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Click here to send us your comments. If possible, please provide a page number or section title to identify the content you’re describing.

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Electronic Invoicing

**Note:** The Electronic Invoicing SuiteApp provides the ability to generate and send e-documents as well as receive and convert them into transactions records. Inbound and outbound electronic invoicing processes support transaction records including cash sales, cash refunds, credit memos, estimates, invoices, purchase orders, and returns. See Transactions and Processes Supported by the Electronic Invoicing SuiteApp.

To understand how to set up and use the electronic invoicing features, read the following topics:

- Electronic Invoicing Overview
  - Outbound Electronic Invoicing
  - Inbound Electronic Invoicing
  - Transactions and Processes Supported by the Electronic Invoicing SuiteApp
  - Customizations Supported by the Electronic Invoicing SuiteApp
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Electronic Invoicing Errors
- Electronic Invoicing Error Codes
- Electronic Invoicing Common Errors
- Outbound E-Document Generation Errors
- Outbound E-Document Sending Errors
Electronic Invoicing Overview

The Electronic Invoicing SuiteApp enables you to create and use electronic documents (e-documents) in XML, for your business. The use of XML e-documents has become a standard for exchanging business information in many countries. E-documents can help you comply with legal requirements in your country, or to automate your order-to-cash and purchase-to-payment processes. By using e-documents, your company, customers, vendors, tax agencies or government regulatory bodies, can exchange information on business transactions electronically using standard data format.

The Electronic Invoicing SuiteApp supports outbound and inbound processing of e-documents. Outbound e-document processing involves generating XML e-documents from supported NetSuite transactions, and then sending the XML e-documents to your customers, vendors and tax agencies. On the other hand, inbound e-document processing involves receiving XML e-documents from your vendors and then converting the XML e-documents into NetSuite transaction records. Both inbound and outbound e-documents use templates that you can create. Sample templates for inbound and outbound e-documents are included in the SuiteApp.

**Important:** The Electronic Invoicing SuiteApp provides a framework for automating e-documents processing. It does not include native support for any country-specific requirements or e-document standards. But you can create custom country-specific e-document templates and packages using the Electronic Invoicing SuiteApp.

The Electronic Invoicing SuiteApp enables you to track received, converted, generated and sent e-documents through an audit trail on the E-Document subtab of a transaction record.

The SuiteApp is available free of charge when used for a single country. To use e-documents across multiple countries, contact your NetSuite account representative to purchase a license. For more information, see Electronic Invoicing SuiteApp Availability and License Client.

The Electronic Invoicing SuiteApp also supports multiple languages that the NetSuite user interface can be displayed in. For more information, see the help topics Configuring Multiple Languages and Choosing a Language for Your NetSuite User Interface.

Outbound Electronic Invoicing

The Electronic Invoicing SuiteApp enables you to generate outbound XML e-documents from NetSuite estimates, invoices, item fulfillments, purchase orders, credit memo, cash sales, cash refunds, customer payments, and return authorizations. Generated e-documents can then be sent to your customers, vendors or tax agency, individually or in batches. The default sending method of the outbound electronic invoicing is through email. You can also create custom sending methods like SOAP web services or automate the sending of e-documents by deploying scripts. The electronic invoicing outbound process also supports e-document certification, by sending e-documents to a certification authority and then receiving the certified e-documents.

In general, the electronic invoicing outbound process is composed of the following steps:

1. The administrator creates and sets up outbound e-document templates and sending methods:
   a. The outbound e-document template must contain the XML code and specify the supported transactions and the recipient subsidiaries. For more information, see Creating E-Document Templates and Multi-subsidiary Support in the Outbound Process.
   b. The sending method must specify the custom plug-in implementation, the supported transactions, the recipient subsidiaries, and if it will be used for certification. For more
2. The administrator creates an e-document package, which specifies an e-document template and sending method. See Creating E-Document Packages. Users can assign the e-document package to customers or vendors. The transactions of that customer or vendor will apply the e-document template and sending method of the e-document package. For more information, see Assigning E-Document Packages to Customer or Vendor Records.

Or, users can create or edit a transaction record, then select an e-document template and an e-document sending method. For more information, see Transactions and Processes Supported by the Electronic Invoicing SuiteApp and Selecting E-Document Packages, Templates and Sending Methods on Transactions.

3. Users can generate the outbound e-documents of transactions with an associated e-document template and sending method. Outbound e-documents can be generated from NetSuite estimates, invoices, item fulfillments, purchase orders, credit memo, cash sales, cash refunds, customer payments, and return authorizations. See Generating and Regenerating E-Documents.

4. Users can send generated e-documents to your customers, vendors or tax agency. For more information, see Sending and Resending E-Documents.

   a. If you need to certify the generated e-document, specify a certification sending method. Then, send the e-documents to the certification authority or tax agency. See E-Document Certification in the Outbound Process.

The following diagram shows the general process flow of outbound electronic invoicing in NetSuite.
For more information about the process of generating and sending outbound e-documents, read the following topics:

- Overview of Outbound E-Document Process
- Selecting E-Document Packages, Templates and Sending Methods on Transactions
- Generating and Regenerating E-Documents
- Sending and Resending E-Documents

Inbound Electronic Invoicing

You can receive inbound e-documents from your vendors or government regulatory bodies. Inbound e-documents are received in NetSuite through email or SOAP web services, which are the supported inbound channels. You can also receive e-documents from portable file storage media or devices from your vendors. Then, you can manually upload to NetSuite the received XML e-documents, which you will subsequently convert into NetSuite transactions.

An inbound e-document template must be created in order to convert the received e-documents into supported NetSuite transactions. A sample inbound e-document template is included with the SuiteApp.

For example, a vendor whom you initially sent a purchase order may send you an XML e-document invoice, which you receive and then convert into a vendor bill record in NetSuite.

The following diagram shows the general process flow of inbound electronic invoicing in NetSuite.
For more information about the process of receiving and converting inbound e-documents, read the following topics:

- Overview of Inbound E-Document Processing
- Receiving Inbound E-Documents by Email Capture
- Uploading Received XML Files as Inbound E-Documents
- Converting Inbound E-Documents into Transaction Records

Transactions and Processes Supported by the Electronic Invoicing SuiteApp

Inbound and outbound transaction types are better understood in the perspective of the NetSuite user, who can either be the vendor or the customer in the conduct of a transaction.

The following diagram illustrates scenarios where transaction types are transformed into other types in the perspective of the NetSuite user along the outbound and inbound e-document process.

Based on the diagram, the NetSuite user can either be a vendor or a customer, who can generate and send XML outbound e-documents or receive inbound XML e-documents using the Electronic Invoicing SuiteApp.

As the vendor (the party selling items or providing services), the NetSuite user can generate the XML e-document of an invoice, based on an initial purchase order sent by a customer. Likewise, the NetSuite
user can generate the XML e-document of an item fulfillment, credit memo, or return authorization. Generated outbound XML e-documents can then be sent through email or web service to a customer or tax authority.

Outbound e-document generation for vendor bill is a special case, as it supports self-billing. This is useful if you want to charge your company in advance for goods or services acquired from a vendor, and then send the generated e-document of the bill to your vendor along with the payment.

As the customer (the party buying items or acquiring services), the NetSuite user can receive inbound XML e-documents from a vendor or tax authority through email or web service. After the inbound XML e-document is received in NetSuite, it can be converted into its corresponding transaction record. A vendor can send to your company the e-document of an invoice, which you can receive and convert into a vendor bill. Currently, only vendor bill is supported for inbound processing.

The following table lists the transaction types currently supported by outbound and inbound electronic invoicing.

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<thead>
<tr>
<th>Outbound</th>
<th>Inbound</th>
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</thead>
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<td>Invoice</td>
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<tr>
<td>Item fulfillment</td>
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<tr>
<td>Purchase Order</td>
<td></td>
</tr>
<tr>
<td>Credit Memo</td>
<td></td>
</tr>
<tr>
<td>Cash Sale</td>
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</tr>
<tr>
<td>Cash Refund</td>
<td></td>
</tr>
<tr>
<td>Return Authorization</td>
<td></td>
</tr>
<tr>
<td>Estimate</td>
<td></td>
</tr>
<tr>
<td>Customer Payment</td>
<td></td>
</tr>
<tr>
<td>Bill (for self-billing)</td>
<td></td>
</tr>
<tr>
<td>Transfer Order</td>
<td></td>
</tr>
</tbody>
</table>

Electronic Documents Dashboard SuiteApp Portlet

The Electronic Documents Dashboard SuiteApp Portlet displays the number of e-documents that are pending a process. Clicking the number under a process opens a results page with a list of e-documents pending a process, or the page for performing an e-document process.

For outbound e-document processing, the left column displays the number of:

- Outbound E-Documents for Generation
- Outbound E-Documents for Sending, or Outbound E-Documents for Certification

**Note:** If a certification sending method is specified, Outbound E-Documents for Certification is displayed instead of Outbound E-Documents for Sending.

- Certified E-documents for Sending is only displayed if at least one certification sending method is specified.
- Outbound E-Documents with Errors
A Send Failed Outbound E-Documents link is included on the outbound column to allow easy searching and resending of outbound e-documents that failed initial sending. For more information, see Sending and Resending E-Documents.

For inbound e-document processing, the right column displays the number of:

- Inbound E-Documents for Conversion
- Convert Failed Inbound E-Documents
- Incomplete Inbound E-Documents

The inbound column also has a link for manually uploading inbound e-documents. For more information, see Uploading Received XML Files as Inbound E-Documents.

E-document settings for administrator tasks can be accessed from the menu, Setup > E-Documents.

For more information about the e-documents portlet, see Granting Access Permission to the E-Documents Portlet and Displaying the E-Documents Portlet on the Home Page.

Customizations Supported by the Electronic Invoicing SuiteApp

The Electronic Invoicing SuiteApp is designed to support the following customizations:

- Scheduling of outbound e-document generation – See Deploying the Bulk Generation Script for E-Documents.
- Scheduling of outbound e-document sending - See Deploying the Script for Scheduled Sending of E-Documents
- Scheduling of inbound e-document conversion - See Deploying Automatic Bulk Conversion Script for Inbound E-Documents

E-Document Audit Trail and Statuses


To understand e-document processing, including inbound and outbound process flows, see the following topics:

- Overview of Outbound E-Document Process
- Overview of Inbound E-Document Processing

Electronic Invoicing Permissions and Access Levels

The following tables show the permissions and access levels for features provided by the Electronic Invoicing SuiteApp:
# Electronic Invoicing Overview

## Admin and Setup Tasks

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<th>Role and Permission</th>
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</thead>
<tbody>
<tr>
<td>Creating E-Document Packages</td>
<td>By default, only the Administrator can create, edit, or delete e-document packages. All other roles can only view e-document packages.</td>
</tr>
<tr>
<td>Creating E-Document Templates</td>
<td>By default, only the Administrator can create, edit, or delete e-document template records. All other roles can only view e-document template records.</td>
</tr>
<tr>
<td>Creating E-Document Sending Methods</td>
<td>By default, only the Administrator can create, edit, or delete e-document sending methods. All other roles can only view e-document sending methods.</td>
</tr>
<tr>
<td>Creating a Custom Plug-in Implementation for Sending E-Documents</td>
<td>Roles with access to customer and vendor and contact records can assign e-document packages to customer and vendor records.</td>
</tr>
<tr>
<td>Selecting a Designated E-Document Sender</td>
<td>By default, only the Administrator can select a designated e-document sender.</td>
</tr>
<tr>
<td>Assigning E-Document Packages to Customer or Vendor Records</td>
<td>By default, only the Administrator can assign e-document packages to customer and vendor records.</td>
</tr>
<tr>
<td>Creating a Custom Plug-in for Inbound E-Document Validation</td>
<td>By default, only the Administrator can create a custom plug-in for inbound e-document validation.</td>
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## Outbound Processing Permissions and Access Levels

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### Electronic Invoicing Overview

#### Tasks or Functionality

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#### Template and Sending Method Auto-selection

For more information on Template and Sending Method Auto-selection, see Multi-subsidiary Support in the Outbound Process

Roles with **Edit** or **Full** access to customer and vendor records can have access to template and sending method auto-selection feature.

### Inbound Processing Permissions and Access Levels

#### Tasks or Functionality

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</table>
Electronic Invoicing Overview

Tasks or Functionality | Role and Permission
--- | ---
- Accountant
- Bookkeeper
- Buyer
- CFO
- Administrator
- Custom Roles (with permission)

Electronic Invoicing SuiteApp Availability and License Client

The Electronic Invoicing SuiteApp enables you to utilize and manage e-documents for various transaction types. The SuiteApp has two major components, inbound and outbound e-document processing. Outbound e-document processing enables you to generate and send e-documents to other parties such as customers, vendors, or tax agencies. Inbound e-document200x193(162,50),(849,503)

Electronic Invoicing SuiteApp Availability and License Client

Electronic Invoicing Limitations and Best Practices

Read the following topics to know the current limitations of the Electronic Invoicing SuiteApp, and to be guided by best practices for setting up and using electronic invoicing features.

Electronic Invoicing Limitations

General limitations of the Electronic Invoicing SuiteApp:
- Only FreeMarker is supported for outbound e-document templates.
- Only the following transaction types are currently supported:
  - Bill
  - Cash sales
  - Cash refunds
  - Credit memos
  - Estimates
  - Invoices
  - Purchase orders
  - Returns
  - Customer payment
  - Item Fulfillment
  - Transfer Order
- Custom transaction types are not supported.
- Mass download of e-documents is not supported.
- Intercompany transfer order is not supported.
- Creating the following records using the create new icon is not supported.
  - E-Document Template (on all transaction records)
  - E-Document Package (on vendor/customer records and transfer order transaction records)
  - E-Document Sending Method (on all transaction records)
  - E-Document Email Recipient (on transfer order transactions)

**Limitations in outbound e-document processing:**

The system can send an e-document by email to a maximum of 10 recipients for each customer.

**Note:** The system counts each contact added as a recipient. If you add the same contact multiple times, each instance is considered one recipient.

**Limitations in inbound e-document processing:**

- Only one XML file and one PDF file reference can be processed per email received.
- Inbound e-documents can only be uploaded manually, one at a time.
- Currently, only vendor bills can be created or converted from inbound e-documents.

**Electronic Invoicing Best Practices**

Perform the following best practices to prevent errors and performance issues:

- Do not create or add MR script deployments. Maintain the default single script deployments of the Electronic Invoicing SuiteApp, which are: Generate E-Document Content MR, Automatic Send E-Document MR, and Convert Inbound E-Document MR.
- When assigning an e-document package to a customer or vendor, make sure that the customer or vendor has contact records if the e-document package uses an email sending method. To prevent validation errors caused by missing e-document email recipients, it is recommended that you create the contact records first before assigning the e-document package to the customer or vendor.
When using CSV import to assign e-document packages to customers or vendors, be sure to include email recipients for e-document packages that use an email sending method. The system will encounter an error when sending an e-document that has no email recipient.

When sending e-documents in bulk, NetSuite recommends that you first make sure that custom roles have the required permissions and access to use the bulk sending feature. See Setting Up Custom Roles to Send E-Documents.

When sending e-documents in bulk, NetSuite recommends that you use the filters to limit the number of e-documents to process at a time.

When setting up sending method custom plug-ins:
- There is no need to include loading of customer and invoice records as well as vendor and purchase order records to retrieve data within your custom plug-in. This information is already provided by the Electronic Invoicing SuiteApp.
- There is no need to load recipients within your custom plug-in. This information is already provided by the Electronic Invoicing SuiteApp.
- Avoid loading e-document recipients within your custom plug-in for sending email. When an e-document package with an email sending channel is assigned to a customer or vendor, the Electronic Invoicing SuiteApp automatically performs a validation check to make sure customer or vendor records have recipients with valid email addresses. If your custom plug-in loads e-document recipients, those recipients will not be included in the validation.
- Be aware of SuiteScript 2.0 governance and time limits. Suitelet limits apply to individual sending. Map function limits (Map/Reduce script type) apply to bulk sending. See the following topics:
  - SuiteScript 2.0 Suitelet Script Type
  - SuiteScript 2.0 Map/Reduce Governance
- Test your e-document sending plug-ins thoroughly before using them on live data.
- Avoid data leaks when sending e-documents by email or sending to third party SOAP web services. Data leaks can be avoided by making sure codes are properly reviewed. Also make sure you are not sending more information than what is required.
- Use appropriate and specific error messages in your scripts. Error messages should inform users when a problem occurs, help users understand why the problem occurred, and recommend an action that can fix the problem.

Electronic Invoicing Administrator Guide

Only the Administrator role can install the Electronic Invoicing SuiteApp and set up the custom records and templates required for generating and sending e-documents. The administrator must also deploy the script for generating e-documents in bulk.

The following topics are intended for administrators:

**General Setup Tasks**
- Installing the Electronic Invoicing SuiteApp
- Prerequisites for Using Electronic Invoicing
- Considerations When Setting Up Electronic Invoicing
- Electronic Invoicing Setup Tasks
- Defining the E-Document Country for Free Use
- Granting Access Permission to the E-Documents Portlet
■ Understanding E-Documents and E-Document Packages
■ Creating E-Document Packages
■ Multi-subsidiary Support in the Outbound Process
■ Creating E-Document Templates
■ Editing E-Document Templates

Outbound E-Document Processing Setup Tasks
■ E-Document Certification in the Outbound Process
■ Creating E-Document Sending Methods
■ Setting Up an Email Sending Method for E-Documents
■ Creating Custom Methods for Sending E-Documents
■ Selecting a Designated E-Document Sender
■ Setting Up Custom Roles to Send E-Documents
■ Customizing Roles to Restrict E-Document Generation or Sending
■ Deploying the Bulk Generation Script for E-Documents
■ Deploying the Script for Scheduled Sending of E-Documents
■ Updating E-Document Certification Statuses

Inbound E-Document Processing Setup Tasks
■ Electronic Invoicing Inbound Email Capture
■ Using SOAP Web Services for Inbound Processing
■ Setting Up Custom Roles that can Convert Inbound E-Documents
■ Inbound Validation Plug-ins
■ Deploying Automatic Bulk Conversion Script for Inbound E-Documents

See also the following topics:
■ Electronic Invoicing Overview
  □ Understanding E-Documents and E-Document Packages
  □ Electronic Invoicing Permissions and Access Levels
  □ Electronic Invoicing Limitations and Best Practices
■ Electronic Invoicing Errors
  □ Electronic Invoicing Error Codes
  □ Outbound E-Document Generation Errors
  □ Outbound E-Document Sending Errors

Installing and Setting Up Electronic Invoicing

Read the following topics to understand how to install and set up Electronic Invoicing:
■ Prerequisites for Using Electronic Invoicing
■ Installing the Electronic Invoicing SuiteApp
Prerequisites for Using Electronic Invoicing

Before installing the Electronic Invoicing SuiteApp, you must complete the following steps:

1. Install the NetSuite SuiteApps License Client (Bundle ID: 116144). For more information, see the help topic NetSuite SuiteApps License Client.
   The NetSuite SuiteApps License Client (Bundle ID: 116144) must be installed before you install the Electronic Invoicing SuiteApp (Bundle ID: 116076). To install, see the help topic Installing a Bundle.
   The NetSuite SuiteApps License Client controls an account's access to the Electronic Invoicing features. Upon installation, the NetSuite SuiteApps License Client communicates with the NetSuite SuiteApps License Server to obtain active license information.
   If the account has an active license, you can use Electronic Invoicing features for multiple countries. If the account does not have an active license, you can still use the Electronic Invoicing SuiteApp for free, but your account can generate and send e-documents to only one country, and convert into vendor bills received e-documents from the same country. See Defining the E-Document Country for Free Use to set up your account for free use of the Electronic Invoicing SuiteApp.
   If the NetSuite SuiteApps License Client is not installed, your account can neither generate and send e-documents nor convert received e-documents into vendor bills.

2. Make sure the following features are enabled in your account:
   - Custom Records
   - Advanced PDF/HTML Templates
   - Client SuiteScript
   - Server SuiteScript
   - Web Services
   To enable features, see the help topic Enabling Features.

3. Make sure the Company Information page has a return email address.
   
   ! **Important:** If the Return Email Address field is blank, the system will encounter script errors when accessing Electronic Invoicing features.

   a. Go to Setup > Company > Company Information.
   b. In the Return Email Address field, enter a valid email address for the company.
   c. Click Save.

   ! **Note:** If you have a OneWorld account, you must set up the Return Email per subsidiary that uses the Electronic Invoicing SuiteApp.

   a. Go to Setup > Company > Setup Tasks > Company Information.
   b. In the Recipient of E-Document Notifications field, enter the email of the user whom you want to receive notifications about e-document processing.
   c. Click Save.
If no notification recipient is defined, the system will send notifications about e-document processes to all active administrators.

Installing the Electronic Invoicing SuiteApp

1. Make sure all prerequisites are met. See Prerequisites for Using Electronic Invoicing.
2. Go to Customization > SuiteBundler > Search & Install Bundles.
3. In the Keywords box, enter the bundle ID or name:
   - Bundle ID: 116076
   - Bundle Name: Electronic Invoicing
4. Click Search.
5. Click the link for the Electronic Invoicing SuiteApp.
6. On the Bundle Details page, click Install.

The Electronic Invoicing SuiteApp is a managed SuiteApp. When improvements or new features are added to the SuiteApp, your account is automatically updated.

But in sandbox, the update is not automatic. Your administrator must manually update the SuiteApp to get the latest version.

For information on purchasing a license for the Electronic Invoicing SuiteApp, contact your NetSuite account representative.

