

Dynamics 365 Coupa Integration Accelerator by DataMap

Coupa App/Connector Solution Document

Your primary contact for app certification:

Name:	Mike Quinn	Title	CTO
Email:	mike@datamapllc.com	Phone:	+19136331455

Table of Contents:

1. [Certification Application: App Profile](#)
2. [Solution Overview](#)
3. [Functional Overview and Diagrams](#)
4. [Technical Overview and Diagrams](#)
 - 4.1. [Overview](#)
 - 4.2. [Technical Integration Points](#)
 - 4.3. [Data Mapping](#)
 - 4.4. [Middleware Platform](#)
 - 4.5. [Error Handling](#)
5. [Implementation Methodology and Diagrams \(Separate doc\)](#)
 - 5.1. [Overview](#)
 - 5.2. [Partnership](#)
 - 5.3. [High Level Project Plan](#)
6. [Executing & Documenting Test cases](#)
7. [Performance](#)
8. [Security](#)

1. CERTIFICATION APPLICATION: APP PROFILE

App Name	Dynamics 365 Coupa Integration Accelerator
-----------------	--

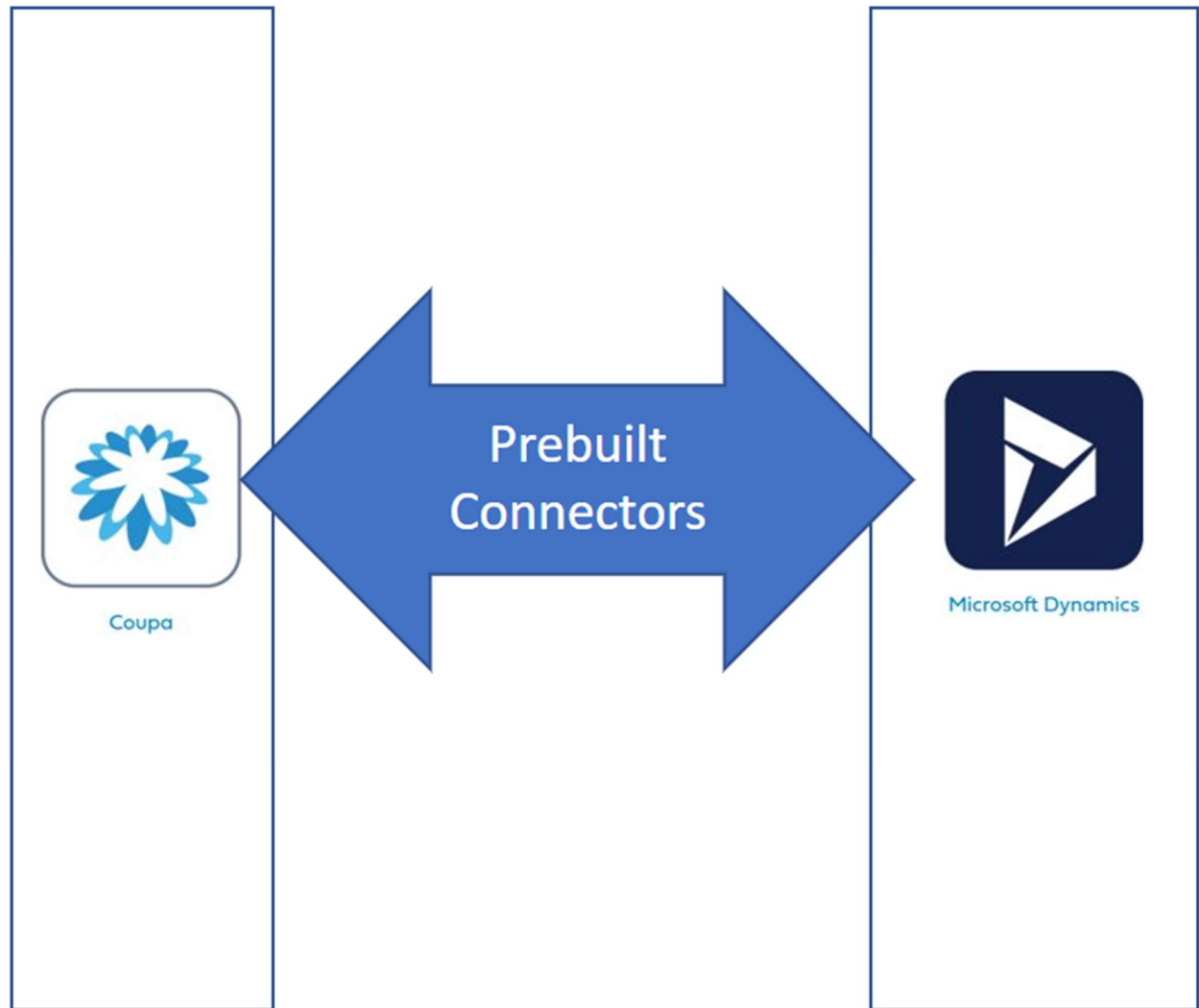
Partner Company Name	DataMap LLC
Developing Partner <i>If different than Partner name</i>	
Partner Product Internal Name	Dynamics 365 Coupa Integration Accelerator
Partner Product Version	October 2022
Partner Product Instance URL	
Certifying Coupa Release Number	Coupa R34
Coupa Application instance URL	https://datamap-coupalink-demo.coupacloud.com/
Integration method <i>API /CSV/Panel App/iFrame/ In-Context iFrame</i>	
List of current mutual customers <i>Coupa + Partner</i>	None

