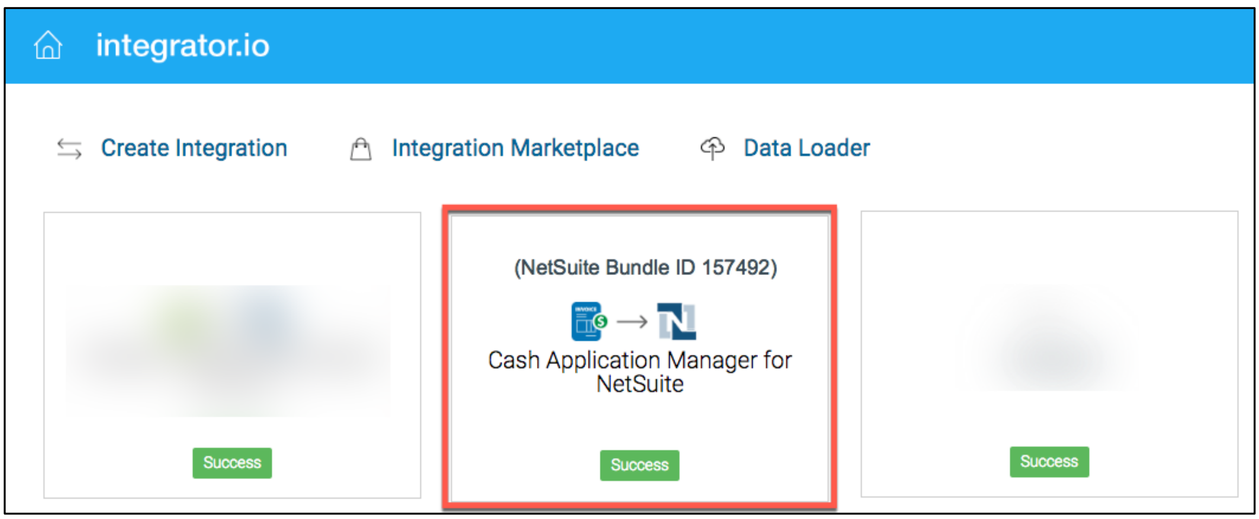
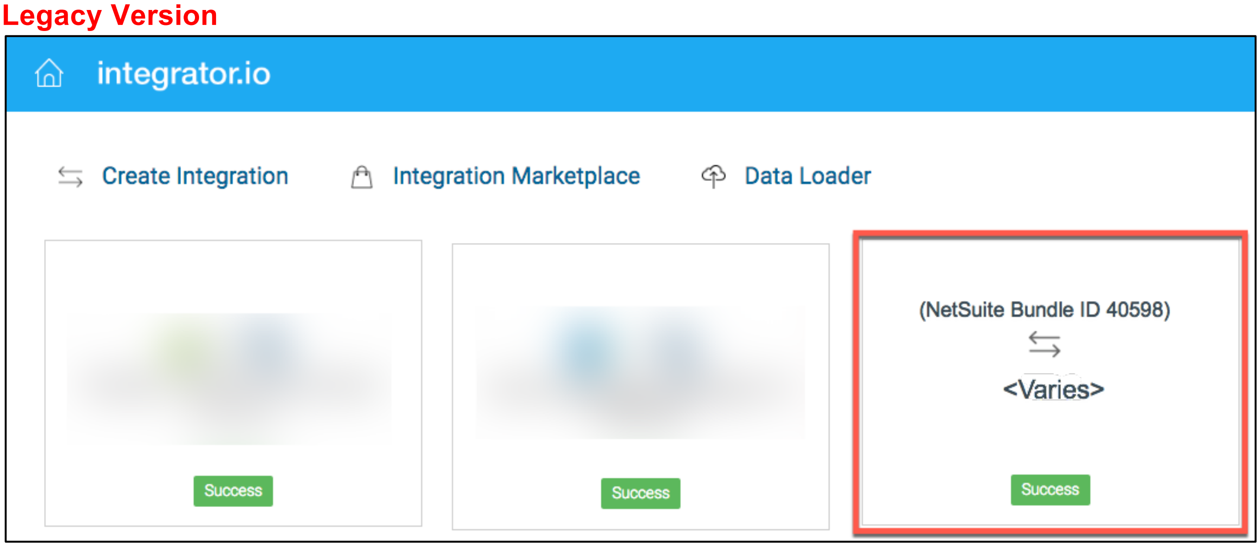
There are two versions of Cash Application Manager. To determine if you are on the latest integrator.io (“IO”) or the V2 (“Legacy”) version:

1. Log into your Celigo integrator.io account.
2. On the home page, if you see an integration tile called **Cash Application Manager for NetSuite** with the NetSuite logo, you are on the IO version. If you see an integration tile that just has a double set of arrows without any logos, then you are on the Legacy version. Whenever highlighted, follow the instructions for your version.
3. Another way to identify your version is by the NetSuite Bundle ID #. IO version is **157492** and Legacy version is **40598**.
4. Follow the instructions as detailed for the version that you are using.

