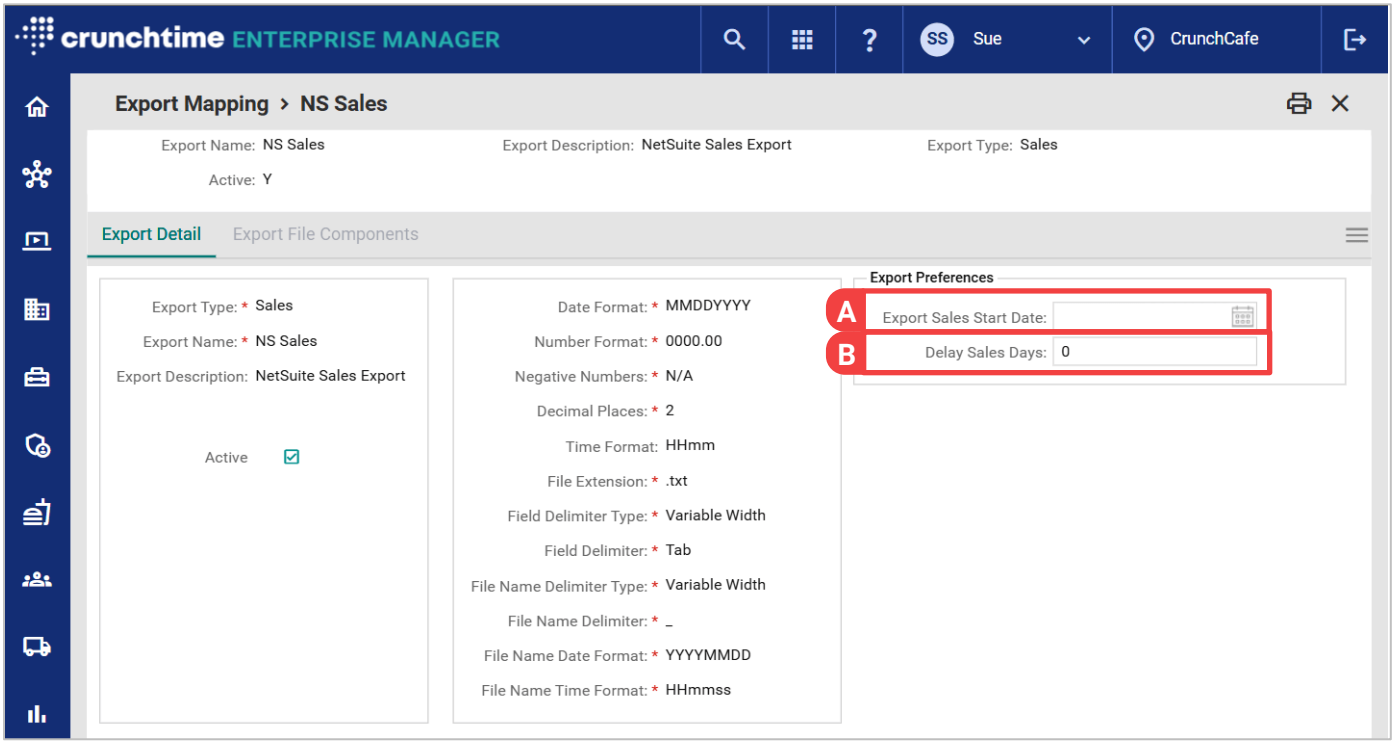
Overview

The Export Mappings screen allows corporate users to define the Export Preferences for all of the available sales exports. Mapping for the NetSuite Sales export will be visible only when the Company User Defined Attribute for NS_INTEGRATION_ENABLED = 'true'. This mapping can only be edited by a corporate user associated with a User Group that has the "Export Mapping: Sales Edit" control enabled.

Export Mapping – NetSuite Sales

The following preferences can be defined for the NetSuite Sales export:

Enterprise Manager > Interfaces: Export Mapping > NS Sales



A *Export Sales Start Date* – Select/enter the first date that should be included in the first export.

B *Delay Sales Days* – Enter the number of days sales (0-6) from the end of each period that should be delayed (excluded) from the export for that period. The sales for those days will be included in the next period export. This helps ensure the sales for each period are final prior to exporting to NetSuite.