Considerations When Setting Up Electronic Invoicing

Before you set up an account to use the Electronic Invoicing SuiteApp, it is recommended that you consider the following questions to help you decide on the settings to apply:

**For outbound e-document processing:**
- To whom should I send my e-documents?
- What e-document templates do I need to use?
- How do I want to send my e-documents to stakeholders?
- Do I want to generate outbound e-documents one by one or in bulk?

**For inbound e-document processing:**
- From whom should I receive e-documents?
- How do I want to receive the inbound e-documents from vendors or other parties?
- Do I want to convert inbound e-documents into vendor bills, one by one or in bulk?

Be sure to also read Electronic Invoicing Limitations and Best Practices.

Electronic Invoicing Setup Tasks

After installing the Electronic Invoicing SuiteApp, an administrator must accomplish some common setup tasks. As the Electronic Invoicing SuiteApp is composed of two major components, the administrator
must also complete specific setup tasks for outbound e-document processing and inbound e-document processing. Some inbound and outbound settings have a common record.

**Common Setup Tasks for Outbound and Inbound E-Document Processing:**

1. Install the Electronic Invoicing SuiteApp.
2. Define the country for free use (required only if you choose not to purchase a license). See [Defining the E-Document Country for Free Use](#).

**Setup Tasks for Outbound Processing:**

1. Create e-document sending methods. See [Creating E-Document Sending Methods](#).
2. (Optional) Select a designated e-document sender. See [Selecting a Designated E-Document Sender](#).

**Setup Tasks for Inbound Processing:**

1. (Optional) Create an inbound e-document validation plug-in. See [Inbound Validation Plug-ins](#).
2. (Optional) Create an XSD file for automatic template selection. See [Understanding XSD in Inbound E-Document Templates](#).
3. Enable the Email Capture Plug-in. See [Electronic Invoicing Inbound Email Capture](#).
4. (Optional) Use SOAP web services to receive inbound e-documents. See [Using SOAP Web Services for Inbound Processing](#).
5. Update item records.
6. Update vendor records.
7. Define the schedule for automatic bulk conversion. See [Deploying Automatic Bulk Conversion Script for Inbound E-Documents](#).

### Defining the E-Document Country for Free Use

The Electronic Invoicing SuiteApp can be used for free if you intend to send e-documents to only one country.

To set up your account for free use of the Electronic Invoicing SuiteApp, you must go to the Company Information page and define the country to which you will be sending e-documents.

This is the first step in setting up your account so that you can generate e-documents and send them to customers or vendors. You can send e-documents only to those customers whose country billing addresses match the e-document country for free use.

**To define the e-document country for free use:**

1. Go to Setup > Company > Company Information.
2. In the [E-Document Country for Free Use](#) field, select the country to which you want to send e-documents. This setting applies to all subsidiaries of the parent company. If you have a license for multi-country use of the Electronic Invoicing SuiteApp, this field is disabled.
3. Click **Save**.

After defining the e-document country for free use, you can create e-document packages. See **Creating E-Document Packages**.

---

**Granting Access Permission to the E-Documents Portlet**

Roles that have default permissions to access and perform e-document processes, will be able to add and display the e-documents portlet on the Home page. These roles include:

- AR Clerk
- AP Clerk
- Accountant
- Administrator
- Bookkeeper
- CFO
- Custom Role for Accounting Center.

**To grant roles the access permission to the e-documents portlet:**

1. Go to Customizations > Scripting > Script Deployments.
2. On the Script Deployments page, click the Filters plus sign (+) to display the filters. In the **Type** filter, select **Portlet** from the dropdown list.
3. Click the Edit link of the E-Document Dashboard PT script.
4. On the script deployment page of the portlet, go to the **Audience** subtab. In the **Roles** dropdown list, select the roles that you want to grant permission to access the e-documents portlet.
5. Click **Save**.

---

**Understanding E-Documents and E-Document Packages**

The following topics describe e-documents and e-document packages according to how they are used by NetSuite and the Electronic Invoicing SuiteApp.

**E-Document**

An e-document is a NetSuite transaction represented as an XML document generated according to a specified standard.

E-documents are transmitted to interested external parties, such as customers, vendors, or tax agencies. E-documents can be downloaded or shared through email, or transmitted through a web service or other custom method.

Some countries legally recognize these XML files as official documents, whereas other countries recognize the printed transactions as the officially accepted documents.

For information about currently supported transactions, see **Electronic Invoicing Limitations and Best Practices**.
E-Document Package

An e-document package defines a set of formats used for various transactions to ensure clear communication between all stakeholders of a specific business process, such as vendors communicating with customers, and vendors communicating with tax authorities.

For example, the PEPPOL e-document package defines all possible transactions between vendors and government agencies (sales orders, invoices, credit memos, return authorizations, and others).

An e-document package specifies the following:

- the file format and template
- the communication medium for transmitting the e-documents
- the process necessary for ensuring authenticity and privacy of the information

An e-document package is usually defined by a tax authority or an industry governing body. Some e-document packages are defined by independent entities such as PEPPOL and ISO.

Creating E-Document Packages

An administrator must first create e-document packages so that users can assign them to customer and vendor records.

An e-document package defines the e-document templates and sending methods to be used for the customer's or vendor's transactions.

The Electronic Invoicing SuiteApp includes a default e-document package record to which you can associate e-document templates and sending methods. The default e-document package cannot be edited or deleted.

To create an e-document package:

2. In the Name field, enter a name for the e-document package.
3. In the Inbound Validation Plugin field, select a validation plug-in.
   For more information on the validation plug-in, see Inbound Validation Plug-ins.
4. (Optional) In the Description field, enter text that describes this e-document package.
5. Click Save.

You can now assign e-document templates and sending methods to the e-document package. For more information, see Creating E-Document Templates and Creating E-Document Sending Methods.

Multi-subsidiary Support in the Outbound Process

If you are using OneWorld accounts and have multi-subsidiary customer enabled, outbound e-documents templates and sending methods can be associated with subsidiaries as preferred or necessary. To do this, the administrator must specify subsidiaries in the Subsidiary field on an outbound e-document template or sending method record. The transactions of the selected subsidiaries will use the outbound template and sending method. For more information, see Creating E-Document Templates and Creating an E-Document Sending Method Record.
If only one outbound template or one sending method is associated with a customer or vendor, you can set automatic selection of that template and sending method for the transactions of the customer or vendor. To do this, edit a customer or vendor record and go to the E-Document subtab, then check the **Template and Sending Method Auto-selection** box and save the record. The template and sending method will be automatically selected as the default value of the E-Document Template or E-Document Sending Method field on the transaction records of the customer or vendor.

**Creating E-Document Templates**

In outbound processing, the e-document template maps what data in a NetSuite transaction record will populate which elements in the XML file that will be generated and sent to customers or vendors.

In inbound processing, the opposite is implemented. The e-document template maps what elements in the received XML file will populate which data fields in the NetSuite transaction record that will be created from the XML file.

Both outbound and inbound e-document templates can be created on the E-Document Templates record. In this record, you can define the name of the e-document template, the e-document package that the template will be applied to, the applicable transaction types for the template, and the template content.

The template content is different for an outbound and inbound transaction. An outbound e-document template should have content in XML, whereas an inbound e-document template will have content as JSON objects for the field mapping.

An e-document template can be used for both outbound and inbound e-documents, given that the right transaction types are selected and the template content for both outbound and inbound are defined. You can create or customize e-document templates for each country you do business in or for certain industries, according to specified standards.

Use FreeMarker to create the template content for both outbound and inbound e-documents. For more information about scriptable templates and FreeMarker, see the following topics:

- **Scriptable Templates**
- **FreeMarker Data Model**
- **FreeMarker Syntax**

Or, you can customize the sample outbound and inbound e-document templates included with the Electronic Invoicing SuiteApp.

The sample outbound template is based on the Brazil NF-e standard. It can be downloaded from the File Cabinet in the Sample Templates folder of the SuiteApp in Documents > File Cabinet > SuiteBundles > Bundle 116076. The following table lists the sample e-document templates and details.

<table>
<thead>
<tr>
<th>Filename</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>customer_payment_sample.xml</td>
<td>sample outbound e-document template with tags for customer payment</td>
</tr>
<tr>
<td>inbound_template_expenses_items_sample.txt</td>
<td>sample inbound e-document template with tags for items and expenses</td>
</tr>
<tr>
<td>inbound_template_sample.txt</td>
<td>sample inbound e-document template with tags for items only</td>
</tr>
<tr>
<td>NFe_sample.xml</td>
<td>sample outbound e-document template for Brazil</td>
</tr>
<tr>
<td>itemfulfillment_sample.xml</td>
<td>sample outbound e-document template with tags for customer and company information, includes PO number and items</td>
</tr>
<tr>
<td>Filename</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>vendorbill_sample.xml</td>
<td>sample outbound e-document template with tags for vendor and company information, includes items and expenses</td>
</tr>
</tbody>
</table>

To create an e-document template:

2. In the **Name** field, enter a name for the template.
3. (Optional) In the **Description** field, enter text that describes this template.
4. In the **E-Document Package** field, select the e-document package that this template will be associated with.

For more information, see **Creating E-Document Packages**.

**Note:** If the template is for outbound, the e-document package that this template will be included in, must be assigned to corresponding customers or vendors.

5. (Optional) Select a plug-in implementation in the **Digital Signature Plugin Implementation** field. The selected plug-in enables you to include a Digital Signature to the e-documents that will be generated using the template. For more information, see **Creating a Digital Signature Plug-in Implementation for E-Documents**.

6. (Optional) Select a plug-in implementation in the **Custom Data Source Plugin Implementation** field. The selected plug-in enables you to include a custom data source in the template for adding more field values to e-documents that will be generated using the template. For more information, see **Creating a Custom Plug-in Implementation for E-Document Custom Data Source**.

7. In the **Transaction Type** field, select one or more transaction types for which this template will be used. To select multiple transaction types, press and hold the **Ctrl** key while selecting the transaction types.

**Note:** Make sure that you select the right transaction type that match the template you are creating. If you are creating an outbound template, you must select transaction types that are applicable to outbound processing. See **Transactions and Processes Supported by the Electronic Invoicing SuiteApp** to know which transaction types you can select.

Selecting a transaction type for either outbound or inbound will make its corresponding Template Content field required. For example, if you select the outbound transaction type Invoice, the XML Template for Outbound E-Documents field will be required. On the other hand, if you select Bill, which is an inbound transaction type, the JSON Field Mapping for Inbound E-Documents will be required.

The selected transaction types cannot be modified after the template has been used in a transaction. You must remove the e-document template from the transaction before you can modify this field.

8. (For an outbound template) In the **Subsidiary** field, select the subsidiaries that you want to associate with this template. To select multiple subsidiaries, press and hold the **Ctrl** key while selecting the subsidiaries.

If only this template is associated with a subsidiary, the supported transactions of that subsidiary will display this template on the E-Document Template field on the E-Document subtab. For more information, see **Multi-subsidiary Support in the Outbound Process**.

9. In the **Restrict Editing of Transactions with E-document Status** field, select any of the following e-document statuses:
   - Sent
Sending
Ready for Sending
Certification in Progress

To select multiple e-document statuses, press and hold the Ctrl key while selecting the statuses. Transactions with the selected e-document status will be locked for editing if this template is associated with them. Those transactions will display a banner message indicating that the transaction cannot be edited. Editing is only locked on the user interface, transactions can still be edited through script.

10. Under the Template Content section, do the following:

- If you selected transaction types for outbound processing, enter the XML content of the outbound e-document template in the Template for Outbound E-Documents field.
- If you selected transaction types for inbound processing, enter JSON content in the Field Mapping for Inbound E-Documents field. For more information about the inbound e-document template in JSON format, see Understanding Inbound E-Document Templates in JSON Format.

If the template record you are creating is for both outbound and inbound transaction types, make sure that you enter content in both Template for Outbound E-Documents, and Field Mapping for Inbound E-Documents fields. Otherwise, error messages will be displayed when you save the template record.

11. Create an XSD file to enable the system to automatically assign the right template to a received XML file after validating mandatory tags and attributes in the XML document. Then, upload the XSD file you created to the File Cabinet. For more information and a sample of the XSD file, refer to Understanding XSD in Inbound E-Document Templates.

12. Return to the E-Documents Templates page, and under Template Content, select the XSD file you created from the Inbound XSD File dropdown field.

13. Create an XSD file to enable the system to validate mandatory tags and attributes in the generated XML e-document. Then, upload the XSD file you created to the File Cabinet. For more information and a sample of the XSD file, refer to Understanding XSD in Outbound E-Document Templates.

14. Return to the E-Documents Templates page, and under Template Content, select the XSD file you created from the Outbound XSD File dropdown field.

15. Enter the folder ID or folder path of a File Cabinet in the XSD Folder field. The folder contains the XSD files imported by the outbound XSD file.

16. (Optional) Add path and regex validation expressions to use for validating the template.

There is no need to add node() at the end to get the value.
See XPath and Regex Examples for E-Document Templates.

17. Click Save.

After creating the e-document template, you can include it in an e-document package, which is then assigned to a customer or vendor. See Creating E-Document Packages

**XPath and Regex Examples for E-Document Templates**

The examples provided in the table can be used to validate the following sample template:

```xml
<document>
  <buyer>Abuyer</buyer>
  <amount>100</amount>
  <items>
    ...
  </items>
</document>
```
The following table contains sample xpath and regex validation expressions:

<table>
<thead>
<tr>
<th>Xpath</th>
<th>Regex validation expression</th>
<th>Description</th>
<th>Values for validation</th>
<th>Validation result</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;document/buyer&quot;</td>
<td>/^.+$/</td>
<td>The value cannot be blank</td>
<td>Abuyer</td>
<td>Pass</td>
</tr>
<tr>
<td>&quot;document/amount&quot;</td>
<td>^\d+.(\d{0,4})$/</td>
<td>The value is a decimal with up to 4 decimal places</td>
<td>100</td>
<td>Fail</td>
</tr>
<tr>
<td>&quot;document/items/item/id&quot;</td>
<td>^\d+$/</td>
<td>The value is a whole number</td>
<td>Each value will be validated</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>Pass</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>Pass</td>
</tr>
<tr>
<td>&quot;document/items/count&quot;</td>
<td>^\d+(.*\d{0,2}){1}$/</td>
<td>The value is a whole number or a decimal number with up to 2 decimal places</td>
<td>3.0</td>
<td>Fail</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3.0</td>
<td>Pass</td>
</tr>
</tbody>
</table>

For more information about xpath and regex validations, go to the w3schools website:
- w3schools xpath tutorial
- w3schools regex tutorial

**Understanding Inbound E-Document Templates in JSON Format**

Implementing an inbound e-document template enables the system to map which elements in the received XML file will provide data to which fields in the vendor bill record to be created from the XML file.

An inbound e-document template is in JSON format. For more information on JSON objects, go to the w3schools website JSON Introduction.

The bundle also includes a sample JSON template that can be used for parsing XML inbound e-documents for conversion into vendor bills. You can download the sample JSON template from the File Cabinet. The JSON inbound template contains the mapping to basic bill information:

- tranid
- trandate
- currency
- memo
- item:
  - vendorname/vendorcode
  - amount
You can use or customize the sample JSON template that contains the mapping to basic vendor bill information:

```json
{
    "tranid": "${XML.Invoice.InvoiceHeader.InvoiceNumber}",
    "trandate": "${XML.Invoice.InvoiceHeader.InvoiceDate}",
    "currency": "${XML.Invoice.InvoiceHeader.Currency}",
    "memo": "${XML.Invoice.InvoiceHeader.Memo}",
    "createdfrom": "${XML.Invoice.InvoiceHeader.PONumber}",
    "item": [
        <#list XML.Invoice.InvoiceDetails.InvoiceItem as item>
            "vendorcode": "${item.ItemName}",
            "quantity": "${item.Quantity}",
            "rate": "${item.UnitPrice?replace($", "\")}",
            "amount": "${item.LineItemSubtotal?replace($", "\")}",
            "description": "${item.Description}",
            "tax1amt": "${item.TaxAmount?replace($", "\")}"
        </#list>  
    ],
    "expense": [
        <#list XML.Invoice.InvoiceDetails.InvoiceExpense as expense>
            "amount": "${expense.Amount?replace($", "\")}",
            "memo": "${expense.Description}"
        </#list>  
    ]
}
```

**Note:** The alias for the inbound XML e-document object is ‘XML’. Use this when mapping the XML elements to keys. For example, `${XML.ParentElement.ChildElement}`.

** tranid, trandate, currency, memo, item, expense and createdfrom ** are called key names. Every key name must correspond to a field ID in the vendor bill record to be created from the received XML file. The key name is the reference that points to a field in the vendor bill record. Each key name must extract a value from the received XML file. The value of the key name will be the data that will be entered in the corresponding field of the vendor bill record.

** tranid ** is a required key, used as reference number of the vendor bill. ** item ** is another required key name that is an array of JSON objects with details of each item in the vendor bill.

** createdfrom ** is a key name used if the vendor bill record to be created is from a Purchase Order. ** createdfrom ** will take up the value of the PO# of the source purchase order.

** item ** is another required key name that is an array of JSON objects with details of each item in the vendor bill. Under ** item ** is ** vendorcode **, which is a required key name if the Multiple Vendor feature is enabled.
**vendorcode** maps to the code assigned to a specific vendor of an item. If the Multiple Vendor feature is not enabled, the **vendorname** key name must be used. **vendorname** maps to the vendor name/code field of an item.

**expense** is also an array of JSON objects that takes each expense in the vendor bill. Under **expense** are the **amount** and **memo** key names.

**Note:** Ensure that your item records are updated and must have unique **vendorname** or **vendorcode**. Also, you must specify the Default Expense Account in the vendor record if you expect to receive bills for expense lines.

At least the required key names must be present in an inbound e-document template. You must not change or edit required key names.

If you have custom records or fields, you can create your own key names that correspond to the field IDs of those custom fields. But make sure that your custom key names have data to extract from the XML files that you will receive from your vendors or other parties.

After setting up the key names and values of your JSON template, you can now implement it as an inbound e-document template. For more information, refer to step 6 of Creating E-Document Templates.

### Understanding XSD in Inbound E-Document Templates

The XSD file or XML Schema is a text file that defines and validates what XML elements and attributes must be present in the received XML, before it is uploaded as an inbound e-document record. After the received XML file is validated, the system assigns an e-document template to it. The first matched e-document template will be assigned to the newly created inbound e-document.

The following is a sample XSD that you can use as a reference in creating your own XSD file:

```xml
<xs:schema>
  <xs:element name="edoc" type="edocType"/>
  
  <xs:complexType name="edocType">
    <xs:sequence>
      <xs:element name="tranid" type="xs:string"/>
      <xs:element name="po" type="xs:integer"/>
      <xs:element name="memo" type="xs:string"/>
      <xs:any processContents="skip" minOccurs="0"/>
    </xs:sequence>
    <xs:attribute name="version" type="xs:string" use="required" fixed="1.1"/>
  </xs:complexType>
  
</xs:schema>
```

This sample XSD validates an XML document for the following:

- The root element is **edoc** is present, which must have an attribute **version**, with a value of **1.1**.
- The **edoc** element must have **tranid**, **po**, and **memo** elements in the correct order, where:
  - **tranid** is a string
  - **po** is an integer
  - **memo** is a string

If this sample XSD is used, a received XML file must contain all the elements and attributes defined in the XSD. If it does, the E-Document Template record that the XSD is a part of, will be applied to the received
XML file, which is then uploaded as an inbound e-document record. Other elements and attributes can be present in the received XML file in addition to the required ones defined in the XSD. You can define your own mandatory elements and attributes in the XSD file you will create.

Understanding XSD in Outbound E-Document Templates

The XSD file or XML Schema is a text file. It defines and validates what XML elements and attributes must be present in the generated XML, before it is saved as a generated e-document. A detailed audit trail message is logged if the validation fails.

The following is a sample XSD that you can use as a reference in creating your own XSD file:

```xml
<xs:element name="edoc" type="edocType"/>
<xs:complexType name="edocType">
  <xs:sequence>
    <xs:element name="tranid" type="xs:string"/>
    <xs:element name="po" type="xs:integer"/>
    <xs:element name="memo" type="xs:string"/>
    <xs:any processContents="skip" minOccurs="0"/>
  </xs:sequence>
  <xs:attribute name="version" type="xs:string" use="required" fixed="1.1"/>
</xs:complexType>
</xs:schema>
```

This sample XSD validates an XML document for the following:

- The root element `edoc` is present, which must have an attribute `version`, with a value of `1.1`.
- The `edoc` element must have `tranid`, `po`, and `memo` elements in the correct order, where:
  - `tranid` is a string
  - `po` is an integer
  - `memo` is a string

If this sample XSD is used, the generated XML file must contain all the elements and attributes defined in the XSD. If it does, the e-document is successfully generated. Other elements and attributes can be present in the generated XML file in addition to the required ones defined in the XSD. You can define your own mandatory elements and attributes in the XSD file you will create.

Creating a Digital Signature Plug-in Implementation for E-Documents

A Digital Signature plug-in implementation for e-documents will enable you to generate digitally signed e-documents. You can select a digital signature plug-in from the Digital signature Plug-in Implementation field in an e-document template record to digitally sign e-documents. Only the XML files are generated with a digital signature. The generated PDF files are not digitally signed.

You must first create a custom plug-in implementation for digital signature and then implement it in NetSuite. After this, the plug-in will be available for you to select from the Digital Signature Plug-in Implementation field on the e-document template record. In order to create this plugin implementation, you must first create a JavaScript file for the digital signature plug-in implementation. The JavaScript file
must be compatible with SuiteScript 2.0. For more information on creating a Javascript file, refer to the help topic **SuiteScript 2.0 Script Creation Process**.