IO Version



Legacy Version



NetSuite Steps

A. Enable your NetSuite account with Token-Based Auth (TBA)

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Company > Enable Features**.
3. Click **SuiteCloud** subtab.
4. Scroll down to **Manage Authentication** section.
5. Check the **TOKEN-BASED AUTHENTICATION** checkbox.
6. **Save** your changes.

B. Create custom NetSuite Role

IO Version

1. Log into NetSuite as an Administrator
2. Go to **Setup > Users/Roles > Manage Roles**
3. Click **Customize** beside the **Celigo CashApp Manager SmartConnector** role.
4. Clone the role by creating a new name for the role. Add other permissions as needed.
5. Click **Save**.

Legacy Version

1. Log into NetSuite as an Administrator
2. Go to **Setup > Users/Roles > Manage Roles**
3. Click **Customize** beside the **Celigo integrator.io Full Access w/o 2FA [Locked]** role.
4. Clone the role by creating a new name for the role. Add other permissions as needed.
5. Click **Save**.

C. Select NetSuite User and assign Role

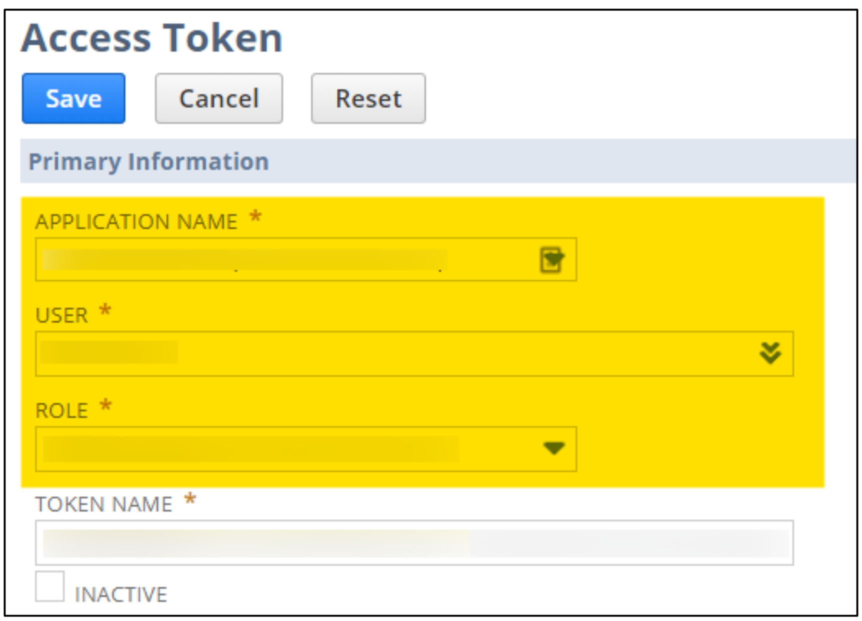
Select the NetSuite user account that will be used to connect your Cash Application Manager (applicable for both versions of Cash Application Manager):

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Manage Users**.
3. On **Manage Users** page, click on the user that you wish to connect your Cash Application Manager.
4. On that user's **Employee** page, select **Edit**.
5. Go to **Access > Roles**.
6. Select the role that was created in the prior Step B.
7. Click **Save**. The **Confirmation** message appears.

D. Generate NetSuite Access Tokens

IO Version

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Access Tokens > New**.



3. In the **APPLICATION NAME** drop-down box, select:

   High Tech Connectors Token-based Auth

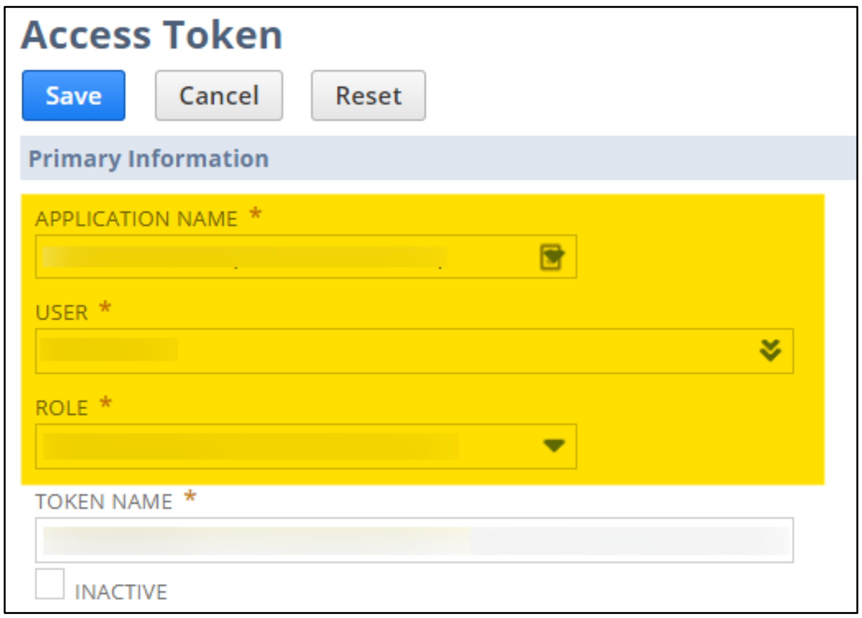
4. In the **USER** drop-down list box, type in the NetSuite user that you designated for the Celigo integration in the prior Section B or else Search for the user.