Example: Today is Sept.10, 2025; if your Week Ending Day is 'Tuesday', then your last Post period ended on Tue, Sept. 9. If you set the *Export Sales Start Date* to '08/01/2025', and *Delay Sales Days* to '3', then all data from Aug 1, 2025 thru Sept. 6, 2025 will be included in the first export, and the next export for the period ending Tue, Sept 16 will include data for Sept. 7 thru Sept. 13.

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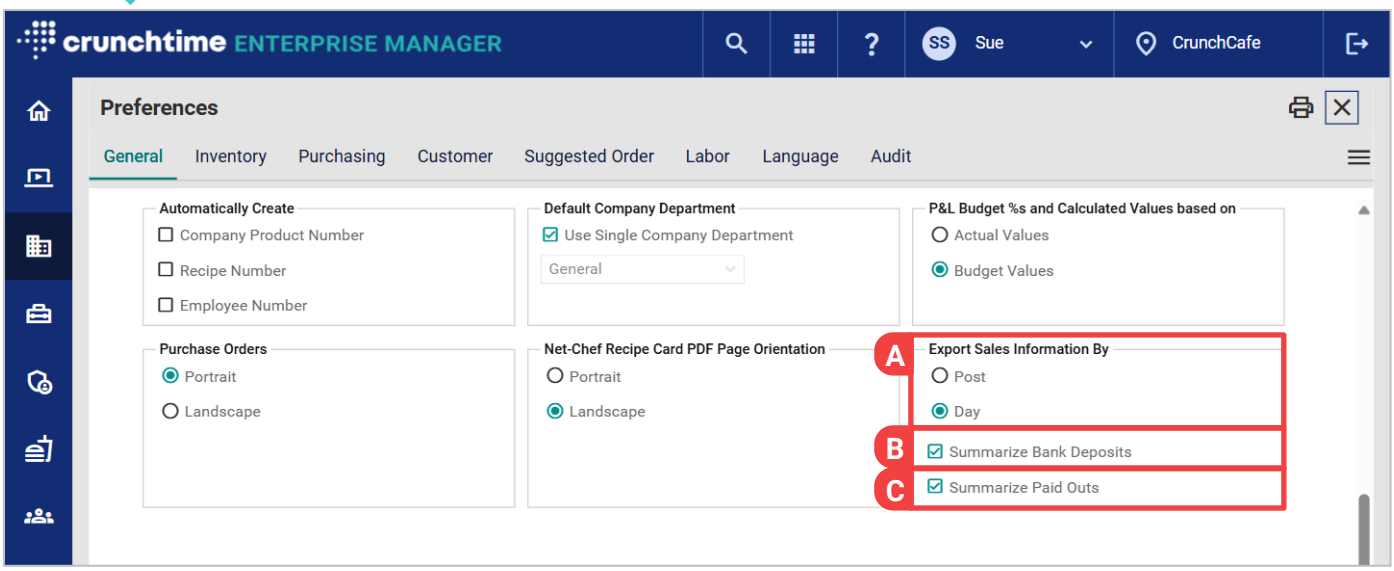
NetSuite Integration

Sales Export Setup (Continued)

General Preferences

The General Preferences screen also includes settings that are applicable to NetSuite Sales exports.

Enterprise Manager > Corporate: Preferences > General tab



A Export Sales Information By:

- *Post* – Choose this option to export sales information once for each post period.
- *Day* – Choose this option to export sales information on a daily basis.

B *Summarize Bank Deposits* — When checked (default), the export will include an aggregated total for the Bank Deposit value. If not checked, the system will export a separate row for each record from each register for the Location/Date.

C *Summarize Paid Outs* — When checked (default), the export will include an aggregated total for the Paid Outs value. If not checked, the system will export a separate row for each record from each register for the Location/Date.

Tip: The "Summarize" preferences are only available when "Accounting Software" = 'STANDARD' in the Company setup screen.