The plug-in script must return an object with the following function:

```javascript
/**
 * Copyright (c) 2019, Oracle NetSuite and/or its affiliates. All rights reserved.
 * @NApiVersion 2.x
 * @NModuleScope Public
 * @NScriptType plugintypeimpl
 */
define(['N/crypto/certificate','N/file'],

  function(certificate, file){

    /**
     * @param pluginContext
     * @param {String} pluginContext.unsignedString
     * @param {String} plugincontext.subsidiaryId
     *
     * @returns {Object} result
     * @returns {string} result.success
     * @returns {String} result.signedString
     * @returns {String} result.message
     */
    function signDocument(pluginContext){

      /**
       * Extract the values from pluginContext
       */
      var unsignedString = pluginContext.unsignedString;
      var subsidiaryId = pluginContext.subsidiaryId;

      var rootTag = "RootTag";
      var certificateId = "custcertificatesfd";
      var algorithm = "SHA1";

      var result = { success : true, signedString : unsignedString, message : "This is default implementation of Digital Signature."};

      /**
       * Call services to sign the string
       */
      try {
        var random = 0;
        /*var signedXML = certificate.signXml(
          algorithm : algorithm,
          certId: certificateId,
          rootTag : rootTag,
          xmlString : unsignedString
        );
        result.success  = true;
        */
```
This script takes the input `pluginContext` which is a JSON object. The parameters of this object are listed in the following table.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Description</th>
<th>Required/Optional</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>unSignedString</td>
<td>String</td>
<td>This field holds the generated e-document of a transaction in XML format. It is not digitally signed.</td>
<td>Required</td>
<td></td>
</tr>
<tr>
<td>subsidiaryId</td>
<td>String</td>
<td>This field holds the Subsidiary ID of a transaction.</td>
<td>Required</td>
<td>This parameter can be blank if the subsidiary information is unavailable in the transaction.</td>
</tr>
</tbody>
</table>

This script must implement digital signature process on an unsigned XML string using any suitable digital signature API. For example, Suitescript 2.0 module `N/crypto/certificate`. This results in a signed XML string which must be returned in a JSON object with parameters listed in the following table.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Description</th>
<th>Required/Optional</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>success</td>
<td>Boolean</td>
<td>Valid Values are either true or false. Set the value to true, if the digital signature plug-in implementation is successful and e-document is digitally signed. A string will be generated. Otherwise, set it to false.</td>
<td>Required</td>
<td></td>
</tr>
<tr>
<td>signedString</td>
<td>String</td>
<td>This parameter holds the signed string when the digital signature plug-in implementation is successfully completed.</td>
<td>Required</td>
<td></td>
</tr>
<tr>
<td>message</td>
<td>String</td>
<td>Message to be passed to Electronic Invoicing (Not in active use currently).</td>
<td>Optional</td>
<td></td>
</tr>
</tbody>
</table>

⚠️ **Important:** The digital signature plug-in implementation script must have the `@NSScriptType plugintypeimpl` tag.

**To create a plug-in implementation record:**

2. Create a JavaScript file following the sample script.
3. Select the JavaScript file you created, from the Script File field and click Create Plug-in Implementation button.

4. Select the Digital Signature for E-Document plug-in type from the Select Plug-in Type record.

5. Type the information in the required fields on the Plug-in Implementation record.

6. Click Save.

Once a digital signature plug-in implementation record is created, you can select it from the E-Document Template record. For more information, see the help topics Custom Plug-in Creation and Digital Signing.

Creating a Custom Plug-in Implementation for E-Document Custom Data Source

A custom plug-in implementation for custom data source will enable you to add custom data sources to an e-document template. With a custom data source plug-in specified in an e-document template, you can add to e-documents more field values from the transactions that the e-documents will be generated from.

You must create a custom plug-in implementation for custom data source first and then implement it in NetSuite so that it will be available for selection on the e-document template record. Create a JavaScript file for the custom data source plug-in implementation. The JavaScript file must be compatible with SuiteScript 2.0.

The plug-in script must return an object with the following function:

```javascript
/* @NApiVersion 2.x */
/* @NScriptType plugintypeimpl */
/* @NModuleScope Public */

define(["N/render"], function(nsrender) {
    /**
     * inject - This function will provide the custom data source during the generation process
     * @param {Object} params
     * @param {String} params.transactionId
     * @param {Object} params.transactionRecord
     *
     * @returns {Object} result
     * @returns {render.DataSource} result.alias
     * @returns {string} result.format
     * @returns {Object | Document | string} result.data
     */

    function inject(params) {
        var txnRecord = params.transactionRecord;
        var txnId = params.transactionId;

        var customObj = {};
        log.debug("Custom Object", customObj);
        return {
            customDataSources: [
                {
                    format: nsrender.DataSource.OBJECT,
                    alias: "custom",
                    data: customObj
                }
            ]
        }
    }
})
```
Important: The custom data source plug-in implementation script must have the `@NSScriptType plugintypeimpl` tag.

After creating the script for plug-in implementation, upload it to Customization > Plug-ins > Plug-in Implementations > New. The type of the custom plug-in implementation must “Custom Data Source for E-Document”. For more information, see the help topics Custom Plug-in Creation, TemplateRenderer.addCustomDataSource(options) and Using Custom Data Sources for Advanced Printing.

The following are guidelines for custom data sources:

- Naming convention - Element names must not begin with digits
- Do not add a large amount of data to the data object in customDataSource. This may result in an Out of Memory error.

If the datasource provided by your implementation is in the following format:

```javascript
return {
  customDataSources: [
    {
      format: nsrender.DataSource.OBJECT,
      alias: "custom",
      data: {isOneWorldEnabled: true}
    }
  ],
};
```

Then, include in the e-document template the following line:

```xml
${custom.isOneWorldEnabled} <xml> </xml>
```

Editing E-Document Templates

To edit e-document templates, go to Setup > E-Documents > E-Document Templates. Open the e-document template in edit mode and modify information as needed, then click **Save**.

Note: The **Transaction Type** field in the e-document template becomes unavailable if the e-document template has already been assigned to one or more transaction records. This field remains unavailable unless you remove the e-document template from all transactions.

E-Document Certification in the Outbound Process

Most countries that implement electronic invoicing in e-commerce require that businesses or companies submit their e-documents to a certification authority or tax agency. Certification authorities check
the validity of e-documents and their compliance to any prescribed format and content. Certified e-documents are returned to the sending company for use in any other business requirements.

The outbound component of the Electronic Invoicing SuiteApp supports the sending of e-documents to authorities, organizations, or a tax agency that provide certification services.

Before e-documents can be sent for certification, the administrator must first assign a certification sending method by checking the **Sending Method for Certification** box on a sending method record. The certification sending method is a different sending method from the sending method applied at the transaction level. The certification sending method is applied to the transaction types and subsidiaries selected on the sending method record. Whether the certification sending method will use email or web service channel, the administrator must specify the certification services provider or authority as the recipient. For more information, see **Creating an E-Document Sending Method Record**.

**Note:** Only one certification sending method must be associated with a combination of subsidiaries and transactions you select.

E-documents generated from transaction types and subsidiaries with an assigned certification sending method will display the **Certify E-Document** button on the record. Clicking the **Certify E-Document** button sends the e-document to the certification authority.

On the other hand, e-documents generated from transaction types and subsidiaries without an associated certification sending method will display the **Send E-Document** button.

NetSuite receives successfully certified e-documents, of which certified XML file you can view from the E-Document subtab. The **E-Document Status** field on the E-Document subtab indicates the result of e-document certification. If certification fails, details of errors are logged on the E-document Audit Trail.

**Note:** If you have created your own certification sending method, you must store the certified copy of the XML in the File Cabinet and update the file ID of the certified e-document in the transaction body field certified e-document.

Certified e-documents can be sent to customers, vendors or any third party as recipients using the standard sending method assigned to the transaction. With the appropriate sending method selected, you can click the **Send E-Document** button on the transaction. For more information, see **Sending the E-Document of a Single Transaction**.

### Creating E-Document Sending Methods

An administrator must create e-document sending methods so that they can be available for selection on the transaction record and the e-document package record. Sending methods must be implemented as custom plug-in implementations instead of scripts.

Before users can send e-documents, an administrator must first assign sending methods to the e-document package record. This will enable users to select an e-document sending method on the **E-Document** subtab of the customer’s transaction records.

An administrator can select an employee whose name and email address should appear as the sender of e-documents sent by your company or subsidiary. Selecting a designated e-document sender is optional. If there is no designated sender, the system uses the name and email address of the user who sent the e-document as the sender. See **Selecting a Designated E-Document Sender**.

Another type of sending method, the certification sending method, supports the sending of e-documents to certification authorities, which certifies e-documents for validity and compliance to business requirements. For more information, see **E-Document Certification in the Outbound Process**.
To create sending methods, see the following topics:

- Setting Up an Email Sending Method for E-Documents
- Creating Custom Methods for Sending E-Documents
  - Creating a Script for Sending E-Documents
  - Creating an E-Document Sending Method Record
  - Editing an E-Document Sending Method Record

### Setting Up an Email Sending Method for E-Documents

#### Note:
The system can send an e-document by email to a maximum of 10 recipients for each customer or vendor. The system counts each contact added as a recipient. If you add the same contact multiple times, each instance is considered one recipient.

You can send e-documents by email using the **NetSuite Email Custom Plugin** sending method included in the Electronic Invoicing SuiteApp. This sending method is automatically associated with the default e-document package record also provided by the SuiteApp, and cannot be associated with any other e-document package. Also, the **NetSuite Email Custom Plugin** sending method cannot be edited or deleted.

Before you can send e-documents by email to a customer or vendor, the customer or vendor record must be assigned an e-document package that has an email sending channel. You must also define the email recipients for your customer or vendor. For information, see Creating E-Document Packages and Defining E-Document Email Recipients.

After you send e-documents by email, the system sends you a notification informing you that the e-document sending process is finished. If there are errors found, an error report is included in the notification.

The **E-Document Audit Trail** subtab under the **E-Document** subtab of the transaction shows one of the following statuses to indicate whether the e-document was sent successfully or not:

- **Sent** – This status means the e-document was successfully sent. The **Details** column shows the email addresses of the sender and recipients.
- **Sending Failed** – This status means the e-document was not sent. Information about sending errors are shown in the **Details** column. You must fix the errors before you can successfully resend the e-document.

For more information, see Outbound E-Document Sending Errors.

### Creating Custom Methods for Sending E-Documents

An administrator can create various custom methods for sending e-documents to different customers and vendors.

To create a custom method for sending e-documents, the administrator must first create an e-document sending method plug-in implementation and then create an e-document sending method record for that implementation.

After custom sending methods are created, they become available for selection on e-document package records and transaction records.

See the following topics:

- Creating a Custom Plug-in Implementation for Sending E-Documents
Creating a Custom Plug-in Implementation for Sending E-Documents

A custom plug-in implementation for sending e-documents must be created so that it will be available for selection on the sending method record.

Create a JavaScript file for the custom plug-in implementation. The JavaScript file must be compatible with SuiteScript 2.0.

The plug-in script must return an object with the following function:

```javascript
/**
 * @NApiVersion 2.0
 * @NScriptType plugintypeimpl
 */
define(["../../lib/string_formatter",
       ".../../lib/wrapper/ns_wrapper_error",
       ".../../lib/wrapper/ns_wrapper_config",
       ".../../lib/wrapper/ns_wrapper_email",
       ".../../lib/wrapper/ns_wrapper_file",
       ".../../app/einvoice/app_einvoice_notifier",
       ".../../lib/translator"],
function(stringFormatter, error, config, email, file, notifier, translator) {

    /**
     * send - This function is the entry point of our plugin script
     * @param {Object} plugInContext
     * @param {String} plugInContext.scriptId
     * @param {String} plugInContext.sendMethodId
     * @param {String} plugInContext.eInvoiceContent
     * @param {Object} plugInContext.customer
     * @param {String} plugInContext.customer.id
     * @param {Array} plugInContext.customer.recipients
     * @param {Object} plugInContext.transaction
     * @param {String} plugInContext.transaction.number
     * @param {String} plugInContext.transaction.id
     * @param {String} plugInContext.transaction.poNum
     * @param {Object} plugInContext.sender
     * @param {String} plugInContext.sender.id
     * @param {String} plugInContext.sender.name
     * @param {String} plugInContext.sender.email
     * @param {Array} plugInContext.attachmentFileIds
     *
     * @returns {Object} result
     * @returns {Boolean} result.success
     * @returns {String} result.message
     */
    function send(pluginContext) {

        var MSG_NO_EMAIL = translator.getString("ei.sending.sendernoemail");
        var MSG_SENT_DETAILS = translator.getString("ei.sending.sentdetails");
```
var senderDetails = pluginContext.sender;
var customer = pluginContext.customer;
var transaction = pluginContext.transaction;
var recipientList = customer.recipients;
var result = {};
var parameters;
if (!senderDetails.email) {
  parameters = {
    EMPLOYEENAME: senderDetails.name
  };
  stringFormatter.setString(MSG_NO_EMAIL);
  stringFormatter.replaceParameters(parameters);
  result = {
    success: false,
    message: stringFormatter.toString()
  };
} else {
  var invoiceSendDetails = {
    number: transaction.number,
    poNumber: transaction.poNum,
    transactionType: transaction.type,
    eInvoiceContent: pluginContext.eInvoiceContent,
    attachmentFileIds: pluginContext.attachmentFileIds
  };
  notifier.notifyRecipient(senderDetails.id, recipientList, invoiceSendDetails);

  parameters = {
    SENDER: senderDetails.email,
    RECIPIENTS: recipientList.join(",
  ");
  stringFormatter.setString(MSG_SENT_DETAILS);
  stringFormatter.replaceParameters(parameters);

  result = {
    success: true,
    message: stringFormatter.toString()
  };
}

return result;

return {
  send: send
};

---

Important: The sending method custom plug-in script must have the `@NSScriptType plugintypeimpl` tag.

After creating the script for plug-in implementation, upload it to Customization > Plug-ins > Plug-in Implementations > New. The type of the custom plug-in implementation must be “Sending Plugin”. For more information, see the help topic Custom Plug-in Creation.
Creating a Script for Sending E-Documents

**Important:** Sending methods must be created as custom plug-in implementations instead of scripts. You must recreate existing sending method scripts as new custom plug-in implementations of the type ‘Sending Plugin’. For more information, see Creating a Custom Plug-in Implementation for Sending E-Documents. The system will not support sending method scripts in NetSuite 2019.2.

An e-document sending method script must be a JavaScript file that is compatible with SuiteScript 2.0. The script must return an object with the following function:

```javascript
send(scriptContext)
```

<table>
<thead>
<tr>
<th>Description</th>
<th>Executed when sending an e-document.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returns</td>
<td>A result object.</td>
</tr>
<tr>
<td>Since</td>
<td>Version 2015 Release 2</td>
</tr>
</tbody>
</table>

### Parameters

- **Note:** The `scriptContext` and `result` parameters are JavaScript objects.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Required / Optional</th>
<th>Description</th>
<th>Since</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>scriptContext.scriptId</code></td>
<td>string</td>
<td>required</td>
<td>The ID of the document in the file cabinet</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.sendMethodId</code></td>
<td>string</td>
<td>required</td>
<td>The ID of the customer's or vendor's selected sending method</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.eInvoiceContent</code></td>
<td>string</td>
<td>required</td>
<td>The e-document content as a string</td>
<td>Version 2015 Release 2</td>
</tr>
</tbody>
</table>

- **Note:** This content is the generated e-document.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Required / Optional</th>
<th>Description</th>
<th>Since</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>scriptContext.customer.id</code></td>
<td>string</td>
<td>required</td>
<td>The ID of the customer</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.customer.recipients</code></td>
<td>array of string</td>
<td>optional</td>
<td>The email addresses of the recipients of the e-document</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.transaction.id</code></td>
<td>string</td>
<td>required</td>
<td>The ID of the e-document transaction</td>
<td>Version 2015 Release 2</td>
</tr>
</tbody>
</table>

- **Note:** The transaction id specified here is the ID of the document from which the e-document was generated.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Required / Optional</th>
<th>Description</th>
<th>Since</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>scriptContext.transaction.number</code></td>
<td>string</td>
<td>required</td>
<td>The document number of the e-document transaction</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.transaction.poNum</code></td>
<td>string</td>
<td>optional</td>
<td>The PO/check number of the e-document transaction</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td><code>scriptContext.sender.id</code></td>
<td>string</td>
<td>required</td>
<td>The ID of the designated sender of the e-document</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td>Parameter</td>
<td>Type</td>
<td>Required / Optional</td>
<td>Description</td>
<td>Since</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------</td>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>scriptContext.sender.name</td>
<td>string</td>
<td>required</td>
<td>The name of the designated sender of the e-document</td>
<td>Version 2015 Release 2</td>
</tr>
<tr>
<td>scriptContext.sender.email</td>
<td>string</td>
<td>required</td>
<td>The email address of the designated sender of the e-document</td>
<td>Version 2015 Release 2</td>
</tr>
</tbody>
</table>

```javascript
/**
 * @NApiVersion 2.x
 * @NModuleScope Public
 */
define(["N/record"], function(record, error) {
  return {
    send: function(plugInContext) {
      var result = {
        success: true,
        message: "Success"
      };
      try {
        var rec = record.load({
          type: record.Type.INVOICE,
          id: plugInContext.transaction.id,
        });
        rec.setValue({
          fieldId: "memo",
          value: ["Electronic Invoicing",
```
Creating an E-Document Sending Method Record

Make sure that you have created a sending method custom plug-in implementation before you create e-document sending method records. For more information, see Creating a Custom Plug-in Implementation for Sending E-Documents.

To create an e-document sending method record:

2. In the **Name** field, enter a name for the e-document sending method.
3. In the **E-Document Package** field, select the e-document package you want to associate this sending method with. For more information, see Creating E-Document Packages.
4. In the **E-Document Sending Method Plugin Implementation** field, select the e-document plug-in implementation for this method.
5. In the **Sending Channel** field, enter the sending channel to use for this method. For example, email, SOAP or REST.

   **Note:** If the sending channel is **email** (case-sensitive), the system validates the email recipients upon saving the customer or vendor record and when sending the e-document.

6. In the **Transaction Type** field, select one or more transaction types for which this sending method will be used. To select multiple transaction types, press and hold the Ctrl key while selecting the transaction types.

   The Transaction Type field only displays the transaction types applicable to or supported by outbound e-document sending, which include:
   - Cash refund
   - Cash sale
   - Credit memo
   - Estimate
   - Invoice
   - Purchase order

Important: To prevent permission errors, make sure the sending method script has the `@NModuleScope Public` JSDoc tag.
■ Return authorization
■ Customer payment

For more information, see Transactions and Processes Supported by the Electronic Invoicing SuiteApp.

**Note:** The selected transaction types cannot be modified after the sending method has been used in a transaction. You must remove the e-document sending method from the transaction before you can modify this field.

7. In the **Subsidiary** field, select the subsidiaries that this sending method will be associated with. To select multiple subsidiaries, press and hold the **Ctrl** key while selecting the subsidiaries.

   If only this sending method is associated with a subsidiary, the supported transactions of that subsidiary will display this sending method on the E-Document Template field on the E-Document subtab. For more information, see Multi-subsidiary Support in the Outbound Process.

8. (Optional) If the sending method is to be used for e-document certification, check the **Sending Method for Certification** box. For more information, see E-Document Certification in the Outbound Process.

   **Note:** Only one certification sending method must be assigned to a combination of subsidiaries and transactions you select.

9. Click **Save**. This sending method can now be selected on e-document package records.

   If the **Inactive** box is checked, this record will not be available for selection.

### Editing an E-Document Sending Method Record

To edit an e-document sending method record, go to Setup > E-Documents > E-Document Sending Methods. Open the e-document sending method in edit mode and modify information as needed, then click **Save**.

Sending method records must reference sending method plug-ins, instead of scripts, from the **E-Document Sending Method Plugin Implementation** field. Existing sending method scripts must be recreated as new custom plug-in implementations of the type ‘Sending Plugin’. For more information, see Creating a Custom Plug-in Implementation for Sending E-Documents.

**Important:** The system will not support sending method scripts in NetSuite 2019.2, but until that time, you can still edit and use existing sending method scripts.

**Note:** The **Transaction Type** field in the e-document sending method is disabled if the e-document sending method has been assigned to one or more transaction records. To enable the field, you must remove the e-document sending method from all transactions.

### E-Document Email Custom Templates

An administrator can create custom templates to specify default subject and body text for e-document emails. Users can use these templates when sending e-documents by email to any entity selected in outbound e-document sending process.

After the administrator creates the e-document email templates, you can select them from the **E-Document Email Customization** dropdown list. You can find the dropdown list on the Subsidiary record.
or Company Information page in OneWorld accounts and on Company Information page in Single Instance accounts.

For more information, see Creating an E-Document Email Custom Template and Selecting an E-Document Email Custom Template.

**Creating an E-Document Email Custom Template**

An administrator can create one or more custom templates in the E-Document Email Customization Template page.

**To create an e-document email custom template:**

1. Go to Setup > E-Documents > E-Document Email Customization > New.
2. In the **Name** field, enter a name for the e-document email template.
3. In the **Email Subject Text** field, enter text for the subject of the email. You can also enter additional information using the following placeholders as needed:
   - `{TRANTYPE}` — Transaction type
   - `{TRANID}` — Transaction ID
   - `{PONUM}` — Transaction purchase order number
   - `{COMPANYNAME}` — Company name

   **Note:** You must enter the placeholders in capital letters along with the braces `{}`. There should be no spaces inside the braces.

