



Coupa Supplier Portal (CSP)

Compliant Countries E-Invoicing Setup and Invoice Creation

Shanghai • 2019
Procurement Performance Team • APAC Hub Procurement

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Introduction to Coupa

What is Coupa?

Air Liquide has selected Coupa as the technology platform to streamline the procure-to-pay processes and enable electronic Purchase Order and Invoice (Except Air Liquide China Suppliers) transmission.

- Coupa is a leading e-Procurement platform, connecting buyers with their suppliers.
- “Coupa is an internet-based solution capable of accommodating a variety of different systems.” (plug and play)
- The Coupa Supplier Portal (CSP) will be utilized by Air Liquide to request indirect materials and services, as well as create and communicate Purchase Orders.
- The Coupa Supplier Portal (CSP) is free. There is no cost for suppliers.



Introduction to Coupa

How Will You Benefit?

By working with Air Liquide electronically, you will increase your order-taking efficiency, reduce mistakes and delays fulfilling orders, be able to maintain a better presence with Air Liquide.

- Efficient Purchase Order receiving and acknowledgement
- Instant visibility to Purchase Order details
- Reduced manual paper transaction processing




Introduction to Coupa


One System, Two Interaction Methods

As a supplier, you have two ways in which you can electronically interact with Air Liquide:

1. Through Supplier Actionable Notification (SAN)/Email

2. Through Coupa Supplier Portal (CSP)


EPIC Purchase Order #191

Powered by 

[Create Invoice](#)
[Acknowledge PO](#)
[Add Comment](#)

[Login](#)

EPIC PURCHASE ORDER

北京泰来华顿低温设备有限公司

PO NUMBER 191
 DATE 06/03/19
 PAYMENT TERMS
 SHIPPING TERMS
 CURRENCY USD
 CONTRACT
 CONTACT Inna Cao
inna.cao@kpmg.com

Ship To

EPIC
 上海市古美路1515号
 Building 18, No. 1515 Gu Mei
 Road Shanghai China
 Shanghai, 200233
 China

Bill To

EPIC
 Building 18, No. 1515 Gu Mei
 Road
 Shanghai, 200233
 China
 Attn: Ming Zhang

Line	Description	Need By Date	Qty	Unit	Price	Total
1	test		1	EACH	2.00	2.00
						2.00 USD

123456

OR

Registration and Setup

Transactions in Coupa Via CSP

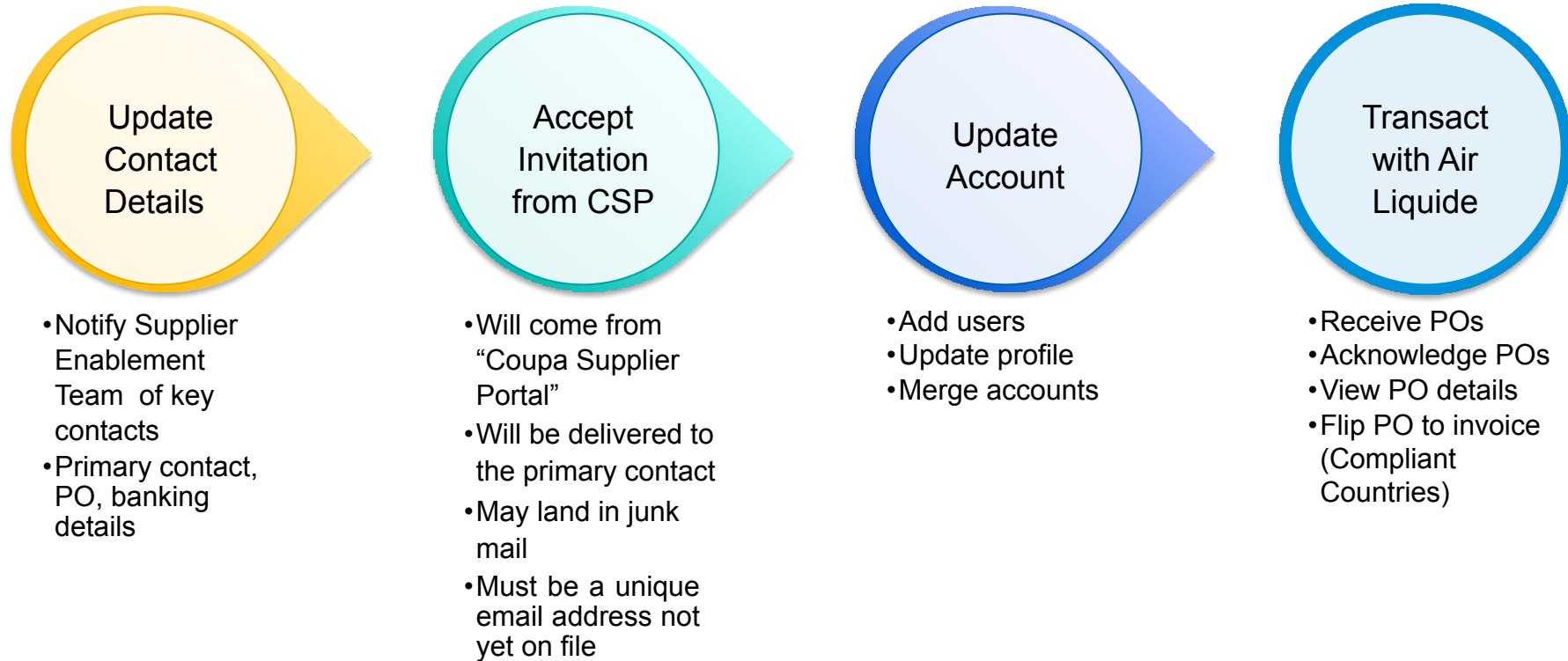
- With the help of Coupa, Suppliers will be able to quickly receive and acknowledge POs, and create electronic invoices via online platform.
- As a Supplier, you will have the ability to :
 - 1) Manage your company information
 - 2) Configure your PO and invoice transmission preferences
 - 3) Create an online catalog
 - 4) View all of your purchase orders