5. In the **ROLE** drop-down list box, select the role that was assigned to the user.
6. The **TOKEN NAME** populates automatically. Modify the name as needed.
7. Click **Save**.
8. **Token ID** & **Token Secret** will be displayed. Save the tokens in a place where you can copy it into your Celigo connection as described in the next section.

   ***Note**: Token ID and Token Secret are only displayed once & cannot be retrieved. We recommend that you save them in a secure location if you need to reference them later.*

Legacy Version

1. Log into NetSuite as an Administrator.
2. Go to **Setup > Users/Roles > Access Tokens > New**.



3. In the **APPLICATION NAME** drop-down box, select:

   integrator.io (Token-Based Auth)
4. In the **USER** drop-down list box, type in the NetSuite user that you designated for the Celigo integration in the prior Section B or else Search for the user.
5. In the **ROLE** drop-down list box, select the role that was assigned to the user.
6. The **TOKEN NAME** populates automatically. Modify the name as needed.
7. Click **Save**.
8. **Token ID** & **Token Secret** will be displayed. Save the tokens in a place where you can copy it into your Celigo connection as described in the next section.

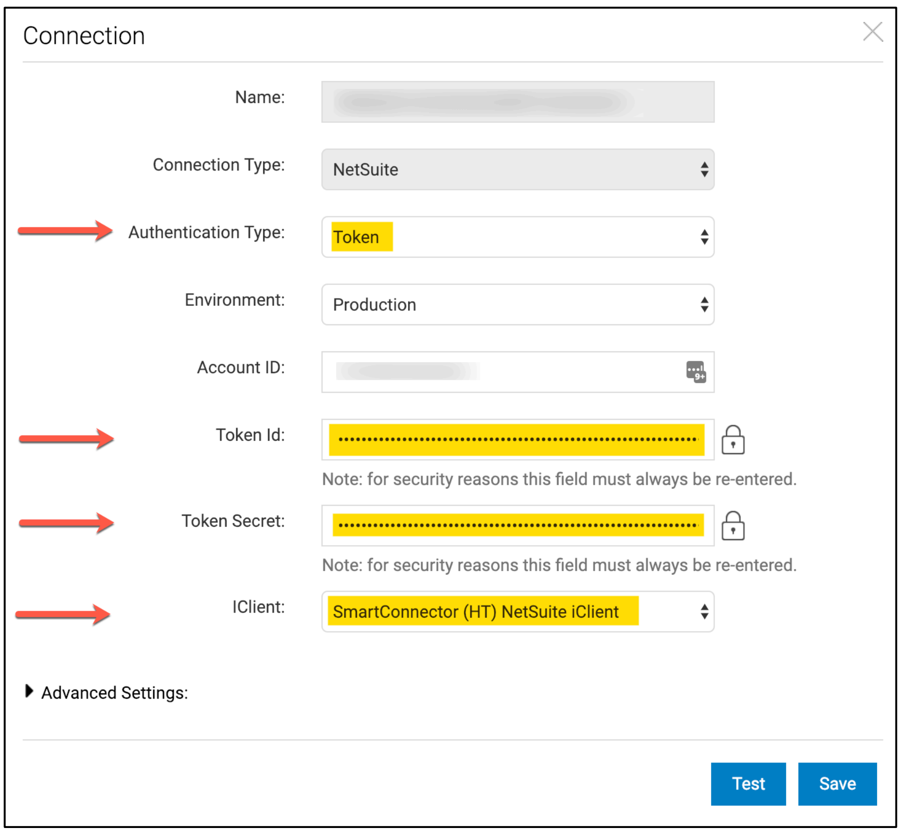
   ***Note**: Token ID and Token Secret are only displayed once & cannot be retrieved. We recommend that you save them in a secure location if you need to reference them later.*