4. In the **Email Body Text** field, enter text for the body of the email. You can also enter additional information using the following placeholders as needed:
   - `{TRANTYPE}` — Transaction type
   - `{TRANID}` — Transaction ID
   - `{PONUM}` — Transaction purchase order number
   - `{COMPANYNAME}` — Company name

   **Note:** You must enter the placeholders in capital letters along with the braces `{}`. There should be no spaces inside the braces.

5. Click **Save**.

   The template will be available for selection on the Subsidiary record or Company Information page. You can use the template only if you select **Default** option in the **E-Document Sending Method Plugin Implementation** field on the E-Document Sending Method record.

   **Note:** If you do not create a template in the E-document Email Customization record, then a system generated default template is used in the e-document email. This email is sent to customers or vendors during the outbound e-document sending process.

**Selecting an E-Document Email Custom Template**

After creating the custom templates for e-document email, an administrator can select the templates on the Subsidiary record or Company Information page. The selected template will be used in sending the e-documents by email to customers or vendors.
To select an e-document email custom template on the Subsidiary record:

1. Go to Setup > Company > Subsidiaries.
2. Click Edit next to the required subsidiary.
3. From the E-document Email Customization dropdown list, select the required custom template.
4. Click Save.

To select an e-document email custom template on the Company Information page:

1. Go to Setup > Company > Company Information.
2. From the E-document Email Customization dropdown list, select the required custom template.
3. Click Save.

**Note:** E-document email custom templates can be selected on both Subsidiary record and Company Information page for the following combinations:

- If you select a different template on both Subsidiary record and Company Information page, then the template you selected on the Subsidiary record is used.
- If you select a template on the Company Information page and not on the Subsidiary record, then the same template is applied on transactions of all the subsidiaries.
- If you select a template on the Subsidiary record for a transaction, then the selected template is used for all transactions that are created for this subsidiary. It overrides the template selected on the Company Information page.

**Note:** If you do not select a template either on Subsidiary record or Company Information page, then a system generated default template is used in the e-document email. This email is sent to customers or vendors during the outbound e-document sending process.

Selecting a Designated E-Document Sender

An administrator can select an employee whose name and email address should appear as the sender of e-documents sent by your company or subsidiary. This task is optional. If there is no designated sender, the system uses the name and email address of the user who sent the e-document as the sender.

**To select a designated e-document sender:**

1. Go to Setup > Company > Company Information.
   
   If you have a OneWorld account, go to Setup > Company > Classifications > Subsidiaries, and click the edit link to open a subsidiary record.

2. In the E-Document Sender field, select an employee.
3. Click Save.

Setting Up Custom Roles to Send E-Documents

The following standard roles can send and re-send e-documents in bulk:
An administrator can give custom roles access to the bulk sending feature. The following conditions must be met to enable a custom role to send e-documents in bulk:

- The custom role has been added to the script audience for the **Outbound E-Invoicing Form SU** script.
- The custom role has Edit permissions for the transaction types for which your company generates and sends e-documents.
- The custom role has Edit permission for the Add E-Document Sending Batch custom record.

**To grant custom roles access and permissions to send e-documents:**

1. Add the custom roles to the script audience by performing the following steps:
   a. Go to Customization > Scripting > Script Deployments.
   b. Click the Edit link of the script named **Outbound E-Invoicing Form SU**.
   c. On the **Audience** subtab, in the **Roles** field, select the custom roles that you want to give access to.
   d. Click **Save**.

2. Add the required permissions to custom roles by performing the following steps:
   a. Go to Setup > Users/Roles > Manage Roles.
   b. Click the Edit link of the custom role that you want to modify.
   c. Add permission to edit transaction types:
      i. On the **Permissions** subtab, go to the **Transactions** subtab.
      ii. In the **Permission** column, on a blank row, select a transaction type.
      iii. In the **Level** column, select **Edit**.
      iv. Click **Add** to add the row.
      v. Add other transaction types that the custom role must have access to.
   d. Add permission to edit the custom record used for bulk sending:
      i. On the **Permissions** subtab, go to the **Custom Record** subtab.
      ii. In the **Record** column, on a blank row, select **Add E-Document Sending Batch**.
      iii. In the **Level** column, select **Edit**.
      iv. In the **Restrict** column, select **Editing Only**.
      v. Click **Add** to add the row.
   e. Click **Save** to save the changes to the custom role.
Customizing Roles to Restrict E-Document Generation or Sending

By default, the Generate E-Document and Send E-Document buttons are visible on all outbound transaction types that E-Invoicing SuiteApp supports, regardless of the level of permission the user has on the transaction record.

The administrator can customize standard and custom roles to restrict their permission to manually generate and send outbound e-documents.

**To restrict the permission of standard and custom roles to generate and send outbound e-documents:**

1. Go to Setup > Users/Roles > User Management > Manage Roles.
2. Click the Customise or Edit link of the role that you want to restrict permission to generate or send outbound e-documents.
4. If you want to allow this role to send e-documents for certification, check the Allow Sending of E-Document for Certification box; otherwise, clear the box.
5. Click Save.

   The Generate E-Document button or Send E-Document button will not be available on transaction records viewed by role. If you did not grant the role permission to send e-documents for certification, the Certify E-document button will not be available on transactions viewed by role.

Deploying the Bulk Generation Script for E-Documents

The Electronic Invoicing SuiteApp enables an administrator to deploy a script to generate multiple e-documents at a specific time, instead of generating e-documents for each transaction manually.

By default, the script's status is set to Not Scheduled. The administrator can set a schedule for the script to generate e-documents in bulk.

**Note:** Only an administrator can view, edit, and run the Generate E-Document Content script included in the SuiteApp.

The script generates e-documents for transactions that have the following e-document statuses:

- **For Generation** – The script generates e-documents for transaction records that have e-document templates.
- **Generation Failed** – The script regenerates e-documents for transaction records with assigned e-document templates that previously encountered errors during generation. Errors must be fixed before e-documents can be regenerated. For more information, see Outbound E-Document Generation Errors.

After the system generates e-documents, it updates the value in the E-Document Status field on the E-Document subtab of each transaction record. The field shows one of the following values:

- **Ready for Sending** – This status means the e-document was generated successfully and can be sent to the customer or vendor.
Generation Failed – This status means the e-document was not generated. Information about generation errors are shown in the Details column of the E-Document Audit Trail subtab. The user must first fix the errors before the e-document can be regenerated for the transaction record.

Note: If e-document generation fails, NetSuite does not send an email notification to the administrator. Instead, it sends an email notification containing the error details to the user who created the transaction record. The user must fix the errors before an e-document can be regenerated for the transaction record.

For more information about generation errors, see Outbound E-Document Generation Errors.

See also Generating and Regenerating E-Documents in Bulk.

To deploy the bulk generation script for e-documents:

1. Go to Customization > Scripting > Script Deployments.
2. Click the Edit link of the Generate E-Document Content MR script.
3. Clear the Deployed check box if you do not want to deploy the script yet. A script will not run in NetSuite until the Deployed check box is selected.
4. Select a status in the Status field:
   - Testing
   - Not Scheduled
   - Scheduled

For more information, see the help topic Setting Script Deployment Status.

5. Choose an event type on the Schedule subtab:
   - Single event – The script generates e-documents only one time.
   - Daily event – Enter the interval between days if this event is every day or every few days, or select every weekday if this event is every day except Saturdays and Sundays.
     Enter 1 as the interval if this event is every day, for example, or enter 2 if the event is every other day.
   - Weekly event – Enter the interval between weeks, and select the day of the week this event repeats on.
   - Monthly Event – If you want to generate e-documents on the same day of every month or every few months, enter the date the generation of e-documents repeats, and select the interval between months.
     If you want to generate e-documents on the same day of the week every month or every few months, select the week, the day of the week, and enter the interval between months.
   - Yearly Event – If you want to generate e-documents one time every year, select the month and day to generate e-documents, or select the week, day, and month.
   - Start Date – You must enter the date you want to schedule the generation of e-documents for.
   - Start Time – Enter the time you want the generation of e-documents to start.
   - Repeat – Select how often you want the script to generate e-documents. On the day the script is scheduled to run, e-documents are generated at the specified Start Time and repeat every n hours until midnight.
   - End By – Set the date the script stops generating e-documents.

If you are scheduling a single event, e-documents will be generated on the date entered in the Start Date field.
If you are scheduling a repeat event, e-documents will be generated according to the schedule you set starting on the date entered in the Start Date field and ending on the date entered in the End By field.

- **No End Date** – Check this box if you want to repeat the schedule indefinitely.

6. Click **Save and Execute** to generate e-documents immediately. Click **Save** to generate e-documents according to the schedule you chose.

### Deploying the Script for Scheduled Sending of E-Documents

Like the script for generating e-documents in bulk, the Electronic Invoicing SuiteApp also has a script for automatic scheduled sending of outbound e-documents. The script sends only outbound e-documents whose status is Ready for Sending.

**Note:** By default, only the administrator can view, edit, and run the Automatic Send E-Document MR script included in the SuiteApp, because the administrator has the permission to view, edit and run Script Deployment records.

By default, the script's status is set to Not Scheduled. The administrator can set a schedule for the script to send outbound e-documents.

**To deploy the script for scheduled sending of e-documents:**

1. Go to Customization > Scripting > Script Deployments
2. Click the Edit link of the **Automatic Send E-Document MR** script.
3. Clear the **Deployed** check box if you do not want to deploy the script yet. A script will not run in NetSuite until the Deployed check box is selected.
4. Select a status in the **Status** field:
   - Testing
   - Not Scheduled
   - Scheduled
   For more information, see the help topic **Setting Script Deployment Status**.
5. Choose an event type on the **Schedule** subtab:
   - **Single Event** – The script sends outbound e-documents only one time.
   - **Daily Event** – Enter the interval between days if this event should occur every day or every few days, or select every weekday if this event should occur every day except Saturdays and Sundays. For example, enter 1 as the interval if this event should occur every day, or enter 2 if the event should occur every other day.
   - **Weekly Event** – Enter the interval between weeks, and select the day of the week this event should be repeated.
   - **Monthly Event** – If you want to send e-documents on the same day of every month or every few months, enter the date when you want e-document sending to repeat and then select the interval between months. If you want to send e-documents on the same day of the week every month or every few months, select the week, the day of the week, and enter the interval between months.
   - **Yearly Event** – If you want to send e-documents one time every year, select the month and day, or select the week, day, and month.
   - **Start Date** – You must enter the date when you want to schedule the sending of e-documents.
- **Start Time** – Enter the time when you want the sending of e-documents to start.
- **Repeat** – Select how often you want the script to send e-documents. On the day the script is scheduled to run, e-documents will be sent at the specified Start Time and the process repeats every n hours until midnight.
- **End By** – Set the date when the script should stop sending e-documents.
  
  If you are scheduling a single event, e-documents will be sent on the date entered in the Start Date field.
  
  If you are scheduling a repeat event, e-documents will be sent according to the schedule you set, starting from the date entered in the Start Date field and ending on the date entered in the End By field.
- **No End Date** – Check this box if you want to repeat the schedule indefinitely.

6. Click **Save and Execute** to send e-documents immediately. Click **Save** to send e-documents according to the schedule you chose.

The script automatically searches for outbound e-documents whose status are Ready for Sending, and then sends them. After the outbound e-documents are sent, their status is changed to either Sent or Sending Failed. Details of any error during sending are recorded in the E-Document Audit Trail. Error notification is sent to the Recipient of E-Document Notifications. If Recipient of E-Document Notifications has not been defined yet, the notifications are sent to active administrators. The notification has a CSV file attached containing details of the error.

**Updating E-Document Certification Statuses**

E-document certification statuses are not automatically updated by the Electronic Invoicing SuiteApp. E-document certification statuses can be updated through the certification sending method implementation. If your company or organization is implementing its own e-document certification sending, you can use the format of the following sample script for capturing sending method return, which can be used to update the e-document certification statuses and log corresponding messages in the E-document Audit Trail.

Sample script to implement e-document certification status updates:

```javascript
/**
 * Copyright (c) 2017, Oracle and/or its affiliates. All rights reserved.
 * @NApiVersion 2.x
 * @NScriptType pluginTypeimpl
 * @NModuleScope public
 */
define([], function() {

    /**
     * send - This function is the entry point of our plugin script
     * @param {Object} plugInContext
     * @param {String} plugInContext.scriptId
     * @param {String} plugInContext.sendMethodId
     * @param {String} plugInContext.eInvoiceContent
     * @param {Object} plugInContext.customer
     * @param {String} plugInContext.customer.id
     * @param {Array} plugInContext.customer.recipients
     * @param {Object} plugInContext.transaction
     * @param {String} plugInContext.transaction.number
```
If e-document certification is successful, the script will change the e-document status of the transaction to Ready for Sending and add the following details in the E-Document Audit Trail:

**The e-document was successfully certified and is ready for sending.**

The following table lists the parameters that the object `eiStatus` in the script takes up:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>transactionId</td>
<td>String</td>
<td>ID of transaction record</td>
<td>Required</td>
</tr>
<tr>
<td>transactionType</td>
<td>String</td>
<td>Transaction type such as INVOICE, VENDOR_BILL, ITEM_FULFILLMENT, and others</td>
<td>Required</td>
</tr>
<tr>
<td>entity</td>
<td>String</td>
<td>ID of entity record; for example, Customer, Vendor, and others</td>
<td>Required</td>
</tr>
<tr>
<td>eDocStatus</td>
<td>String</td>
<td>E-document Status</td>
<td>Required</td>
</tr>
<tr>
<td>transactionId</td>
<td>plugInContext.transaction.id</td>
<td>ID of transaction record</td>
<td>Required</td>
</tr>
<tr>
<td>transactionType</td>
<td>plugInContext.transaction.tranType</td>
<td>Transaction type such as INVOICE, VENDOR_BILL, ITEM_FULFILLMENT, and others</td>
<td>Required</td>
</tr>
<tr>
<td>entity</td>
<td>plugInContext.sender.id</td>
<td>ID of entity record; for example, Customer, Vendor, and others</td>
<td>Required</td>
</tr>
</tbody>
</table>
### Electronic Invoicing Administrator Guide

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Type</th>
<th>Description</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>READY_FOR_SENDING : 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_IN_PROGRESS : 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_DATA_ERROR : 21</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_FAILED : 22</td>
</tr>
<tr>
<td>eventType</td>
<td>String</td>
<td>E-document Audit Trail Event</td>
<td>Use numbers for event types. The following numbers can be used:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>READY_FOR_SENDING : 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_IN_PROGRESS : 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_DATA_ERROR : 21</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CERTIFICATION_FAILED : 22</td>
</tr>
<tr>
<td>details</td>
<td>String</td>
<td>Details</td>
<td>Required</td>
</tr>
<tr>
<td>owner</td>
<td>String</td>
<td>ID of user or Employee</td>
<td>Required</td>
</tr>
<tr>
<td>isUpdateFields</td>
<td>String</td>
<td>Flag; if TRUE, the EI Status is updated, fields are provided in extraFieldsForUpdate field and an audit trail is created. Otherwise, an audit trail is created.</td>
<td>Required</td>
</tr>
<tr>
<td>extraFieldsForUpdate</td>
<td>JSON</td>
<td>A JSON object containing the key-value pair for the transaction body fields, where key is the field ID and value is the field value. It can be used to update any transaction body field required by a Country SuiteApp.</td>
<td>Required (can be an empty object)</td>
</tr>
<tr>
<td>bundleId</td>
<td>String</td>
<td>BundleId of the requester</td>
<td>Required</td>
</tr>
<tr>
<td>bundleName</td>
<td>String</td>
<td>BundleName of the requester</td>
<td>Required</td>
</tr>
</tbody>
</table>

The parameter details will be included in the E-Document Audit Trail.

**Electronic Invoicing Inbound Email Capture**

Inbound electronic invoicing supports the capturing of vendor invoices in XML format sent through email. This means your vendors can send you invoices in XML through email, which you can directly view as inbound e-document records.

When the system receives email with an XML invoice attached, it first determines the vendor based on either the vendors’ email domain or sender email address. If the vendor is determined, the system automatically captures the email with the XML invoice and then stores the XML content as an inbound e-document record. Inbound e-document records from email capture are automatically added to the Inbound E-Documents List with the e-document status indicated.

If the vendor is not determined from the email e-document, or other errors are encountered, the system sends a notification to the Recipient of E-Document Notifications, informing that user of the problems encountered with the received email e-document. If the Recipient of E-Document Notifications is not set up, the notifications are sent to all active administrators.

**Setting Up Inbound Email Capture**

Set up the Inbound Email Capture feature in your account by performing the following tasks:

- Enable the Inbound Email Capture Plug-in.
Set up Vendor E-Document Email Sender.

**Enabling Inbound Email Capture Plug-in**

The Electronic Invoicing SuiteApp comes with an inbound email capture plug-in that you must first enable.

**To enable the inbound email capture plug-in:**

1. Go to Customizations > Plug-ins > Manage Plug-ins.
2. On the Manage Plug-In Implementations page, check the **Inbound Email Capture PI** box.
3. Click **Save**.

Take note of the email address indicated, with the domain emails.netsuite.com. This is the email address where your vendors should send their XML invoices to. This email address is different for every account. It is recommended that you set up an alias for this email address in your email facility, so that your vendors can easily record or remember the email address. For more information on setting up an email alias, see the help topic **Create an Email Alias and Set Up Forwarding**

To view details of events or errors associated with the inbound email capture plug-in, go to Customization > Plug-ins > Plug-in Implementations. Click the View link of the Inbound Email Capture PI and then on the Plug-In Implementation page, click the Execution Log subtab. For more information on the email capture plug-in, see the help topics **Email Capture Plug-in Overview** and **Administering an Email Capture Plug-in Implementation**

Aside from the plug-in execution log, the system also sends inbound e-document email capture notification messages to your designated recipient, informing that user of the details of any event or error associated with the inbound email capture plug-in.

**Setting Up Vendor E-Document Email Sender**

After enabling the e-document email capture plug-in, you must identify or assign the Vendor E-Document Sender in vendor records.

**To set up the vendor e-document email sender**

1. Edit a vendor record and click the **E-Document** subtab.
2. You can enter the email domain associated with the vendor in the **Sender Email Domain** field. If you enter an email domain in this field, the system will use the email domain to determine the vendor of the captured email e-documents.

   **Note:** The vendor email domain you enter must be unique for each vendor. No vendors must have the same email domain.

3. Enter the email address of the vendor's designated user in the **Vendor E-Document Email Sender** sublist. Add as many vendor sender email addresses as necessary. The system will use the email addresses you entered to determine the vendor of captured email e-documents.

   **Note:** Only designated vendor e-document email senders can create inbound e-documents.

4. If you want the system to use the email addresses you entered in **Vendor E-Document Email Sender** instead of the domain, for determining the vendor of captured e-document email, you can check the **Use Sender Email List** box. If you check the box, you must enter email addresses in the **Vendor E-Document Email Sender** field, which becomes mandatory and replaces the domain as the basis for determining the vendor.

5. Click **Save**.
If you do not enter an email domain or check the Use Email Sender List box, the system will not be able to determine the vendor of the email e-document and an inbound e-document will not be created. In this case, the system will send a notification to the recipient you designated, informing that user that e-document email was received but no vendor was associated with the e-document.

To apply these settings to your existing vendor records, you can use CSV Import.

**To update vendor records to apply or update vendor e-document email sender or recipient:**

1. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
2. In the **Import Type** field, select Custom Records.
3. In the **Record Type** field, select Vendor E-Document Email Sender or Recipient.
4. Click **Select**, and select the CSV file to upload.
5. Click **Next**.
6. On Import Options, select the appropriate Data Handling option. Click **Next**.
7. On Field Mapping, if you are updating the vendor e-document email sender, make sure that email and vendor are mapped to appropriate values. If you are updating the vendor e-document email recipient, make sure that the contact and vendor are mapped to appropriate values. Click **Next**.
8. In the **Import Map Name**, enter a unique name. Click **Save & Run**.

For more information on performing CSV Import, see the help topics CSV Imports Overview and Importing CSV Files with the Import Assistant.

### Using SOAP Web Services for Inbound Processing

**Important:** Currently, support SOAP web services in inbound processing is still in release preview status and only accessible to sandbox accounts. SOAP web services in inbound processing will be live and available for production accounts by the end of October.

Inbound e-document processing supports SOAP web services, which offer advantages in interoperability, flexibility and security in sending information over the internet. By enabling the web service features in NetSuite, you can receive XML files sent through web service and then capture information in XML for subsequent creation of e-documents. You can set up vendor or employee records to authorize them as web service senders. As authorized web service senders, these entities can send single or multiple XML files in one web service request.

**Setting Up Inbound E-Document SOAP Web Services**

1. Go to Setup > Company > Setup Tasks > Enable Features.
   a. On the **SuiteCloud** subtab, under SuiteTalk (Web Services), check **SOAP Web Services**.
   b. Under Manage Authentication, check **Token-Based Authentication**.
   c. On the **Web Presence** subtab, under Access, check **Vendor Access**.
   d. Click **Save**.

   For more information, see the help topics SuiteCloud Features and Commerce Features.

2. Create an integration record to generate authentication keys. Go to Setup > Integration > Integration Management > Manage Integrations > New. For more information, see the help topic Creating an Integration Record.
   a. Enter or select values in the **Name** and **Description** fields. Retain the default value in the **State** field, which is **Enabled**.
b. On the **Authentication** subtab, check **Token-based Authentication**. The **User Credentials** box is checked by default, retain this.

c. Click **Save**.

The Consumer Key and Consumer Secret are generated and displayed on the integration record. Copy the Consumer Key and Consumer Secret to send to the vendors or parties that you want to authorize as web service senders.