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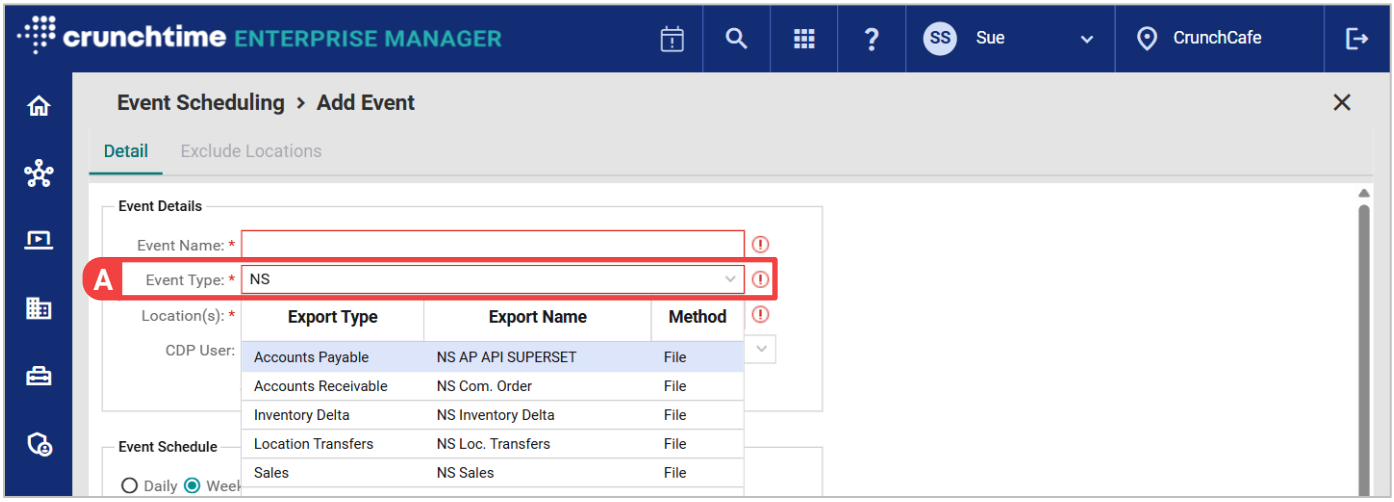
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NetSuite Integration

Schedule and Verify Exports

Schedule an Export

Enterprise Manager > Interfaces: Event Scheduling



A For the *Event Type*, select the desired NetSuite export. (Hint: Filter the field by entering "NS".) Options include:

- Accounts Payable (NS AP API SUPERSET):
  - Frequency = Daily (Recommended) or Weekly
  - Posting Dependency = N/A
  - Editing of Invoices is not allowed by default after export
- Accounts Receivable (NS Com. Order):
  - Frequency = Daily (Recommended) or Weekly
  - Posting Dependency = N/A
  - No editing consideration
- Inventory Delta:
  - Frequency = Weekly
  - Posting Dependency = Yes
  - Unposting & editing of Inventory is not allowed by default after export
- Location Transfers:
  - Frequency = Daily (Recommended) or Weekly
  - Posting Dependency = N/A
  - No editing consideration
- Sales:
  - Frequency & Posting Dependency determined based on the Sales Export Preferences; see previous page for details.
  - If Frequency = Daily, Posting Dependency = N/A
  - If Frequency = Weekly, Posting Dependency = Yes

Tip: For more detailed information on how to schedule an export, follow this link: https://links.crunchtime.com/EMQS-ScheduleAnExport

