



# NetSuite integration- Token Based Authentication

Connect with NetSuite using a token

The following steps must be performed by an **Admin** user in *NetSuite*:

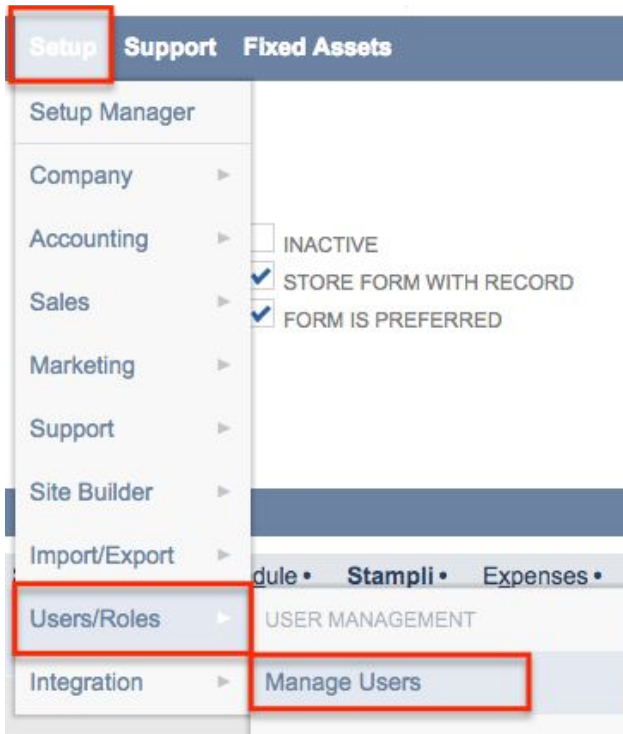
**Enable Token Based Authentication:** First make sure that Token Based Authentication is enabled in your account:

- Go to Setup > Company > Setup Tasks > Enable Features.
- Click the SuiteCloud subtab.
- Scroll down to the SuiteScript section, and check the following boxes (if not checked): Client SuiteScript. Server SuiteScript. Click I Agree on the SuiteCloud Terms of Service page.
- Scroll down to the Manage Authentication section, and check (if not checked) the Token-based Authentication box. Click "I Agree" on the SuiteCloud Terms of Service page.
- Click Save

Now follow these steps:

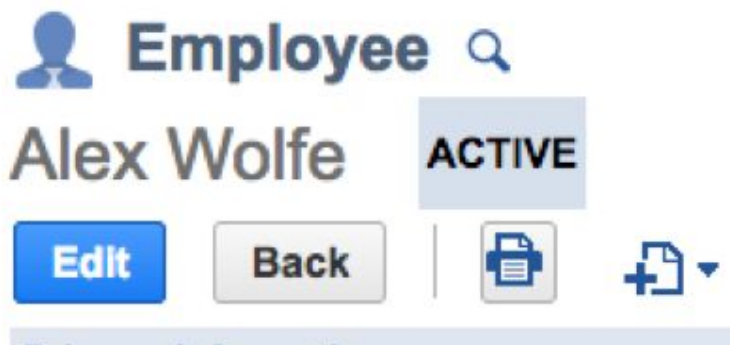
1. Assign the integration custom role to the end users authorized to use the integration

Go to: **Setup -> Users/Roles -> Manage Users**



1.1 Either select a user from the list and click Edit, or create a new user for the integration.

Alex Wolfe	ofer@stampli.com	Administrator	650-555-9788
Alex Wolfe	ofer@stampli.com	Support Director	650-555-9788
Amy Nguyen	ofer@stampli.com	12: A/P Clerk	415-555-9674



1.2 Enter the “Access” tab, and in the “Roles” section below, add the role “Stampli Integration TBA”, click Add. Once done click on Save

Communication Address Human Resources Time Tracking Commission Related Records Marketing Access System Information