3. If you upgraded the Electronic Invoicing SuiteApp from a previous version, make sure that the custom role, Inbound E-Document Web Service Role, is included in the target audience of the E-Document Inbound UE script deployment. But if the SuiteApp is a new installation, you do not have to perform these steps.

   a. Go to Customization > Scripting > Scripts.
   b. Click the Deployments link of the E-Document Inbound UE script and edit the record.
   c. On the **Audience** subtab, under Roles, select **Inbound E-Document Web Service Role** to add it to the list of roles.
   d. Click **Save**.

4. Assign the Inbound e-Document Web Services Role to the vendor or employee whom you want to authorize to be the sender of XML files through web service.

   a. Edit the vendor record that you authorized as web service sender.
   b. On the vendor record **E-Document** subtab, enter appropriate values in the **Web Service ID** and **Web Service Sender** fields.

      For the Web Service ID, you can assign any unique identifier of the vendor, like the tax ID.
      For the Web Service Sender, you can choose from the list a vendor or an employee, whom a vendor designated to send e-documents of its behalf.

   c. Click **Save**.

   For more information, see the help topics Assigning Roles to an Employee and step 6 under the Access section in Adding a Vendor Record.

5. Create access tokens for each vendor or employee that you authorized as web service sender.

   b. In the **Application Name** field, select the integration record that you created in step 2, which will be associated with the access token you will create.
   c. In the **User** field, select the vendor or employee whom you assigned the Inbound e-Document Web Service Role.
   d. In the **Role** field, select **Inbound e-Document Web Service Role**. The Token Name is automatically assigned a value.
   e. Click **Save**.

   The Token ID and Token Secret are generated and displayed on the Access Token page. Copy the values for the Token ID and Token Secret before going to another page.

   **Important:** For security reasons, the values for the Token ID and Token Secret are only displayed on the initial setup page. They cannot be retrieved from the system. If you did not take note or copied the Token ID and Token Secret values, you will need to create a new token.

   For more information, see the help topic Getting Started with Token-based Authentication.

6. Send or convey the following web service connection and authentication details to authorized web service senders:

   - Consumer Key
Go to Setup > Company Information. In the **Account ID** field, obtain the value that you need to send.

**Inbound E-Document Web Service RESTlet External URL**

Go to Customization > Scripting > Scripts. View the Inbound E-Document Web Service RL, RESTlet. On the **Deployments** subtab, click **Inbound E-Document Web Service RL**. The External URL is displayed.

**The vendor Web Service ID.**

After setting up SOAP web services for inbound processing, you are ready to receive XML e-documents from SOAP web services. For more information, see [Receiving E-Document XML Files from Web Service](#).

### Web Service Sender Setup Tasks

The authorized web service sender can either be a vendor or an employee. Web service senders must also perform setup tasks before they can send XML files through web service.

First, a web service sender must obtain the web service connection and authentication details from you. Then, they must meet the following requirements in constructing the web service request.

<table>
<thead>
<tr>
<th>Requirements</th>
<th>Web Service Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>OAuth 1.0 Authentication</td>
<td>Use the authentication details from the NetSuite user:</td>
</tr>
<tr>
<td></td>
<td>- Consumer Key</td>
</tr>
<tr>
<td></td>
<td>- Consumer Secret</td>
</tr>
<tr>
<td></td>
<td>- Token ID</td>
</tr>
<tr>
<td></td>
<td>- Token Secret</td>
</tr>
<tr>
<td></td>
<td>- Realm (Account ID)</td>
</tr>
<tr>
<td>OAuth Data</td>
<td>- Consumer Key = generated from Netsuite</td>
</tr>
<tr>
<td></td>
<td>- Signature Method = HMAC-SHA1 or HMAC-SHA256</td>
</tr>
<tr>
<td></td>
<td>- OAuth Nonce = unique string that is generated</td>
</tr>
<tr>
<td></td>
<td>- Timestamp = timestamp in seconds</td>
</tr>
<tr>
<td></td>
<td>- OAuth Version = 1.0</td>
</tr>
<tr>
<td></td>
<td>- OAuth Token = generated from Netsuite</td>
</tr>
<tr>
<td></td>
<td>- OAuth Signature = Key is secret key, Base String. For more information, see the help topics Using TBA for RESTlet Authentication (OAuth) and Step 1: Obtain An Unauthorized Request Token.</td>
</tr>
<tr>
<td>Content-type header</td>
<td>Application/json</td>
</tr>
<tr>
<td>Request Method</td>
<td>POST</td>
</tr>
<tr>
<td>Web Service Request Body</td>
<td>JSON Object</td>
</tr>
</tbody>
</table>
### Requirements

<table>
<thead>
<tr>
<th>Web Service Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sample code for sending a single XML file in one request:</strong></td>
</tr>
</tbody>
</table>
| `{  
|   "identifier": "vendor1",  
|   "fileName": "vendor1.xml",  
|   "content": "<XML>content</XML>"  
|}` |
| If multiple XML files must be sent in one web service request, the format must be an array of JSON objects. |
| **Sample code for sending multiple XML files in one request:** |
| `[  
|   {  
|     "identifier": "vendor1",  
|     "fileName": "vendor1-1.xml",  
|     "content": "<XML>content</XML>"  
|   },  
|   {  
|     "identifier": "vendor1",  
|     "fileName": "vendor1-2.xml",  
|     "content": "<XML>content</XML>"  
|   },  
|   {  
|     "identifier": "vendor2",  
|     "fileName": "vendor2.xml",  
|     "content": "<XML>content</XML>"  
|   }]` |
| **Important:** There is a limit of 10MB per string used as RESTlet input or output. For more information, see the help topic SuiteScript 2.0 RESTlet Governance. |

### Setting Up Custom Roles that can Convert Inbound E-Documents

An administrator can create custom roles or customize standard roles, to grant them the permission to perform conversion of inbound e-documents into transaction records.

**To grant a role the permission to convert inbound e-documents into transaction records:**

1. Set up the permission. Go to Setup > Users/Roles > User Management > Manage Roles. Select the role you want to grant permission to and click its Customize link. On the Role page, do the following:
   - On the Custom Record subtab, do the following:
     - In the Inbound E-Documents row, click the entry in the Level column. Select Edit.
     - In the E-Document Audit Trail row, click the entry in the Level column. Select Edit.
On the **Transactions** subtab, do the following:
- In the Bills row, click the entry in the Level column. Select **Full**.
- In the Purchase Order row, click the entry in the Level column. Select **View**.

On the **Lists** subtab, do the following:
- In the Vendors row, click the entry in the Level column. Select **View**.
- In the Perform Search row, click the entry in the Level column. Select **View**.
- In the Documents and Files row, click the entry in the Level column. Select **View**.

Click **Save**.

2. Make the Convert button visible to the roles with permission to perform e-document conversion. To do so, the inbound e-document script deployment must be enabled. Go to Customization > Scripting > Script Deployments. On the Script Deployments page, do the following:
- Click the Edit link of the script customdeploy_edoc_ue_inbound, **E-Document Inbound UE**.
- On the **Audience** subtab, select the roles that the script will execute for. To select multiple roles, press and hold down the Ctrl key while selecting the roles.
- Click **Save**.

For more information on associating a role with script deployment, see the help topic **Executing Scripts Using a Specific Role**.

3. Assign the role with the permission to perform inbound conversion, to employees. See the help topic **Assigning Roles to an Employee**.

For more information, see the help topics **Customizing or Creating NetSuite Roles** and **Setting Permissions for a Custom Record Type**.

### Inbound Validation Plug-ins

The Electronic Invoicing SuiteApp provides support for plug-ins that can perform inbound e-document validation according to the requirements of tax agencies or standards regulatory bodies.

You can create or customize a plug-in that communicates with external sites or systems of a third party, such as a tax agency, which validates e-documents and then returns the results to the plug-in. Or you can create or customize a plug-in that itself performs the required e-document validation.

An inbound e-document validation plug-in must be set up first and integrated with a vendor e-document package. With the validation plug-in set up, every time a user converts inbound e-documents to vendor bills, the plug-in automatically triggers the validation process that is transparent to the user. Depending on your implementation of the plug-in, it can either send the XML e-documents to a validating third party or validate them locally.

The result of the validation process can be viewed from the status of the inbound e-document. If the inbound e-document passed validation, then parsing and conversion will proceed. However, if the inbound e-document is invalid, conversion will not proceed and the status of the inbound e-document will be set to **Conversion Failed**. The audit trail of the inbound e-document will indicate the details of a failed local conversion process or information from a validating third party.

### Creating a Custom Plug-in for Inbound E-Document Validation

A custom plug-in implementation for validating inbound e-documents must be created so that it will be available in the vendor e-document package.

A validation custom plug-in implementation script is included in Electronic Invoicing SuiteApp. Use the sample script as a reference or a template for creating your own custom validation plug-in.
The validation plug-in must be a JavaScript file that is compatible with SuiteScript 2.0.

To open the sample validation plug-in script, go to Documents > Files > File cabinet > SuiteBundles > Bundle 116076 > src > comp > pl > pl_inbound_validation_sample.js. Open the script in a programming editor to view the following code:

```javascript
/**
 * Copyright (c) 2017, Oracle and/or its affiliates. All rights reserved.
 *
 * @NModuleScope public
 * @NApiVersion 2.x
 * @NScriptType plugintypeimpl
 */

define([], function() {
  /**
   * validate - This function is the entry point of our plugin script
   * @param {Object} plugInContext
   * @param {Object} plugInContext.eDocument
   * @param {String} plugInContext.eDocument.id
   * @param {String} plugInContext.eDocument.scriptId
   * @param {String} plugInContext.eDocument.content
   * @param {Object} plugInContext.eDocument.source
   * @param {String} plugInContext.eDocument.source.id
   * @param {String} plugInContext.eDocument.source.text
   * @param {Object} plugInContext.eDocument.template
   * @param {String} plugInContext.eDocument.template.id
   * @param {String} plugInContext.eDocument.template.text
   * @param {Object} plugInContext.eDocument.status
   * @param {Integer} plugInContext.eDocument.status.id
   * @param {String} plugInContext.eDocument.status.text
   * @param {Object} plugInContext.eDocument.package
   * @param {String} plugInContext.eDocument.package.id
   * @param {String} plugInContext.eDocument.package.text
   * @param {Object} plugInContext.eDocument.transactionType
   * @param {String} plugInContext.eDocument.transactionType.id
   * @param {String} plugInContext.eDocument.transactionType.text
   * @param {Object} plugInContext.eDocument.vendor
   * @param {String} plugInContext.eDocument.vendor.id
   * @param {String} plugInContext.eDocument.vendor.text
   * @returns {Object} result
   * @returns {Boolean} result.success
   * @returns {String} result.message
   */

  function validate(pluginContext) {
    var eDoc = pluginContext.eDocument;
    var result = {
      success: false,
      message: ""
    };

    // Connect to validation service
```
```javascript
// If successful
result.success = true;
result.message = "Validation successful!";

// Sample result if not successful
// result.success = false;
// result.message = "Service returned a failed response";

return result;
}

return {
  validate: validate
};
```
Deploying Automatic Bulk Conversion Script for Inbound E-Documents

The administrator can create schedules to run periodic and automatic bulk conversion of all inbound e-documents of which status is For Conversion. The Electronic Invoicing SuiteApp includes a Script Deployment for running automatic bulk conversion of inbound e-documents. By default, the status of the script is set to Not Scheduled. The administrator can set a schedule for the script to convert inbound e-documents in bulk.

To deploy the bulk conversion script for inbound e-documents:

1. Go to Customization > Scripting > Script Deployments.
2. Expand the Filters and select Map/Reduce in the Type field. Click the Edit link of the script Convert Inbound E-Document MR.
3. Clear the Deployed check box if you do not want to deploy the script yet. A script will not run in NetSuite until the Deployed check box is selected.
4. Select a status in the Status field:
   - Testing
   - Not Scheduled
   - Scheduled
   For more information, see the help topic Setting Script Deployment Status.
5. Choose an event type on the Schedule subtab:
   - Single Event – The script converts inbound e-documents only one time.
   - Daily Event – Enter the interval between days if this event should occur every day or every few days, or select every weekday if this event should occur every day except Saturdays and Sundays. For example, enter 1 as the interval if this event should occur every day, or enter 2 if the event should occur every other day.
   - Weekly Event – Enter the interval between weeks, and select the day of the week this event should be repeated.
   - Monthly Event – If you want to convert inbound e-documents on the same day of every month or every few months, enter the date when you want inbound e-document conversion to repeat and then select the interval between months. If you want to convert inbound e-documents on the same day of the week every month or every few months, select the week, the day of the week, and enter the interval between months.
   - Yearly Event – If you want to convert inbound e-documents one time every year, select the month and day, or select the week, day, and month.
   - Start Date – You must enter the date when you want to schedule inbound e-document conversion.
   - Start Time – Enter the time when you want inbound e-document conversion to start.
   - Repeat – Select how often you want the script to convert inbound e-documents. On the day the script is scheduled to run, inbound e-documents will be converted at the specified Start Time and the process repeats every n hours until midnight.
   - End By – Set the date when the script should stop converting inbound e-documents.
If you are scheduling a single event, inbound e-documents will be converted on the date entered in the Start Date field.

If you are scheduling a repeat event, inbound e-documents will be converted according to the schedule you set, starting from the date entered in the Start Date field and ending on the date entered in the End By field.

- **No End Date** – Check this box if you want to repeat the schedule indefinitely.

6. **Click Save and Execute** to convert inbound e-documents immediately. **Click Save** to convert inbound e-documents according to the schedule that you set.

After running the automatic bulk conversion, all inbound e-documents with status For Conversion, will be converted into transaction records. Successfully converted inbound e-documents will have their status set to Converted; otherwise, the status will be Conversion Failed.

If any of the inbound e-documents in the batch failed conversion, a notification will be sent to the email address of the user defined in the Recipient of E-Document Notifications. If all inbound e-documents in the batch were successfully converted, no notification email will be sent. The email notification will have an attached CSV file listing the inbound e-documents that underwent conversion. The list has columns indicating the Internal ID, Vendor, and details of the conversion process and errors. Likewise, you can view the error details of an inbound e-document that failed conversion by clicking the View link of that record. Then, on the E-Document Audit Trail subtab, in the Details column, view the error scope and details.

**Electronic Invoicing User Guide**

- **Note:** To fully utilize the outbound and inbound e-document processing of the Electronic Invoicing SuiteApp, make sure your account administrator has already created and applied the e-document templates, sending method, email recipients, email capture, inbound validation plug-in, and other settings. For information on setting up Electronic Invoicing, see [Electronic Invoicing Administrator Guide](#).

The following topics are intended for users of the Electronic Invoicing SuiteApp.

**General User Task**

- **Displaying the E-Documents Portlet on the Home Page**

**Outbound E-Document Processing User Tasks**

- **Overview of Outbound E-Document Process**
- **Outbound E-Document Statuses**
- **Assigning E-Document Packages to Customer or Vendor Records**
- **Defining E-Document Email Recipients**
- **Selecting E-Document Packages, Templates and Sending Methods on Transactions**
- **Enabling PDF File Reference Generation**
- **Generating and Regenerating E-Documents**
  - **Generating E-Documents for Single Transactions**
  - **Regenerating E-Documents for Single Transactions**
  - **Generating and Regenerating E-Documents in Bulk**
- **Sending and Resending E-Documents**

**Electronic Invoicing**
Displaying the E-Documents Portlet on the Home Page

The Electronic Documents Dashboard SuiteApp Portlet provides links to outbound and inbound e-document processes and features. For more information, see Electronic Documents Dashboard SuiteApp Portlet.

If you have access permission to the e-documents portal, you can display it on your NetSuite Home page just like any dashboard portlet.

To display the E-Documents Portlet on the Home page:

1. Go to the NetSuite Home page.
2. Click Personalize.
4. Click the Electronic Documents portlet, or drag the icon to the dashboard.

Electronic Invoicing User Guide
Overview of Outbound E-Document Process

From a user’s perspective, the following steps describe the end-to-end process of generating XML e-documents from NetSuite transaction records and then sending the XML e-documents:

1. Assign an e-document package to a customer or vendor by performing the following steps:
   a. Create or edit a customer or vendor record. If you are using an e-document sending method with an email channel, be sure to create or add the email recipients of the e-document. Then, on the **E-Document Email Recipient** subtab under the **E-Document** subtab, select contacts. You can select only contacts associated with the customer or vendor. Contacts must have valid email addresses. See **Defining E-Document Email Recipients**.
   - If the customer or vendor is a company, create one or more contact records.
   - If the customer or vendor is an individual, add a valid email address on the record.
   b. On the **E-Document** subtab, in the **E-Document Packages** field, select the e-document package to use for the customer’s or vendor’s transaction records.

   **Note:** The outbound template and sending method included in the e-document package you will select must have subsidiaries belonging to this customer or vendor. For more information, see **Multi-subsidiary Support in the Outbound Process**.

2. Create or edit a transaction record. Select an e-document template and an e-document sending method. For more information, see **Transactions and Processes Supported by the Electronic Invoicing SuiteApp** and **Selecting E-Document Packages, Templates and Sending Methods on Transactions**.
   - If the e-document to be generated must be sent to a certification authority for certification, make sure that a certification sending method is assigned to the transaction and subsidiary. For more information, see **E-Document Certification in the Outbound Process**.

3. Generate an e-document for the transaction record. You can generate e-documents individually or in bulk. For more information, see **Generating and Regenerating E-Documents**.

4. Send the e-document. You can send e-documents individually or in bulk. For more information, see **Sending and Resending E-Documents**.

   **Note:** If a certification sending method is assigned to the transaction and subsidiary, the **Certify E-Document** button is displayed, which sends the e-document to the specified certification authority. Certified e-documents can be sent again to customers, vendors or a tax agency.

To understand errors that can be encountered during the generation or sending of e-documents, read the following topics:

- **Outbound E-Document Generation Errors**
- **Outbound E-Document Sending Errors**

To understand the outbound electronic invoicing process flow and e-document status definitions, see the following topics:

- **Outbound Electronic Invoicing**
- **E-Document Audit Trail and Statuses**
Outbound E-Document Statuses

E-document statuses are indicated in the **E-Document Status** field on the **E-Document** subtab. Outbound e-document statuses describe whether a transaction or e-document is in the process of e-document generation, sending or certification. The following table lists the e-document generation statuses.

<table>
<thead>
<tr>
<th>E-Document Generation Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Generation</td>
<td>The e-document can be generated. An outbound e-document template was associated with the transaction and the e-document can be generated. Audit trail log indicates Tagged for Generation.</td>
</tr>
<tr>
<td>Generating</td>
<td>The e-document is being generated.</td>
</tr>
<tr>
<td>Generation Failed</td>
<td>The e-document was not generated. An error caused generation to fail. See details of e-document generation errors on the E-Document Audit Trail subtab. You must first fix the errors before you can regenerate an e-document. For more information, see <a href="#">Outbound E-Document Generation Errors</a>.</td>
</tr>
<tr>
<td>Untagged for E-Invoice Generation</td>
<td>The e-document template was removed from the transaction record. The e-document of the transaction record will not be generated.</td>
</tr>
</tbody>
</table>

The following table lists the e-document sending statuses.

<table>
<thead>
<tr>
<th>E-Document Sending Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready for Sending</td>
<td>The e-document was generated successfully and the e-document can be sent to specified recipients. Whether the e-document was generated manually or through bulk generation is indicated.</td>
</tr>
<tr>
<td>Sending</td>
<td>The e-document is being sent to specified recipients.</td>
</tr>
<tr>
<td>Sending Failed</td>
<td>The e-document was not sent. Information about sending errors are shown in the Details column. You must fix the error and regenerate the e-document before you can resend it.</td>
</tr>
<tr>
<td>Sent</td>
<td>The e-document was successfully sent. If the default sending method is email, the Details column shows the email addresses of the sender and recipients.</td>
</tr>
</tbody>
</table>

**Note:** When an e-document is sent, the designated e-document sender's name and email address is displayed as the sender. If you did not designate a sender, the system uses the name and email address of the person who initiated the sending process as the sender of the e-document. For more information, see [Selecting a Designated E-Document Sender](#).

The following table lists the e-document certification statuses.

**Note:** E-document certification statuses are not automatically updated by the system, you must implement the updates through the certification sending method. See [Updating E-Document Certification Statuses](#).

<table>
<thead>
<tr>
<th>E-Document Certification Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready for Certification</td>
<td>The e-document has a certification sending method assigned to its transaction and subsidiary, and it can be sent to the certification authority.</td>
</tr>
</tbody>
</table>
### Assigning E-Document Packages to Customer or Vendor Records

The e-document templates and sending methods assigned to the e-document package are available for selection on the **E-Document** subtab of every customer or vendor transaction.

**To assign an e-document package to a customer or vendor:**

1. Create or edit a customer or vendor record.
2. Click the **E-Document** subtab of the customer or vendor record.
3. In the **E-Document Package** field, select the appropriate e-document package for the customer or vendor.

   **Note:** The outbound template and sending method included in the e-document package you will select, must have subsidiaries belonging to this customer or vendor. For more information, see [Multi-subsidiary Support in the Outbound Process](#).

4. Click **Save**.

   **Note:** Assigning e-document packages with email sending methods can only be done by editing the customer or vendor record.

### Defining E-Document Email Recipients

If you want to use an e-document sending method that has an email sending channel, you must first define the email recipients for your customer or vendor. If the customer or vendor is a company, there should be at least one email recipient defined on the **E-Document** subtab on the customer or vendor record. If the customer or vendor is an individual, make sure it has an email address.

**Note:** The system can send an e-document by email to a maximum of 10 recipients for each customer or vendor. The system counts each contact added as a recipient. If you add the same contact multiple times, each instance is considered an individual recipient.