Registration and Setup

Connection to Air Liquide via Coupa

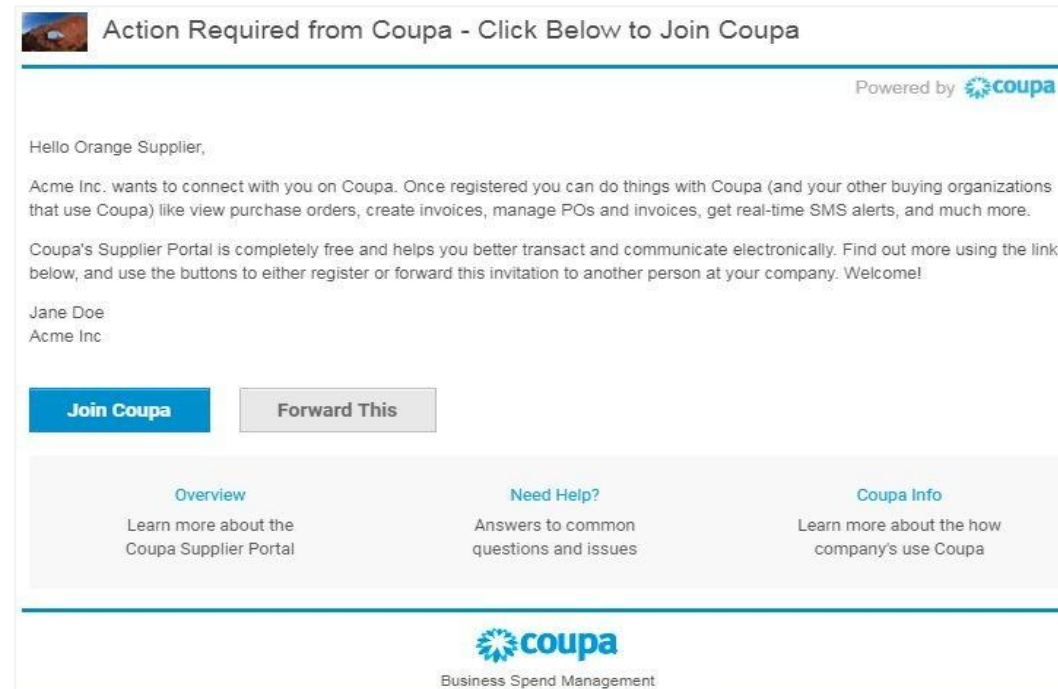
It is imperative that all suppliers connect to the Coupa platform to transact with Air Liquide successfully. Each of the below steps must happen before a supplier can properly interact with Air Liquide:



Registration and Setup

How to join Coupa Supplier Portal (CSP)? (1/2)


Below is a sample of the invitation letter that will come from Coupa Supplier Portal. Please alert your team to keep a look-out for this invitation and act upon it when it is received. Be sure to click only on the direct link at the bottom of the email invitation for CSP account registration.



Registration and Setup

How to join Coupa Supplier Portal (CSP)? (2/2)

You will automatically be redirected to the Coupa Supplier Portal account-registration page upon clicking on the direct link in your email invitation: Complete the required remaining information to register your linked CSP account.

coupa supplier portal

Join the Coupa Supplier Portal

Validate the information below and create the password for your account. Click here for [help](#).

* First Name

* Last Name

* Company

* Email

* Password

Use at least 8 characters and include a number and a letter.

* Password Confirmation

☐ I accept the [Privacy Policy](#) and the [Terms of Use](#).

Submit

Forward email

@coupa.com

Submit

Registration and Setup

Manage Account

- Once, you click the emailed link and sign up for the CSP, you can manage your account information.
- Click on your **user** and **Account Settings**.
- Edit your **first name**, **last name**, **email*** and **password**.

(*Email can't be changed. If you want to change it, you have to create a new CSP account and connect it to your company.)

My Account Password

[Settings](#)

[Notification Preferences](#)

[Security & Two-Factor Authentication](#)

* First Name

First

* Last Name

Last

* Email

supplier@supplier.com

* Current Password

Password

Use at least 8 characters and include a number and a letter.

Password Confirmation

Save

Registration and Setup

View and Manage Notifications

- On the **Notification Preferences** page, you will be able to select notifications you want to receive as well as the channel where you want to receive the notification: **online** (to do list) - recommend, **email** - recommend, or **SMS*** (short text message).

(*You can choose to receive notifications in short text messages only if you have an SMS-capable device and you validate your phone number. SMS notifications are turned off by default. Your SMS notification selections are deleted if you disable mobile phone verification. You can verify your mobile phone for SMS notification receiving on **Security and Two-Factor Authentication** page.)

My Account

Notification Preferences

[Settings](#)
[Notification Preferences](#)
[Security & Two-Factor Authentication](#)

You will start receiving notifications when your customers enable them.

Catalogs

A new comment is received	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is approved	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is rejected	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS
A catalog is about to expire	<input type="checkbox"/> Online	<input type="checkbox"/> Email	<input type="checkbox"/> SMS