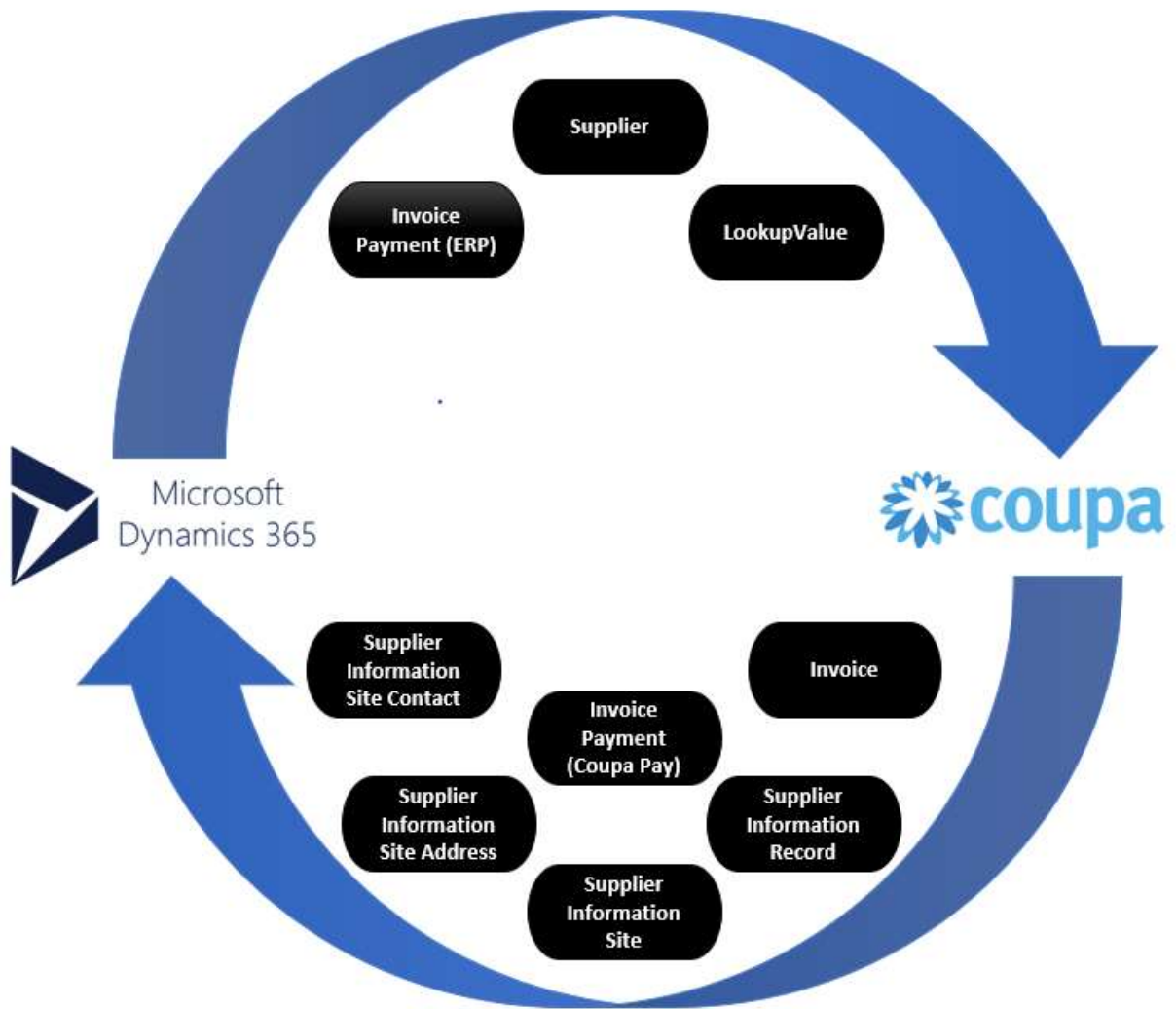
2. SOLUTION OVERVIEW

DataMap provides prebuilt accelerators that quickly enable Coupa and Dynamics 365 to share master and transactional data with each other. Dynamics 365 Coupa Integration Accelerator delivers a fully pre-configured integration solution to assist you with modernizing your procure-to-pay activities. Connecting Dynamics 365 Coupa Integration Accelerator into the Coupa Business Spend Management Platform gives our customers a streamlined Microsoft Dynamics 365 FO integrations experience and lowers cost and time to market.