**To define e-document email recipients:**

1. Create or edit a customer or vendor record.
2. On the **E-Document Email Recipient** subtab under the **E-Document** subtab, select a contact or select **New** to create a new contact.
Selecting E-Document Packages, Templates and Sending Methods on Transactions

Before you can generate an e-document, you must specify on the transaction record the e-document template and sending method to use for generating and sending the e-document.

**To Select E-Document Package, Template and Sending Method on Transactions:**

1. Create or edit any supported transaction record that you want to generate and send an e-document.
2. Go to the **E-Document** subtab.
   
   For item fulfillment records, you must first define an Item Fulfillment template and sending method along with Transfer Order template and sending method in the same package. This is to enable the selection of Item Fulfillment template and sending method directly from the Item Fulfillment record.

   **Note:** The **E-Document Package** field is specific only for transfer order and it’s following item fulfillment transactions.

4. Select an e-document template that you want the system to use for generating the e-document on the **E-document Template** field.
   
   If you do not want the transaction to be tagged for e-document generation, leave this field blank.

   **Note:** The e-document templates available for selection are based on the e-document package assigned to the customer. For more information, see Creating E-Document Packages.

5. Select the sending method to use for sending the e-document on the **E-Document Sending Method** field.
6. Click **Save**.

Enabling PDF File Reference Generation

The Electronic Invoicing SuiteApp supports the creation, sending, and receiving of PDF file references of transaction records undergoing the e-document process. The PDF version of transaction records will enable you to view and check if the content of an XML e-document is correct.

In outbound e-document processing, if you enable the setting Generate PDF, the PDF file is created when the XML file of a transaction record is generated. After the PDF file is created, you can view it in
the **Generated PDF** field, on **E-Document** subtab of transaction records. The PDF file is attached to the generated XML e-document when sending.

**Note:** PDF file reference generation is not supported for vendor bill records. The Generate PDF box and Generated PDF link are not available on vendor bill records with generated outbound e-documents.

### Generate PDF File References

You can generate PDF file references of transaction records to be converted into e-documents.

The PDF file generated will follow the default printing layout of the transaction. You can set a default preference on entity records.

**Enabling Generate PDF as a Default in Entity Records**

1. Edit a customer or vendor record and go to the **E-Document** subtab.
2. Check the **Generate PDF** box. As a result, all transaction types supported by electronic invoicing from this customer or vendor will have the Generate PDF box automatically checked. When e-documents are generated from the transactions, corresponding PDF file references will be automatically created. PDF file references are attached when their XML e-documents are sent.
3. Click **Save**.

   When the e-document is generated, the PDF file reference can be viewed and downloaded under **Generated PDF** on the **E-Document** subtab of the transaction.

If you do not want to create PDF file references of individual transaction records, you can still override PDF generation enabled on the customer or vendor record. To do so, edit the transaction record that you do not want to generate a PDF file reference of, and then clear the **Generate PDF** box. If Generate PDF is cleared on a transaction record where it was initially enabled and a PDF file was generated, during the next e-document generation, no PDF file will be generated and any previously generated PDF file will be deleted.

### Generating and Regenerating E-Documents

The e-documents of transaction records in NetSuite can be generated using the Electronic Invoicing SuiteApp. The generated e-documents can then be sent to your customers or tax authorities through the outbound process.

You can generate the XML e-documents of the following transaction records:

- Invoice
- Item Fulfillment
- Purchase Order
- Credit Memo
- Cash Sale
- Cash Refund
- Return Authorization
- Estimate
- Customer Payment
- Bill (for self-billing)

To generate an e-document, you must first select an e-document template on the transaction. The system cannot generate an e-document if there is no e-document template associated with the transaction.
The e-document templates available for selection in each transaction record are templates you have assigned to the customer's e-document package. For more information, see Creating E-Document Packages.

The e-document templates available for selection in each transaction record are templates that have been assigned to that transaction type. For more information, see Creating E-Document Templates.

You can generate e-documents individually or in bulk, regardless of transaction type.

The system supports e-document generation for supported transactions created using the user interface, CSV import, SOAP web services, and SuiteScript.

Generating E-Documents from the Electronic Documents Portlet

You can quickly access outbound e-documents with status For Generation from the Electronic Documents portlet on the Home page. For more information on the Electronic Documents portlet, see Electronic Documents Dashboard SuiteApp Portlet.

To generate e-documents from the Electronic Documents portlet:

1. Go to the Electronic Documents portlet on the Home page.
2. Click the number under Outbound E-Documents for Generation.
   The Outbound E-Documents For Generation results page is displayed.
3. Click the View link of the transaction record that you want to generate an e-document from.
4. On the selected transaction record, click the Generate button.

Generating E-Documents for Single Transactions

You can also start the process of generating e-documents from transaction records.

To generate an e-document:

1. Create or edit a transaction record.
2. Enter items and other required information on the transaction record.
3. Click the E-Document subtab.
4. In the E-Document Template field, select the e-document template that you want the system to use for generating the e-document. If you do not want this transaction to be tagged for e-document generation, leave this field blank.

   Note: The e-document templates available for selection are based on the e-document package assigned to your customer or vendor. For more information, see Creating E-Document Packages.

   Important: Use caution when you want to edit the transaction record. Each time you edit and save a transaction, the E-Document Status field is updated to For Generation. You will need to generate and send the e-document again. Note that this does not apply to e-documents with the Sent status.

5. Click Save. The system updates the transaction record, and a Generate E-Document button is displayed at the top. On the E-Document subtab, the value of the E-Document Status field is updated to For Generation.
Note: The Generate E-Document button appears only when viewing a transaction record. It is not displayed in edit mode.

6. **Click Generate E-Document.**

The outbound e-document is generated. A PDF version of the source transaction is also generated if Generate PDF is enabled on the transaction record.

After generating the e-document, the system updates the value in the E-Document Status field on the E-Document subtab. The field shows one of the following statuses:

- **Ready for Sending** – This status means the e-document was generated successfully and can be sent to the email recipients defined in the customer record or your e-document sending method.
  
  For more information, see Creating E-Document Sending Methods.

- **Generation Failed** – This status means the e-document was not generated. Information about generation errors are shown in the Details column of the E-Document Audit Trail subtab. You must first fix the errors before you can regenerate an e-document.
  
  For more information, see E-Document Audit Trail and Statuses.

### Regenerating E-Documents for Single Transactions

You can regenerate an e-document for individual supported transaction records at any time. The transaction records must have an e-document template assigned to them, and the status in the E-Document Status field must not be blank or Sent. However, if an error occurs during generation and the error is not fixed, the system will not be able to generate an e-document for the transaction.

If the value in the E-Document Status field on the E-Document subtab shows Generation Failed, you can regenerate the e-document by doing the following:

**To regenerate an e-document:**

1. Fix the errors identified in the audit trail.
2. View the transaction and click Generate E-Document.

**Important:** Use caution when you want to edit the transaction record. Each time you edit and save an document, the E-Document Status field is updated to For Generation. You will need to generate and send the e-document again. This can result in generating and sending multiple e-documents for one transaction record. Note that this does not apply to e-documents with the Sent status.

For more information about generation errors, see Outbound E-Document Generation Errors.

### Generating and Regenerating E-Documents in Bulk

If your account administrator has set up a schedule to run the bulk generation script periodically, the script automatically generates e-documents for those transactions that have any of the following statuses:

- For Generation
- Generation Failed

Upon successful bulk generation of outbound e-documents, PDF versions of the transactions are also generated if those transactions have the Generate PDF setting enabled.

For failed generation, errors must be fixed first before e-documents can be regenerated.

When the system encounters an error during bulk generation of e-documents, it sends an email notification to the Recipient of E-Document Notifications. If the Recipient of E-Document Notifications
is not assigned yet, the notification will be sent to the active administrator of the account. For more information on assigning the Recipient of E-Document Notifications, see Prerequisites for Using Electronic Invoicing, step 4.

The email message contains an attachment in CSV format that lists the transaction records that encountered errors during bulk generation.

The user who created the transaction record must fix the errors for each individual transaction record. After the errors are fixed, the e-documents will be generated during the next scheduled bulk generation of e-documents. Alternatively, the user can regenerate an e-document for the individual transaction record.

For more information about generation errors, see Outbound E-Document Generation Errors.

If you want to generate or regenerate e-documents for multiple transactions outside of the scheduled script run, contact your account administrator for assistance. See Deploying the Bulk Generation Script for E-Documents.

**Sending and Resending E-Documents**

A successfully generated e-document displays the Send E-Document button on the transaction record and its e-document status indicating Ready for Sending.

A generated e-document with a certification sending method assigned to its transaction and subsidiary, displays the Certify E-Document button on the transaction.

**Note:** Generating a new e-document overwrites the previous e-document.

**Sending the E-Document of a Single Transaction**

Perform the following steps to send the e-document of a single transaction.

**To send an e-document:**

1. Open the transaction record whose e-document status is Ready for Sending.
   
   If the e-document is for certification and a certification sending method is assigned to the transaction and subsidiary, the status is Ready for Certification.

2. Make sure that the E-Document Sending Method field specifies the sending method appropriate for this transaction record.
   
   If the e-document is for certification, make sure that a certification sending method is assigned to the transaction and subsidiary.

3. Click the Send E-Document button.
   
   If the e-document is for certification and a certification sending method is assigned to the transaction and subsidiary, click the Certify E-Document button.

A banner appears on the transaction record indicating that sending of the e-document is in progress. The e-document is sent through the selected sending method and the value of the E-Document Status field on the E-Document subtab is updated. For more information, see Outbound E-Document Statuses.

Successfully certified e-documents are returned by the certification authority. You can view or download the XML file of the certified e-document by clicking the corresponding links under Certified E-Document on the E-Document subtab of the transaction.

**Resending the E-Document of a Single Transaction**

Perform the following steps to resend the e-document of a single transaction.
To resend an e-document:

1. If failure in the previous e-document sending was caused by an error, amend the transaction as necessary and save it.
2. Open the amended transaction and click Generate E-Document.
   After the system generates the e-document, an audit trail is created and the status in the E-Document Status field changes to Ready for Sending.
3. Click Send E-Document to send the e-document.
   After the system sends the e-document, the status displayed in the E-Document Status field changes to Sent, and an audit trail is created.

Resending E-Documents in Bulk

Note: Resending e-documents in bulk requires certain permissions and access levels for roles. For more information, see Setting Up Custom Roles to Send E-Documents.

The Electronic Invoicing SuiteApp provides a search filter to enable you to resend in bulk the e-documents that failed initial sending. The system searches for all e-documents with Sending Failed status.

Errors must be fixed before e-documents can be successfully resent. For more information, see Outbound E-Document Sending Errors.

To access outbound e-documents that failed generation or sending, go to the Electronic Documents portlet on the Home page, and then click the number under Outbound E-Documents with Errors. On the Outbound E-Documents with Errors results page, view or edit the transaction records that you want to fix.

After fixing the errors, you can proceed with either regenerating or resending the outbound e-documents.

To resend e-documents in bulk:

1. Go to the Electronic Documents portlet on the Home page, and then click the link Send Failed Outbound E-Documents.
2. In the Select entity type filter, choose either Customer or Vendor.
3. To view a list of transactions for a particular customer or vendor, select that customer or vendor from the Customer or Vendor field. If no customer or vendor is selected, the search result will display all transaction belonging to the subsidiary, regardless of customer or vendor.
4. In the Subsidiary field, select a subsidiary to view the transactions for that subsidiary only.
5. In the Transaction Date From field, set the date to define the beginning of the date range. The search result displays all created transaction records starting from the date you set in this field.
6. In the Transaction Date To field, set the date to define the end of the date range. The search result displays all created transaction records starting from the date you set in this field.
7. If you chose the Customer entity type, select one or more transaction types in the Transaction Type field, for each e-document you want to resend. To select multiple transaction types, press and hold the Ctrl key while selecting each transaction type. If no transaction type is selected, the search result will show all e-documents with Sending Failed status, regardless of transaction type.
   If you chose the Vendor entity type, Purchase Order is automatically selected in the Transaction Type field, because only purchase order is applicable to vendor entities.
   Only transaction types that are supported by or applicable to outbound e-document sending are shown in the transaction list, which include:
   - Cash refund
Cash sale
Credit memo
Estimate
Invoice
Purchase order
Return authorization
Customer payment

8. Click Search.
The search result displays all e-documents with Sending Failed status, according to your search criteria.

9. Click Send to resend all e-documents displayed in the search results.
After the system sends the e-documents, it updates the value in the E-Document Status field on the E-Document subtab on each transaction record. The field shows one of the following statuses:
- Sent – This means the e-document was successfully sent. The Details column shows the email addresses of the sender and recipients.
- Sending Failed – This means the e-document was not sent. Information about sending errors are shown in the Details column. You must fix the errors before you can successfully resend the e-document.

For more information, see Outbound E-Document Sending Errors.
The system sends an email notification to the person who initiated the sending process when the e-documents have been sent.
The email message contains an attachment in CSV format that lists the transaction records and the status of each transaction. If errors were encountered, the details are included in the attachment.

Overview of Inbound E-Document Processing

The following describe the end-to-end process of creating inbound e-documents and then converting them into NetSuite transaction records using the Electronic Invoicing SuiteApp.

To upload and convert inbound e-documents:

1. The administrator creates an inbound e-document template, which will map the data elements of the inbound XML e-document to corresponding NetSuite transaction fields when converted. See Creating E-Document Templates.
2. The administrator associates the inbound e-document template with an e-document package, which is assigned to a customer or vendor. See Assigning E-Document Packages to Customer or Vendor Records.
3. The administrator designates an employee or group who will receive an email notification after scheduled automatic bulk conversion of inbound e-document records to transaction records.
4. If the inbound e-document is received through means other than email capture, users can upload it manually. See Uploading Received XML Files as Inbound E-Documents.
5. Users can convert inbound e-document records with status For Conversion, into transaction records. You can manually convert e-documents or run automatic scheduled bulk conversion. See Converting Inbound E-Documents into Transaction Records.

The status of newly created vendor bills from e-document conversion is dependent on the default status of Accounting Preference or whether Vendor Approval Routing is enabled.
Inbound E-Document Statuses

E-document statuses are indicated in the E-Document Status field on the E-Document subtab. Inbound e-document statuses describe the state of a received e-document in the e-document conversion process. The following table lists the inbound e-document statuses.

<table>
<thead>
<tr>
<th>E-Document Conversion Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete</td>
<td>The inbound e-document is missing some details or content. Audit trail log indicates Tagged as Incomplete.</td>
</tr>
<tr>
<td>For Conversion</td>
<td>The inbound e-document is ready for conversion into a vendor bill. A vendor, XML file reference, and e-document template have been defined in the inbound e-document. Audit trail log indicates Tagged for Conversion.</td>
</tr>
<tr>
<td>Converting</td>
<td>The e-document is being converted to a transaction record.</td>
</tr>
<tr>
<td>Converted</td>
<td>The inbound e-document was successfully converted into a vendor bill.</td>
</tr>
<tr>
<td>Conversion Failed</td>
<td>An error occurred and the inbound e-document was not converted. Information about conversion errors can be found in the Details column of the E-Document Audit Trail subtab.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The inbound e-document was canceled. If cancellation of the inbound e-document encountered an error and did not proceed, the audit trail log will indicate Cancellation Failed.</td>
</tr>
</tbody>
</table>

Receiving Inbound E-Documents by Email Capture

After your administrator has set up the Inbound Email Capture plug-in and Vendor E-Document Sender, you are ready to receive inbound e-documents from your vendors. The system automatically receives inbound e-documents sent through email and then queues them as Inbound E-Documents for Conversion if an e-document template is assigned.

The number of e-documents received from email capture is displayed on the Electronic Documents portlet, under Inbound E-Documents for Conversion. You can click the number displayed to go to the Inbound E-Documents for Conversion: Results page, which lists the inbound e-documents for conversion. For more information, see Electronic Documents Dashboard SuiteApp Portlet.

If you have automatic bulk conversion set up, the bulk conversion script will automatically convert the e-documents in the list into transaction records at a defined schedule. For more information, see Deploying Automatic Bulk Conversion Script for Inbound E-Documents. Or, you can convert individual e-documents in the list by clicking the View link of an e-document, and then click the Convert button on the inbound e-document record page.

Inbound e-document email capture receives XML files along with their PDF file reference attachment, if any were generated. Received PDF files are stored in the File Cabinet and can be viewed by clicking a link in the PDF File Reference field on the newly created inbound e-document record. When the inbound e-document is converted into vendor bill, the PDF file reference can also be viewed from the E-Document subtab.

Note: Inbound email capture can only receive one XML e-document and one PDF file per email.

Editing Incomplete Inbound E-Documents

Inbound e-documents that do not clearly define the vendor who sent them, will also be missing the e-document template, which is defined by the vendor. These inbound e-documents will be tagged as
incomplete. They are queued as Incomplete Inbound E-Documents, which is displayed on the e-document dashboard portlet. You can click the number displayed under Incomplete Inbound E-Documents to go to a results page, where you can click the Edit link of an inbound e-document to complete it.

On the Inbound E-Document record page, you can complete the inbound e-document by selecting the right vendor in the Vendor field and then the system automatically selects the e-document template that is applicable to the inbound e-document based on the XML content and the selected vendor. But, you can still manually select or override the default e-document template. After completing the inbound e-document, the E-Document Status is changed to For Conversion.

Receiving E-Document XML Files from Web Service

XML files sent through web service are received by NetSuite and are displayed in the Electronic Documents dashboard portlet. But before receiving e-documents, you must first set up and select the appropriate inbound e-document templates to be used. For more information on setting up inbound templates, see Understanding Inbound E-Document Templates in JSON Format and Understanding XSD in Inbound E-Document Templates.

XML e-documents received by NetSuite through web service are validated and checked if the information they contain is complete. The system automatically identifies the sender using the Token ID and Token Secret provided in the request. The Web Service ID is used to identify the vendor whom the e-document should be associated with. The integrity of the XML file is also checked. The results of these validations determine if an inbound e-document record will be created from the received XML file. If created, the inbound e-document record will indicate Web Service in the Source field. The inbound e-document is added to the queue corresponding its processing status displayed on the Electronic Documents dashboard portlet.

NetSuite responds to web service requests by confirming the success or failure of e-document creation. You can view web service requests and responses by going to Customization > Scripting > Scripts, then click the View link of the Inbound E-Document Web Service RL script. The logs are on the Execution Log subtab.

Web Service Errors

The following tables list the web service errors that can be encountered by the recipient and sender of web service requests. The recipient is the user in your company who can receive the XML files from web service. The sender is the vendor you authorized to issue web service requests to NetSuite to send XML files.

Errors Encountered by Web Service Recipients

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Description and Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Web Service ID is already being used by another vendor. Enter a different Web Service ID.</td>
<td>This message is displayed when user tries to save a vendor record that has a web service identifier that is already being used by another vendor. A different web service identifier must be entered.</td>
</tr>
<tr>
<td>The inbound e-document is incomplete, as the correct template cannot be determined. Either select a template in the inbound e-document record, or set up the XSD in the e-document template record to enable template autoselection.</td>
<td>This message is sent through email to the Recipient of E-Document Notifications, informing the recipient that an inbound e-document record was created but is incomplete. Either manually set the template in the inbound e-document record, or set up the template's XSD to enable template auto selection.</td>
</tr>
</tbody>
</table>
## Error Message

The inbound e-document is incomplete, as the correct vendor cannot be determined. Either select a vendor in the inbound e-document record, or set the Web Service ID in the associated vendor record.

### Description and Solution

This message is sent through email to the Recipient of E-Document Notifications, informing the recipient that an inbound e-document record was created but is incomplete. Either manually set the vendor in the inbound e-document record, or correctly set up the vendor’s web service ID field.

### Errors Encountered by Web Service Sender

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Description and Solution</th>
</tr>
</thead>
</table>
| The following keys are missing: (KEYS), which you must provide in the web service request. | The web service request failed because any of the following keys is missing:  
- identifier  
- filename  
- content  
Ensure that the missing keys are provided in the web service request. |
| The body of the web service request must be a JSON object or an array of JSON objects using Content-Type: 'application/json'. | The web service request failed.  
The content of the web service request must be JSON objects. |
| The selected XML File Reference is not a valid XML file. Ensure that the file you select has the .xml extension. | The web service request failed.  
Provide a valid XML file for the XML File Reference. |
| No vendor is associated with the Web Service ID: {IDENTIFIER}. Ensure that the correct Web Service ID is used. | The web service request failed.  
Ensure that the Web Service ID is associated with a vendor or the party sending XML files. |
| The selected XML File Reference is not a well-formed XML document. | The web service request failed.  
Check the XML File Reference and ensure that content adheres to XML syntax, with properly defined content, structure and tags. |

### Uploading Received XML Files as Inbound E-Documents

Aside from email capture, you can receive vendor bills in XML format through other means like storage media. You can manually upload these XML file references to NetSuite as inbound e-document records, which are subsequently converted into vendor bills records.

**To upload an XML file reference as an inbound e-document record:**

1. On the E-Documents Portlet on the Home page, click the **Upload Inbound E-Document** link.
   
The Inbound E-Documents page displays the following fields:  
- Transaction Type indicates the record (Bill) that will be created as a result of the conversion.  
- Source indicates Manual Upload by default.  
- Reference Number and PO Number receive values from the XML file reference that you will upload. These fields will have values after conversion to a transaction record.
E-Document Status indicates the status of the newly created inbound e-document.