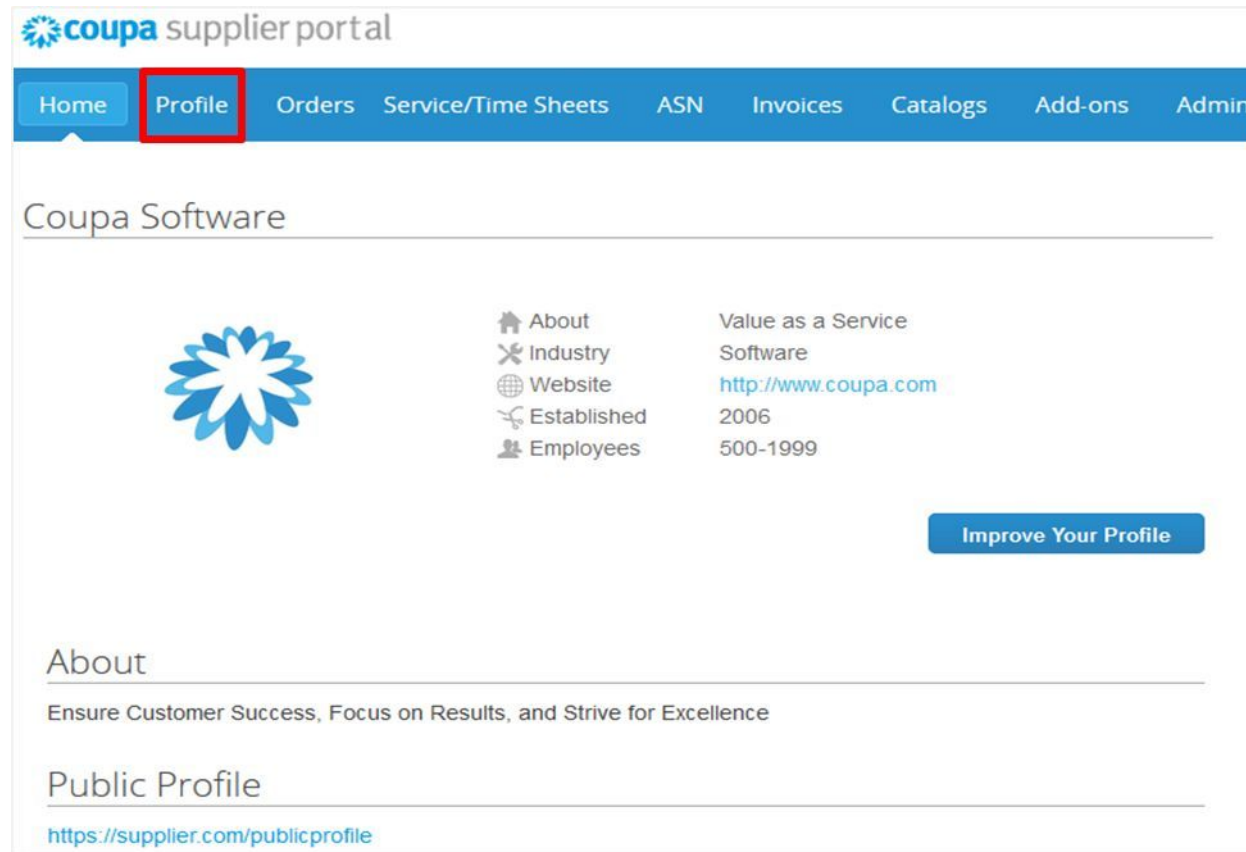
Coupa Accelerate

New Early Pay Customer	<input checked="" type="checkbox"/> Online	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> SMS
------------------------	--	---	------------------------------

Registration and Setup

Updating Supplier Profile

- Once, you click the emailed link and sign up for the CSP, you can verify and complete your Profile information.
- Select **Profile** from the top menu bar.



Registration and Setup

Completing Public Profile

Edit Company Info.

To start, complete your Public Profile*:

(*Public profile is what other Coupa customers, aside Air Liquide, can see about your company on the CSP.

You can also edit specific profile for one customer, but **information in the profile will not be transferred to Air Liquide system.**)

- Select **Profile** from the top menu bar
- Click **Edit Profile**
- Confirm existing company information and complete any missing fields in at least the **General Information, Address, Primary Contact** sections (**Required fields are marked with an asterisk**)
- Click **Save** when finished



About

Primary Contact

Address shanghai
shanghai
shanghai
200000

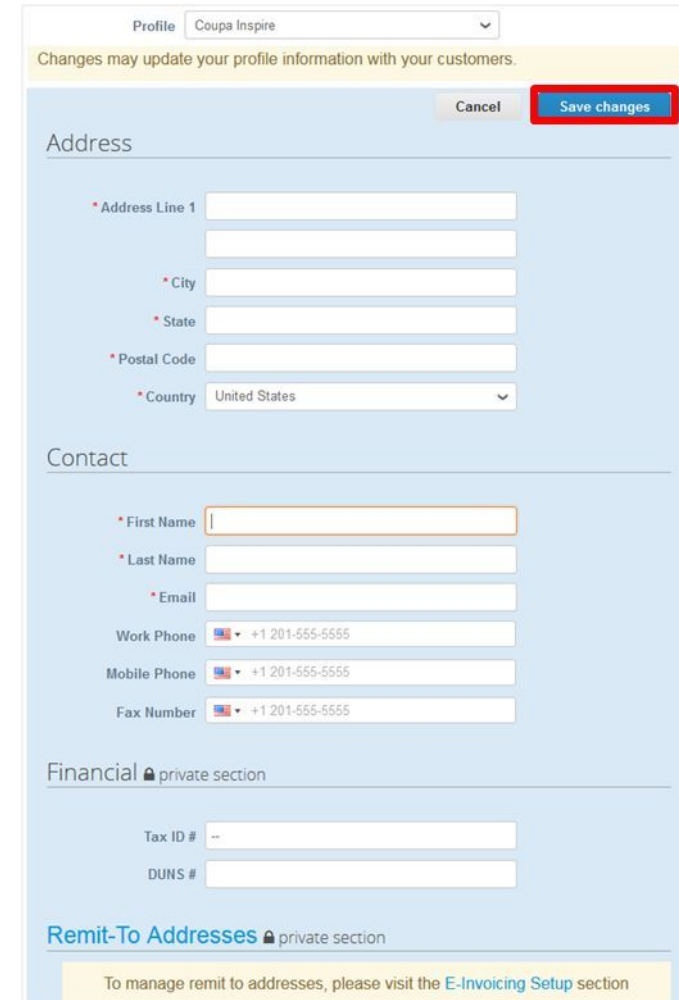
Primary Contact Wei zhang
Jameszheng.1127@gmail.com

Work Phone

Mobile Phone

Fax Number

Edit Profile

Profile Coupa Inspire

Changes may update your profile information with your customers.