Dynamics 365 Coupa Integration Accelerator supports needs across industries, bringing a multitude of assets and supporting services to promote rapid transformation, including:

- A pre-configured integration solution that supports leading-practice business processes, mappings, and configuration templates.
- Quick enablement of integrations accelerates your extraction and data transformation efforts considerably.





What We Do	Differentiator
Dynamics 365 Focus	We understand Dynamics 365. We get into both systems to make sure we understand both the Coupa side and D365 side of the integrations.
Dynamics 365 Knowledge	In addition to invoice processing, we understand how to read the D365 Ledger, Configure D365 Vendor Management, and work in all areas of D365. Our developers have admin access to multiple environments with full permissions so they can really get in and figure out how things work.
Microsoft Partner	We are a Microsoft Partner with multiple dev, test, and demo environments of Dynamics 365 FO. With "One Version" we keep our sandboxes up to date.
CoupaLink Partner	Our Dynamics 365 FO integration quick start is scheduled for certification May 31, 2021. We work directly with Coupa internal QA to ensure that our apps are optimized and error free.
Azure Experts	We are skilled with Azure Portal. With deep knowledge of most azure resources. We have native skills using virtual machines, function apps, logic apps, and security. We can deploy D365 environments as well.
Hosting	We can host your integrations and provide production support, or you can self-host.

3. FUNCTIONAL OVERVIEW AND DIAGRAMS

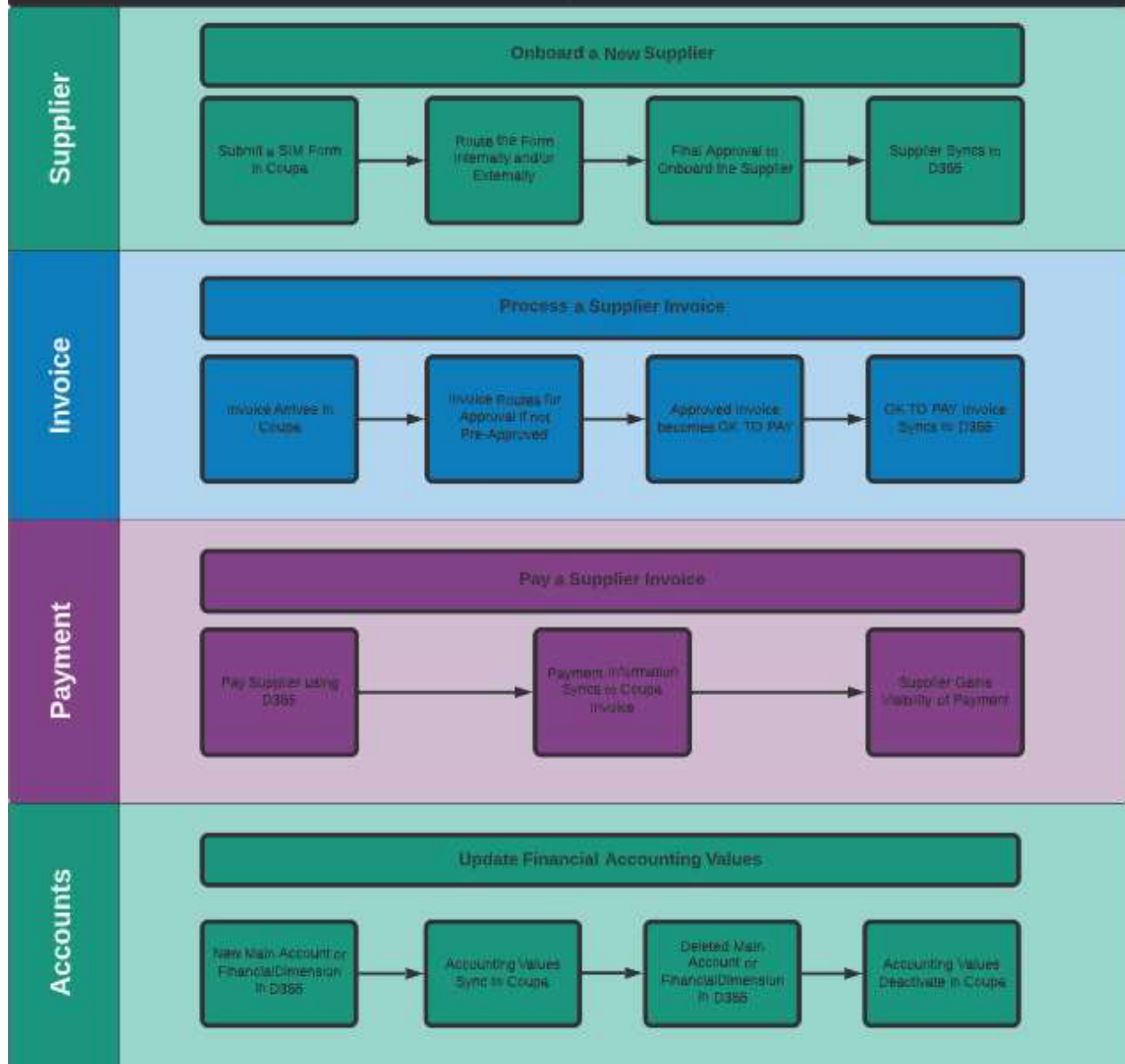
Dynamics 365 Coupa Integration Accelerator can help your organization achieve efficiencies and cost savings.