2. In the Vendor dropdown list, select the vendor who sent the XML file.

3. In the XML File Reference field, click + and select the XML file that you will convert into a transaction record.
   The XML File Reference dropdown list displays files stored in the File Cabinet. Ensure that you select an XML document that is well-formed and valid, with the .xml file extension; otherwise, an error will be generated.

4. In the E-Document Template field, select an inbound e-document template.

   Note: If an XSD file was selected in a template record that is appropriate for this inbound e-document record, that template is automatically selected in the E-Document Template field.

5. If you want to attach the PDF version of the XML document, click + on the PDF File Reference field, then select the PDF file you want to associate with this record.

6. Click Save.

A new inbound e-document record is created and displayed with its E-Document Status set to For Conversion. The E-Document Audit Trail subtab displays information about the inbound e-document record including the date created, entity, event type, owner, and details. If the uploaded XML file has an attached PDF file reference, the attachment can be viewed and downloaded in PDF File Reference field on the created inbound e-document record.

Converting Inbound E-Documents into Transaction Records

Converting an E-Document into Vendor Bill Linked to Purchase Order

The process of converting purchase order to vendor bill is viewed from the perspective of the NetSuite user being a customer, who purchased items or services from a vendor. In this scenario, the NetSuite user initially sends a purchase order to a vendor, via outbound electronic invoicing. The purchase order is received by the vendor and processed on their side. The vendor will enter the details of the purchase order into their system and eventually generates an invoice record, which is then converted into an XML e-document and returned to the NetSuite user. The XML e-document from the vendor is received by the NetSuite user through the inbound electronic invoicing feature. The NetSuite user uploads the received XML file to NetSuite as an inbound e-document record. It is this inbound e-document record that will undergo conversion to a vendor bill that is linked to the original purchase order.

Purchase Order Items and Expenses in Inbound E-Documents

Important: Currently, support for expenses in inbound processing is still in release preview status and only accessible to sandbox accounts. Expenses in inbound processing will be live and available for production accounts by the end of October.

As an item or an expense is required in a purchase order, either of them must also be included in the e-document for conversion; otherwise, conversion to vendor bill will not proceed.
In addition, items or expenses specified in the inbound e-document must include relevant details:

- For items, either the vendor code or vendor code/name must be included, depending on whether the Multiple Vendors feature is enabled or not.
- For expense, the amount must be included, and it is recommended that the Default Expense Account in the vendor record has a value. If there are specified amounts with no corresponding accounts, the Default Expense Account is automatically made the default account in the new vendor bill created from conversion.

For more details about the prerequisites for converting inbound e-documents with purchase orders items or expenses, see the following topic.

**Prerequisites and Conditions for Conversion**

**Permission to Convert E-Documents**

Your user role must have the permission to convert e-document records into NetSuite transactions. For more information on granting a role the permission to perform inbound e-document conversion, see Setting Up Custom Roles that can Convert Inbound E-Documents.

**Status of Purchase Order**

The inbound XML e-document must not be linked to a purchase order whose status is fully billed, unapproved, rejected, cancelled or closed. Otherwise, the conversion will fail. Conversion will also fail if the vendor in the inbound XML e-document is different from the vendor in the purchase order.

**Inbound E-Document has Reference Number with Mapping in the Template**

The Reference Number must be included in the inbound XML e-document and the e-document template must contain the mapping for the reference number. Without the reference number in the inbound XML e-document or the correct reference number mapping in the template, conversion of the e-document will fail.

**Inbound E-Document has Purchase Order Number and the Template has Mapping to the createdfrom Field**

The Purchase Order Number must be included in the inbound XML e-document and the e-document template must contain the mapping for the createdfrom field. Without the Purchase Order Number in the inbound XML e-document or the correct reference number mapping in the template, conversion will result in a stand-alone vendor bill. See Converting an Inbound E-Document Without a Purchase Order Number.

**Purchase Order must have either an Item or Expense**

The reference purchase order of the inbound e-document for conversion, must have either an item or expense specified. Without item or expense, the inbound e-document will not be converted. Moreover, purchase order items or expenses must have required details included in the inbound e-document for conversion. The required details of items or expenses are discussed in the following sections.

**Required Account and Amount for an Expense**

If the XML e-document has an expense line, the mandatory Account and Amount fields of the bill must have values. The Account field of the expense line references the value of Default Expense Account on the Financial subtab of the vendor record. Therefore, the vendor must have a Default Expense Account setup or the conversion will fail.

**Required Vendor Code for Item Records**
If the purchase order has item records, the vendor code of these item records must be included in the inbound XML e-document. If the Multiple Vendors feature is enabled during conversion, you must enter the Vendor Code on the Vendors subtab of the item record. The vendor code will be used to map the items to their corresponding vendor. If the vendor code in the XML e-document does not match any vendors, conversion will fail. The vendor code field is highlighted in the following screenshot.

**Required Vendor Code/Name for Item Records**

If the Multiple Vendors feature is disabled, the vendor code/name on the main tab of item records must be included in the inbound XML e-document. Otherwise, the conversion will fail. If two or more items have the same vendor code/name, implying duplicates, the conversion will fail. The vendor code/name field is highlighted in the following screenshot.
Common Scenarios in Vendor Bill Conversion

The following tables summarize the conversion of inbound e-documents with reference purchase orders that have items and expenses. Consider the scenarios that result in successful conversion and avoid those where conversion will fail.

### Conversion Scenarios with Purchase Order Items

<table>
<thead>
<tr>
<th>Case</th>
<th>Details of Reference Purchase Order</th>
<th>Details of Inbound XML E-Document based from the Purchase Order</th>
<th>Details of Inbound E-Document Template</th>
<th>Expected Conversion Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partial billing of some line items</td>
<td>The purchase order contains multiple line items.</td>
<td>The inbound XML e-document contains less line items than the total number of line items in the reference purchase order.</td>
<td>The template is valid with correct mapping.</td>
<td>Conversion will succeed. The created vendor bill includes only the line items contained in the XML e-document. The vendor bill is linked to the reference purchase order.</td>
</tr>
<tr>
<td>Duplicate line items</td>
<td>The purchase order contains duplicate line items.</td>
<td>The inbound XML e-document contains only one instance of each line item in the purchase order.</td>
<td>The template is valid with correct mapping.</td>
<td>Conversion will succeed. The created vendor bill contains no duplicate line items. The vendor bill is linked to the reference purchase order.</td>
</tr>
<tr>
<td>E-document template contains no mapping</td>
<td>The purchase order contains line items with values for amount, quantity, tax code, and rate fields.</td>
<td>The inbound XML e-document contains line items with field values.</td>
<td>The e-document template is valid but has no mapping for line item field values.</td>
<td>Conversion is successful. Field values for line items will take the default values entered in the purchase order.</td>
</tr>
<tr>
<td>The XML e-document contains additional line items that are not in the purchase order.</td>
<td>The purchase order is not yet billed and contains multiple line items.</td>
<td>The inbound XML e-document contains all or some of the purchase order line items, plus additional line items that are not in the purchase order.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will succeed. All purchase order line items that are included the XML e-document, are entered in the created vendor bill. The additional line items included in the XML e-document but not in the purchase order, are also entered in the vendor bill. If all line items from the purchase order are included in the vendor bill. The status of the reference purchase order becomes Fully Billed.</td>
</tr>
<tr>
<td>Converting a Partially Received purchase order with additional line items that are not in the reference purchase order</td>
<td>The purchase order is Partially Received and contains multiple line items, one of which has been received.</td>
<td>The inbound XML e-document contains some (but not all) purchase order line items, including the ones that have been received, plus additional line items that are not in the purchase order.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will succeed. All purchase order line items in the XML e-document that are not yet received, are included in the created vendor bill. Line items already received but still included in the XML e-document, are taken as additional line items in the bill. Additional line items that are not in the purchase order are included in the</td>
</tr>
<tr>
<td>Case</td>
<td>Details of Reference Purchase Order</td>
<td>Details of Inbound XML E-Document based from the Purchase Order</td>
<td>Details of Inbound E-Document Template</td>
<td>Expected Conversion Result</td>
</tr>
<tr>
<td>---------------------------------------------------------------------</td>
<td>-------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>---------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>The inbound XML e-document contains line items with no field values or values are set to 0.</td>
<td>The purchase order contains line items with values for amount, quantity, tax code, or rate.</td>
<td>The inbound XML e-document contains line items but with no values for the amount or quantity fields, or values are set to 0.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will fail. Details of the error are indicated in the E-Document Audit Trail.</td>
</tr>
<tr>
<td>The inbound XML e-document contains no line items.</td>
<td>The purchase order contains multiple line items.</td>
<td>The inbound XML e-document contains no line items.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will fail. Details of the error are indicated in the E-Document Audit Trail.</td>
</tr>
<tr>
<td>The XML e-document contains only line items that are not in the reference purchase order.</td>
<td>The purchase order contains multiple line items.</td>
<td>All line items in the XML e-document are not in the reference purchase order.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will fail. Details of the error are indicated in the E-Document Audit Trail. The transaction must contain at least one line item.</td>
</tr>
</tbody>
</table>

**Conversion Scenarios with Purchase Order Expenses**

<table>
<thead>
<tr>
<th>Case</th>
<th>Details of Reference Purchase Order</th>
<th>Details of Inbound XML E-Document based from the Purchase Order</th>
<th>Details of Inbound E-Document Template</th>
<th>Expected Conversion Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>The XML inbound e-document is for partial billing. Not all purchase order expenses are billed.</td>
<td>The purchase order contains expenses with the required amount and corresponding account.</td>
<td>The inbound XML e-document does not include all amounts for each expense line.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will succeed. The created vendor bill has the amount of the expenses mapped to their corresponding accounts.</td>
</tr>
<tr>
<td>An extra expense amount is included in the inbound e-document.</td>
<td>The purchase order contains expenses with the required amount and corresponding account.</td>
<td>The inbound XML e-document contains an expense amount with no corresponding account.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will succeed. The expense amount with no corresponding account will automatically be assigned to the Default Expense Account specified in the vendor record.</td>
</tr>
<tr>
<td>The purchase order has expense amount and account, but the inbound XML e-document does not</td>
<td>The purchase order contains expenses with the required amount and corresponding account.</td>
<td>The inbound XML e-document does not have an expense included.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will only proceed if the inbound XML e-document includes at least one line item from the reference purchase order. If neither line item nor expense is included in the inbound e-</td>
</tr>
</tbody>
</table>
### Case Details of Reference Purchase Order Details of Inbound XML E-Document based from the Purchase Order Details of Inbound E-Document Template Expected Conversion Result

<table>
<thead>
<tr>
<th>Case</th>
<th>Details of Reference Purchase Order</th>
<th>Details of Inbound XML E-Document based from the Purchase Order</th>
<th>Details of Inbound E-Document Template</th>
<th>Expected Conversion Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>have an expense included.</td>
<td>The purchase order has no specified expense amount and account, but has at least one line item.</td>
<td>The purchase order has no specified expense amount and account, but has at least one line item.</td>
<td>The e-document template is valid with correct mapping.</td>
<td>Conversion will only proceed if there is at least one line item included, and a Default Expense Account is specified in the vendor record. The expense amounts in the inbound e-document will be assigned to the Default Expense Account.</td>
</tr>
<tr>
<td>The purchase order has item lines and no specified expense, but the inbound e-document has expense amounts</td>
<td>The purchase order has item lines and no specified expense, but the inbound e-document has expense amounts.</td>
<td>The inbound XML e-document has expense amounts included, without corresponding accounts.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Converting Individual Inbound E-Documents into Vendor Bills

If the conditions and requirements for conversion have been met, you are ready to convert an inbound e-document into a vendor bill. See Prerequisites and Conditions for Conversion

**To convert an inbound e-document into a vendor bill**

**Note:** Before proceeding with conversion, make sure that the date format in the XML e-documents is the same as the date format set in Set Preferences.

1. Go to the E-Documents Portlet on the Home page, and then click the number under **Inbound E-Documents for Conversion**.
2. On the Inbound E-Document for Conversion results page, click the View link of the inbound e-document that you want to convert into a vendor bill.
3. On the Inbound E-Documents page, click **Convert**.

The progress of conversion is displayed as a banner on the page. If conversion is successful, the created vendor bill is displayed. On the **E-Document** subtab of the vendor bill, the **Inbound E-Document** field indicates the record link of the converted inbound e-document. The **E-Document Audit Trail** subtab of the inbound e-document record will indicate the details of the successful conversion and the status is set to Converted. Details of any error or failure in conversion will also be listed in the e-document audit trail.

If the converted inbound e-document has an attached PDF file reference, the attachment can be viewed and downloaded on the **E-Document** subtab of the created vendor bill.

### Converting an Inbound E-Document Without a Purchase Order Number

An inbound e-document without a purchase order number can be converted into a stand-alone vendor bill. Even if the inbound e-document is neither derived from, associated with, nor linked to an existing purchase order record, it can still be converted into a vendor bill. But the inbound e-document that will undergo conversion, must meet the following requirements:

- It must be a valid and well-formed XML document.
- It must include a reference number.
It must include at least one item purchased or an expense.

If it includes expense line, vendor record must have a Default Expense Account.

Convert this type of (stand-alone) inbound e-document by clicking **Convert** on the record. Or, use a script to run automatic bulk conversion of inbound e-document records with status For Conversion. For more information, see **Deploying Automatic Bulk Conversion Script for Inbound E-Documents**.

### Converting Failed Inbound E-Documents

Inbound e-documents that initially failed conversion can be manually converted again, individually or in bulk, into vendor bills.

First, you must review the inbound e-documents that failed conversion and then resolve the errors in those e-documents. Without resolving the errors, the conversion process will fail again.

After resolving the errors, you need to search for the inbound e-documents that you fixed and finally proceed with the bulk conversion.

**To search and convert inbound e-documents that failed initial conversion:**

1. Go to the Electronic Documents portlet on the Home page, and then click the number under **Convert Failed Inbound E-Documents**.
   
   The Convert Inbound E-Documents page is displayed with search filters where you can define criteria for refining the search for failed inbound e-documents.

2. Enter a date in the **Date Created From** and **Date Created To** fields.

   **Note:** The **Date Created From** must be an earlier date than the **Date Created To**.

   The combined dates that you entered define a date range during which all inbound e-documents created within that period will be displayed as the result.

3. (Optional) Select a vendor in the **Vendor** field
   
   The Vendor field further refines your search criteria by searching for inbound e-documents from a particular vendor.

   **Important:** The search will not proceed if any inbound e-document within the specified date range or from the selected vendor, is undergoing the conversion process at the same time. In this case, a message is displayed instructing you to change your search criteria or try again later when the ongoing conversion is finished.

4. Click **Search**.
   
   A results page is displayed listing the failed inbound e-documents that meet your search criteria. The results page displays the first 25 inbound e-documents, if there are more inbound e-documents found, they are displayed on succeeding pages. On the results page, you can click the Internal ID link of an inbound e-document is a link that to open the inbound e-document record.

5. Click **Convert**.
   
   A message is displayed on the banner, confirming that the e-documents are being converted.

   After the conversion is completed, an email notification is sent to the user who performed the conversion and to the email address in the Email Recipient Notification setup, if any is specified. If errors are encountered during conversion, the email will have an attached CSV file listing the inbound e-documents that underwent conversion, including columns for the Internal ID, Vendor, and details of the conversion process and errors.
For more information on choosing the recipient of notifications, see step 4 of [Prerequisites for Using Electronic Invoicing](#).

**Note:** You can also convert inbound e-documents that failed conversion, individually or one at a time. For more information, see [Converting Individual Inbound E-Documents into Vendor Bills](#).

### Compatibility of Approval Workflows with Vendor Bill Conversion

If Vendor Bill Approval Workflow is enabled, it is automatically applied to vendor bills created from inbound e-document conversion, without further configuration.

With approval workflow enabled, a vendor bill created from inbound e-document conversion is also assigned an approval status. If the new vendor bill is still pending approval when it was created, the approval process is continued. The vendor bill is then properly routed to the next approver defined in the workflow. For more information, see the help topic [Vendor Bill Approval Workflow](#).

If 3 Way Match Vendor Bill Approval Workflow is enabled, you can determine the discrepancy between the created vendor bill and the reference purchase order. Clicking Bill Exception on the new vendor bill will display any discrepancy resulting from the validation performed by the approval workflow against set exception criteria. A vendor bill and its corresponding purchase order may have discrepancies in terms, quantity tolerance, quantity difference, or amount. For more information, see the help topic [3 Way Match Vendor Bill Approval Workflow](#).

**Note:** The standard workflow included in the Vendor Approval SuiteApp does not support checking for tax amount discrepancy. If you want to enable checking for tax amount discrepancy, see the help topic [Customizing for the Vendor Bill Approval Workflow](#).

### Canceling Inbound E-Documents

You can cancel an inbound e-document if you do not want to convert it into a NetSuite transaction.

To cancel an inbound e-document, view or open the inbound e-document you want to cancel and then click **Cancel**. A banner is displayed on the inbound e-document confirming cancellation of the record. The E-Document Audit Trail on the E-Document subtab also indicates the details of cancellation. Canceled e-documents cannot be converted to NetSuite records anymore.

You cannot cancel an inbound e-document if it is already converted or canceled. A canceled or converted e-document does not display the Cancel button. Cancellation will also fail if the inbound e-document is concurrently being converted or canceled by another user.

If cancellation of the record failed, a banner is displayed on the inbound e-document indicating the failure. The E-Document Audit Trail on the E-Document subtab also indicates the cause of the failure to cancel the inbound e-document.

### Electronic Invoicing Errors

To understand outbound and inbound e-document processing errors, see the following topics:

- **Electronic Invoicing Error Codes**
- **Outbound E-Document Generation Errors**
- **Outbound E-Document Sending Errors**
- **Inbound E-Document Conversion Errors**
## Electronic Invoicing Error Codes