Cancel Save changes

Address

* Address Line 1

* City

* State

* Postal Code

* Country United States

Contact

* First Name

* Last Name

* Email

Work Phone +1 201-555-5555

Mobile Phone +1 201-555-5555

Fax Number +1 201-555-5555

Financial private section

Tax ID #

DUNS #

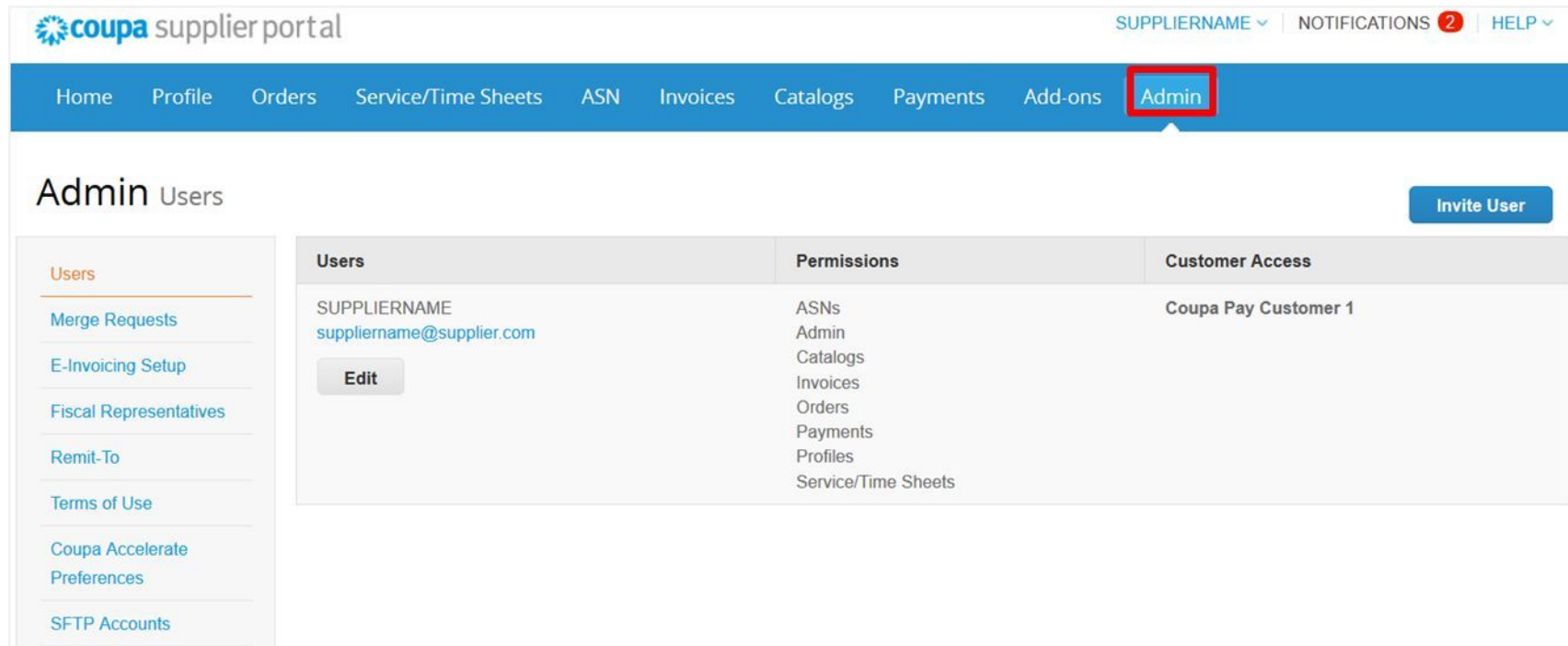
Remit-To Addresses private section

To manage remit to addresses, please visit the [E-Invoicing Setup](#) section

Registration and Setup

Updating the Admin Settings

- Once, you click the emailed link and sign up for the CSP, you can manage and update your Admin information.
- Select **Admin** from the top menu bar.



coupa supplier portal

SUPPLIERNAME | NOTIFICATIONS 2 | HELP

Home Profile Orders Service/Time Sheets ASN Invoices Catalogs Payments Add-ons **Admin**

Admin Users

[Invite User](#)

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com Edit	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	Coupa Pay Customer 1

Users

- Merge Requests
- E-Invoicing Setup
- Fiscal Representatives
- Remit-To
- Terms of Use
- Coupa Accelerate Preferences
- SFTP Accounts

Registration and Setup

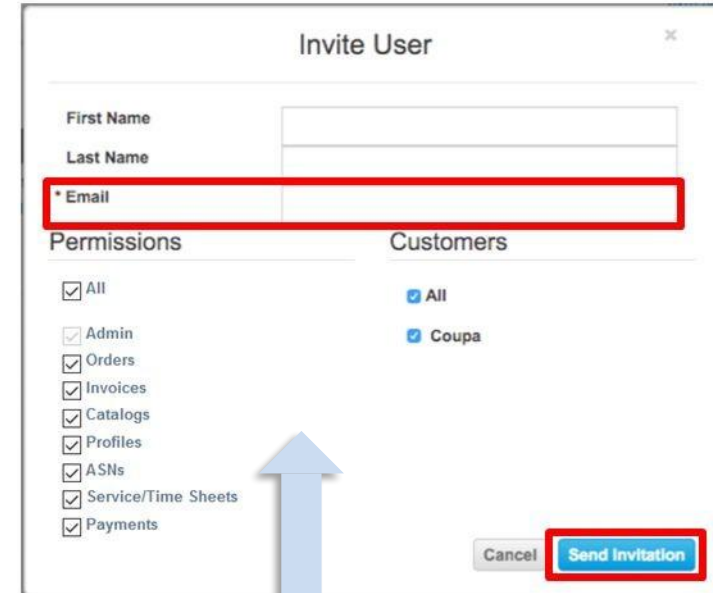
Adding Users

Add Users

If desired, you can allow additional users access to your supplier account to perform all tasks*:

(*You can manage user permissions and customer access by assigning certain users to only certain customers and by limiting what types of documents they can access and what functions they can perform with their assigned customers.)

- From the top menu bar, select **Admin**, then click **Invite User**
- Enter at least the employee's email address in the **Invite User** popup window and click **Send Invitation**
- You can restrict access to specific **customers** and **permissions** by checking/unchecking customer name boxes and permission boxes in the user table



Invite User

First Name

Last Name

* Email

Permissions

Customers

☒ All

☒ Admin

☒ Orders

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

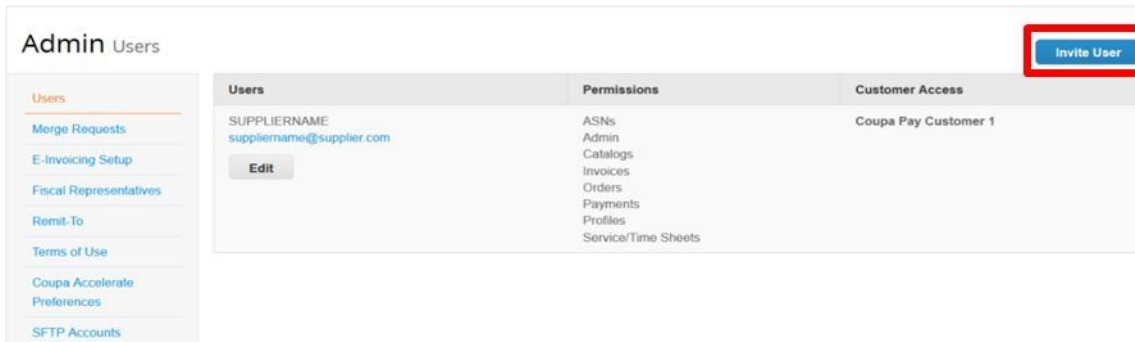
☒ Payments

☒ All

☒ Coupa

Cancel

Send Invitation



Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com Edit	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time Sheets	Coupa Pay Customer 1

Registration and Setup

Editing Users

Edit Existing Users

You can edit and manage individual user access at any time:

- From the top menu bar, select **Admin**, then click **Edit** under the desired User's name
- Modify the specific permissions and customer access by checking/unchecking respective boxes in the popup window user table
- Click **Save** when finished
- For auditing purposes, Coupa doesn't allow users to be deleted. You can **deactivate** a user when you no longer want that user to be able to access the account. You can also **reactivate** users later.