- Faster deployment of Coupa solutions.
- Significant reductions in time and cost for your project timelines.
- Reduced IT complexity as a pre-configured solution.
- Scalability and timely access to software updates.
- More timely information transparency to support strategic decision-making.

This package includes integration flows that support the following integration use-cases:

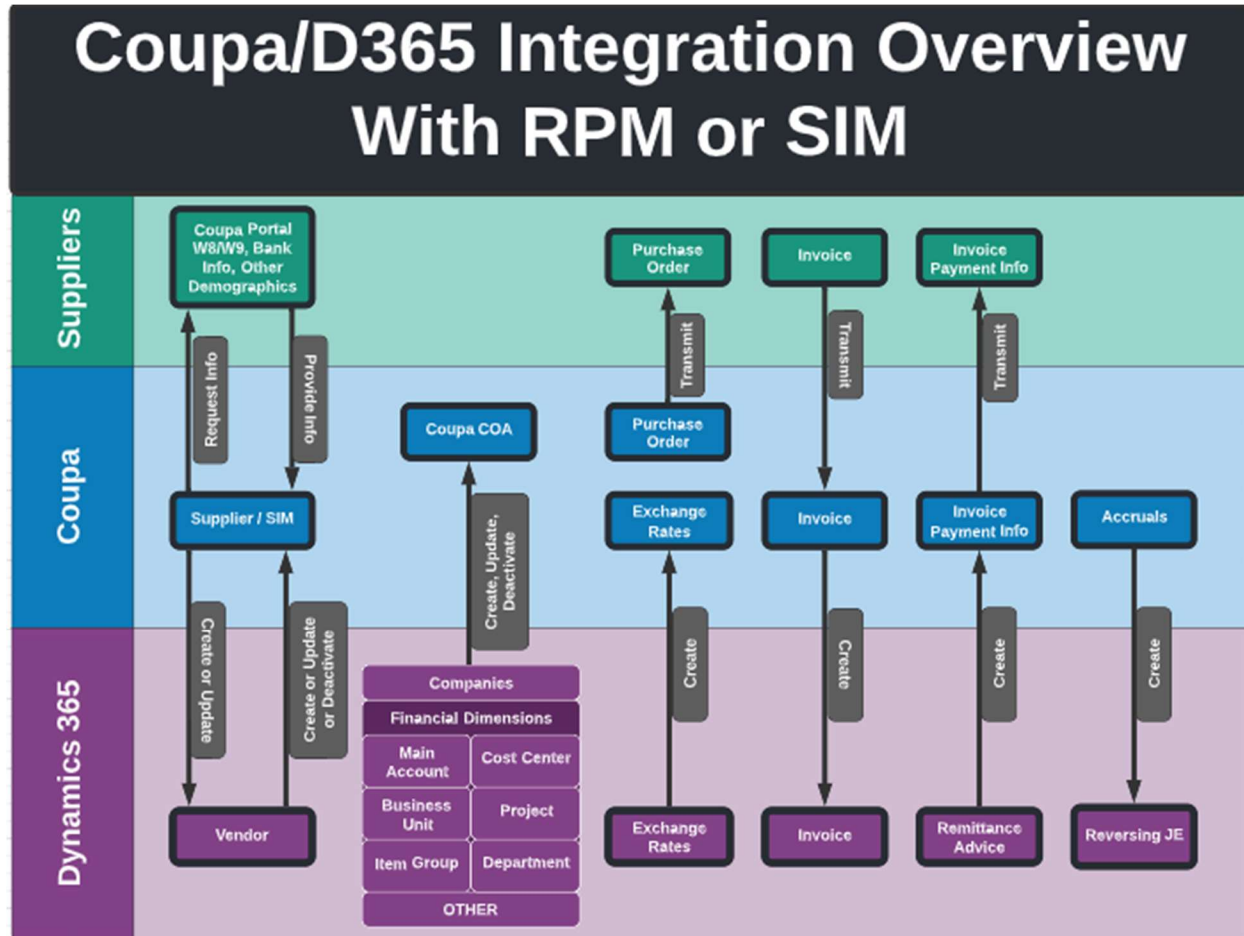
- **Dynamics 365 to Coupa:**
 - Invoice Payment (ERP)
 - Supplier
 - LookupValue
- **Coupa to Dynamics 365:**
 - Invoice
 - Invoice Payment (Coupa Pay)
 - Supplier Information Record
 - Supplier Information Site
 - Supplier Information Site Address (Remit-to Address)
 - Supplier Information Site Contact