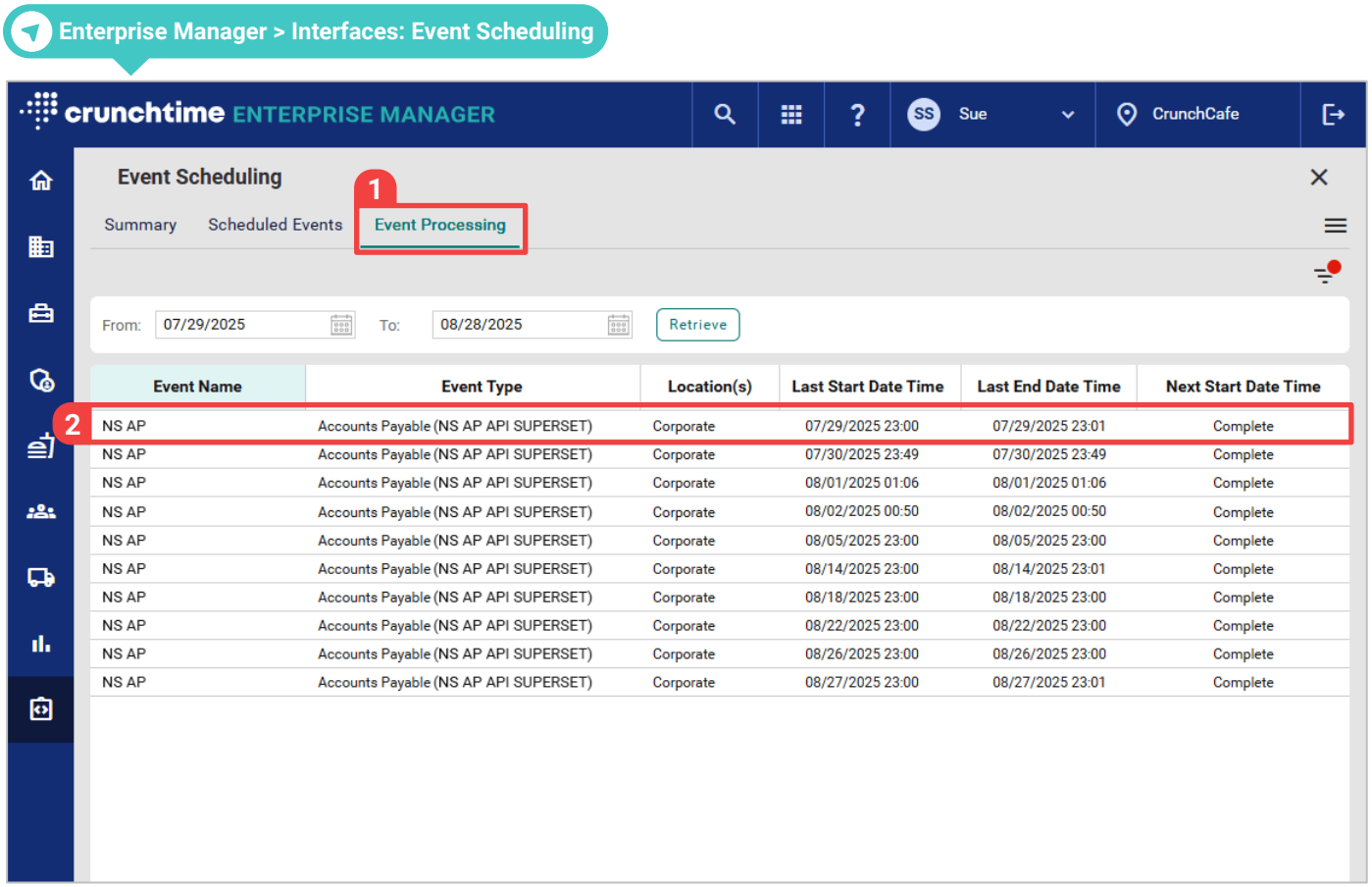
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NetSuite Integration

Schedule and Verify Exports (Continued)

Verify Completed Exports



1. In the Event Scheduling screen, select the *Event Processing* tab.
2. Locate the export event and verify it has been completed.