Admin Users

Users	Permissions	Customer Access
SUPPLIERNAME suppliername@supplier.com <div>Edit</div>	ASNs Admin Catalogs Invoices Orders Payments Profiles Service/Time	Coupa Pay Customer

Write User

Edit user access for suppliername

User info

* First Name: supplier

* Last Name: name

* Email: suppliername@supplier.com

Permissions

☒ All

☒ Admin

☒ Orders

☒ Invoices

☒ Catalogs

☒ Profiles

☒ ASNs

☒ Service/Time Sheets

☒ Payments

Customers

☒ All

☒ Coupa Pay Customer 1

Cancel Deactivate User Save

Purchase Orders

Email and CSP are Linked

- You will be notified of the status of your Purchase Order via email.
- You can click **View Order** in the acknowledgement email to check the order in the Coupa Supplier Portal.

epic Purchase Order #191 Powered by **coupa**

Hi Mr,

This is PO #191

Submitted By Inna Cao
 Supplier 北京泰来华顿低温设备有限公司
 Total 2.00 USD
 Items test 1.0 @ 2.00 2.00 USD

[View Order](#)

More Detail

PO ID 191	Department None
Status Issued - Scheduled for email	Last Opened None
Order Date 06/03/19	Acknowledged At None
Revision Date 06/03/19	Payment Term None
Req # 441	Incoterms None

Supplier 北京泰来华顿低温设备有限公司

Shipping 上海市古美路1515号
 Building 18, No. 1515 Gu Mei Road Shanghai China
 200233 Shanghai
 China
 Attn: Inna Cao

Lines

1.0 x test for 2.00 USD
 Supplier 北京泰来华顿低温设备有限公司 • Commodity HCB401400 - Liquid hydrogen - Bulk - Account CNCH010-Project Number
 1-Task Code 3-Expend Type 3-03-101021002-0-C02020103M000

Total 2.00 USD



epic Purchase Order #191 Sign Out

Status Issued - Sent via Email

Order Date 06/03/19
 Revision Date 06/03/19
 Requester Inna Cao
 Email Inna.cao@kpmg.com

Payment Term None
 Stamped PO None
 attachment
 Attachments None
 Acknowledged ☒

Shipping

Ship-To Address 上海市古美路1515号
 Building 18, No. 1515 Gu Mei Road Shanghai
 China
 200233 Shanghai
 China
 Attn: Inna Cao

Terms None

Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Qty	Unit	Price	Total	Invoiced
1	test	1	EACH	2.00	2.00	0.00

Part Number None Special Requirements None

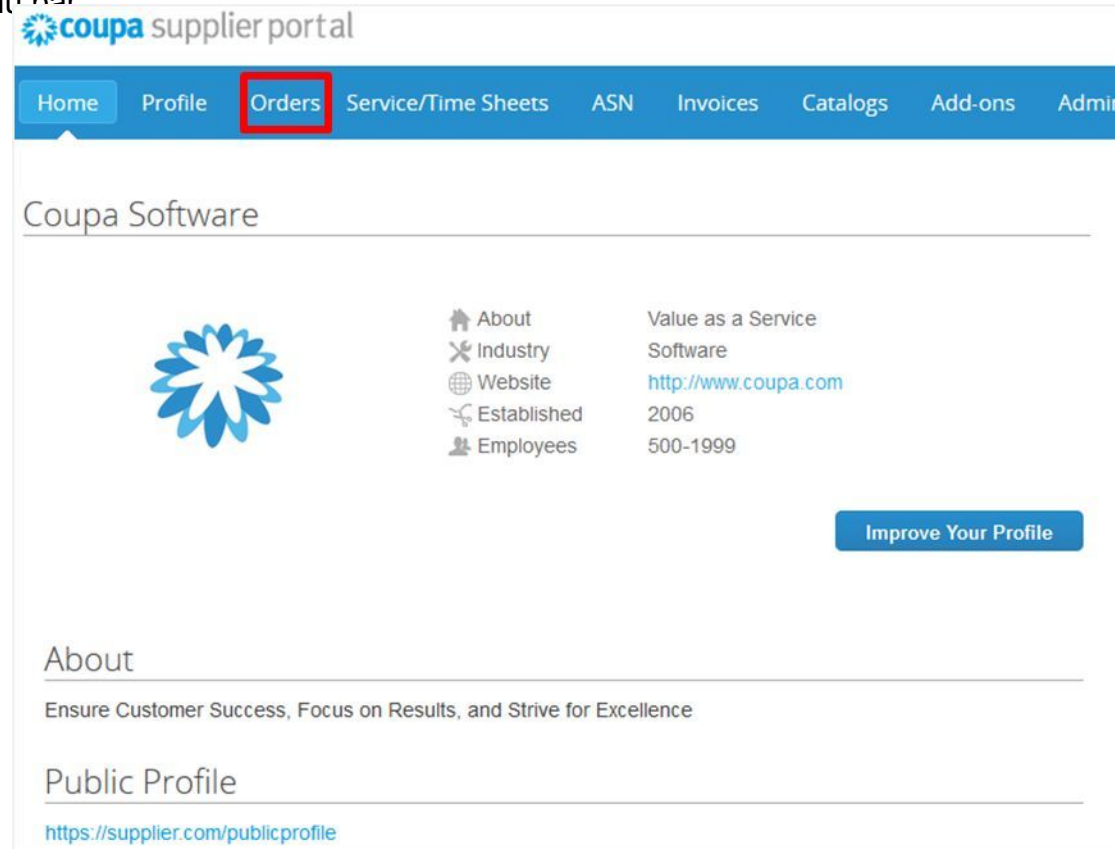
Per page 15 45 90

Total 2.00 USD

[Create Invoice](#) [Save](#) [Print View](#)

Purchase Orders Receive & View Orders (1/2)

- Regardless of the PO delivery preference set, you will have access to POs within CSP.
- Select **Orders** from the top menu bar



Purchase Orders Receive & View Orders (2/2)