Coupa/D365 Integration Overview

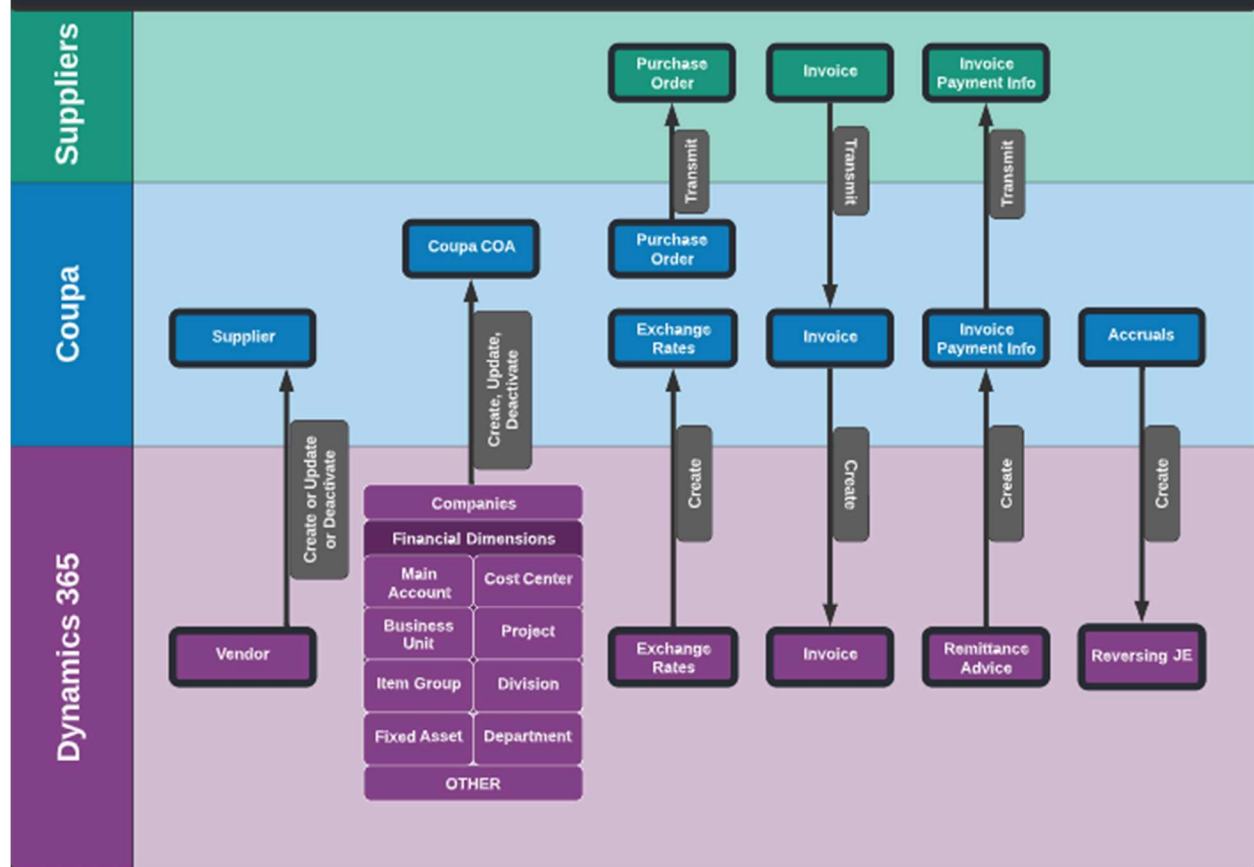


4. TECHNICAL OVERVIEW AND DIAGRAMS

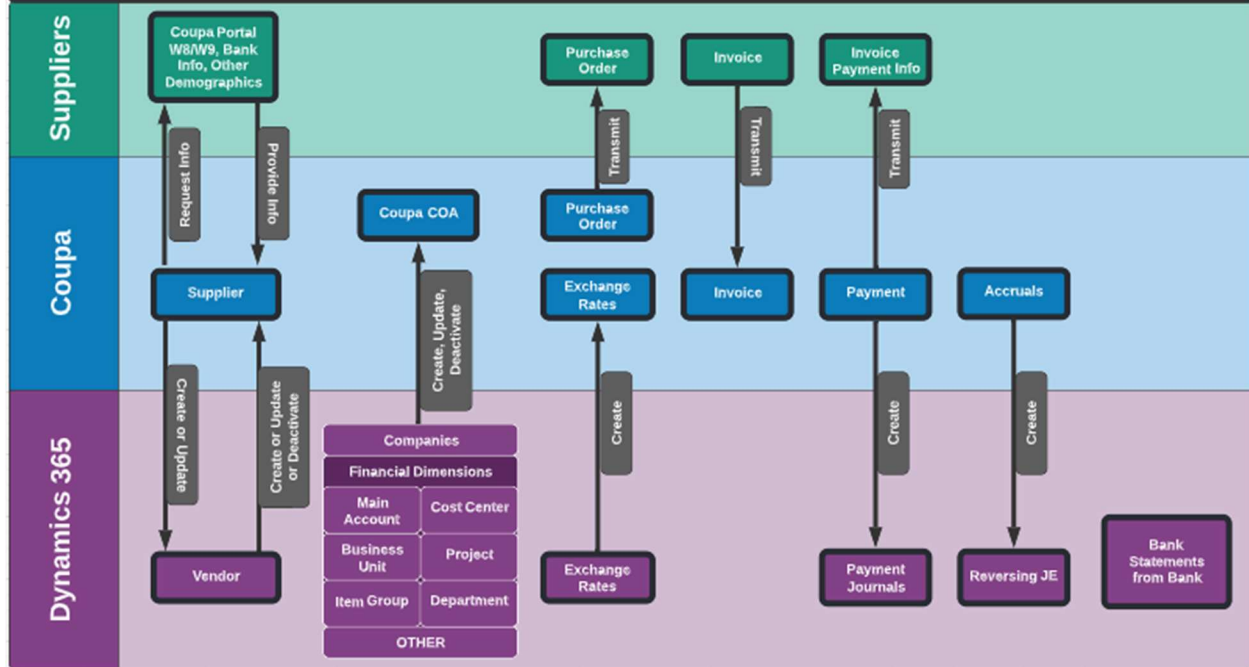
4.1. OVERVIEW



Coupa/D365 Integration Overview Without RPM or SIM



Coupa/D365 Integration Overview With CoupaPay and RPM/SIM



4.2. TECHNICAL INTEGRATION POINTS

Objects	Data Type	Source System	Target System	Transmission Method (API/sFTP)	Operation (Read/Write/Update)
Coupa SIM to Dynamics 365 Vendor	Master	Coupa	Dynamics 365	API	Write
Dynamics 365 Vendor to Coupa Supplier	Master	Dynamics 365	Coupa	API	Write
Dynamics 365 Financial Dimension Value/Main Accounts/LegalEntities to Coupa Account Segment (Lookup Value)	Transactional	Dynamics 365	Coupa	API	Write
Coupa Invoice to Dynamics 365 Vendor Invoice Journal Header/Lines	Transactional	Coupa	Dynamics 365	API	Write
Dynamics 365 Vendor Payment Journal Line Settled Invoices to Coupa Payment	Transactional	Dynamics 365	Coupa	API	Write

4.3. DATA MAPPING

Data mapping is conducted during installation with customer mapping exercise. The data maps will be shared with customers upon initiation of services with DataMap.

4.4. MIDDLEWARE PLATFORM

For security purposes and to protect customer systems, DataMap keeps infrastructure information confidential. If a customer would like details on the infrastructure, please contact support@datamapllc.com and DataMap will provide an NDA.

4.5. ERROR HANDLING

Where are errors managed?	Errors are managed during integration. They are a combination of an automatic ticket logged with DataMap and notifications.
Who is the error notification sent to?	Customer Admin and DataMap Managed Services
Who has access to error logs?	Customer and DataMap

System(s)	Action	Error	Error Handling
Coupa	GET data	Timeout	Retry logic (5 tries, increasing delay between tries)
Coupa	*	HTTP 401/403	Email DataMap Support ticket email describing credentials issue. Email/ticket should only be triggered once, not every time the process is run.
Dynamics 365	*	HTTP 401/403	Email DataMap Support ticket email describing credentials issue. Email/ticket should only be triggered once, not every time the process is run.
Dynamics 365	Create/Update	HTTP 400	Email DataMap Support ticket email describing missing required field(s). Email/ticket should only be triggered once, not every time the process is run.