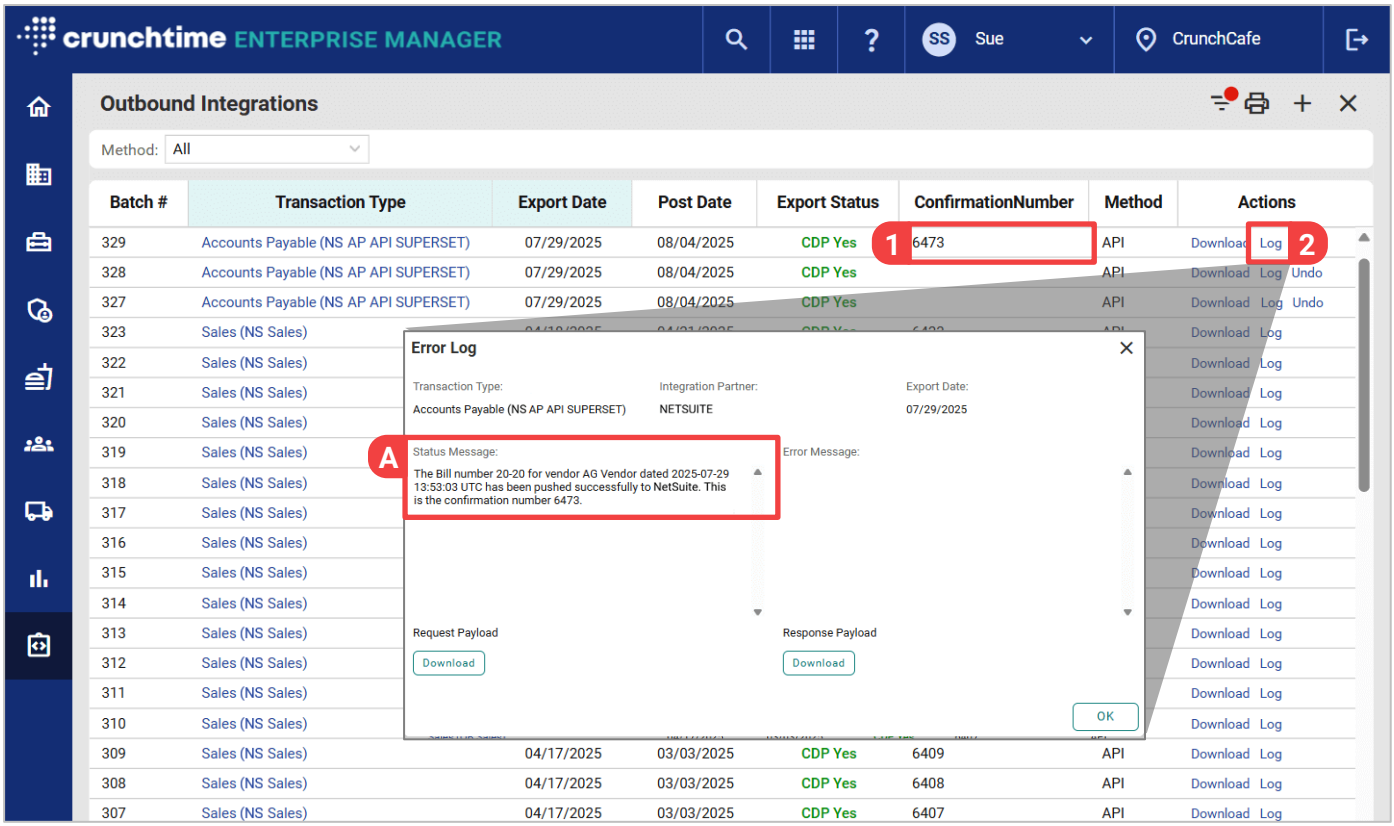
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NetSuite Integration

Schedule and Verify Exports (Continued)

Verify Completed Exports (Continued)

Enterprise Manager > Interfaces: Outbound Integrations



1. In the Outbound Integrations screen, locate the export batch and verify that a *Confirmation Number* was received from NetSuite. You will also receive an email confirmation; see the example on Page 18.
2. In the Actions column, select the *Log* file to view it.
   - **A** Here you can see the *Status Message* confirming the data was received by NetSuite.

Note: If the data had not been received successfully, an Error Message would be displayed here and the batch in Enterprise Manager would not have gotten a Confirmation Number from NetSuite. See the next page for details on how to proceed in this situation.

Tip: The *Confirmation Number* column is hidden by default; you will have to enable it. Once enabled, you can click and drag it to any position on the screen.