- A **Purchase Orders** screen will display and show all purchase orders sent by Air Liquide.
- To find purchase orders, you can use the **Search** functionality. You can also sort by column headers by clicking on any of the column headers (**PO Number, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions**).
- In addition, as you start to receive multiple purchase orders, you can use the **View** functionality to filter the purchase orders.
- All purchase orders on this screen are hyperlinked, and you can view additional information about the purchase order by clicking on that blue hyperlink, i.e. **PO Number**.

coupa supplier portal SUPPLIERNAME ▾ NOTIFICATIONS 2 HELP ▾

Home Profile **Orders** Service/Time Sheets ASN Invoices Catalogs Add-ons Admin

Orders Order Lines

Select Customer Coupa ▾ Configure PO Delivery

Purchase Orders

PO Number	Order Date ▾	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
3050	05/31/17	Issued	None	200 Each of Purple Spiral Notebook	No	100.00 USD	
3049	05/31/17	Issued	None	1 Box of Blue Pens	No	90.00 USD	

Purchase Orders

Acknowledge Orders

- The page refreshes to display the PO details and shipping address.
- Click the **Acknowledged** checkbox to notify the customer whose PO you have received. Air Liquide can also see the statue update.

(*If you do not agree with any aspect of the order, please send your concerns or requests to the requester's email address)

- You can also attach supporting document in **Supplier Attachment** field, and click on **Save**. Air Liquide can also see documents you attached.
- You can print the PO in PDF version by clicking **Print View**.



Purchase Order #191

Status: Issued - Sent via Email

Order Date: 06/03/19

Revision Date: 06/03/19

Requester: Inna Cao

Email: inna.cao@kpmg.com

Payment Term: None

Stamped PO attachment: None

Attachments: None

Acknowledged ☒

Shipping

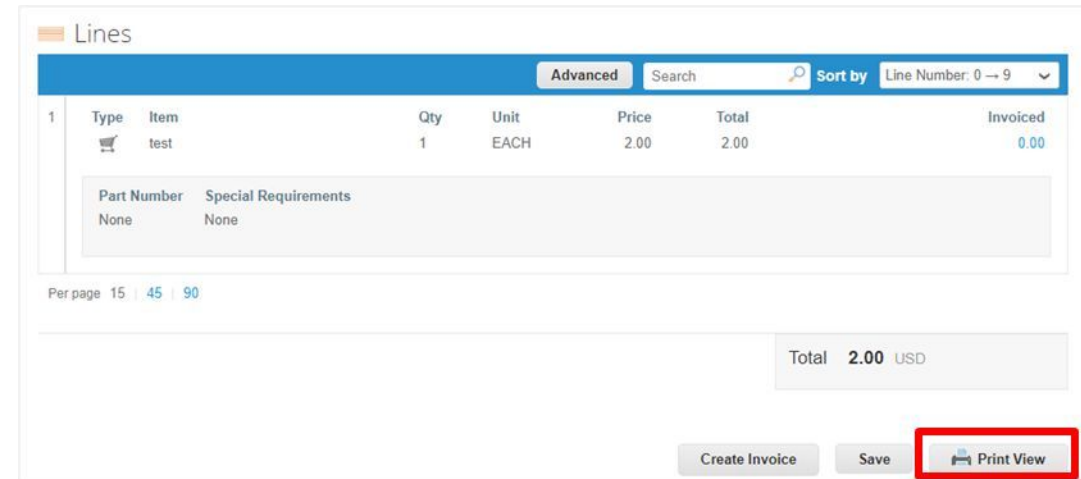
Ship-To Address: 上海市古美路1515号
Building 18, No. 1515 Gu Mei Road Shanghai
China
200233 Shanghai
China
Attn: Inna Cao

Terms: None

Sign Out



PO view screen continued



Lines

Advanced Search Sort by Line Number: 0 → 9

Type	Item	Qty	Unit	Price	Total	Invoiced
test		1	EACH	2.00	2.00	0.00

Part Number: None Special Requirements: None

Per page: 15 | 45 | 90

Total: 2.00 USD

Create Invoice Save **Print View**

Setup E-Invoicing



To set up your account to create electronic invoices, click on the E-Invoicing Setup link on the left of the Admin page. The Legal Entity page appears. You can add new legal entities, or manage or deactivate existing ones.

Admin

E-Invoicing Setup

Add Legal Entity

Users

Merge Requests

E-Invoicing Setup

Fiscal Representatives

Remit-To

Terms of Use

Coupa Accelerate Preferences

Legal Entity

Company

ABCD

Tax ID

Actions

Manage

Deactivate Legal Entity

Remit-To Address

123 Success Ave

Results City

XY 99999

United States





Ship From Address

456 Excellence Dr

Success City

XY 99999

United States

Field/Checkbox	Description
Which customers do you want to see this?	<p>Select all or the specific customer(s) that you want to see your legal entity information.</p> <p>Customers that use Coupa for payments are marked with the Coupa Pay  icon.</p> <p>If you select a Coupa Pay customer, the payment information that you enter is validated. The icon and tooltip are different depending on whether your banking information is:</p> <ul style="list-style-type: none"> Valid:  Invalid:  Pending validation: 
What address do you invoice from?	<p>Required for invoicing.</p> <p>Registered address of your legal entity. This is the same location where you receive government documents. It might differ from the physical address.</p> <p>Sometimes this is called your address of record or registered company address.</p> <p>Address line 1, city, and postal code are mandatory.</p>
Country	The country you selected when adding the legal entity.
Use this address for Remit-To*	Selected by default. Deselect it if your remit-to address is different from your invoice-from address or you have more than one remit-to locations.
Use this for Ship From address*	Selected by default. Deselect it if your ship-from address is different from your invoice-from address or you have more than one location.
<p>Tip: Include this information on the invoice when the addresses are different. For many countries, including this information is mandatory.</p>	

Banking Information

Optional but recommended banking information for the remit-to address. You can use both domestic (US) and international (global) banking information.

Note: Banking information is required for compliant invoicing in some countries when indicated (with a red asterisk). Otherwise, banking information is not required and remains private.

Some banking information is also required if your customers use Coupa for payments

This information is displayed on the invoice.

Bank Account Country

Select the country from the drop-down list.

Bank Account Currency

Select the currency from the drop-down list.

Bank Name

Enter the name of your bank.

Beneficiary Name

Enter the name of the beneficiary.

Routing (Bank Code) Number

Select one of the **Routing Number** (default), **Bank Code**, **BSB**, **IFSC**, **Sort Code**, or **Transit Number and Institution Number** fields and fill in the field next to it accordingly.

Account Number

Must be 4-28 digits, depending on the selected country.