5. IMPLEMENTATION METHODOLOGY AND DIAGRAMS (SEPARATE DOC)

5.1. OVERVIEW



During the Mobilize Phase, we do an integration kickoff and environment plan. During the Model Phase, we review integration mapping and error handling. During the Validate Phase, we conduct integration testing. During the Deploy Phase, we enable the production integration. The solution also includes managed services and hypercare.

5.2. PARTNERSHIP

Implementation Type	Implementation Time	Coupa PS SOW * Required?	Implementation Cost (Services & Customer Enablement)
Partner Led	Minimum 8 weeks (depends on customer master data integrity e.g. need for Supplier Modeling, Supplier Rationalization, and Chart of Account Modeling)	No	Varies depending on number of instances and customer master data integrity. Implementation estimated cost range is \$30,000 to \$200,000

5.3. HIGH LEVEL PROJECT PLAN

6. EXECUTING & DOCUMENTING TEST CASES

Capture the test cases and results that you have performed to validate the solution

[Dynamics 365 Test Tracker](#)

Test ID	Scenario	Use Case
9.1 Master Data Integration – Coupa SIM to Dynamics 365 Vendor		
M1A	Coupa Supplier Information Record to D365 Vendor	When a new Coupa SIM record is approved then a new Vendor record is created in Dynamics 365
M1B	Coupa Supplier Information Record to D365 Vendor	When an approved Coupa SIM record is updated then the vendor's data is updated in Dynamics 365
M1C	Coupa Supplier Information Record to D365 Vendor	Deactivate a supplier via SIM Form
M2	Coupa Supplier Information Site to D365 Party Contacts	
M3	Coupa Supplier Information Site Address (Remit-to Addresses) to D365 PartyLocationPostal Address	
M4	Coupa Supplier Information Site Contact to D365 Party Contacts	
9.2 Master Data Integration – Dynamics 365 Vendor to Coupa Supplier		
M5A	Coupa Supplier from D365 Vendor	When a Coupa SI Record is updated, the vendor's data is updated in Dynamics 365 then the Coupa Supplier record will be updated
M5B	Coupa Supplier from D365 Vendor	
9.3 Transactional Integration – Dynamics 365 Financial Dimension Value/Main Accounts/LegalEntities to Coupa Account Segment (Lookup Value)		
M7A	Coupa Lookup Value from D365 FinancialDimensionValue	When a new FinancialDimensionValue is added to a relevant Financial Dimension, the Lookup Value is created in Coupa.
M7B	Coupa Lookup Value from D365 FinancialDimensionValue	When a FinancialDimensionValue DimensionValue is changed, the External Ref Num is changed in Coupa.

M7C	Coupa Lookup Value from D365 FinancialDimensionValue	When a FinancialDimensionValue is marked as Suspended (IsSuspended) , the Lookup Value is inactivated in Coupa.
M7D	Coupa Lookup Value from D365 FinancialDimensionValue	When a FinancialDimensionValue is unmarked as suspended , the Lookup Value is activated in Coupa.
M7E	Coupa Lookup Value from D365 FinancialDimensionValue	When a FinancialDimensionValue Description is changed, Description and Name are changed in Coupa.

9.4 Transactional Integration – Coupa Invoice to Dynamics 365 Vendor Invoice Journal Header/Lines

T1A	Coupa Invoice to D365 Invoice Journal Header & Invoice Journal Line	When a new invoice is created and approved in Coupa then
T1B	Coupa Invoice to D365 Invoice Journal Header & Invoice Journal Line	When an existing invoice is updated in Coupa then it's updated in 365
T1C	Coupa Invoice to D365 Invoice Journal Header & Invoice Journal Line	When an existing invoice is voided in Coupa then it's voided in 365
T1D	Coupa Invoice to D365 Invoice Journal Header & Invoice Journal Line	When a new invoice is created, approved, and voided in Coupa before creating in D365 then
T1D	Coupa Invoice to D365 Invoice Journal Header & Invoice Journal Line	When a new invoice is created, approved, and voided in Coupa before creating in D365 then

9.5 Transactional Integration – Dynamics 365 Vendor Payment Journal Line Settled Invoices to Coupa Payment

T3	Coupa Invoice Payment (Coupa Pay) to D365 Vendor Payment Journal Lines Settled Invoices	
T4	Coupa Invoice Payment (ERP) from D365 Vendor Payment Journal Lines Settled Invoices	

7. PERFORMANCE

Architectural performance follows Coupa best practices. E.g. Delta Processing, Error Handling, Logging Integration Runs, Integration Errors.