<table>
<thead>
<tr>
<th>Error code</th>
<th>Message</th>
<th>Description</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>EI_TEMPLATE_CSV_ERROR</td>
<td>The XML template contains errors. XML format must be well-formed.</td>
<td>The XML input for Template for Outbound E-Invoices field is invalid.</td>
<td>You must fix the XML input for the Template for Outbound E-Invoices field.</td>
</tr>
<tr>
<td>EI_TEMPLATE_VALIDATOR_CSV_ERROR</td>
<td>The REGEX field contains an incorrect regular expression. Proper syntax must be used.</td>
<td>The Regex input for XML validators is invalid.</td>
<td>You must fix the regex input for Regex Validation Expression field in the XML Validators sublist of the template.</td>
</tr>
<tr>
<td>EI_INACTIVE_CUSTOMER</td>
<td>Transactions with inactive customers are not supported by e-document.</td>
<td>The customer who owns the transaction is inactive.</td>
<td>You must remove the e-document template from the transaction or activate the inactive customer.</td>
</tr>
<tr>
<td>EI_SENDING_NO_RECIPIENTS</td>
<td>The e-document cannot be sent because the customer has no email address. Before you can send this e-document by email, an email address must be provided on the customer record.</td>
<td>The customer (individual) does not have any email address specified in the Customer record.</td>
<td>You must enter a valid email address in the Customer record.</td>
</tr>
<tr>
<td>EI_SENDING_NO_RECIPIENTS</td>
<td>There are no e-document recipients for this customer. To send electronic documents by email to this customer, at least one contact must be added to the list of e-document recipients.</td>
<td>The customer (company) does not have any e-document recipients defined in the Customer record.</td>
<td>You must enter e-document recipients in the Customer record.</td>
</tr>
<tr>
<td>EI_SENDING_RECIPIENT_NO_EMAIL</td>
<td>One or more recipients of the e-document, associated with this transaction, does not have an email address. Verify that the recipients for this customer have valid email addresses.</td>
<td>The customer (company) has an e-document recipient that does not have an email address.</td>
<td>You must enter a valid email address in the e-document recipient in the Customer record.</td>
</tr>
<tr>
<td>EI_SENDING_INVALID_METHOD</td>
<td>Select a valid sending method for (TYPE)#{TRANSACTIONNUMBER}.</td>
<td>The transaction does not have an e-document sending method defined.</td>
<td>You must enter an e-document sending method in the Transaction record.</td>
</tr>
<tr>
<td>EI_SEND_INVALID_RESULT</td>
<td>The plug-in failed to return a valid result.</td>
<td>The plug-in used for sending, did not return a result.</td>
<td>You must fix the plug-in implementation so that it will return a result object.</td>
</tr>
<tr>
<td>EI_SENDING_PLUGIN_IN_ERROR</td>
<td>&lt;ERROR MESSAGE&gt;</td>
<td>The plug-in used for sending, encountered an error.</td>
<td>You must fix the plug-in implementation based on the error message.</td>
</tr>
<tr>
<td>PROBLEM&gt;Loading_PLUGIN_IN</td>
<td>E-document Sending encountered an error while loading a custom plug-in. Error Code: &lt;ERROR CODE&gt; Message: &lt;MESSAGE&gt;</td>
<td>The plug-in file used for sending, did not load properly.</td>
<td>You must fix the plug-in implementation based on the error message.</td>
</tr>
<tr>
<td>EI_CANNOT_CREATE_DEFAULT_DOCUMENT_PACKAGE</td>
<td>The (DEFAULT_DOCUMENT_PACKAGE) record already exists. You cannot create an e-document package record with the same name. Rename your e-document package record and try again.</td>
<td>Creating an e-document package with the name “Default E-Document Package” is not allowed. (this error is shown in CSV import).</td>
<td>You must create a new e-document package with another name.</td>
</tr>
<tr>
<td>Error code</td>
<td>Message</td>
<td>Description</td>
<td>Solution</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>EI_CANNOT_EDIT_DEFAULT_DOCUMENT_PACKAGE</td>
<td>Editing the (DEFAULT_DOCUMENT_PACKAGE) record Name or Description is not allowed.</td>
<td>Editing the e-document package, &quot;Default E-Document Package&quot;, is not allowed. (this error is shown in CSV import).</td>
<td>Avoid editing the default e-document package record.</td>
</tr>
<tr>
<td>EI_CANNOT_DELETE_DEFAULT_DOCUMENT_PACKAGE</td>
<td>Deleting the (DEFAULT_DOCUMENT_PACKAGE) record is not allowed.</td>
<td>Deleting the e-document package, &quot;Default E-Document Package&quot;, is not allowed. (this error is shown in CSV import)</td>
<td>Avoid deleting the default e-document package record.</td>
</tr>
<tr>
<td>EI_VENDOR_CODE_FIELD_NOT_FOUND</td>
<td>The vendorcode field is missing in the e-document template. Modify the e-document template or select another template that includes vendorcode field mapping.</td>
<td>If the Multiple Vendor feature is enabled in the account, the vendorcode must be indicated in the Mapping Format of the E-Document Template that is being used for Inbound E-Documents conversion.</td>
<td>You must add the mapping for vendorcode field in the Field Mapping for Inbound E-Documents in the template.</td>
</tr>
<tr>
<td>EI_NO_VENDOR_CODE_VALUE</td>
<td>At least one of the items has no vendor code. Cancel this e-document and submit another e-document with the correct value for the XML element mapped to the vendor code field.</td>
<td>The vendorcode of one of the items has no value. This error occurs if the Multiple Vendor feature is enabled in the account.</td>
<td>You must modify the XML by defining a value for the XML tag that is mapped to the vendorcode field.</td>
</tr>
<tr>
<td>EI_VENDOR_NAME_FIELD_NOT_FOUND</td>
<td>The vendorname field is missing in the e-document template. Modify the e-document template or select another template that includes vendorname field mapping.</td>
<td>If the Multiple Vendor feature is disabled in the account, the vendorname field must be indicated in the Mapping Format of the E-Document Template that is being used for Inbound E-Documents conversion.</td>
<td>You must add the mapping for the vendorname field in the Field Mapping for Inbound E-Documents in the template.</td>
</tr>
<tr>
<td>EI_NO_VENDOR_NAME_VALUE</td>
<td>At least one of the items has no vendor name/code. Cancel this e-document and submit another e-document with the correct value for the XML element mapped to the vendor name/code field.</td>
<td>The vendorname of one of the items has no value. This error occurs if the Multiple Vendor feature is disabled in the account.</td>
<td>You must modify the XML by defining a value to the XML tag that is mapped to the vendorname field.</td>
</tr>
<tr>
<td>EI_CREATED_FROM_TRANSACTION_NOT_FOUND</td>
<td>Record ([TRANSTYPE]#{TRANSID}) was not found in the system. Cancel this e-document and submit another e-document with the correct value for the XML element mapped to the createdfrom field.</td>
<td>The transaction that the vendor bill will be created from is not found in the system.</td>
<td>You must define the correct value for the XML tag that is mapped to the createdfrom field.</td>
</tr>
<tr>
<td>EI_CREATED_FROM_TRANSACTION_ENTITY_NOT_MATCH</td>
<td>Record ([TRANSTYPE]#{TRANSID}) is assigned to a different entity. Select the correct entity and convert this e-document.</td>
<td>The referenced transaction has a different entity compared to the inbound e-document.</td>
<td>You must select the correct entity and convert the e-document again.</td>
</tr>
<tr>
<td>EI_TRANSACTION_REF_NUM_ALREADY_EXISTS</td>
<td>A vendor bill with the same reference number already exists. Cancel this e-document and submit another e-document with the correct reference number value for the XML element mapped to the tranid field.</td>
<td>This error occurs during conversion of inbound e-document to vendor bill. The SuiteApp will not proceed with conversion if the reference number on the inbound e-document already exists in one of the vendor bills.</td>
<td>You must define another value for the XML tag that is mapped to the tranid field.</td>
</tr>
<tr>
<td>Error code</td>
<td>Message</td>
<td>Description</td>
<td>Solution</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>EI_TRANSACTION_REF_NUM_NOT_FOUND</td>
<td>The required reference number is missing in the inbound e-document. Cancel this e-document and submit another e-document that includes an XML element for the reference number, mapped to the tranid field.</td>
<td>Reference number must be present in the XML. It has to be mapped to the E-Document template tranid field.</td>
<td>You must add an XML tag that maps to the tranid field.</td>
</tr>
<tr>
<td>EI_TRANSACTION_ITEM_ERROR</td>
<td>The following vendor codes: (ITEMLIST), are associated with multiple item records. Modify the item records and ensure that vendor codes are unique for each item per vendor.</td>
<td>There are items in the XML (in the inbound e-document) that have multiple matches in the item record.</td>
<td>You must edit the vendor codes of the duplicate item records to ensure the uniqueness of the items.</td>
</tr>
<tr>
<td>EI_TRANSACTION_ITEM_ERROR</td>
<td>The following vendor name/codes: (ITEMLIST), are associated with multiple item records. Modify the item records and ensure that vendor name/codes are unique for each item per vendor.</td>
<td>There are items in the XML (in the inbound e-document) that have multiple matches in the item record.</td>
<td>You must edit the vendor name/codes of the duplicate item records to ensure the uniqueness of the items.</td>
</tr>
<tr>
<td>EI_TRANSACTION_ITEM_ERROR</td>
<td>The following vendor codes: (ITEMLIST), are not associated with any item records.</td>
<td>There are items in the XML (in the inbound e-document) that have no match in the system.</td>
<td>You must create an item record for those items with no matches.</td>
</tr>
<tr>
<td>EI_TRANSACTION_ITEM_ERROR</td>
<td>The following vendor name/codes: (ITEMLIST), are not associated with any item records.</td>
<td>There are items in the XML (in the inbound e-document) that have no match in the system.</td>
<td>You must create an item record for those items with no matches.</td>
</tr>
<tr>
<td>EI_TRANSACTION_ITEM_ERROR</td>
<td>There are no items in the inbound e-document that is included in the referenced transaction. Check the status of the referenced transaction if it can be transformed. If it can be transformed, cancel this e-document and submit another e-document with the correct value for the XML element mapped to the createdfrom field.</td>
<td>The user cannot convert the transaction or the referenced transaction does not have any matching items to the items in the inbound e-document.</td>
<td>A different transaction must be referenced or a different inbound e-document with the correct items must be used.</td>
</tr>
<tr>
<td>EI_SENDING_IN_PROGRESS</td>
<td>The system cannot perform a search using the filters you selected because e-document sending is already in progress for transactions within the date range (TRANDATE_FROM) - (TRANDATE_TO) for subsidiary (SUBSIDIARY). Please change your search criteria or try again later.</td>
<td>The records you are searching for might already be undergoing the sending process.</td>
<td>You can change the parameters for sending, or wait for the current sending process to finish before sending again.</td>
</tr>
<tr>
<td>EI_CONVERSION_IN_PROGRESS</td>
<td>The system cannot perform a search using the filters you selected because inbound e-document conversion is already in progress within the date range (DATECREATED_FROM) - (DATECREATED_TO). Please change your search criteria or try again later.</td>
<td>The records you are searching for might already be undergoing the conversion process.</td>
<td>You can change the parameters for conversion, or wait for the current conversion process to finish before converting again.</td>
</tr>
<tr>
<td>EI_CERTIFICATION_SENDING_METHOD_ALRDY_EXISTS</td>
<td>You cannot set this sending method as the Certification Sending Method because ‘CERTIFICATION_SENDING_METHOD_NAME’ is already selected as the Certification Sending Method for the Subsidiaries ([SUBSIDIARIES]) and transactions ([TRANSACTIONS]). To save this record, you must unassign ‘CERTIFICATION_SENDING_METHOD_NAME’.</td>
<td>A certification sending method is assigned to a combination of a transaction and subsidiary that already has a certification sending method. Only one certification sending method can be assigned to</td>
<td>You must unassign the existing certification sending method or make it inactive, to be able to assign a new certification sending method and save it.</td>
</tr>
</tbody>
</table>
### Electronic Invoicing Errors

<table>
<thead>
<tr>
<th>Error code</th>
<th>Message</th>
<th>Description</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>NAME</td>
<td>as a Certification Sending Method, or make it inactive.</td>
<td>a particular combination of transaction and subsidiary.</td>
<td></td>
</tr>
</tbody>
</table>
| EI_TEMPLATE_ERROR | Any of the following error messages can be displayed:  
- You selected an outbound transaction type, but the XML content of the template is missing. Enter the XML content in the Template for Outbound E-Documents field.  
- The XML and JSON content are both missing. For an outbound transaction, enter the XML content in the Template for Outbound E-Documents field. For an inbound transaction, enter the JSON content in the Field Mapping for Inbound E-Documents field.  
- The selected XSD file is not a valid XSD file. Ensure that the file you select has the .xsd extension. | Any of these errors will be displayed if validations related to template are not met. For example, if any of the required fields in an XML template or JSON mapping are missing, or when an invalid XSD file is selected. | You must provide the missing fields or select a valid XSD file. |

### Electronic Invoicing Common Errors

<table>
<thead>
<tr>
<th>Message</th>
<th>Error on User Interface</th>
<th>Description</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>An error occurred during conversion. Check the E-Document Audit Trail on the E-Document subtab for details.</td>
<td>Banner on the record</td>
<td>A red banner is displayed on the inbound e-document record indicating failed conversion.</td>
<td>Check the audit trail for more information.</td>
</tr>
<tr>
<td>Unable to convert this inbound e-document because the selected vendor is inactive. The E-Document Status field has not been updated and an audit trail has not been created. Clear the Inactive box on the vendor record, then try converting the e-document again.</td>
<td>Banner on the record</td>
<td>A yellow banner is displayed on the inbound e-document record indicating that an inactive vendor is selected.</td>
<td>Activate the inactive vendor before converting the inbound e-document.</td>
</tr>
<tr>
<td>Unable to convert this inbound e-document because the selected customer is inactive. The E-Document Status field has not been updated and an audit trail has not been created. Clear the Inactive box on the customer record, then try converting the e-document again.</td>
<td>Banner on the record</td>
<td>A yellow banner is displayed on the inbound e-document record indicating that an inactive customer is selected.</td>
<td>Activate the inactive customer before converting the inbound e-document.</td>
</tr>
<tr>
<td>Parsing failure. Check the Field Mapping for Inbound E-documents.</td>
<td>Audit Trail log</td>
<td>The Audit Trail of the inbound e-document logs this error after a failed conversion due to failure in XML parsing.</td>
<td>Check the inbound template for errors.</td>
</tr>
<tr>
<td>Conversion failure.</td>
<td>Audit Trail log</td>
<td>The Audit Trail of the inbound e-document logs the error after the failed conversion process.</td>
<td>Check the inbound e-document for errors.</td>
</tr>
<tr>
<td>Message</td>
<td>Error on User Interface</td>
<td>Description</td>
<td>Solution</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversion failed because the status of the inbound e-document record is '{STATUS}'</td>
<td>Audit Trail log</td>
<td>The Audit Trail of the inbound e-document logs the error after a failed conversion due to a wrong status detected during conversion process.</td>
<td>A concurrent conversion process might be running, or the record is already cancelled when conversion was started. You can wait for the other conversion process to finish, or verify if the record has been canceled.</td>
</tr>
<tr>
<td>An error occurred during cancellation. Check the E-Document Audit Trail on the E-Document subtab for details.</td>
<td>Banner on the record</td>
<td>A banner is displayed indicating an error in cancellation.</td>
<td>You must check the inbound e-document for errors; most likely, the error is due to an invalid status.</td>
</tr>
<tr>
<td>The selected XML File Reference is not a valid XML file. Ensure that the file you select has the .xml extension.</td>
<td>Popup message</td>
<td>The inbound e-document record has an invalid e-document file.</td>
<td>You must make sure that the file attached to the inbound e-document is an XML file.</td>
</tr>
<tr>
<td>The selected XML File Reference is not a well-formed XML document.</td>
<td>Popup message</td>
<td>The inbound e-document record has a malformed XML file.</td>
<td>You must check the attached XML file if it is well-formed.</td>
</tr>
<tr>
<td>The Transaction Date From must not be later than the Transaction Date To. Change the dates so that the Transaction Date From is earlier than the Transaction Date To.</td>
<td>Popup message</td>
<td>The selected Transaction Date To is earlier than the Transaction Date From.</td>
<td>You must change the selected dates to make the Transaction Date From earlier than the Transaction Date To.</td>
</tr>
<tr>
<td>The Date Created From must not be later than the Date Created To. Change the dates so that the Date Created From is earlier than the Date Created To.</td>
<td>Popup message</td>
<td>The selected Date Created To is earlier than the Date Created From.</td>
<td>You must change the selected dates to make the Date Created From earlier than the Date Created To.</td>
</tr>
<tr>
<td>The selected XSD file is not a valid XSD file. Ensure that the file you select has the .xsd extension.</td>
<td>Popup message</td>
<td>This message is displayed while creating/editing a template record when the selected file is not an XSD file.</td>
<td>You must select an XSD file</td>
</tr>
<tr>
<td>There is no e-document email sender for this vendor. To receive e-documents through email from this vendor, you must enter at least one email address in the Vendor E-Document Email Sender list.</td>
<td>Popup message</td>
<td>The vendor does not have any e-document senders defined in the vendor record. This error appears when saving the record with Use Sender List box checked.</td>
<td>You must add at least one sender email address, or clear the box and input a sender domain.</td>
</tr>
<tr>
<td>The sender email address already exists.</td>
<td>Popup message</td>
<td>The sender email address entered in the sublist is already existing for the same vendor.</td>
<td>You must enter a different email address or remove the current entry.</td>
</tr>
<tr>
<td>The sender email domain is already being used by a different vendor.</td>
<td>Popup message</td>
<td>The sender domain is already being used by another vendor.</td>
<td>You must enter a different domain, or use the sender list to enter specific email addresses.</td>
</tr>
<tr>
<td>This account does not have an active license to use the Electronic Invoicing SuiteApp in multiple</td>
<td>Popup message</td>
<td>This message is displayed when trying to convert failed</td>
<td>The administrator must set up the E-Document Country for Free Use field.</td>
</tr>
</tbody>
</table>
### Outbound E-Document Generation Errors

The following errors can occur during the generation of e-documents:

- **Malformed Template**
- **Malformed XPath**
- **Malformed Regex**
- **Unsupported XPath**
- **Data Failed Validation Checking**
- **Inactive Customer Record**

#### Malformed Template

Generation of e-documents will fail if the selected template contains FreeMarker syntax errors.

To fix this error, select a different template or update the content of the e-document template, then try generating the e-document again.

Make sure that e-document templates are well-formed.

Click the link to the e-document template in the **E-Document Template** field to view and edit your e-document template.
For more information, see XPath and Regex Examples for E-Document Templates.

**Malformed XPath**

Generation of e-documents will fail if there is no xpath to validate your e-document template, or the xpath format is invalid.

To fix this error, select a different template or verify that an xpath exists and the format is correct in your e-document template, then try generating the e-document again.

Make sure that e-document templates use the proper syntax for the xpath.

Click the link to the e-document template in the E-Document Template field to view and edit your e-document template.

For more information, see XPath and Regex Examples for E-Document Templates.

**Malformed Regex**

Generation of e-documents will fail if the regex validation expression that validates your e-document template is invalid.

To fix this error, select a different template or check the regex validation expression's format in your e-document template, then try generating the e-document again.

Make sure that e-document templates use the proper syntax for the regex validation expression.

Click the link to the e-document template in the E-Document Template field to view and edit your e-document template.

For more information, see XPath and Regex Examples for E-Document Templates.

**Unsupported XPath**

Generation of e-documents will fail if the e-document template does not contain the information required by the xpath used to validate it.

To fix this error, select a different template, update the e-document template, or delete the xpath, then try generating the e-document again.

Click the link to the e-document template in the E-Document Template field to view and edit your e-document template.

For more information, see XPath and Regex Examples for E-Document Templates.

**Data Failed Validation Checking**

Generation of e-documents will fail if the transaction does not contain the information needed by the e-document template you selected. For example, if your e-document template requires a shipping address with a 5-digit postal code, but the shipping address on your transaction record has a 4-digit postal code, an error will occur.

To fix this error, select a different template, update the transaction record with the required information, or update the e-document template validations, then try generating the e-document again.

**Inactive Customer Record**

Generation of e-documents will fail if the customer associated with the transaction record is inactive.
To fix this error, set the **E-Document Template** field on the transaction to blank. If the **E-Document Template** field is blank, the system will not generate an e-document for the transaction, and no error message will be shown. If you intend to generate an e-document for the transaction, you must make the customer record active, then try generating the e-document again.

To activate the customer record, go to Lists > Relationships > Customers and find the customer record. Click **Edit**, then go to the **System Information** subtab and clear the **Inactive** box.

To regenerate e-documents, see the following topics:
- Regenerating E-Documents for Single Transactions
- Generating and Regenerating E-Documents in Bulk

### Outbound E-Document Sending Errors

Errors can occur when sending e-documents. When the system encounters an error, NetSuite sends an email notification containing the error details to the user who initiated the sending process.

An audit trail containing the error details is also created on the **E-Document Audit Trail** subtab on the transaction record.

Fixing errors may require an Administrator role. Be sure to inform your account administrator about the error immediately. If the error is not fixed, the e-document cannot be sent.

The following errors can occur when sending e-documents:
- Invalid Sending Method
- Invalid E-Document Sender
- Invalid Email Recipient
- Plug-in Script Error

#### Invalid Sending Method

Sending of e-documents will fail if no sending method has been selected on the transaction record.

To fix this error, edit the transaction record and select a sending method, then try sending the e-document again.

#### Invalid E-Document Sender

Sending of e-documents will fail if the e-document sender has no email address.

To fix this error, change the e-document sender or make sure the e-document sender has a valid email address, then try sending the e-document again.

To view the **E-Document Sender** field, go to Setup > Company > Company Information.

If you have a OneWorld account, go to Setup > Company > Classifications > Subsidiaries. Then, click the subsidiary to view the assigned employee in the **E-Document Sender** field.

To add or change the email address, go to Lists > Employees and edit the employee record.

#### Invalid Email Recipient

Sending of e-documents will fail if the selected sending method has no email recipients or if one or more email recipients have no email addresses.
To fix this error, select a different sending method or make sure the selected sending method has at least one email recipient with an email address. If the customer is a company, there should be at least one email recipient defined on the E-Document Email Recipient subtab on the customer record. If the customer is an individual, enter the email address.

To view and add email recipients for the selected sending method, go to the E-Document subtab of the customer record. On the E-Document Email Recipient field, verify that your email recipients have email addresses. Click New E-Document Email Recipient to add an email recipient. Only contacts associated with the customer record are available for selection in the dropdown list.

**Plug-in Script Error**

Sending of e-documents will fail if the selected custom sending method is invalid.

To fix this error, make sure that the script of your custom sending method is valid.

For more information, see Creating Custom Methods for Sending E-Documents.

**Inbound E-Document Conversion Errors**

Errors can occur when converting e-documents. When an error is encountered in automatic scheduled bulk conversion, the system sends an email notification with error details to the Recipient of E-Document Notifications. If the Recipient of E-Document Notifications is not assigned, the system sends the notification to all active administrators.

An audit trail containing the error details is also created on the E-Document Audit Trail subtab on the inbound e-document record.

Fixing errors may require an Administrator role. Be sure to inform your account administrator about the error immediately. If the error is not fixed, the e-document cannot be converted.

The following errors can occur when converting inbound e-documents:

- Purchase Order is not Ready
- Incorrect PO Number
- Item vendorcode is not Unique
- Duplicate Reference Number
- Incorrect Mapping to Transaction Fields
- Mapping to Mandatory Vendor Bill Fields is Missing
- Missing Default Expense Account

**Purchase Order is not Ready**

Inbound e-document conversion will fail, if the e-document to be converted was generated from a purchase order that is not ready for billing, closed or fully billed.

To fix this error, ensure that the PO status is ready for billing.

**Incorrect PO Number**

Inbound e-document conversion will fail, if the e-document to be converted was generated from a purchase order with incorrect PO Number.
To fix this error, contact the vendor or party whom the e-document came from, inform them to make corrections to the PO Number, and have them send the amended XML file.

**Item vendorcode is not Unique**

Inbound e-document conversion will fail, if the e-document to be converted contains items whose vendorcode are not unique.

To fix this error, update the item records and ensure that each item has a unique vendorcode.

**Duplicate Reference Number**

Inbound e-document conversion will fail, if the Reference Number of an e-document to be converted has a duplicate. Duplicate Vendor Bill Detection is enabled for the Electronic Invoicing SuiteApp, so a duplicate Reference Number and vendor will cause the error.

To fix this error, review the existing bill, and then determine if it is duplicate. If it is a duplicate, cancel the e-document. If it is not duplicate, ask the vendor to resend an updated XML document, and then cancel the e-document.

**Incorrect Mapping to Transaction Fields**

Inbound e-document conversion will fail, if the JSON template has incorrect mapping to transaction fields.

To fix this error, review the inbound e-document template and make sure that JSON objects map to the correct vendor bill transaction fields.

**Mapping to Mandatory Vendor Bill Fields is Missing**

Inbound e-document conversion will fail, if the JSON template is missing the mapping to mandatory vendor bill fields.

To fix this error, review the inbound e-document template and define the JSON objects that will map to mandatory vendor bill transaction fields.

**Missing Default Expense Account**

Inbound e-document conversion will fail, if the XML contains an expense line but the vendor record does not have a default expense account specified. To fix this error, edit the vendor record and on the Financial tab, specify a Default Expense Account.