Confirm Account Number

Confirm your account number by entering it again.

IBAN

Must be 5-34 alphanumeric characters without spaces.

SWIFT/BIC Code

Must be eight or eleven characters. The first six characters must be letters.

Bank Account Type

Type of the bank account: business or personal.

Bank Address

Includes address-specific fields: **Address Line 1**, **Address Line 2**, **City**, **State**, and **Postal Code**.

What is your Tax ID?

Enter your local tax ID if you are not registered for VAT or GST in some countries.

Country

Select your tax country from the drop-down list.

Tax/VAT ID

Enter the tax/VAT ID, including the prefix to the number, for example, GB1234567890.

Tip: You can add more tax IDs by clicking on the **Add additional Tax ID** link.

I don't have a VAT/GST Number

Select the checkbox to add your local tax ID.

Miscellaneous

Invoice from Code

Tie your CSP invoice-from address (that is, registered address) with the corresponding address in your ERP.

Preferred Language

Select your language from the drop-down list.

*If your remit-to and ship-from addresses are different from your invoice-from address, you need to provide also that information.

To manage your legal entities, click on the Actions button on the Legal Entity page, select Manage and click Continue. In the appearing Where do you want to receive payment window, you can add a new remit-to address or manage/edit existing ones.

Where do you want to receive payment?

1234

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To	Banking Information	Status	
123 Success Street Results City 12345 United States	None	Active	Manage

Deactivate Legal Entity

Cancel

Next

To add a new remit-to address, click on the Add Remit-To button and fill in at least the mandatory fields (marked with a red asterisk) and click Continue.


Information	Description
What is your Remit-To Address?	Address where you want to receive payment. (If you receive payments to a different location than where your business is registered.). Address Line 1 , City , Postal Code , and Country are mandatory.
Integration Information	Code to tie your CSP remit-to address with the corresponding address in your ERP.
Banking Information	See the table above.
Remit-To Contact	Optional contact information for the remit-to address: name, email, phone number, fax number, and website.
Which customers do you want to see this?	See the table above.

Note: If you merge accounts, your remit-to addresses are not merged unless you make them available for all customers. Once the merge is complete, you can assign the remit-to address to the specific customer(s) again.

Click Next to add the address where you want to ship goods from, if it is different from the remit-to address. Fill in at least the mandatory fields and click Continue.


After completing the e-invoicing setup by clicking Done, that is, after adding a legal entity, you can use it on new invoices. From the Setup Complete page you can choose to Go to Orders, Go to Invoices, or Return to Admin page.

Setup Complete



Congratulations!

This legal entity can now be used on new invoices.

To get paid - Most customers require that you send them this payment info in in addition to providing it on the invoice. 

- Click on the [Profile Tab](#) to see if your customer has a form that collects payment information.
- Otherwise, you'll have to send it to them through another channel.

Go to Orders

Go to Invoices

Return to Admin


The Info icon with the tooltip provides more details on how the legal entity information is used and updated.

Invoice Creation (PO Flip)



From the drop-down list in the top right corner of the Invoices page, select the customer for whom you want to create or edit an invoice or a credit note.

The Info icon with the tooltip next to the Create Invoices header advises you what to do if you cannot create an invoice as expected, for example, contact your customer to enable more invoicing options for you.


Create Invoices 

Create Invoice from PO


Create Invoice from Contract


Create Blank Invoice

Create Credit Note

Export to 

View

All

Search 

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Actions
TEST12345678	12/24/19	Approved	JPALJ00006744	11,000,000 JPY	No	
TEST123456	12/24/19	Approved	JPALJ00006743	990,000 JPY	No	
TEST12345	12/24/19	Approved	JPALJ00006743	1,002,210 JPY	No	

Create an invoice from a PO

1. Go to the Orders page or, on the Invoices page, click on the Create Invoice from PO button above the table to go to the Orders page.
2. On the Orders page, do one of the following:
 - Click on the Create Invoice (Gold coin) icon for the PO in the Actions column of the Purchase Orders table.
 - Click on the PO Number link to open the purchase order and click on the Create Invoice button.



Create Invoice Create

General Info

* Invoice #

* Invoice Date 

Payment Term ALJ-S000

Date of Supply 

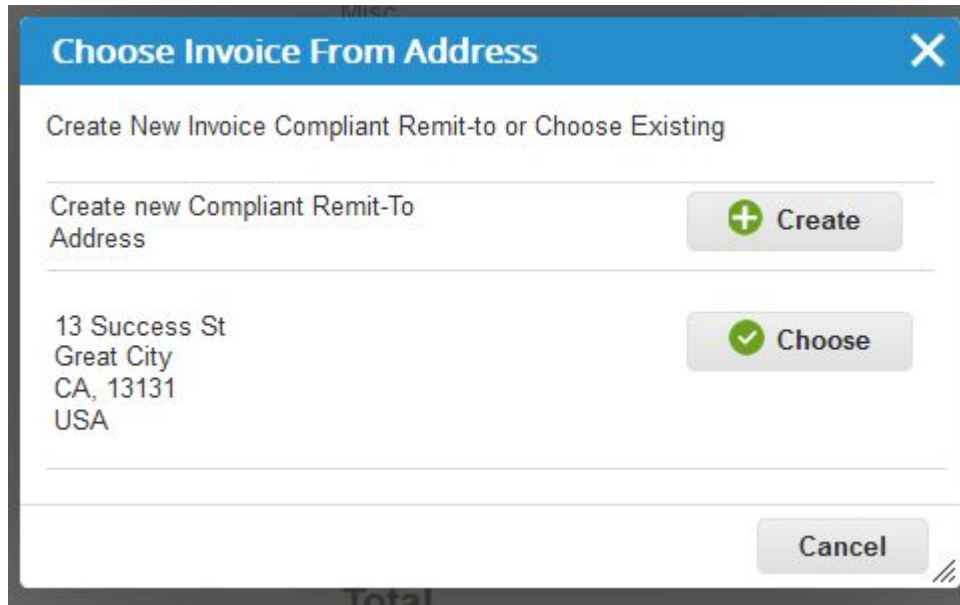
* Currency 

Delivery Number

Status Draft

Image Scan No file chosen

Create a new or choose an existing invoice-from address. The most recently used address is at the top of the list.