GIVE ACCESS    PASSWORD

SEND NOTIFICATION EMAIL    CONFIRM PASSWORD

REQUIRE PASSWORD CHANGE ON NEXT LOGIN

**Password Criteria**

- Is at least 10 characters long ✘
- Does not contain illegal characters ✘
- Contains at least 3 of these 4 character types: ✘
  - Uppercase alpha characters (A, B, ... Z)
  - Lowercase alpha characters (a, b, ... z)
  - Numbers (1, 2, 3, 4, 5, 6, 7, 8, 9, 0)
  - Non-alphanumeric ASCII characters ( !@#\$%^&\*!;:~" \*\*\+?~\_|=(){}<> )
- New passwords match ✘

**Roles** • Global\_Permissions History •

ROLE \*

03: VP Sales

Administrator

Ecommerce Manager

Marketing Director

Project Manager

Support Director

Support Rep

Stampli Integration TBA

2. Create an Access Token for the integration user edited/created above.

Go to: **Setup -> Users/Roles -> Access Tokens -> New**

2.1 Fill the fields from the Dropdown.

- The application name is: “**Stampli Integration**”
- The user is the integration user, and the role is “Stampli Integration TBA”.
- For the token name, leave the default value.

Click on Save.

# Access Token

## Primary Information

APPLICATION NAME \*  
Stampli Integration


USER \*  
Alex Wolfe

ROLE \*  
Stampli Integration TBA

TOKEN NAME \*  
Stampli Integration - Alex Wolfe, Stampli Integration TBA

INACTIVE

2.2 **IMPORTANT:** At this moment, take note of the Token ID and Token Secret. These are displayed only once and will be needed for the configuration in Stampli software.

 **Confirmation**  
Access Token successfully Saved

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**Access Token** List

Actions ▾

**Primary Information**

APPLICATION NAME  
Stampli Integration

USER  
Alex Wolfe

ROLE  
Stampli Integration TBA

TOKEN NAME  
Stampli Integration - Alex Wolfe, Stampli Integration TBA

INACTIVE

**Token Id / secret**

Warning: For security reasons, this is the only time that the Token ID and Token Secret values are displayed. After you leave this page, they cannot be retrieved from the system. If you lose or forget these credentials, you will need to reset them to obtain new values. Treat the values for Token ID and Token Secret as you would a password. Never share these credentials with unauthorized individuals and never send them by email.

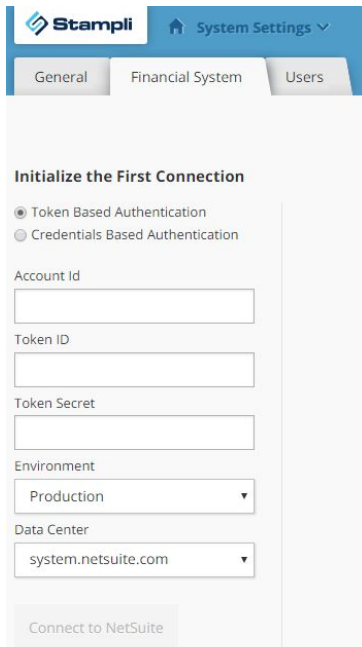
TOKEN ID  
[REDACTED]

TOKEN SECRET  
[REDACTED]

\*\*\* If the admin user in *NetSuite* doesn't isn't able to create the tokens, make sure it has the “**Access Token Management**” permission.

3. Go in *Stampli* app and in the **System Management** page go to **Financial System tab**,

3.1 Select the option to sign up using a token and add the Token ID and Token Secret created in previous step.



The screenshot shows the Stampli application interface. At the top, there is a blue header with the Stampli logo and a 'System Settings' dropdown menu. Below the header, there are three tabs: 'General', 'Financial System', and 'Users'. The 'Financial System' tab is selected. The main content area is titled 'Initialize the First Connection' and contains two radio button options: 'Token Based Authentication' (which is selected) and 'Credentials Based Authentication'. Below these options are several input fields: 'Account Id', 'Token ID', and 'Token Secret', each with a corresponding text input box. There are also two dropdown menus: 'Environment' with 'Production' selected, and 'Data Center' with 'system.netsuite.com' selected. At the bottom of the form, there is a 'Connect to NetSuite' button.