8. SECURITY

Q#	Question	Answer
8.1	Are you using Coupa API Keys? If yes, please explain why. Please <i>note</i>, API keys will be deprecated by R35. OAuth is the recommended approach. More details can be found here.	No
8.2	Are you using the OAuth authentication method to access Coupa APIs? If Yes, please mention the grant type (Client Credentials/ Authorization Code/ Device Code)	Yes, Client Credentials
8.3	Does the solution use Coupa SFTP for sending/receiving files from the Partner system?	No
8.4	How are you ensuring that SFTP credentials are only accessed to authorized persons?	N/A
8.5	Where are you hosting your application?	Azure
8.6	How are the buildings, servers, and infrastructure are kept secure?	Azure facilities, premises, and physical security: This article describes what Microsoft does to secure the Azure infrastructure.
8.7	How are you ensuring the security of the data transportation between your app and Coupa?	Encryption at rest and Encryption in transit
8.8	How do you protect our application infrastructure (For example: by using state-of-the-art firewalls at the hypervisor, kernel, and application levels)	Advanced Endpoint Protection: Microsoft Defender for Business, Application Whitelisting: Microsoft Defender, Asset Inventory: Microsoft In-Tune, Database Encryption: Azure Data Encryption-at-Rest and In Transit, Data Loss Prevention: Microsoft 365 Compliance, DDoS Mitigation: Azure DDoS Protection and Mitigation Services, DMARC: Office365 Sender Policy

		Framework (SPF) , DNS Filtering: Microsoft 365: Web content filtering, Employee Awareness Training: ESET® CYBERSECURITY AWARENESS TRAINING, Incident Response Plan: Based on ISSA Model, Intrusion Detection System: Microsoft Defender for Business, Mobile Device Encryption: Microsoft Intune, Perimeter Firewalls: Windows Firewall + Azure Firewall, Security Info & Event Management, Two-Factor Authentication: Microsoft AD two factor, and Okta two factor, Vulnerability Scans: Microsoft Defender & Azure Security Control, Web Application Firewall: Wix Firewall
8.9	Do you use any intrusion detection systems across all your servers?	Advanced Endpoint Protection: Microsoft Defender for Business, Application Whitelisting: Microsoft Defender, Asset Inventory: Microsoft In-Tune, Database Encryption: Azure Data Encryption-at-Rest and In Transit, Data Loss Prevention: Microsoft 365 Compliance, DDoS Mitigation: Azure DDoS Protection and Mitigation Services, DMARC: Office365 Sender Policy Framework (SPF) , DNS Filtering: Microsoft 365: Web content filtering, Employee Awareness Training: ESET® CYBERSECURITY AWARENESS TRAINING, Incident Response Plan: Based on ISSA Model, Intrusion Detection System: Microsoft Defender for

		Business, Mobile Device Encryption: Microsoft Intune, Perimeter Firewalls: Windows Firewall + Azure Firewall, Security Info & Event Management, Two-Factor Authentication: Microsoft AD two factor, and Okta two factor, Vulnerability Scans: Microsoft Defender & Azure Security Control, Web Application Firewall: Wix Firewall
8.10	How do you ensure the database access is secure?	Principle of least privilege. App credentials only have read/write, not admin.
8.11	Who all has access to the customer data in the databases?	Customer data resides in customer systems only and is cached in a secure database for integration delta processing
8.12	How do you ensure the application is secure?	Advanced Endpoint Protection: Microsoft Defender for Business, Application Whitelisting: Microsoft Defender, Asset Inventory: Microsoft In-Tune, Database Encryption: Azure Data Encryption-at-Rest and In Transit, Data Loss Prevention: Microsoft 365 Compliance, DDoS Mitigation: Azure DDoS Protection and Mitigation Services, DMARC: Office365 Sender Policy Framework (SPF) , DNS Filtering: Microsoft 365: Web content filtering, Employee Awareness Training: ESET® CYBERSECURITY AWARENESS TRAINING, Incident Response Plan: Based on ISSA Model, Intrusion Detection System: Microsoft Defender for

		Business, Mobile Device Encryption: Microsoft Intune, Perimeter Firewalls: Windows Firewall + Azure Firewall, Security Info & Event Management, Two-Factor Authentication: Microsoft AD two factor, and Okta two factor, Vulnerability Scans: Microsoft Defender & Azure Security Control, Web Application Firewall: Wix Firewall
8.13	Please describe your reliability and backup strategy.	TBD
8.14	What is your Disaster Recovery strategy?	TBD
8.15	How are you ensuring the security of the databases that you use for the customers?	TBD
8.16	How do you ensure data security at rest?	TBD
8.17	Do you allow pen testing?	Yes
8.18	Can you please describe the pen testing process that you follow?	TBD
8.19	Do you have HIPPA certification?	No
8.20	Do you have SOC 2 Type II? If yes, please provide the document or link to the document.	Yes, we use Boomi as our back end infrastructure which is SOC 2 Type II Audited. To get a copy of the report, go here: Compliance - Boomi