Choose Invoice From Address

Create New Invoice Compliant Remit-to or Choose Existing

Create new Compliant Remit-To Address

+ Create

13 Success St
Great City
CA, 13131
USA

Choose

Cancel

When you create a new invoice-from address, you are guided through creating your legal entity. The selected or newly created legal entity is added to your invoice. On the Create Invoice page, fill in at least the mandatory fields (marked with a red asterisk) in your invoice. Some of the fields are pre-populated with information from the PO

Create a credit note

You can issue a credit note to:

- Resolve a dispute on an invoice, correct an invoice, or cancel a duplicate invoice. For more information, see Disputed invoices.
- Record miscellaneous credit, for example, return/cancellation of goods, price adjustments, rebates and refunds.

To create a credit note:

- 1) Click on the Create Credit Note button above the Invoices table on the Invoices page or, on the Orders page, click on the Create Credit Note (Red Coins icon for the PO in the Actions column of the Purchase Orders table).
- 2) In the appearing Credit Note popup, select the reason for your credit note.



Credit Note ✕

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ☒ Resolve issue for invoice number ☐ Other (e.g. rebate)

Select an Option ▼

Cancel Continue

- Resolve a dispute

If the credit note is related to a problem with an invoice or the goods shipped, select the Resolve issue for invoice number radio button and, from the drop-down list, select the invoice number. Click Continue to select how you want to resolve the issue.

Credit Note

How do you want to correct invoice "123456789" ?

☒ Completely cancel the invoice with a credit note

i

☐ Adjust invoice with a credit note

i

Cancel

Create

Note: You can choose to issue a credit note to cancel and optionally correct the invoice or to adjust it. Only quantity or price can be reduced through partial credit notes.

- Record a credit

Select Other and click Continue. If a contract is available, you can also select it from the drop-down list.

Credit Note

If you are issuing a credit note in regards to a problem with an invoice or goods shipped, please include the invoice number. If you are issuing a credit note purely to offer a credit to your customer please select other.

Reason ☐ Resolve issue for invoice number

☒ Other (e.g. rebate)

Select a Contract (If applicable)

Cancel

Continue

- Create the credit note similarly to creating an invoice.
- If you completely cancel the invoice, you can edit the following fields: Credit Note Number, Credit Note Date, Supplier Note, and Discount Amount. You can also add attachments (file, URL, or text) and an Image Scan, and modify PO lines, the UNSPSC, and tax reason descriptions. The other fields are pre-populated and not editable so that all the information is carried over from the original invoice.
- If you adjust the invoice, you can also edit the price or quantity. Line level taxes are carried over from the invoice and are prorated based on the credit amount. If you selected Other, you are asked to create a new or choose an existing invoice-from address before editing the invoice.

Quick Start for Coupa Compliant Countries

Quick Start Guide - Supplier

Introduction

You will find the Coupa Supplier Portal, very easy to use. This guide will help you to create a catalog, view POs and create Invoices.

Signing-in


1. **Activate your account:** You should have received an email invitation to join the Coupa Supplier Portal. Follow the instructions provided. You can also register directly on <https://supplier.coupahost.com>
2. **Reset your account:** If you have forgotten your username or password, click on the link at the bottom of the Sign In screen.


Edit Your Company Info

The first thing you should do is complete your Public Profile. Select the Company Info tab and click Edit. Ensure all mandatory fields are filled in then click Save.
Your public profile is visible to ALL Coupa customers, not just customers with whom you are connected.

Add users:

You can add users to access your supplier account and perform all tasks:

1. Under Company Info, select User Accounts. Then click on Invite an Employee.
2. Enter the employee's email address in the text box provided and click on Send Invitation. They will receive an email with instructions to activate their account.
3. ☒ You can restrict access to specific customers by checking/unchecking the box under the customer name in the user table.
4.  You can delete a user by clicking on the Delete icon under the Actions column.

 When enabled for a given customer, a user can access all POs and create Invoices for that customer.

Configure Customers

Settings for PO delivery Option and Punchout are maintained individually for each customer. You can also setup specific customer profiles:


1. Click on the customer tab (labeled with your customer's name).
2. Edit the information under the Profile section. You can select to compare with other profile to easily copy information across.

Set PO Delivery Preference:

1. Under the customer name tab, select PO Delivery.
2. Enter your Email or cXML configuration details. You will still be able to view POs on the CSP.



Configure Punchout Site:

1. Under the customer name tab, select Punchout.
2. Enter the customer Punchout configuration details. It will be effective immediately.

 If your customer chooses to receive updates, this information is automatically propagated to the customer's Coupa environment.

View Orders



Regardless of the PO delivery preference set, you will also have access to POs within the Coupa Supplier Portal. To view customer orders:

1. Select the customer name tab, then click on Purchase Orders.
2.  Click on the PO# to view the PO.
3. ☒ To acknowledge a PO, tick the Acknowledged check box.
4.  You can print the PO by clicking on Print View.

Create Invoice




Providing you have an agreement with your customers to submit paperless invoices, you can create Invoices directly from POs:

1. From the Purchase Order screen, identify the PO that you want to flip into an Invoice.
2.  Click on the Create Invoice under the Actions column.
3. Enter the Invoice number in the Invoice # field. This is a mandatory field. You can edit the date, add a copy of your invoice as an attachment, add comments and also edit quantities, shipping, handling and tax fields. Click on Calculate to update the Total.
4.  Click on Submit.
5. You can check the status of the invoice under Status once you have submitted it. Invoices are processed automatically and if they meet the criteria set by your customer, they will be approved immediately.

Manage Catalogs

In order for your customers to buy products or services from you, you need to have an agreed Catalog in place.

1.  **Create Catalog:** Click on the customer tab and select Catalogs. Click on Create. You can set start and expiry dates.
2. **Submit Catalog:** When you have included all the items required click on Submit to buyer. This automatically sends a notification to the buyer to review the catalog and approve. You can view the status in realtime in the Catalogs view. Once the catalog is approved, your products and services are immediately available to your customer's employees.

Tips

Creating Invoices

- Even if you generate your own invoices, they will be processed faster if you submit them via the CSP or via cXML and provide your own invoice as an attachment. In Coupa, inbound invoices are processed automatically and those that meet the approval criteria are approved for payment immediately.

Managing Catalogs

- Once a catalog is accepted, it cannot be edited. You can create and submit new catalogs to reflect changes in price or product/service offering.

Does your company have more than one CSP account? Merge them!

- On your Home page you will see a list of accounts that you can request to merge. Click on Merge. Add a comment in the text box (this will be sent to the other account's owner) and then click Send Request. Have the other account owner log in and on their Home page, click on Merge then Accept on the next screen.

MORE INFORMATION

For more resources, visit the Coupa Online Training