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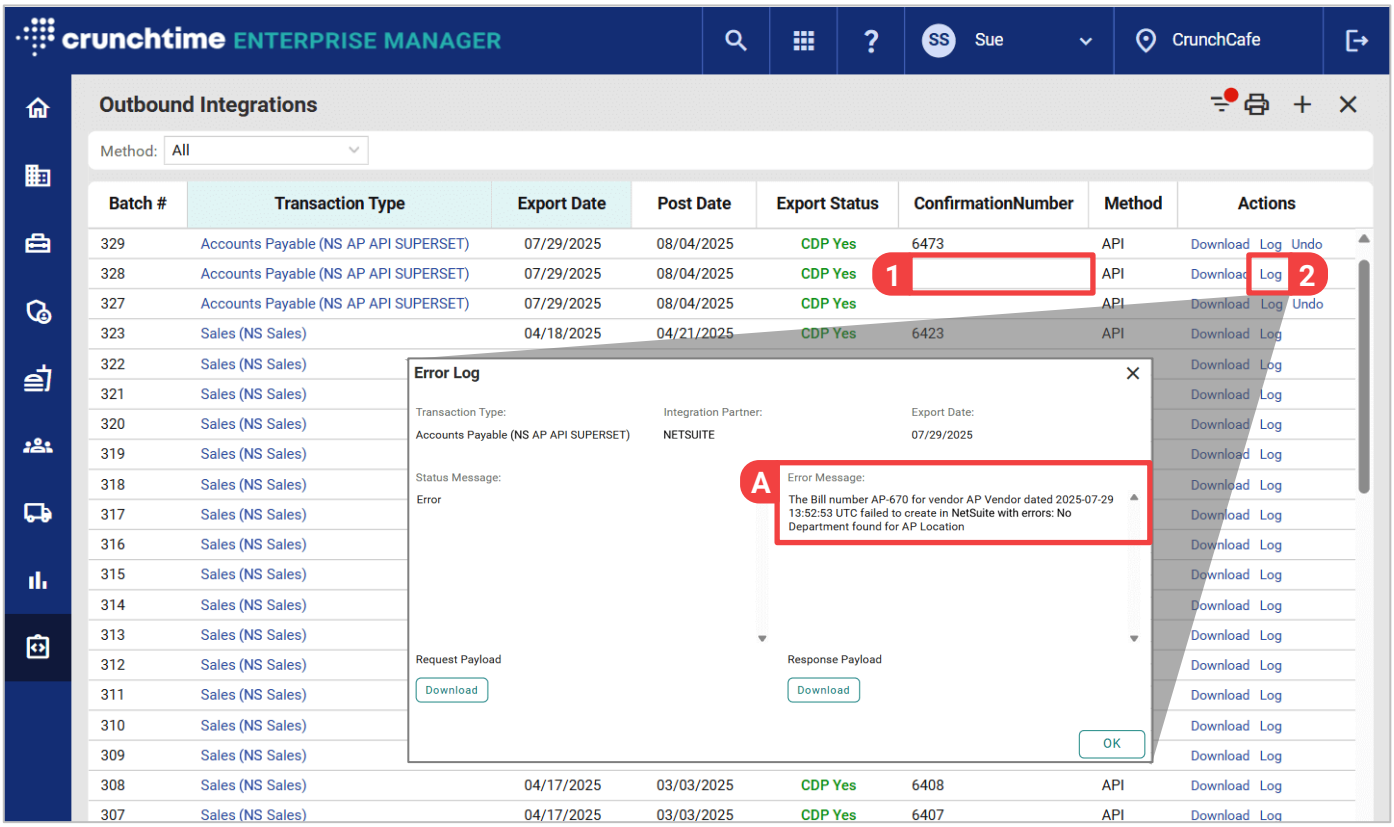
NetSuite Integration

Troubleshoot and Undo Failed Files

In the event that a file was not successfully received by NetSuite, you will need to troubleshoot and correct the problem, then undo the export.

View the Error Log

Enterprise Manager > Interfaces: Outbound Integrations



1. For the export in question, verify that a *Confirmation Number* was NOT received from NetSuite (which means for some reason, NetSuite did not receive the data). You will also receive an email error message.
2. In the Actions column, select the *Log* file to view it.
   - A. Here you can see the *Error Message* indicating why the data was not received.

Important: Your next step is to correct the problem that prevented the successful integration. To ensure a successful push, changes may be needed in Crunchtime and/or NetSuite.