Celigo Steps

Change NetSuite connection to Token-Based Authentication

IO Version

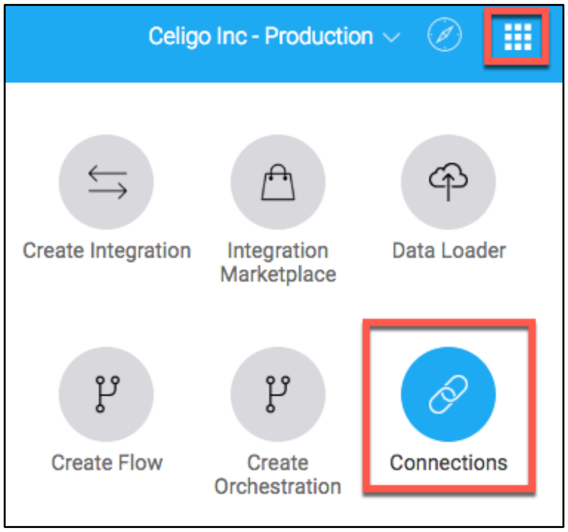
1. Log into your Celigo integrator.io account as either account Owner or Manager.
2. From the home page of integrator.io, go to your Cash Application Manager integration tile and click the **Settings** icon.
3. From the Setting section on the left menu, select **Connections**.
4. Find the NetSuite Connection and select the **Edit pencil** icon.



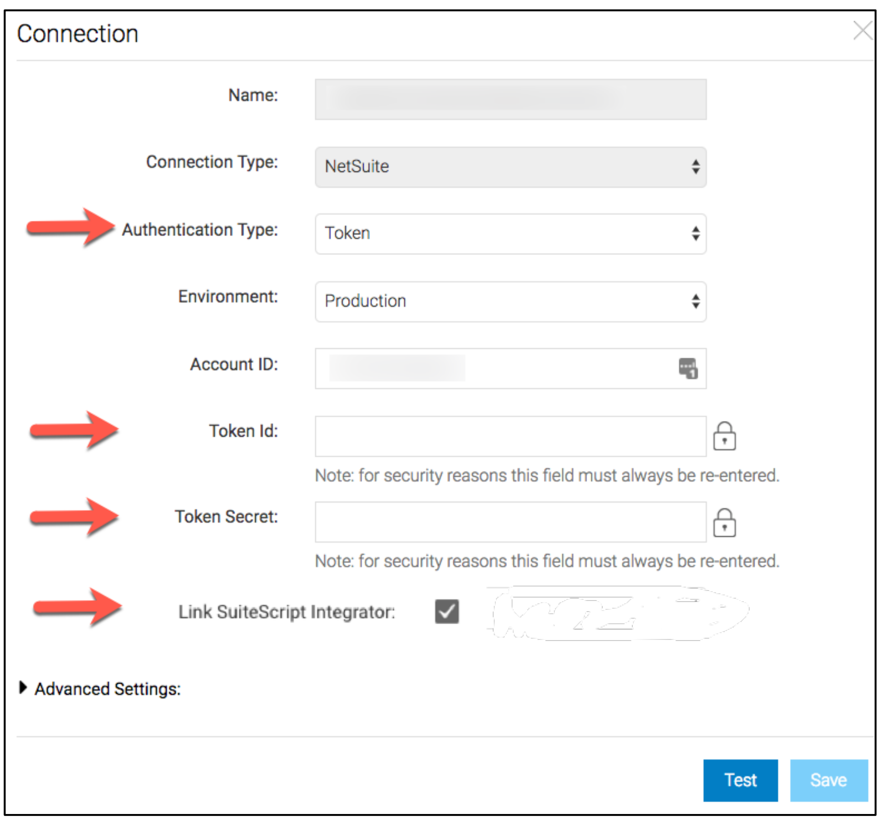
5. Change **Authentication Type** to **Token**.
6. Make sure **Environment** and **Account ID** are correct.
7. Enter **Token ID** and **Token Secret** that were generated in NetSuite.
8. In **iClient** drop-down list, select **SmartConnector (HT) NetSuite iClient**.
9. Click **Test** to verify the connection is work.
10. Click **Save**.

Legacy Version

1. Log into your Celigo integrator.io account as either account Owner or Manager.
2. From the home page of integrator.io, go to the upper right corner and select the waffle icon and click **Connections**.



3. Find the NetSuite Connection and select the **Edit pencil** icon.



4. Change **Authentication Type** to **Token**.
5. Make sure **Environment** and **Account ID** are correct.
6. Enter **Token ID** and **Token Secret** that were generated in NetSuite.
7. Make sure the **Link SuiteScript Integrator** checkbox is checked so that your Legacy eBay integration information remains available on your account dashboard.
8. Click **Test** to verify the connection is work.
9. Click **Save**.

We recommend that you test some integration flows in which data is sent to NetSuite to make sure your NetSuite connection is working properly.