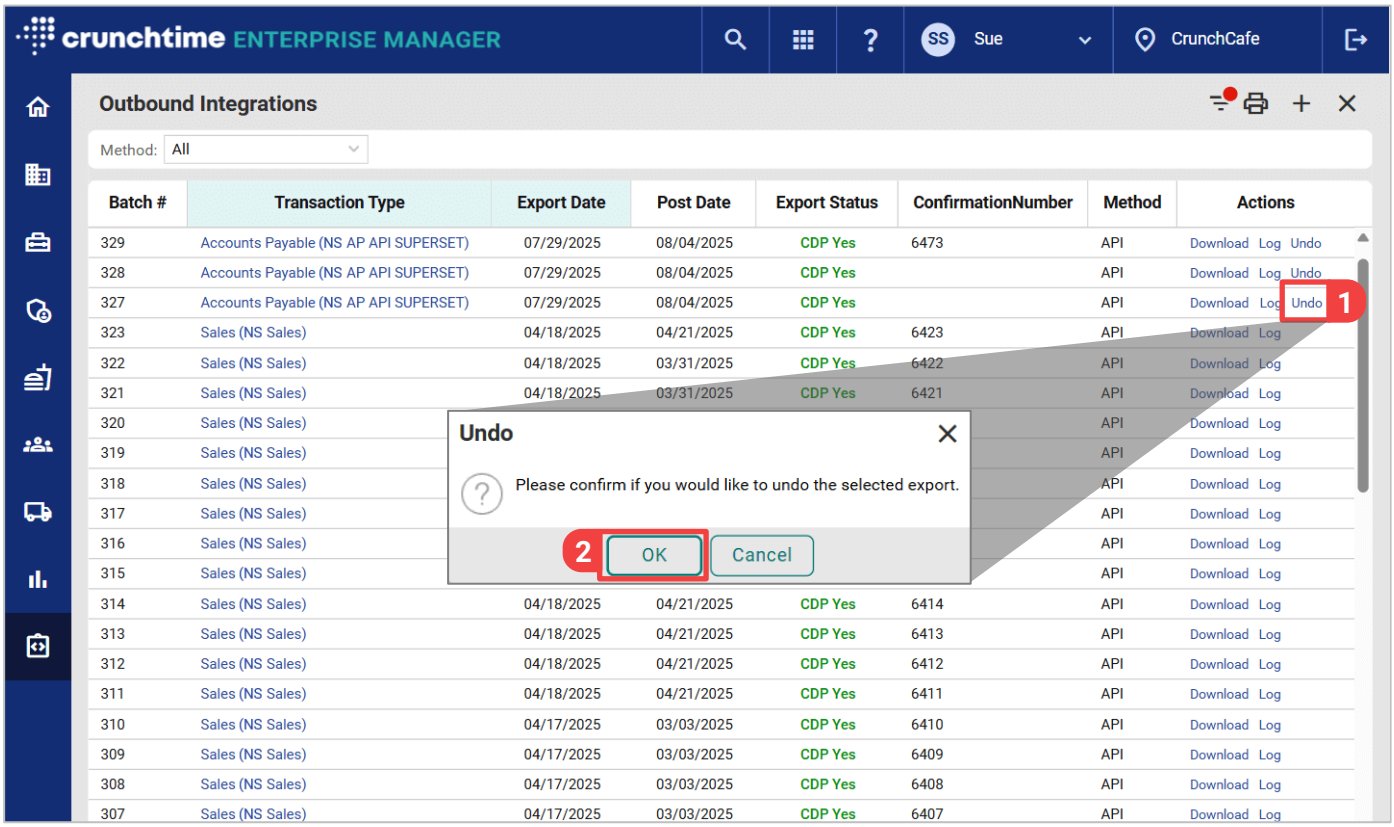
(Continued)

NetSuite Integration

Troubleshoot and Undo Failed Files (Continued)

Undo the Export

Enterprise Manager > Interfaces: Outbound Integrations



1. In the Outbound Integrations screen, select the *Undo* link for the desired file.
2. To confirm the Undo process, select *OK*.

Tip: Once the export has been undone, it will re-export automatically during the next run of the scheduled event. This export will have a new Batch #.